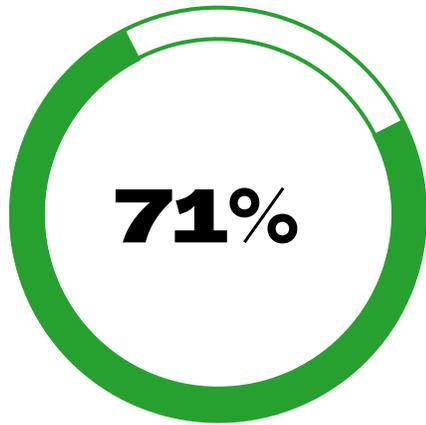




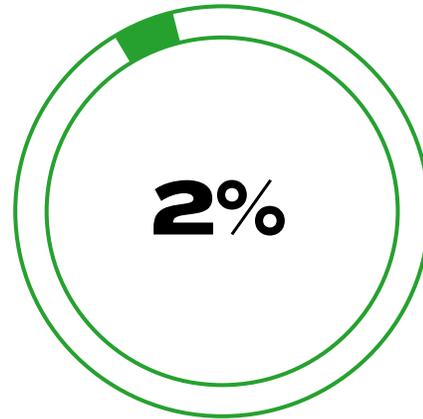
Year Plan 2026



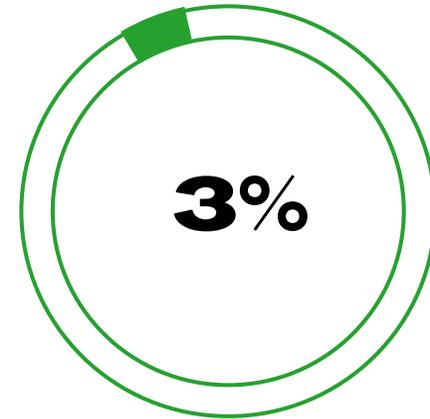
“For decades, we’ve been looking at land for the challenges the world is facing. Now it’s time to shift our view to the sea.”



71% of our planet is covered with oceans, mostly unexplored



Only 2% of our total food source comes from the ocean



< 3% of earth’s water is fresh, 98% of our food source depends on this

Unlock the potential of seaweed



IMPACT

Sustainability

No freshwater, fertilizers, or arable land required. It can contribute to a circular economy and produced in balance with the (marine) ecosystem

Resource security

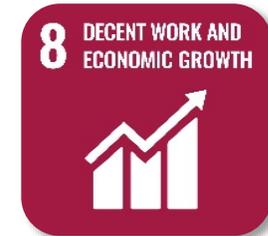
A circular resource that can be grown locally in Europe's oceans and used in food, feed, biomaterials, biostimulants and cosmetics

Health

Excellent nutritional & health values for both humans and animals

Employment

Creating jobs in aquaculture, processing, and manufacturing.
Preserving jobs in critical sectors like fishery and meat processing



APPLICATIONS SEAWEED



Food



Agri-feed



Agri-biostimulants



Packaging



Home decoration



**Cosmetics,
personal hygiene**



Pharma



Textile



**Home, utility,
infrastructure**



Energy

AMBITION

A large-scale and commercially successful European seaweed industry



EU

ACTIVITIES

- 1** Represent the European seaweed industry towards stakeholders
- 2** Support the ESWA member network
 - Initiate joint industry projects
 - Identify and establish valuable collaborations
- 3** Promote & provide up-to-date information on the seaweed industry





REPRESENTATION

- European commission
- National governments
- European markets
- NGO's
- Wind farm developers
- Research & education

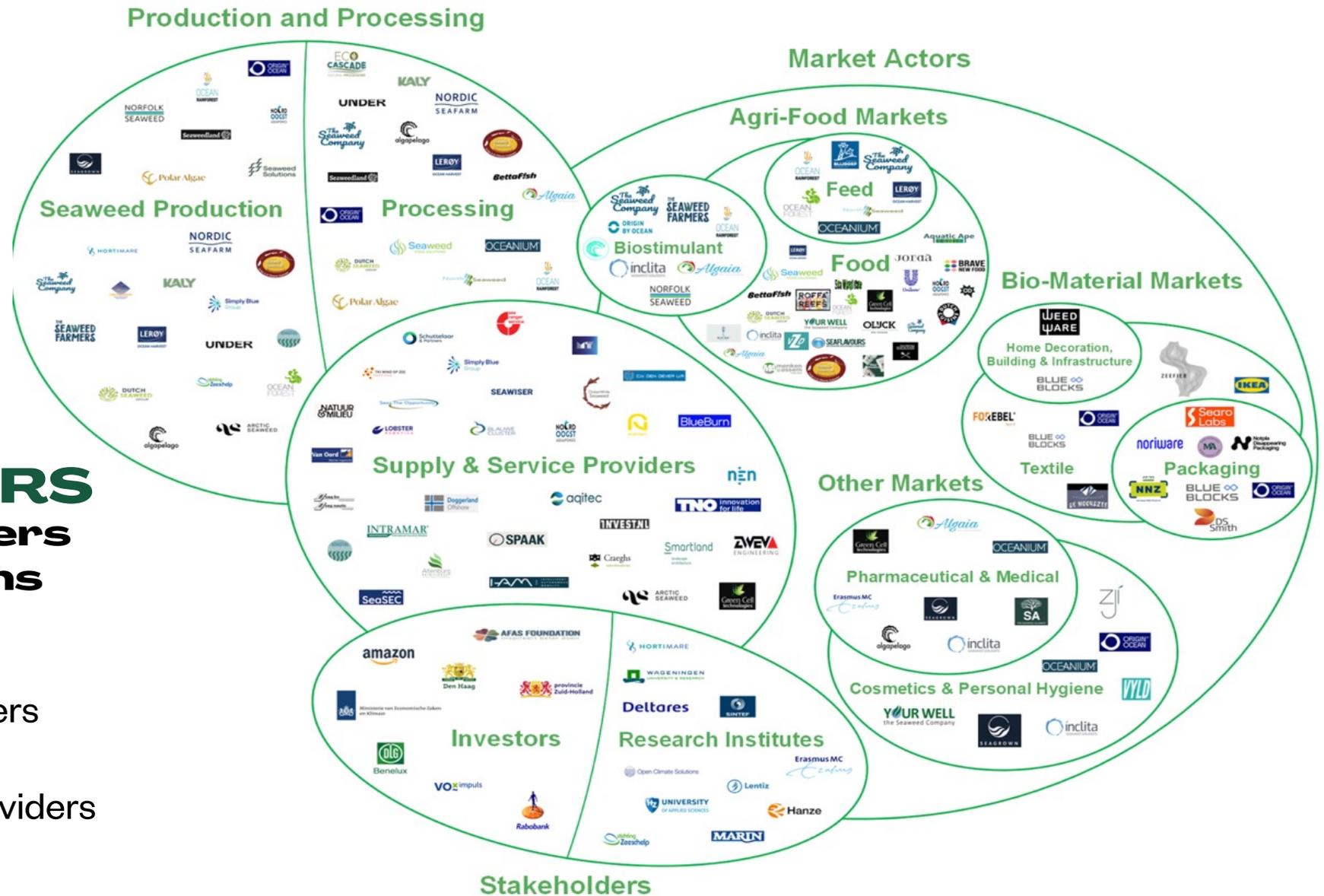




SUPPORT THE ESWA NETWORK

130+ MEMBERS
European members
paid subscriptions

- Seaweed producers
- Product & market players
- Stakeholders
- Suppliers & service providers

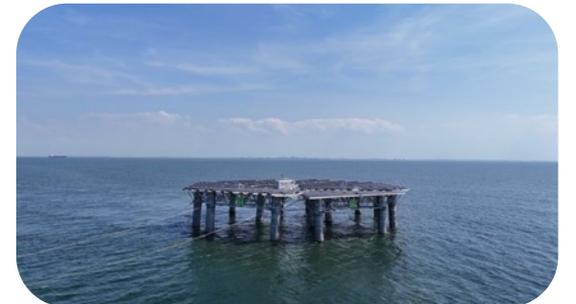




SUPPORT THE ESWA NETWORK

JOINT INDUSTRY PROJECTS

- **North Sea Farm #1**
The world's first commercial-scale seaweed farm located between offshore wind turbines.
- **The Seaweed hotelroom**
Over 15 partners collaborated to create a unique hotel room built almost entirely with seaweed.
- **Offshore Test Site (OTS)**
OTS is the largest test site in Europe, pushing the boundaries of the North Sea to validate real-life innovations in the offshore environment





PROVIDE INFORMATION

ESWA PROVIDES INFORMATION

- **Event - North Sea Seaweed**

The international seaweed conference for and with the European seaweed industry. This is your platform to connect with the market and other stakeholders

- **Communication**

Regular communication to inform the network and promote the interests of the European seaweed industry (newsletter, social media, website, etc.)



BUILD THE EUROPEAN
SEAWEED INDUSTRY



STRATEGY & IMPLEMENTATION 2026

Market development

- Showcasing business cases

Focus & collaboration

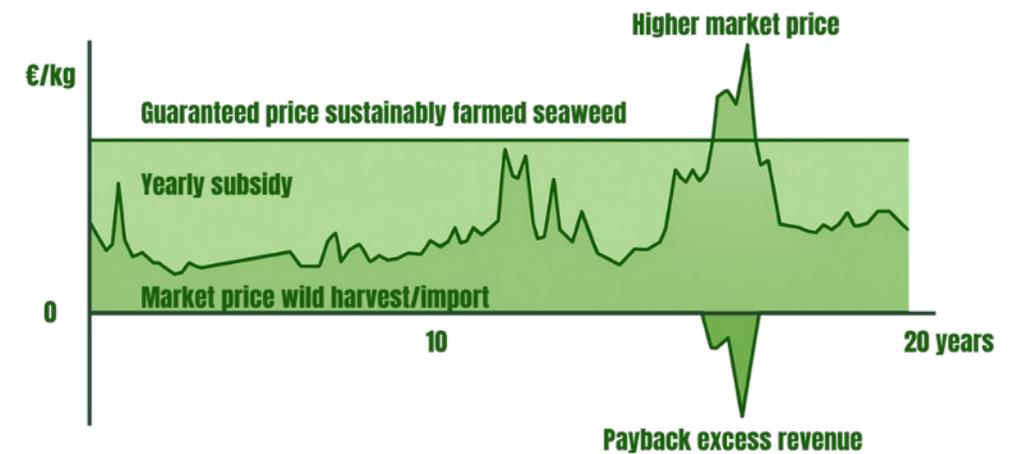
- Industry roadmaps

Build evidence & inspire

- Flagship joint industry projects (eg NSF#1)

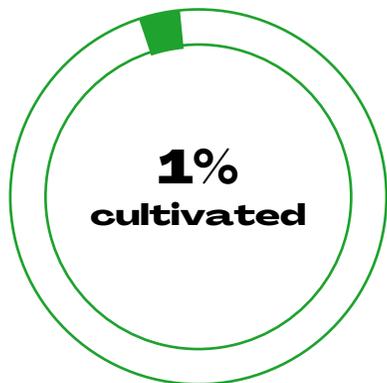
Accelerate

- Production subsidies



Current situation

Production



EUROPE

300.000 ton

Only 1% is cultivated.
The rest is wild-harvest



ASIA

30.000.000 ton

99% is cultivated, 1% wild-harvest



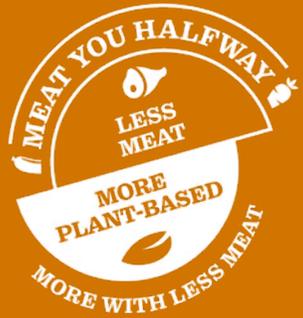
A. Market development



KLM



Formula 1.



Amsterdam UMC



Shell



Notpla



Seaweed hotel room



A. Market development

2026



Rabobank



- FOOD trade show (NL)
- 25.000 visitors
- 3 days
- 500 exhibitors

- HOSPITALITY trade show
- 100.000 visitors
- 3 days
- 1200 exhibitors

- Exposition Seaweed Hotel Room
- Setup headoffice Rabobank Den Haag/Utrecht
- Setup hotelschool The Hague
- Members in interior, design, cosmetics

changeNOW

- Seawood pavilion
- Permanent exhibition around seaweed and its applications

2027



- FOOD trade show (EUROPE)
- 145.000 visitors
- 3 days
- 800 exhibitors

- ESWS27 – Stakeholder event
- The Hague (more high-end)
- Inspiration and roadmaps
- Networking

- Hospitality & Travel trade show
- 100.000 visitors
- 3 days
- 5800 exhibitors

B. Focus & collaboration

Roadmaps to improve focus & collaboration in the industry

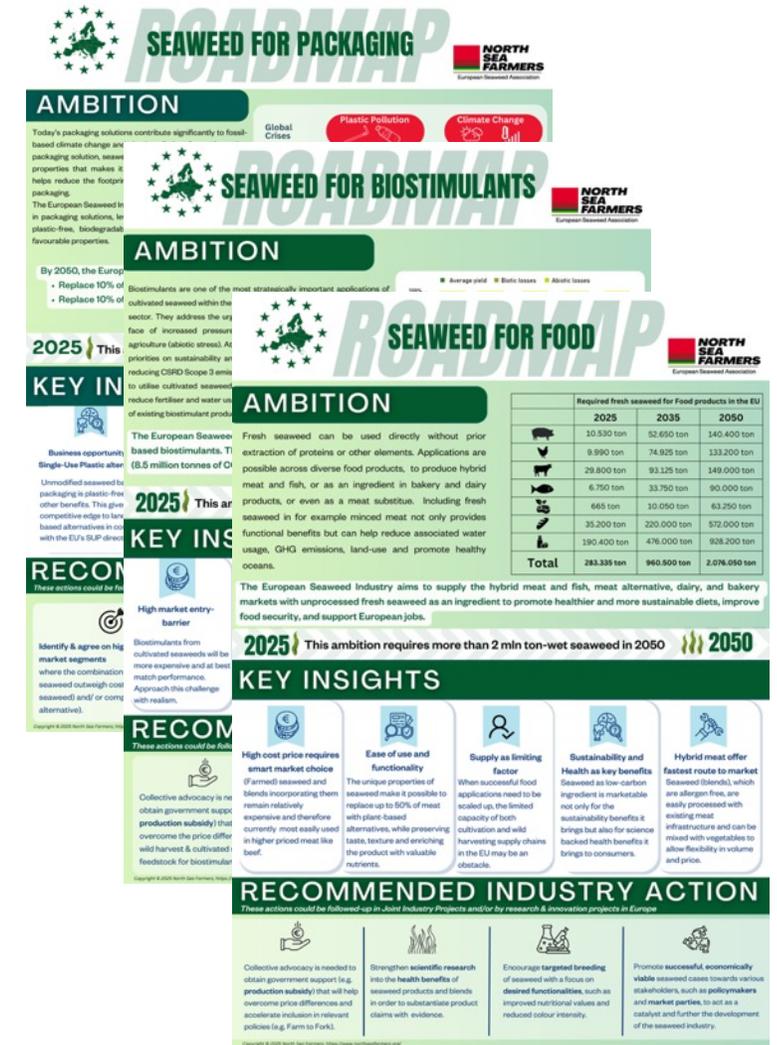
Existing Roadmaps

- Seaweed production
- Markets food, proteins., biostimulants, packaging

Roadmap contents

- One-pager: Ambition, key insights & industry actions
- Background report

Roadmaps are the basis for representation towards stakeholders



B. Focus & collaboration

Roadmap activities 2026

- Improve, communicate and implement existing roadmaps
- Industry acceptance - organizing (online) meetings for each roadmap with ESWA members
- Set-up new roadmaps – Cosmetics, Textile, Building Materials
- Collect & share validated seaweed production data

| | |
|------------------------------|--------|
| ◇ Webinar1 Seaweed for Food | 26 Feb |
| ◇ Webinar2 Packaging roadmap | 5 Mar |
| ◇ Webinar1 Biostimulants | 19 Mar |
| ◇ Webinar1 Production | 16 Apr |
| ◇ Webinar1 Protein | 21 May |
| ◇ Webinar 3 Packaging | 18 Jun |
| ◇ Webinar2 Seaweed for Food | 10 Sep |
| ◇ Webinar2 Biostimulants | 8 Oct |
| ◇ Webinar2 Production | 12 Nov |
| ◇ Webinar2 Protein | 10 Dec |



C. Build evidence

2021

2025

2026

2030

North Sea Farm #1



Gefinancierd door de Europese Unie

2026

2027

2028

2029

2030

1. Improve the performance of the demo-farm

2. Expand farm with other technologies

3. Carbon capture research

4. Biodiversity/ecosystem research

5. Remote monitoring testing



OTS NL

Offshore Test Site (OTS)

The Hague (Scheveningen)

Test innovations under offshore conditions in the North Sea

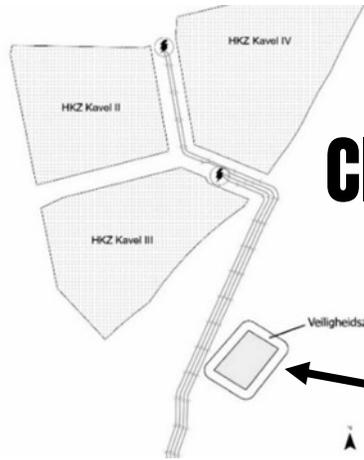
FEATURES

- 6 km² testing area, protected by a safety zone
- Flexible plot layout – 25 to 100 ha
- 12km/30mins sailing from Scheveningen harbour
- Testing from TRL 5-8
- Cross-sector learning on wind farm co-use

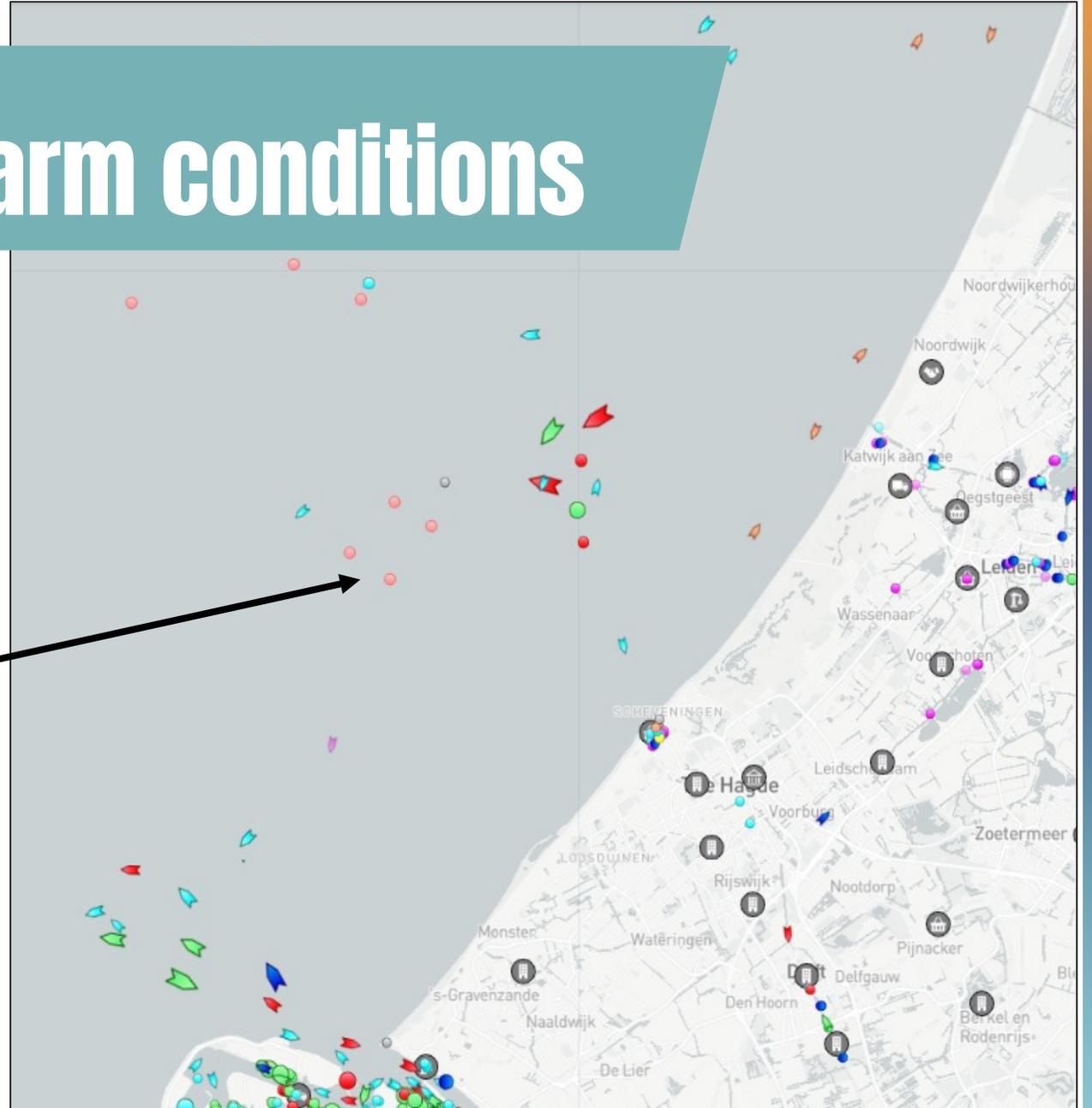


| | | | | | | | | | |
|---|---|---|---|--|---|---|-------------------------------|---|--|
| | | | | OTS Scope | | | | | |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | |
| | | | | Technology validated in relevant environment | Technology demonstrated in relevant environment | System prototype demonstration in operational environment | System complete and qualified | Actual system proven in operational environment | |

Representative wind farm conditions

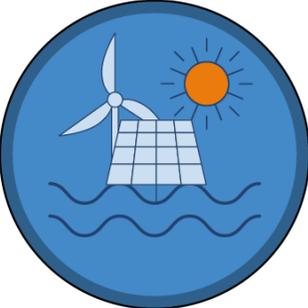


Close to windpark HKZ



C. Build evidence

OTS NL



ENERGY



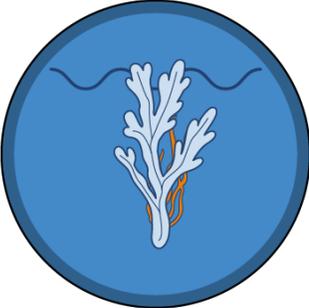
Oceans of Energy



NATURE



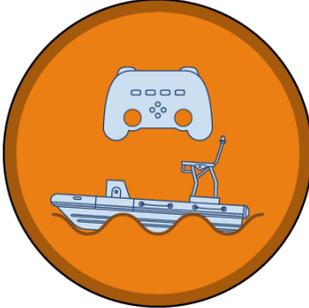
THE OCEAN CLEANUP



FOOD



EUROPEAN SEAWEED ASSOCIATION



MONITORING



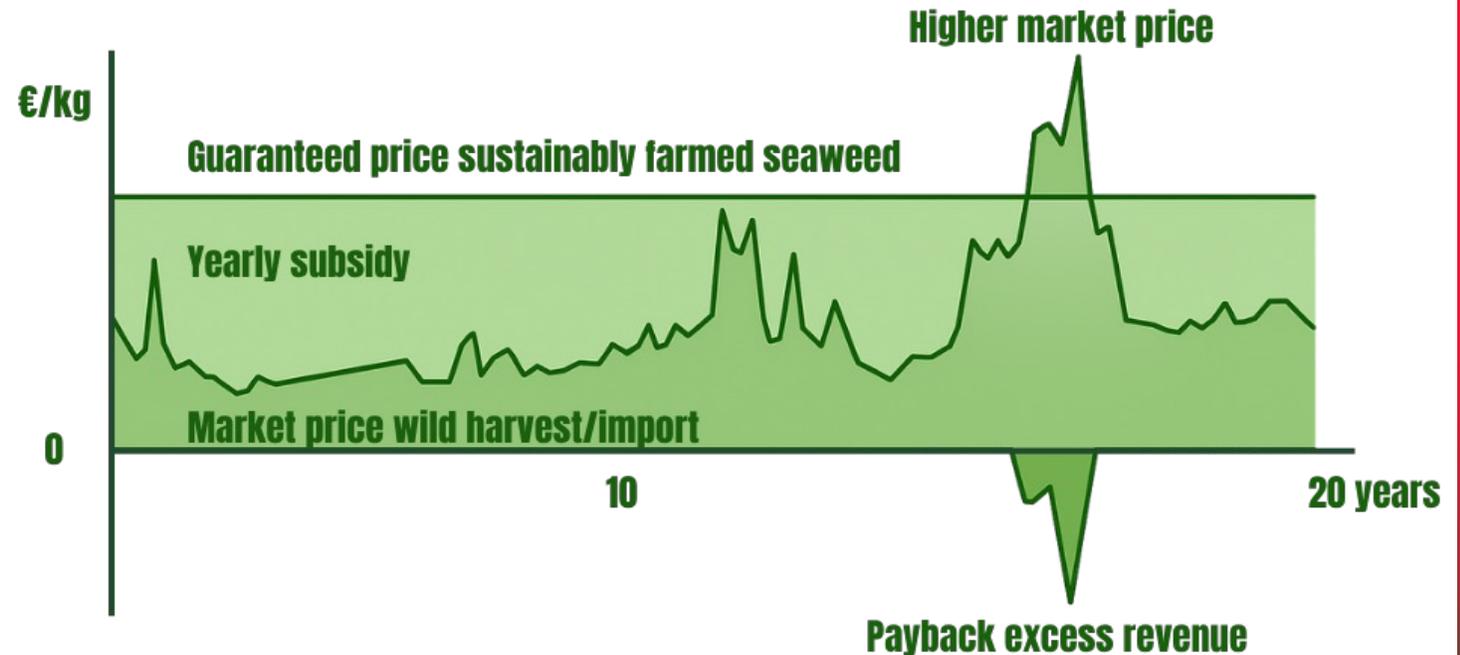
D. Accelerate: Production subsidy

Sales price guarantee

- Wild harvest
- Imports

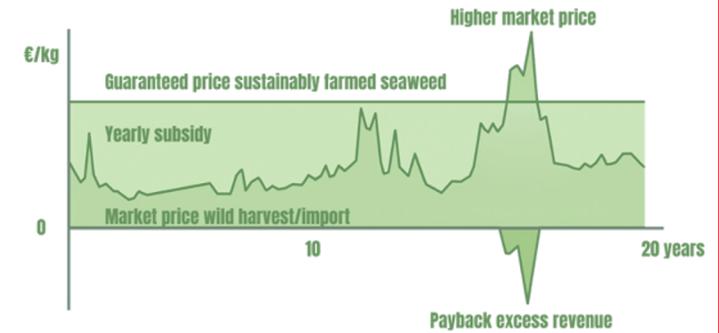
Long term (>10 yrs)

- By individual farm (not per company)



Example: Contract for Difference subsidy scheme

D. Accelerate: Production subsidy



European production



Production volume goes up



Innovation drives cost down



Seaweed quality goes up



European demand



Demand goes up

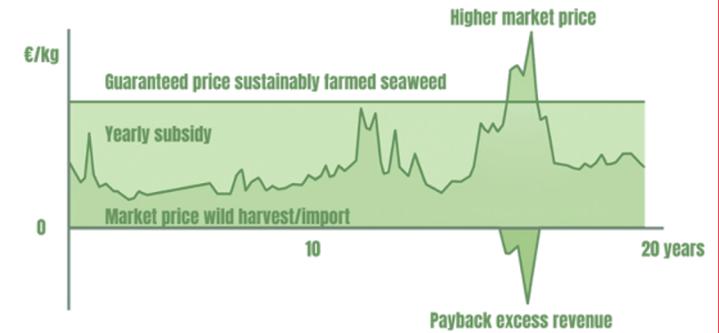


Higher value
Access new markets

D. Accelerate: Production subsidy

ACTIVITIES

- Perform feasibility studies on different production subsidy methods
- Regular visits Europe (DG Mare) and national/regional governments
- Setup inter(regional) consultations in Europe
 - Pilot production subsidy
 - Case building production subsidies
- Lobbying based on roadmap actions



Summary



1. Representation

2. Member network

3. Communication & information

STRATEGY

A. Market development

B. Roadmap coordination

C. Joint industry projects

D. Production subsidy

2026

2027

2028

Building a large scale & commercially successful European Seaweed Industry

Improved European (regional) collaboration on seaweed

Stronger market visibility & access

Production subsidy case building & pilot demonstration

Key European stakeholder on blue economy



EUROPEAN SEAWEED ASSOCIATION

