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Quo Vadimus

Mind the gap between ICES nations' future seafood consumption and aquaculture production

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As the human population grows and climate change threatens the stability of seafood sources, we face the key question of how we will meet increasing demand, and do so sustainably. Many of the 20 International Council for the Exploration of the Sea (ICES) member nations have been global leaders in the protection and management of wild fisheries, but to date, most of these nations have not developed robust aquaculture industries. Using existing data and documentation of aquaculture targets from government and industry, we compiled and analysed past trends in farmed and wild seafood production and consumption in ICES nations, as well as the potential and need to increase aquaculture production by 2050. We found that the majority of ICES nations lacks long-term strategies for aquaculture growth, with an increasing gap between future domestic production and consumption—resulting in a potential 7 million tonne domestic seafood deficit by 2050, which would be supplemented by imports from other countries (e.g. China). We also found recognition of climate change as a concern for aquaculture growth, but little on what that means for meeting production goals. Our findings highlight the need to prioritize aquaculture policy to set more ambitious domestic production goals and/or improve sustainable sourcing of seafood from other parts of the world, with explicit recognition and strategic planning for climate change affecting such decisions. In short, there is a need for greater concerted effort by ICES member nations to address aquaculture's long-term future prospects.

Keywords: adaptive planning, aquatic farming, food security, horizon scanning.

Introduction

Fisheries have long been the primary source of aquatic food production, with commercial or industrial fishing dramatically increasing during the early 20th century (Worm *et al.*, 2009; Watson and Tidd, 2018). It was however the lack of effective management during the rise of industrial scale fishing that led to the overharvest and collapse of many stocks. Yet, policy reform and associated fisheries management, largely initiated during the mid-1990s, demonstrated effective ways to recover and sustain several of the major fisheries (Worm *et al.*, 2009; Hilborn and Ovando, 2014; Costello *et al.*, 2016; Hilborn *et al.*, 2020). Some of the leaders in fisheries research and management are nations of the International Council for the Exploration of the Sea (ICES)—currently 20 nations, generally aligned with the convention to study and disseminate research pertaining to the Northern Atlantic Ocean and the resources therein (Went, 1972). However, these success stories belie an important fact: while the majority of assessed fisheries appears sustainable, meeting the growing demand and food security need for seafood has not and cannot be met without other forms of seafood production (freshwater and marine), in particular aquaculture—now accounting for approximately half of all global aquatic production (FAO, 2018a).

During the earlier years of large-scale industrial fishing, the nations of ICES were major global contributors to both the consumption and production of seafood (Figure 1) and eventually recognized the need for scientific assessments and management of wild-capture fisheries (Went, 1972), but largely overlooked aquaculture. However, as the human population has expanded to 7.7 billion people, changes in the availability and access to seafood have influenced the contribution of ICES nations to global seafood production and consumption (Figure 1). First, improved fisheries management has recovered many stocks, but globally catches have stagnated in the absence of global reform adoption, particularly in coastal developing nations more dependent on seafood for food security and livelihoods (FAO, 2018a). As a result, a major factor contributing to the change in seafood production came from countries focused on fishing *and* aquaculture development. China in particular has put tremendous effort towards increasing seafood production over the last 30 years, now accounting for ca. 60% of all aquaculture production and is the largest net exporter of seafood globally (Szuwalski *et al.*, 2020). However, such efforts have come with large, negative environmental consequences (e.g. habitat degradation, invasive species, pollution), which the country now hopes to address, to some extent, though reduced fishing (catch and effort) and increased polyculture and offshore aquaculture expansion (Szuwalski *et al.*, 2020)—though socioecological standards may still be comparatively more lax (Cao *et al.*, 2015). Importantly, the growth in aquaculture production occurred in parallel with global trade, transporting wild and farmed seafood products all over the world (Gephart and Pace, 2015). As a result, ICES nations now account for a much smaller proportion of global consumers and producers (Figure 1). Yet, total demand for seafood continues to increase in ICES countries and around the world, as well as the associated food security issues therein (FAO, 2018a).

Unanswered is the fundamental question of how ICES nations will continue to develop sustainable aquaculture industries to help meet their own expected seafood needs and contribute to the global market; an issue that is likely to become even more relevant with increased uncertainty and security of ocean resources in the face of climate change. Challenges to sustainable seafood production will continue to be exacerbated under a changing climate. For fisheries, many wild-stock ranges are expected to shift out of originally managed extents to track ocean temperature (Pecl *et al.*, 2017; Oremus *et al.*, 2020; Pinsky *et al.*, 2020) and productivity and recruitment declines may lower overall productivity of a system (Britten *et al.*, 2016; Free *et al.*, 2019). For aquaculture, marine production faces similar temperature and acidifying pressures as their wild counterparts, while inland production is combating flooding and sea level rise, while compromising the health and infrastructure of cultured systems (Peterson *et al.*, 2018; Ahmed *et al.*, 2019; FAO, 2018b; Froehlich *et al.*, 2018). Although there is recognition that climate change threats to aquatic systems will likely grow, the longer-term strategic adaptive planning, especially for aquaculture, still appears nascent (FAO, 2018b; Hollowed *et al.*, 2019; Reid *et al.*, 2019).

Given the history and relevance of seafood for ICES countries, we ask what role sustainable aquaculture may play in these countries in the future, which includes consideration of trade and climate change. Drawing on existing quantitative and qualitative data sources, we explored the relative trends and forward-looking strategies for aquaculture among the respective nations who were, and continue to be, leaders in fisheries science and management. First, we assessed the change in aquatic sources of the collective and individual 20 ICES nations by comparing the general trends (tonnage and interannual variation) of wild capture vs. aquaculture production over the last five decades, paying particular attention to the top producing countries. Next, to determine how future aquaculture goals of the ICES members matched the prevailing trends, we compiled documents and sources from government and industry on proposed growth targets for each country since 2013. From the references, we extracted set goals, if any, for

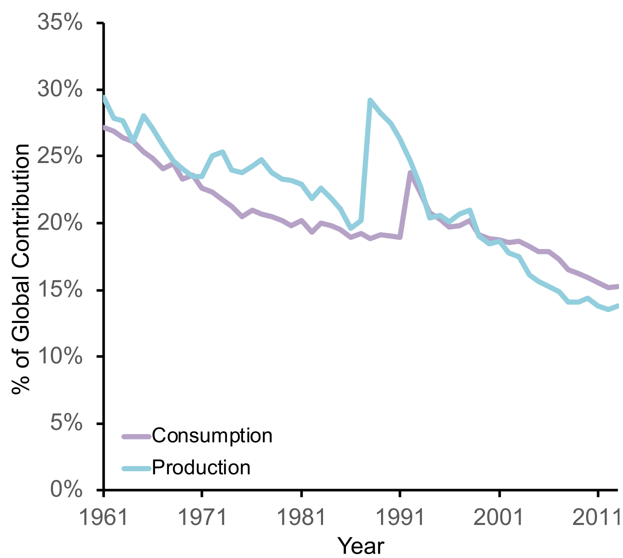

Figure 1. Trends in the percentage of total global consumption and production of seafood (wild capture and aquaculture) from ICES nations. The sudden peak corresponds with the socio-political changes in Russia/Soviet Union. The declining trend in percentage of global contribution is largely due to increasing human population and greater demand in other parts of the world. Data source: FAO (2018a).

future aquaculture production (year, tonnage, and type). We then modelled the potential 2050 aquaculture increases (based on the growth targets) to that of the possible total seafood consumption (i.e. demand) over the same time period, noting years of surplus or deficit. Recognizing that seafood from other countries fills domestic deficits, we highlight the top non-ICES seafood-trade partners, aquaculture production in those countries, and the implications for sustainable seafood. Lastly, we sought evidence of a base-level consideration of climate change in relation to future ICES' goals, given the increasing recognition climate change-related impacts may challenge aquaculture globally (FAO, 2018b). In that, we looked for mention of "climate change" within the associated references. Based on the results, we reflect on the future of seafood for the ICES nations and food system accountability in a global market, including adaptive strategies under a changing climate.

Methods

We used United Nations' Food and Agriculture Organization (FAO) data (production and food supply) to compare general trends of production and variation in wild capture and aquaculture (freshwater and marine, excluding aquatic plants) of the 20 ICES' nations over the last five decades (FAO, 2013, 2018a). First, we assessed how the percentage of contribution of ICES total (in tonnes) consumption and production (capture plus aquaculture) has changed over time relative to global trends. Finding declining trends, which suggests a smaller role in global seafood overall, we next assessed which ICES nations contributed to the past and more recent production of wild and farmed seafood, and the evenness of that tonnage per country by comparing the coefficient of variation (*C.V.*) of intercountry production. This helped highlight if aquaculture is more or less skewed than fisheries between the ICES nations, similar to global trends. Lastly, we compared the yearly percentage change in capture and aquaculture production and the probability [binomial generalized linear model, log link: positive change (0,1) $\sim$ year + type(capture, aquaculture) + year: type] of seeing more increases instead of declines over time in the respective systems.

For assessing future aquaculture goals, we compiled information (government and industry) on proposed growth targets for the ICES member nations since 2013. First, we leveraged the ICES members of the Working Group on Scenario Planning on Aquaculture, from which this project emerged, to provide known documents or sources about their respective countries and any additional information on the other nations (i.e. expert knowledge). One review document we heavily leveraged, which provided detailed reference to aquaculture targets for EU countries (no. countries = 12), was O'Hagan *et al.* (2017). We paired the expert-elicited collection with Google™ searches for references on any remaining countries of interest. The search terms included *country name* and *aquaculture*, *future*, *horizon*, and/or *2050*. We then read the sources of information ($N = 20$) and manually extracted future aquaculture production goals (year, tonnage, and type, such as freshwater, marine, taxa) for the 20 member nations. If we found multiple goals for a given country for the same time periods, we took the mean of the values. From both experts and Internet searchers, we incorporated industry reported values for nations in which we could not find explicit government targets (Iceland) or were cited by the government (Scotland). Another important note, the United Kingdom as a whole is the ICES member, but the aquaculture target is the composite of Scotland, England, Wales, and Northern Ireland and a 2030 report (not included) was in progress during the time of this study. We also noted if the associated references mention "climate change", which we used as a basic indicator of recognition and possible consideration for aquaculture growth. All documents and sources (Supplementary Table S1) not in English were either translated by an ICES working group member or Google™ Translate. While our approach resulted in information on aquaculture growth for every ICES country, we may have missed other, less accessible documents or sources due to language barriers, policy relevance, or limits on information sharing. In particular, goals from nations outside of the European Union, Norway, the United States, and Canada are likely less certain.

To test the feasibility and trajectory of ICES seafood production and consumption, we combined and fit models to past and future FAO aquaculture data (production and consumption) and the extracted future values. Comparing linear, exponential, and second-order polynomial models using corrected Akaike information criterion (AICc) for model selection (Burnham and Anderson, 2002), we found the significant exponential model [log(tonnage) $\sim$ year] best described total aquaculture (tonnes) over time with and without inclusion of the future production values. We then compared future production goals to the potential total consumption trend—assuming a statistically significant linear increase in total consumption to 2050—to calculate the *seafood production deficit* (i.e. total production − total consumption). We focus on the "domestic deficit" because seafood imported from other countries (external to ICES) has different environment and policy implications (e.g. displaced socioecological burden). All data collection, modelling, and figures were produced with Microsoft™ Excel and R*v3.6.1* (R Core Team, 2019). All data used in the study is publically available.

In addition to assessing the "domestic deficit", we complied the top import-seafood-trade ICES partners (USD$) and the production of aquaculture and wild fisheries to qualitatively compare the dependence on other, potentially less regulated countries for seafood (FAO, 2018a). We gathered the country-specific trade information from ResourceTrade.Earth, which is supported by the Chatham House Resource Trade Database and sourced from the United Nations Commodity Trade Statistics Database (UN Comtrade) by the United Nations Statistics Division.

Results and discussion

Past trends of catch and production

Total aquaculture among the ICES countries is dwarfed by the volume of wild-capture fisheries production (Figure 2a). As of 2015, eight nations (Canada, Denmark, Iceland, Norway, Russia, Spain, the United Kingdom, and the United States) accounted for nearly all (87%) of the total ICES wild capture (total catch = 16.8 million tonnes) and these same countries contributed the vast majority of aquaculture production (88%) among the 20 countries (total aquaculture = 3.1 million tonnes; Figure 2b). However, the contribution of tonnage of wild capture is much more evenly distributed (country *C.V.* = 0.83) among the eight countries compared to aquaculture production (country *C.V.* = 1.31). For example, in 2015, the United States landed the most (by volume) with ca. 5 million tonnes (majority from Alaska pollock *Theragra chalcogramma*), or 26% of the total ICES catches. In comparison, Norway was the top aquaculture producing country (nearly all Atlantic

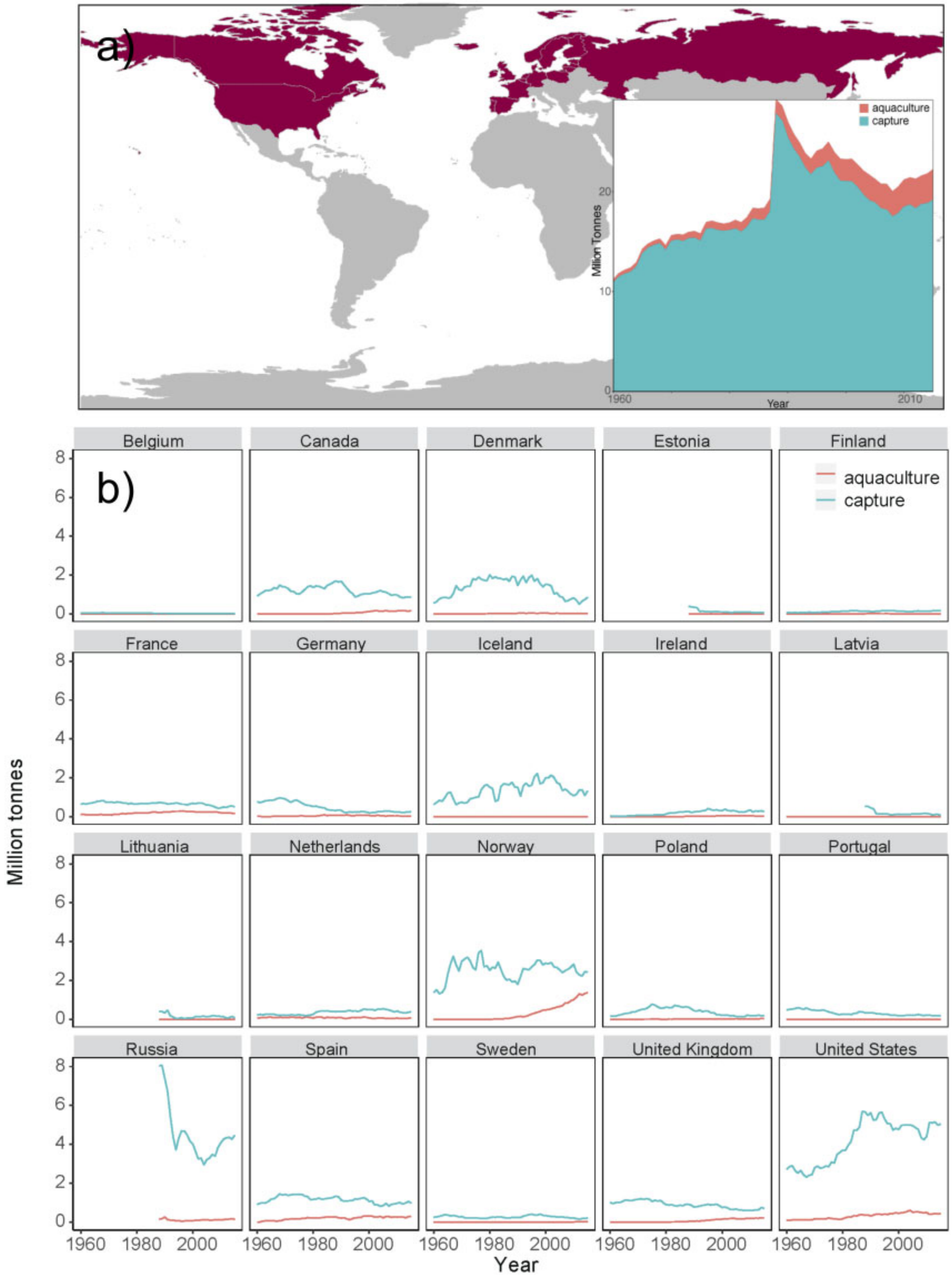

Figure 2. ICES nations (a) highlighted in *maroon*, with total combined production (million tonnes) over time (*inset panel*) and (b) corresponding individual national aquaculture (*orange*) and fisheries catch (*blue*) freshwater and marine (excluding seaweeds) tonnage time series (1960–2015) (FAO, 2013, 2018a).

salmon *Salmo salar*) with 1.4 million tonnes, or 45% of the total ICES aquatic production (Figure 2b). Norway is a particularly interesting case, demonstrating both sustained catch and a comparatively rapid increase in aquaculture production volume, a unique trend among the top ICES nations.

In evaluating past and current temporal trends in production for wild-caught and farmed seafood, we see that capture fisheries production has varied little over time (Figure 3a) and that, on average, yearly catches in a given ICES country have a slightly higher probability of declining from the previous year since the

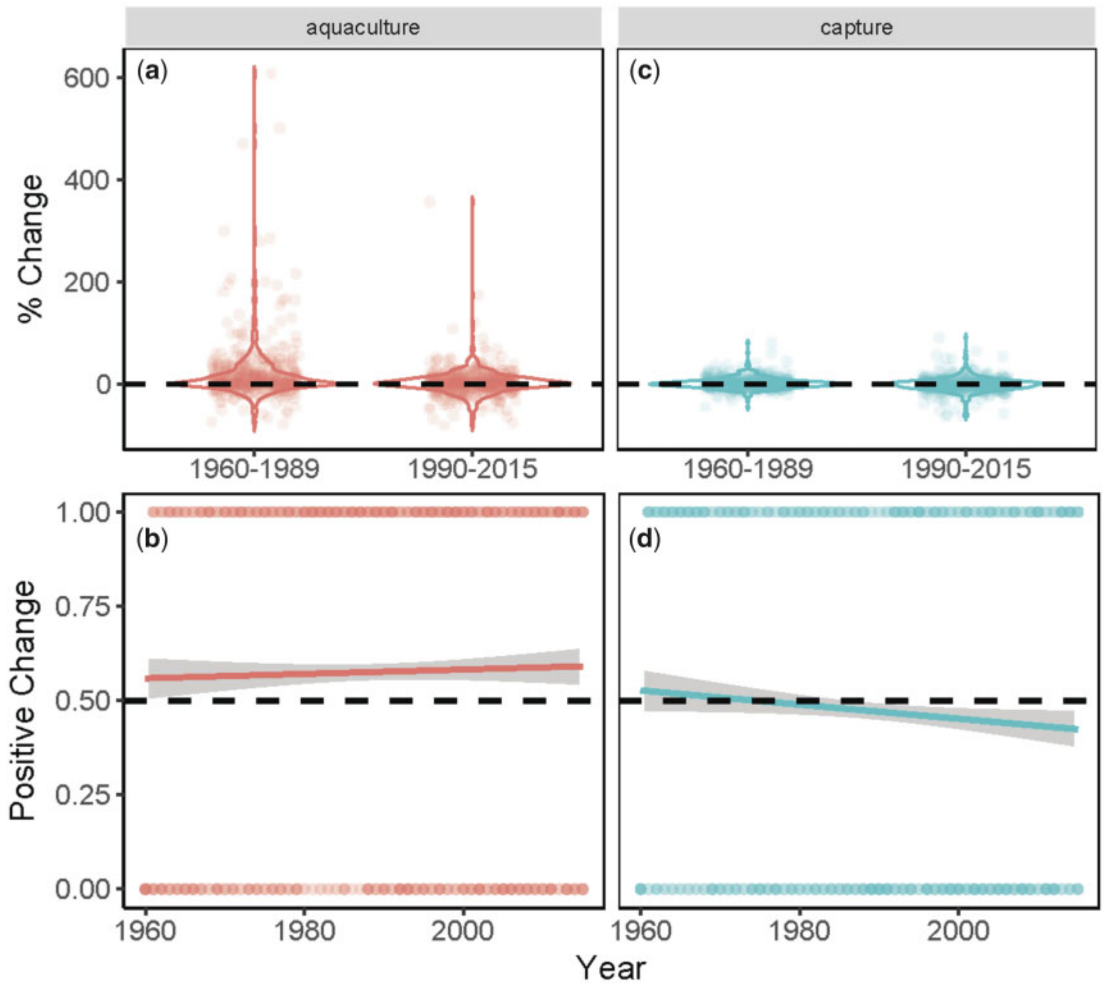

Figure 3. Interannual variability in capture (*blue*) and aquaculture (*orange*) tonnage for each ICES nation over time as shown by percentage (%) change in production between subsequent years (a and c) and the probability the change is positive in a given year across all ICES countries (b and d).

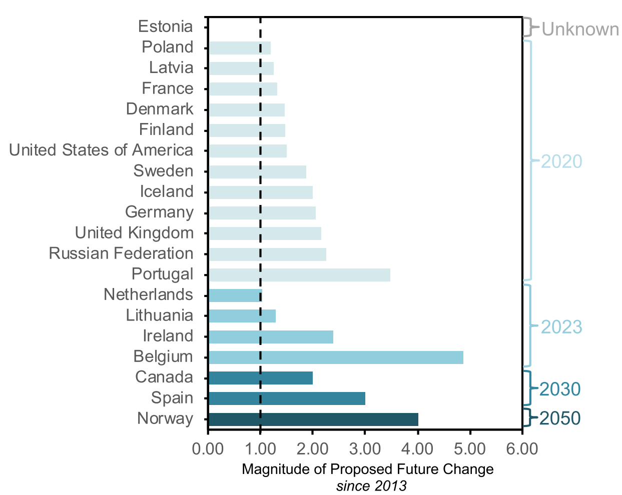

Figure 4. Magnitude of proposed aquaculture growth targets relative to 2013 FAO production estimates as calculated from the countr-specific documentation.

1990s (Figure 3b). In contrast, aquaculture has seen substantially larger variation in growth, in particular with large increases in the past when many fish farms were just developing (Figure 3c), with increases in production from year to year being more probable than declines (Figure 3d); although the yearly trends were not statistically significant (p-value = 0.075). In addition, the variation appears to be contracting as aquaculture grows and matures (Figure 3c). Consistent with global trends, present capture fisheries within ICES countries appear either relatively stable or declining, while aquaculture has been steadily increasing (Costello *et al.*, 2016; FAO, 2018a; Hilborn and Costello, 2018).

Targets for aquaculture growth

Since 2013, all ICES countries have government-sponsored and/or industry-lead reports or initiatives that state potential growth interests or goals for aquaculture (freshwater and marine) within their own territorial boundaries (Figure 4). That said, we were unable to find explicit targets for only one country, Estonia (consistent with O'Hagan *et al.*, 2017), but there does seem to be intent for expansion (e.g. "... areas for suitable aquaculture will be

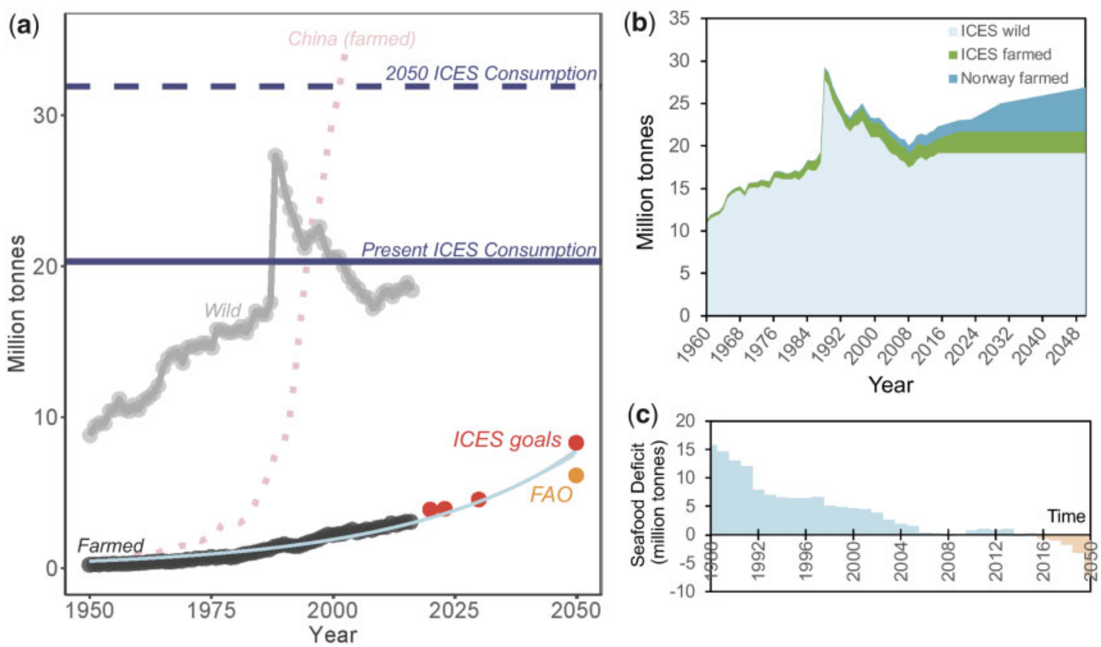

Figure 5. (a) Past and future trends of ICES aquaculture (*black*) and wild (*gray*) capture. ICES goals are shown in *red* and FAO estimates are shown in *orange*, with the exponential model fit with 95% confidence intervals. Current (2013) and future (2050) total consumption levels are depicted as *blue* horizontal *solid* and *dashed* lines, respectively. Chinese aquaculture is shown as the *small, dotted pink* line for the reference of production scale. (b) Total ICES capture (*light blue*), ICES aquaculture excluding Norway (*green*), and Norwegian aquaculture (*aqua*). (c) Domestic seafood deficit in millions of tonnes over time (non-consecutive years) as calculated by consumption minus combined (fisheries and aquaculture) production based on the reported targets; *light blue* positive values show no deficit (i.e. surplus) and *orange* negative values indicate deficits by 2050.

mapped . . ."). The vast majority of explicit targets (16 out of 20) was very short-term, set for the years 2020–2023. In comparison, only three countries (Canada, Spain, and Norway) outlined more strategic planning out to 2030–2050. Nearly all documented targets were for a doubling of production or less (median goal magnitude = 2), with only four countries setting more ambitious growth production goals into the future (Portugal: 3.5× by 2020; Belgium: 4.9× by 2023; Spain: 3× by 2030; Norway: 4× by 2050) (Figure 4). Norway's target represents the most substantial proposed increase in absolute production (3.8 million additional tonnes), while Portugal, Belgium, and Spain's targets represent more modest increases of 25 000 tonnes, 820 tonnes, and 447 000 tonnes, respectively.

In addition to general production goals, we found a tendency of focusing on marine expansion (number of countries = 14) compared to freshwater (number of countries = 6); this is not necessarily surprising, given current marine production is approximately fourfold that of freshwater aquaculture in ICES countries. Some countries even specified the species or mode of production they were interested in expanding. For instance, Norway articulated continued expansion of salmon and also seaweed species. Similarly, Germany highlighted integrated multi-trophic aquaculture of mussels and seaweed in the Baltic Sea, while Latvia emphasized pool and recirculating aquaculture. Of note, nearly all of ICES countries mentioned *spatial planning* or *zoning* as part of the specific strategy for growth. The association between spatial planning and aquaculture seems to track with other policies and initiatives globally, including the reform of the 2013 EU Common Fisheries Policy (O'Hagan *et al.*, 2017) and various Regional Commissions for Fisheries (Meaden *et al.*, 2015).

Sources with mentions of spatial planning tended to co-occur with the acknowledgment of preparation for climate change (84% of sources). However, detailed climate change action plans for aquaculture, especially long-term, were not apparent in the documents we assessed. This is not to say that ICES nations are not planning for climate change, as many countries indeed have ongoing research projects (e.g. EU H2020 CERES and ClimeFish, US NOAA climate science strategy) and other marine planning that may include aquaculture, such as the EU Directive 2014/89/EU (O'Hagan *et al.*, 2017). However, what the specific plans are and how they align with the respective goals for aquaculture growth were not overtly apparent in the sources assessed. The lack of climate change planning perhaps indicates a further need within long-term aquaculture strategies.

Looking across the ICES members' goals, what emerges is the clear pattern that most countries have established comparatively conservative targets (median magnitude = 2) for increasing aquaculture production, though interest in some level of growth appears ubiquitous. Smaller or larger production targets are not better or worse. That said, such targets do have potential implications for the ability of countries to meet their own consumption demand and the trade-offs therein, an issue we explore next.

Mind the domestic production gap

Applying each country's aquaculture growth trajectories out to the year 2050 and modelling the potential growth over time, we uncovered that ICES nations' goals appear feasible given past aquaculture production trends (Figure 5a). We specifically found that an exponential model performed best (according to AICc model selection) in describing past (since 1950) and potential future production among three models tested ($R^2_{adj} = 0.97$, Fstat = 2308, p-value <0.001). Notably, the reported projection from the FAO is a little lower than the ICES national goals (Figure 5a). However, while the trajectories may seem achievable based on previous growth of the sector, there are potential constraints and bottlenecks to aquaculture development, such as a lack of available sites (Sanchez-Jerez *et al.*, 2016), lost production from disease (Stentiford *et al.*, 2017), highly restrictive regulations (Sea Grant, 2019), and poor public perception and social licence (Froehlich *et al.*, 2017), among other factors. As the industry grows, these problems can increase and may slow or limit production for any given country. Nonetheless, assuming that these challenges are addressed and aquaculture production goals of each country are met, ICES countries' goals could reflect production potential in the future, with Norway driving 2050 growth (Figure 5b). Norwegian aquaculture is already the largest producer in ICES, but it is unclear if (Atlantic salmon) production will continue to be increasingly challenged by sea lice (Young *et al.*, 2019) or aided by offshore expansion (e.g. SalMar ASA). Interestingly, Norway meeting the proposed fourfold increase would result in their total aquaculture production surpassing their capture fisheries prior to 2050.

We also found that ICES nations have a mounting domestic seafood production deficit from consuming more seafood than they produce (Figure 5c), meaning a growing reliance on imports that may be less sustainable. If we assume a linear relationship of total seafood consumption (tonnage) over time ($R^2_{adj} = 0.95$; Fstat = 978; p-value <0.001), we would expect to see an average of 57% increase in the total amount consumed by 2050 (since 2013; Figure 5a), trends that align with the projected average of the regions of interest (World Bank, 2013). Compared to the time since the greatest ICES seafood surplus (1988), small domestic deficits appeared to have occurred in 2008 and 2016 (Figure 5c). Accounting for a continued rise in ICES consumption and the production goals of the associated nations, we project a seafood deficit of ~7 million tonnes by 2050 (Figure 5c). Unless aquaculture growth targets are set significantly higher for the other nations excluding Norway, ICES countries will likely become even more reliant on other large seafood producers, such as China (Figure 5a). In fact, the top three, non-ICES seafood-trading partners (India, China, and Indonesia), by import value (total USD in 2017 = $23.7 billion), all have aquaculture production equal to or exceeding their capture fisheries (in total, 2.2 times great than catch). The most common taxa imported from these countries are shrimp and prawns, which have a record of having significant negative environmental impacts (De Silva, 2012) and human rights violations (Motilal and Prakriti, 2018). While an ICES seafood deficit in production is not a certainty, this analysis demonstrates that it is much more likely under current production and consumption trends and potentially presents a greater risk of sourcing less sustainable food items in the future.

Conclusions and recommendations

There is historical precedent for ICES nations to be at the forefront of sustainable seafood production, whether through domestic and/or better trade dimensions. Over the decades, the exploration and implementation of new tools and strategies to better manage wild fisheries have been recognized and adopted to various extents among these nations. While great strides were made to support best fisheries practices—including governance, funding, and research support—to recover many wild stocks, much less effort has been given in most of the ICES nations to usher in aquaculture practices in a similar, but more anticipatory manner. Interestingly, we found that even with the apparent recognition by all current ICES countries that aquaculture will play an increasingly important role in future seafood production, most planning appears very short term and conservative. Development of long-term aquaculture strategies is not just about absolute production and must also include measures to advance improved husbandry, technology, and participation in the changing seafood market, ideally with sustainability leading these components. While the goals moving forward to 2050 by the ICES nations may be feasible as the growing challenges are addressed, growth predominantly depends on one country, Norway. Even if the goals are met, it does not reconcile the deficits in seafood production, requiring increases in imports of seafood, often from places with considerably fewer rules and regulations for sustainable harvest or production. In addition, lack of aquaculture consideration creates a major gap in adaptively planning for the impact of climate change on the seafood sectors domestically and from exporting countries (FAO, 2018b; Froehlich *et al.*, 2018; Thiault *et al.*, 2019).

Governance is key to adaptive planning, and targeted policies that support, not just regulate, domestic aquaculture are needed if ICES countries wish to address the skewed production landscape. In a global setting, the restrictive and complex regulatory structures have been identified as important factors stagnating the growth of aquaculture in Europe and North America and may have resulted in declining their share of world aquaculture production (Engle and Stone, 2013; Young *et al.*, 2019; Garlock *et al.*, 2020). Aquaculture-specific national legislation, which clearly defines requirements and objectives, is important, but not always guaranteed (e.g. Canada) (Sanchez-Jerez *et al.*, 2016), particularly for marine aquaculture (Davies *et al.*, 2019). Arguably, clear legislation should apply to state and provincial level governance as well. The FAO of the United Nations identified "predictability of the rule of law" as one of the four cornerstones of governance principles to support sustainable aquaculture development (Hishamunda *et al.*, 2014). Importantly, legislation likely needs to go beyond robust regulatory standards, which does exist in many of these nations, to include explicit support—which is debatably the case for wild-capture fisheries. For instance, zoned Aquaculture Management Areas—a designated area shared by farmers to minimize risk and impact to the surrounding environment (FAO and World Bank, 2015)—could be a tangible near-term goal for pursuing longer-term aquaculture growth, especially for countries with some form of spatial planning and management already in place. Zoning differs from spatial planning alone in that it specifically prioritizes aquaculture in certain areas over other uses, but rarely at the expense of the environment or other industries (Sanchez-Jerez *et al.*, 2016). Such aquaculture prioritization and support does occur, including in some ICES nations (e.g. Spain, Norway), but is still rare and highly variable (Sanchez-Jerez *et al.*, 2016). In the event of aquaculture zoning, coordinated area-based management beyond a single farm (e.g. "beyond farm" governance, integrated coastal zone management) may also help improve sustainable aquaculture development into the future, as is the case in Norway (Hishamunda *et al.*, 2014; Klinger *et al.*, 2018; Bush *et al.*, 2019). In short, aquaculture would need to become a priority to grow in ICES nations (beyond just Norway), which may not parallel the social or political will of some of the countries being discussed (Froehlich *et al.*, 2017).

Trade is intertwined with domestic seafood governance, especially if ICES nations intend to address the displacement of social and ecological burdens bound to imported seafood. We found the potential for a domestic seafood production deficit more likely now and increasingly so in the future, which increases the chance of imports of less expensive seafood from less regulated countries in the absence of interregional laws. This "whole system" perspective (i.e. beyond local or domestic impacts) applies to nearly every commodity in this globalized age (Kissinger *et al.*, 2011), but seafood in particular is one of the most traded commodities on the planet and production is so heavily skewed globally (ca. 90% of production in SE Asia) (Gephart and Pace, 2015). Accountability of the impacts of our food beyond local and national borders is legally difficult but morally deserves attention (Kissinger *et al.*, 2011; Halpern *et al.*, 2019). Certification, blockchain, and improved monitoring, such as the USA's new Seafood Import Monitoring Program (81 FR 88975), are helping address some issues around trade and traceability of seafood (Gephart *et al.*, 2019). However, with mislabelling and fraud (Stawitz *et al.*, 2017; Luque and Donlan, 2019), worker's rights and slavery (Diana *et al.*, 2013), and climate change (Brown *et al.*, 2017), the scale and complexity of the international seafood issues are overwhelming in the absence of larger political initiatives at the national and global scale.

Not only do ICES countries need strategic domestic and international aquaculture policies, these efforts should be done in the context of changing environmental conditions. Climate change is already impacting fisheries and aquaculture, including ICES members (e.g. USGCRP, 2018), and conditions are predicted to get more challenging in the coming decades, especially in the absence of active mitigation and adaptation measures (Sumaila *et al.*, 2016; Handisyde *et al.*, 2017; FAO, 2018b; Free *et al.*, 2019; Hollowed *et al.*, 2019; Thiault *et al.*, 2019; Oremus *et al.*, 2020). Of note, and reminiscent of a historically narrow focus in fisheries, plans for wild-capture management under climate change are slowly forming as impacts and conflicts emerge and better methods to predict impacts on productivity and behaviour develop (FAO, 2018b; Free *et al.*, 2019; Hollowed *et al.*, 2019; Sumaila *et al.*, 2019; Thiault *et al.*, 2019). Yet, we lack even a map of current aquaculture production locations (freshwater and marine) around the world, making the real versus potential impact on aquaculture highly uncertain, and precautionary planning much more important and challenging (Froehlich *et al.*, 2018). Some regional assessments are emerging (e.g. Falconer *et al.*, 2020; EU ClimeFish, 2020), but more research and support around climate change impacts, mitigation, and adaption for aquaculture are sorely needed.

In general, ICES' governments need more deliberate and strategic plans about the extent to which they wish to increase aquaculture production in their own waters versus. importing farmed and capture species from other countries' waters, and how these decisions may fare under a changing climate. While the solution of "producing more" domestically may sound simple, it is in fact a grand challenge that emerges from highly complex socio-economic and cultural values around seafood, alongside population and demand growing for seafood, and climate change threatening both fishing and aquaculture sectors, as well as the people who depend on them. Our results highlight that this challenge should not be left to reactive future decisions. Instead, nations must proactively prepare for the complex issues ahead.

Supplementary data

Supplementary material is available at the *ICESJMS* online version of the manuscript.

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