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Sectoral Brief

Blue Economy

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Index

Building a nature-positive economy: The role of policy and business

The blue economy: Challenges and opportunities in the nature-positive economy

EU policy: Enabling or hindering the nature-positive transition?

Private sector leadership in the blue economy's nature-positive transition

Scaling change: Examples of nature-positive blue economy policy in practice

Final reflections

References

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Building a nature positive economy: The role of policy and business

Nature is the foundation of our economies, societies, and well-being—yet we are depleting it at an alarming rate through land and sea use change, resource overexploitation, human-induced climate change, and pollution.[1] With more than half of global GDP dependent on nature and its services,[2] biodiversity loss and environmental degradation are not just an ecological crisis. They pose significant risks to businesses, supply chains, and financial markets worldwide. To address this challenge, policy frameworks are evolving to make nature an integral part of economic and financial decision-making. These policies can create an enabling environment for businesses to align their operations with **nature-positive principles** and support a wider transition to a **nature-positive economy**.

What is 'nature positive'?[3]

Nature positive is a global goal aimed at halting and reversing nature loss by 2030 and achieving full recovery of nature by 2050. It represents a shift from merely minimising environmental harm to actively protecting, restoring and using nature in a sustainable way to improve the health, abundance, diversity, and resilience of species, ecosystems, and natural processes.[4] Operationalising this concept involves (i)reducing negative impacts on nature and addressing drivers of nature degradation; (ii) increasing positive impacts, including through nature-based enterprises, nature-based solutions (NbS), and conservation measures; and (iii) fostering transformative change to our economy and society. Companies that integrate nature into their decision-making can enhance long-term resilience, unlock new markets, and reduce material financial risks tied to biodiversity loss.[5]

What is a nature-positive economy?

A nature-positive economy (NPE) means that the net results of all economic activities combined leads to an absolute increase in nature towards full recovery.[6] This will require businesses, governments, and citizens to act across multiple scales in every sector, aligned with social-ecological well-being and equity. By embedding nature-positive strategies into policy design and core business operations—whether through supply chain transformation, regenerative business models, or investment in nature-based solutions—progress can be made towards a thriving, sustainable economy.

How to transition?

The transition to a nature-positive economy demands action from all parts of society, from public policy to private initiatives. In this series of briefs, we explore how five critical sectors – agriculture, the blue economy, forestry, green buildings, and tourism - can take nature positive actions to support the transition to a nature-positive economy. Each brief highlights the sector's current impact on nature and looks at how the EU policy framework and international private initiatives can potentially support or hinder the sector's NPE transition. We also highlight existing examples of businesses in the sector taking nature positive actions. This brief focuses on the blue economy sector.

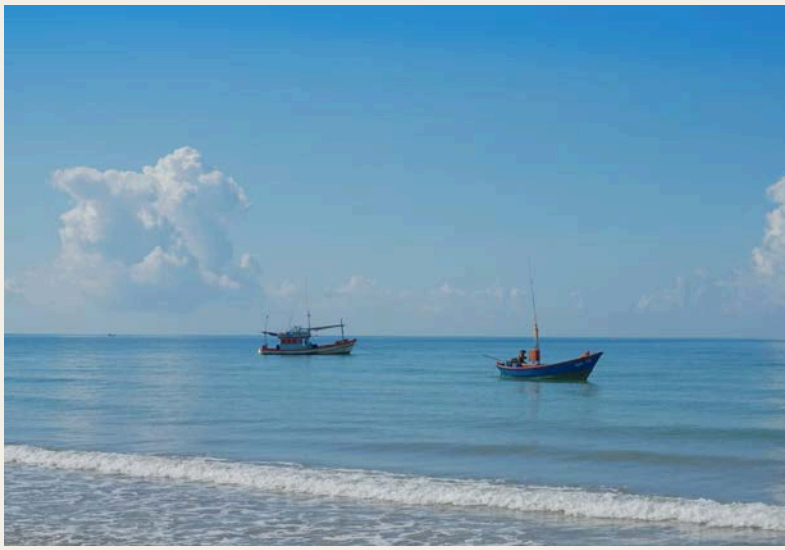
The blue economy: Challenges and opportunities in the nature-positive economy

The blue economy is a key pillar of the EU's economic landscape, encompassing all industries and sectors connected to the ocean, seas, and coasts, thereby covering a vast marine territory.[7] Currently, at least seven blue economy sectors are well established: marine living and non-living resources (e.g., fishing, aquaculture, and mining), marine renewable energy, port activities (e.g., cargo handling and warehousing), shipbuilding and repair, maritime transport and coastal tourism.[8] Most of these sectors, particularly offshore wind energy, have experienced significant growth, recovering from COVID-19 while adapting to evolving economic and energy demands. In addition to these established sectors, emerging industries such as blue biotechnology hold significant potential for growth, sustainable transition, and job creation. By 2022, the blue economy sectors directly employed approximately 4.82 million people and contributed 2.4% to the EU-27 economy.[9]

Environmental impacts: Challenges within the blue economy

Over the years, the growth of blue economy activities has led to significant environmental impacts. Habitat destruction from seabed trawling, overexploitation of marine resources including Illegal, unregulated and unreported fishing (IUU), port expansion, and unsustainable coastal tourism has contributed to biodiversity loss.[10][11] Many of Europe's marine habitats remain in an "unknown" or "unfavourable" conservation status.[12] Pollution, including plastic waste, chemical runoff, oil spills, marine transport waste, further endangers biodiversity and marine habitats.[13] At the same time, the EU fishing fleet is a major CO_2 emitter, not least due to high fuel consumption.

This problem was exacerbated in 2021 and 2022 as a result of rising fuel prices and worsening fuel efficiency, with increased fuel costs taking a larger share of income from landings. The lack of alternative fuels and slow adoption of electrific or hybrid vessels further hinder progress. Furthermore, nutrient emissions from intensive aquaculture and on-land activities result in a loss of marine and coastal ecosystem services impacting marine biodiversity.[14] To balance conservation and economic activities, marine spatial planning (MSP) has been introduced. However, biodiversity conservation is not yet systematically integrated, and Member States show significant discrepancies in implementation, leading to inconsistent marine protection.[15] A reported 86% of EU marine protected areas still provide only low protection or are incompatible with conservation.[16] Further expansion of the blue economy must adopt nature-positive principles, with biodiversity conservation at the core, to reverse nature-harmful trends, support marine recovery, and create sustainable business opportunities aligned with a NPE.



A path forward: Transitioning to a sustainable blue economy

A sustainable blue economy requires multiple industries to adopt nature-positive practices, transforming economic activities in line with a NPE. Key strategies include blue carbon farming and marine ecosystem restoration for carbon sequestration and biodiversity benefits, organic/regenerative aquaculture, and circular bio-based solutions. Recent estimates indicate that the benefits of nature-based solutions for the blue economy exceed the costs by a factor of more than 3.5. [17] In particular, marine ecosystem restoration has proven effective even in areas facing continued human pressure, making it possible to plan restoration measures before all stressors have been reduced.[18] One governance mechanism supporting this transition is the Energy Transition Partnership for the fisheries and aquaculture sector, which promotes cleaner energy by reducing fossil fuel dependency. However, progress has been slow due to infrastructure gaps and financial barriers. Despite a 31% reduction in CO2 emissions from the EU fishing fleet from 2009 to 2022 [19], further innovation is needed. Additional positive trends include a rapid growth of organic aquaculture production in several EU countries[20], the introduction of clean energy vessels, and the transition to green ports reflected in the Environmental Management Index's increase from 7.8 in 2020 to 8.08 in 2023[21], as well as ongoing research and development to create less environmentally harmful technological solutions. Further sustainability improvements have also been identified in the management of fish stocks in the Mediterranean and the Black Sea.[22]

EU policy: Enabling or hindering the nature-positive transition?

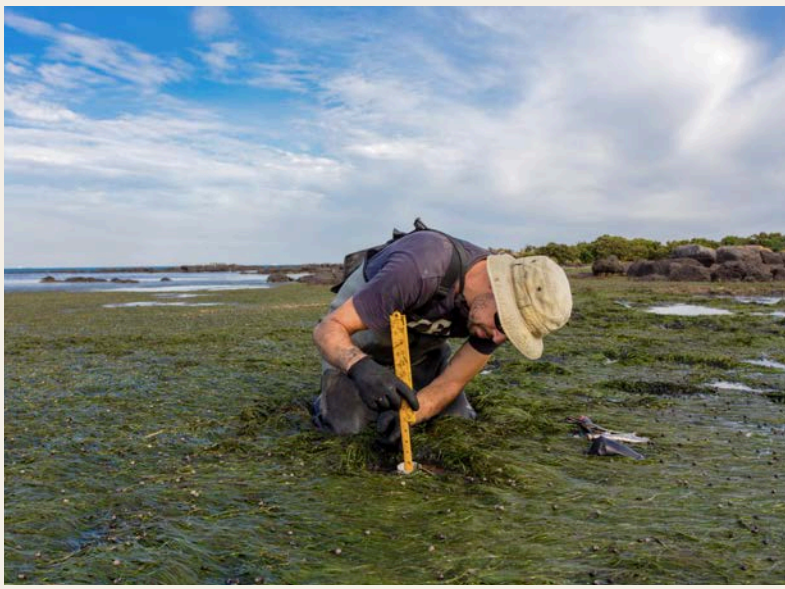
A strong policy framework is essential to drive the blue economy sectors' transition to a NPE. Policy can assist by setting clear targets and establishing a vision, disincentivising and fading out harmful practices, and providing financial incentives for a sustainable blue economy. Public policies, including strategies, regulations, and funding instruments, can either accelerate this transition by promoting regenerative agriculture and biodiversity conservation or hinder progress if they continue to support environmentally harmful practices. In an accompanying report[23], we evaluate more than 60 global and EU policies to identify potential support or hindrances regarding the NPE transition. Here we use examples of two key EU blue economy policies to explore these potential impacts in more detail.[24]

Global and cross-cutting EU policies

At the global level, an overarching framework is provided by policies such as the **Kunming-Montreal Global Biodiversity Framework (GBF)** and the **Paris Agreement,** which broadly support the "nature positive" agenda, aiming to halt and reverse biodiversity loss while addressing climate change. The GBF generally provides a roadmap for integrating biodiversity conservation into global economic systems and encourages governments, businesses, and communities to take coordinated action. With regards to the blue economy, the GBF includes a target to ensure that at least 30% of degraded marine and coastal ecosystems are under effective restoration by 2030 (Target 2), while at least 30% of marine and coastal areas - especially those critical for biodiversity and ecosystem functions - are effectively conserved and managed (Target 3).

The Paris Agreement establishes a global warming target and aims to enhance adaptive capacities, strengthen resilience, and reduce climate change vulnerability while recognising the need to conserve and enhance reservoirs of greenhouse gas emissions, including oceans and coastal and marine ecosystems. Their effectiveness depends on strong enforcement, coherent implementation, and subsidy reforms. Without safeguards, greenhouse gas-focused policies under the Paris Agreement may promote nature-harmful practices like biofuel expansion, undermining the biodiversity-focused goals of a nature-positive economy.

EU policy can support NPE by establishing a vision and direction, such as through the **European Green Deal (EGD)**, the EU's flagship strategy for achieving the transition to a climate-neutral economy by 2050. Launched in 2019, it provides a comprehensive policy framework for transforming the EU's economy to reduce greenhouse gas emissions, enhance resource efficiency, and restore Europe's natural ecosystems.



While the Paris Agreement and EU Green Deal focus on decarbonization, this may also lead to trade-offs, such as: increased offshore wind farm development in ecologically sensitive areas, potentially harming seabirds and marine mammals; expansion of biofuel production from marine sources, which could exacerbate habitat loss; and deep-sea mining proposals that threaten fragile deep-sea ecosystems. Among other important policies, the EGD includes the **EU Biodiversity Strategy for 2030**, which aims to halt biodiversity loss, restore degraded ecosystems, and enhance green infrastructure. It establishes targets and underscores the need for transformative change across sectors to integrate biodiversity into every aspect of policymaking and business practices, ensuring long-term resilience. The evolving EU political landscape following the 2024 elections—with a focus on competitiveness and policy simplification—introduces potential risks. Recent initiatives such as the European **Competitiveness Compass** and the **Omnibus simplification package** illustrate this shift. While efforts to reduce administrative burdens can be beneficial, care must be taken to ensure they do not undermine ambitious and mandatory nature policies.

EU policy can also *establish rules and regulations* that reduce a sector's negative impacts on nature and create additional nature, an approach employed by the **EU Nature Restoration Regulation**. This regulation introduces legally-binding and time-bound targets to restore degraded ecosystems, habitats and species in the EU. Through these targets and an obligation to draft National Restoration Plans, the EU Nature Restoration Regulation is expected to boost national restoration efforts, bringing the EU closer to the nature-positive economy. In addition, the upcoming revision of the **EU Maritime Spatial Planning Directive** could provide an opportunity to align marine economic development more explicitly with biodiversity conservation goals.

EU policy can also provide funding for nature-positive or nature-negative activities. The **Multiannual Financial Framework** (MFF), for example, establishes the EU's long-term budget, outlining the EU's priorities and ensuring predictable and stable funding for various policies and programs. While funding through the current MFF (2021-2027) supports some nature-positive initiatives such as responsible resource use and green and blue infrastructure development, it can also fund activities that may conflict with the NPE, such as infrastructure expansion, offshore resource extraction and environmentally harmful or high-impact aquacultural production. These conflicting priorities within the EU budget weaken its transformative potential for a nature-positive transition.

Sector-specific policy in the EU

Sector-specific EU policy can also support the NPE transition. Two important blue economy policies regarding the transition to a nature-positive economy are the Marine Strategy Framework Directive (MSFD) and the Common Fisheries Policy (CFP).[25] These are complemented with, for example, the European Commission's 2021 *Communication on a new approach for a sustainable blue economy in the EU*, targeting a transition from blue growth to a sustainable blue economy in line with the European Green Deal.

The 2008 **Marine Strategy Framework Directive** is a legal instrument focused on procedural obligations rather than concrete marine management measures. Its main objective is to achieve a Good Environmental Status (GES) by minimising the negative effects of economic activities, with less emphasis on restoration. A key transformative aspect is the legally binding requirement for an ecosystem-based approach to managing marine economic activities. However, social considerations - such as intergenerational equity and stakeholder engagement - are addressed only at a general level, with no provisions for indigenous rights or local coastal communities.

Restricted public access to data reduces transparency and public awareness of marine environmental impact. Further shortcomings include legal ambiguity around GES, unclear enforcement mechanisms, weak integration with related EU legislation, and insufficient coordination with regional conventions and neighbouring countries. These gaps lead to poor accountability and delayed biodiversity recovery, challenging a fully nature-positive transformation of the marine sector.

The Common Fisheries Policy, a central regulatory instrument of the EU blue economy, focuses on minimising fishing pressures through e.g. enhanced selectivity and reduced unwanted catches. By mandating multiannual plans and conservation measures with clear targets, the CFP aims to restore and maintain fish stocks by managing them at maximum sustainable yield while regulating fishing opportunities and fleet capacity. However, effectiveness is limited by a lack of mandatory performance tracking, and ecosystem restoration is not prioritised - even within its conservation measures. The ecosystem-based approach, for example, is applied primarily for mitigating negative impacts, rather than actively enhancing marine biodiversity. Some CFP measures, such as subsidies for fleet modernisation and sustainable aquaculture, risk increasing pressure on marine ecosystems rather than reducing it. [26]

Additionally, the CFP lacks a structured non-financial disclosure framework (e.g., impact reporting on marine biodiversity loss), which would strengthen alignment with Do No Significant Harm and NPE principles. The CFP's non-binding social provisions omit references to vulnerable groups, indigenous knowledge, and diversity, limiting its transformative potential. Furthermore, reliance on Member State-led implementation results in inconsistent enforcement of conservation measures. The absence of a clear timeline for achieving nature-positive fisheries management further weakens the CFP's contribution to a NPE transition.

Private sector leadership in the blue economy's nature-positive transition

Alongside public policy, **private and non-governmental actors play a critical role in driving the transition to a nature-positive economy**. Key initiatives include, for example, sustainability reporting (such as the Taskforce on Nature-related Financial Disclosures [27]), finance alignment (such as the Finance for Biodiversity Foundation), and knowledge development (such as IPBES[28]). In the blue economy, the following initiatives stand out for their impact on the NPE transition:

UN Sustainable Blue Economy Finance Initiative[29]

Launched in 2018 and hosted by the UNEP Finance Initiative, this initiative promotes sustainable ocean-related economic activities by encouraging financial institutions to align investments with the Sustainable Blue Economy Finance Principles. With over 80 signatories representing USD 11 trillion in assets, including AXA, Aviva Investors, and the European Investment Bank, it provides guidance, frameworks, and sector-specific tools for responsible investment, lending, and underwriting in industries such as fisheries, shipping, and marine energy. The initiative is broadly aligned with the nature-positive economy transition, promoting nature-positive finance through instruments such as blue bonds and enhanced reporting and transparency. However, while annual reporting is expected for members, it is not mandatory, limiting enforcement. Despite its potential to shape blue finance practices, the initiative's voluntary nature makes its actual impact on signatories and their business operations inconsistent and difficult to measure.

Green Marine Certification Framework[30]

Established in 2007 in North America and expanded to Europe in 2020, the Green Marine Certification Framework is a voluntary environmental certification programme aimed at improving the maritime industry's environmental performance. The initiative has 490+ members in North America and 29 in Europe, including major ship owners, ports, terminals, and shipyards. Broadly aligned with the NPE transition, the initiative addresses biodiversity protection, water and air quality, waste reduction, and underwater noise. Participants must conduct annual self-evaluations to track progress against a set of indicators (e.g. biodiversity conservation) developed by multi-stakeholder working groups and demonstrate continuous improvement. External verification is required every two years. The framework raises awareness and promotes voluntary improvements, but its impact may be limited by its voluntary nature.

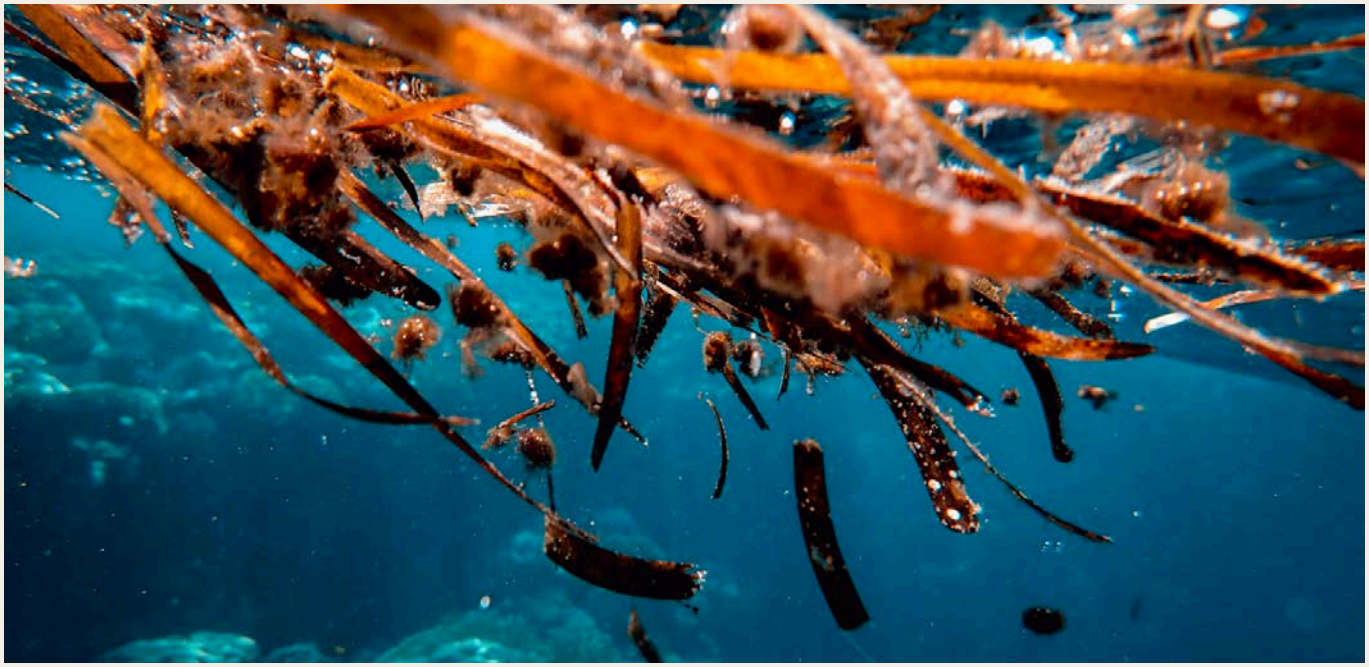
Scaling change: Examples of nature-positive blue economy policy in practice

Launched in 2022 by Simply Blue Group (SBG), Óir na Farraige is an innovative seaweed aquaculture project in Ireland that aligns closely with regional and EU policies promoting sustainable marine practices. By leveraging seaweed farming's environmental benefits - such as carbon absorption, biodiversity enhancement, and nutrient runoff mitigation - the initiative fosters the production of a sustainable marine protein source in line with the EU's Farm to Fork Strategy.

At the national level, Ireland's CAP Strategic Plan (2023-2027) funds climate and environmental measures in marine and coastal areas, while the European Maritime, Fisheries and Aquaculture Fund (EMFAF) 2021-2027 allocates €6.1 billion to support biodiversity and a sustainable blue economy through projects like Óir na Farraige. However, smaller enterprises struggle to access these funds due to administrative complexity and competition with larger industry players.

Marine farming expert Gareth Murphy, with over 20 years of experience, plays a key role in advancing community-based regenerative practices. His work on the C-FARRER project, which explores regenerative seaweed farming across Europe, reinforces Óir na Farraige's contribution to the EU Green Deal and its broader objectives, including ocean restoration and carbon neutrality by 2050.

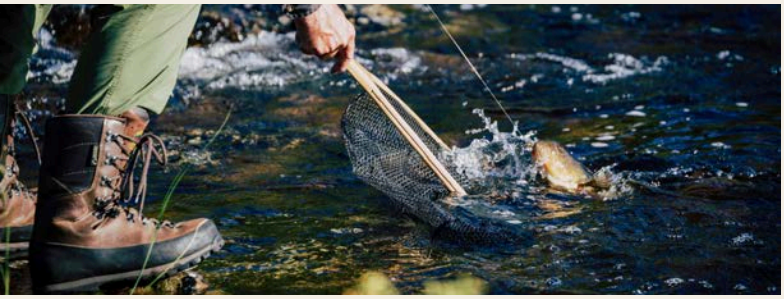
Despite strong policy alignment, challenges such as lengthy licensing processes and limited funding accessibility highlight the need for more inclusive and efficient regulations. Addressing these barriers is crucial to unlocking the full potential of regenerative ocean farming and accelerating Europe's transition toward a more resilient blue economy.



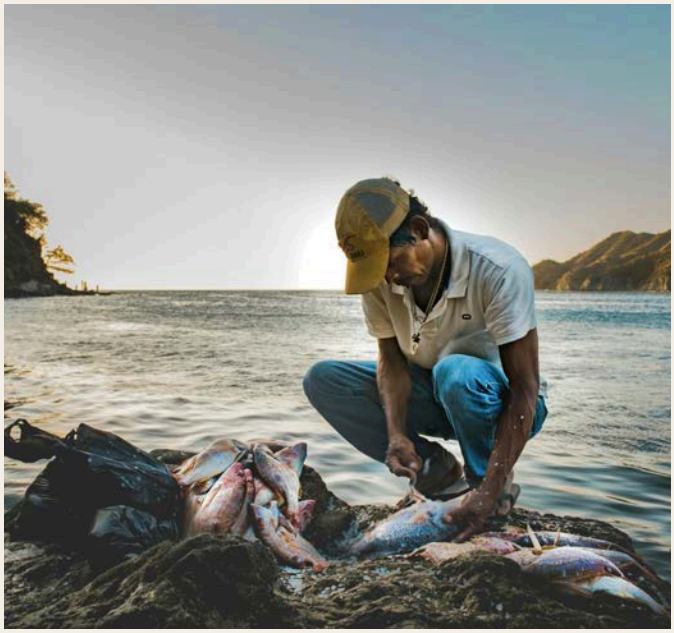
Final reflections

Healthy ecosystems are essential to achieve the EU's political priorities, including its competitiveness. They provide important services that form the backbone of many economic sectors, including agriculture, the blue economy, forestry, the built environment, and tourism. Such services—ranging from carbon sequestration and water purification to soil fertility and pollination—are integral to maintaining Europe's economic stability and growth. As global markets increasingly prioritise sustainability, **investing in nature-positive solutions and nature-based enterprises enhances Europe's ability to compete in emerging green markets**, ensuring sustainable growth and securing its leadership in the global transition to a nature-positive economy. By embedding nature-positive strategies into policy design and business operations, progress towards the transition to NPE can be achieved.

The blue economy holds significant potential for contributing to a NPE, but current governance frameworks, funding mechanisms, and policy trade-offs continue to enable environmentally harmful practices. While EU policy ambition often aims to minimise negative impacts, the framework fails to sufficiently support the restoration of marine ecosystems and their functions and shift away from high-impact blue economy expansion toward regenerative, low-carbon solutions.



To close this gap, biodiversity-positive incentives must be fully integrated into maritime policy, financing instruments, and industrial strategies, with nature-positive principles more explicitly embedded across wider sectoral policies to avoid biodiversity trade-offs. In this context, it is also important to use the momentum of the EU Nature Restoration Regulation to foster more coordinated restoration efforts in coastal and marine areas, maximising the attainable positive impact. Initiatives like Óir na Farraige demonstrate the climate, biodiversity, and food security benefits of regenerative marine farming, but broader uptake is limited by barriers such as insufficient funding access for smaller actors. Unlocking the transformative potential of NbS in marine industries – considered essential to achieving a NPE - thus requires targeted financial incentives and enabling policy measures, such as the integration of the blue economy sector into the EU Taxonomy Regulation to steer investment toward sustainable and restorative practices.



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[3] Definitions and key terms are drawn from the GoNaturePositive Concept Note; see it for a more detailed introduction to concepts discussed in this brief: GoNP! Concept Note 15/10/24

[4] The Nature Positive Initiative (2023) provide a leading definition of Nature Positive: "Halt and reverse nature loss by 2030 on a 2020 baseline, and achieve full recovery by 2050". This is in line with the mission of the Kunming-Montreal Global Biodiversity Framework. See Nature Positive Initiative (2023) The Definition of Nature Positive. www.naturepositive.org/app/uploads/2024/02/The-Definition-of-Nature-Positive.pdf

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[23] See GoNP! Deliverable 1.3. Available at https://www.gonaturepositive.eu/

[24] Four other sectoral briefs focus on other sectors and their policies and initiatives. Available at https://www.gonaturepositive.eu/.

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