



Department of  
**Agriculture, Fisheries and Food**  
An Roinn  
**Talmhaíochta, Iascaigh agus Bia**



Bord Iascaigh Mhara  
Irish Sea Fisheries Board

REPORT OF THE  
**Irish Seafood Market  
Initiative Group**

February 2009



## Background to the establishment of the Group

In July 2008, in response to industry concerns, arising from falling quay wall prices, rising fuel costs and a view that imports were impacting on demand in the domestic market for wild Irish caught fish, the Minister of State at the Department of Agriculture, Fisheries and Food, Mr. Tony Killeen, T.D., established the Irish Seafood Market Initiative Group (ISMIG). The Minister appointed Jason Whooley, CEO of BIM as Chairman of the Group and appointed 12 industry members. The full membership of the Group is listed in Appendix 1.

The terms of Reference were to:

- Develop a shared understanding of key market issues between fishermen, processors, co-ops, retailers and their representative organisations.
- Determine actionable outcomes which will maximise opportunities in the Irish seafood market for the Irish fishing fleet, processors and retailers.

## Group approach

Group meetings took place on 23rd July, 18th September, 15th October and 25th November 2008.

Over the course of the four meetings, the broad seafood issues were examined through detailed presentations from a number of invited speakers from outside the seafood industry, from BIM and from contributions by Group members. This final report draws extensively on these presentations while summaries of the presentations made to the Group are available in Appendix 2 and at [www.bim.ie](http://www.bim.ie). With this information, the context in which the seafood industry is operating and the impact of this on the sector was thoroughly examined.

Group agreement was achieved on all the recommendations in this report. The Group decided to reconvene in mid 2009 to review progress on the recommendations.

The main recommendations of ISMIG are summarised below:

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- **The BIM Quality Seafood Programme (QSP) should be the primary approach to identifying and differentiating Irish seafood. This programme will raise consumer awareness on the range of available Irish seafood.**
  - **A promotional campaign should be developed in 2009, to raise awareness across a range of available yet underutilised and less recognised species from fisheries and aquaculture.**
  - **The opportunity for regional identification and branding of Irish seafood should be developed.**
  - **Seafood should be included in the draft proposal being prepared by the European Commission aimed at consolidating and upgrading food labelling legislation.**

- **Early in 2009, BIM should, in consultation with the industry, actively engage at regional level to examine whether the current route to market model is appropriate or if there is an alternative model(s) that is more suitable.**

The work of the Group focussed on two key areas; a) Awareness and Labelling, b) Route to Market.

### **a) Awareness and Labelling of Irish Seafood**

The Group examined in detail the trends in sales of seafood on the Irish market at both retail and food service level. The analysis showed that sales of salmon and cod together account for 60% of the domestic market. This pointed to a strong lack of consumer awareness on the range of available seafood and in particular Irish wild caught fish.

The producer representatives were primarily concerned with the increasing levels of imported fish<sup>1</sup> in the domestic market and the apparent lack of Irish consumer awareness of imported fish versus Irish wild caught fish. Despite combined growth of seafood sales in 2006 and 2007 of 23%, the overall lack of profile for Irish sourced fish and shellfish was a key concern. Members were also of the belief that this lack of awareness was being compounded by a lack of identification of seafood through appropriate labelling. Many were of the view that labelling, as a minimum, must be capable of identifying fish as Irish caught, wild/farmed and port of landing.

Tailored consumer research was undertaken to assist the workings of the Group. A key finding from this research highlighted that consumers require information on the products they are buying including the origin or source. It was agreed that initiatives should be delivered to help consumers make an informed choice when purchasing seafood, in particular measures that would identify seafood as wild Irish caught or Irish farmed.

On this subject, BIM gave a detailed presentation on the Irish Quality Seafood Programme. This programme consists of a suite of leading quality/environmental assurance schemes and by ensuring that the highest standards are achieved, it promotes and authenticates the reputation and quality of Irish seafood products, both on the home market and internationally. The Group felt that this Programme addressed many of the key concerns on labelling and awareness of Irish seafood.

BIM has developed a range of programmes in conjunction with industry stakeholders and continues to evolve additional schemes for both whitefish and pelagic. Each of the programmes details specific conditions and requirements for catching/production, harvesting, handling and end product quality.

In addition, eco-certification/environmental management systems, alongside quality certification, provide an opportunity to distinguish Irish seafood on the global market, while positively managing the local environment that sustains the sector.

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<sup>1</sup> Seafood imports reached a peak of 46,600 tonnes valued at €181 million in 2007. By end of July 2008, imports actually reverted to the 2006 level of 34,660 tonnes valued at €100m, representing a decline of 22% in volume and 9% in value compared to the level of imports recorded to end of July 2007.

Arising from this presentation and the absolute need to increase awareness of Irish seafood and the ongoing education of consumers, the Group recommends that:

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**The BIM Quality Seafood Programme (QSP) should be the primary approach to identifying and differentiating Irish Seafood. The QSP will highlight the quality, responsibility and provenance of Irish Seafood in order to maximise opportunities in the Irish seafood market for Irish producers, processors and retailers. Associated labelling will raise consumer awareness on the range of available Irish seafood.**

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The Group was also concerned at the low levels of consumer awareness of species other than cod and salmon. Members suggested that a promotional campaign be developed, aimed at building awareness of a number of species that are available but are not being purchased by consumers. Some of the species mentioned included haddock, whiting, hake, megrim, monkfish, prawns, pollock, mussels, oysters and crab.

In light of the above and recognising the necessity of imports of certain species in the domestic market, it is clear that there is a need to promote a wider range of species from available Irish seafood. The Group recommends that:

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**A promotional campaign should be developed, in 2009, to raise awareness across a range of available yet underutilised and less recognised species from fisheries and aquaculture including species such as whiting, haddock, megrim, monkfish, hake, prawns, pollock, mussels, oysters and crab.**

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Furthermore, the Group recommends that:

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**The opportunity for regional identification and branding of Irish seafood should be developed, particularly in conjunction with the relevant coastal partnership groups.**

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In addition to the non-legislative approach to labelling outlined above, the Group believes that there is a need to strengthen the existing labelling legislation relating to seafood in the catering trade.

Unlike the vertical (specific) legislative requirements for seafood products at retail level<sup>2</sup>, there is currently no legal requirement for restaurants to provide “Country of Origin”, “Production Method” or “Catch Area” information to the consumer<sup>3</sup>. It is, therefore, impossible for consumers to identify country of origin for non-farmed seafood. In comparison, Beef Labelling Regulations<sup>4</sup> require caterers

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<sup>2</sup> Labelling of Fish and Aquaculture Products Regulations 2003 SI (No.320 of 2003).

<sup>3</sup> The **Commercial Designation** is the common name for the particular species of fish. e.g. the commercial designation for *Gadus morhua* is Cod. The **Production Method** must be declared as follows: ‘caught at sea’, where the fish was caught at sea or ‘caught in freshwater’, where the fish was caught in freshwater; ‘cultivated’ or ‘farmed’, where the fish resulted from aquaculture. The **Catch Area** must be in accordance with the FAO map of major fishing areas (see Annex 3).

<sup>4</sup> The Health (Country of Origin of Beef) Regulations, 2006 Labelling Regulations 2006 (SI No. 307 of 2006) as amended by SI No. 85 of 2007.

to provide information on the country of origin of beef sold on their premises. The Group supports the concept of introducing similar legislation for seafood; however, it is clear that the EU Commission requires that any proposed labelling legislation be approached on a pan-European rather than on a national basis.

In that context, the Group recommends that:

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**Seafood should be included in the wide-ranging proposal being prepared by the European Commission aimed at consolidating and upgrading food labelling legislation.**

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## **b) Route to Market**

During the course of the meetings there was significant debate on the inability of Irish retailers to secure continuous supplies of Irish Seafood for the Irish market. Similarly, producers highlighted their inability to compete, for various reasons, with imported products. While it was acknowledged that there were many reasons contributing to this situation, the Group agreed that the traditional industry company structures are a major contributing factor.

In seeking to address the problem, case studies from other sectors on supply chain and route to market solutions, both national and international were presented to the Group. Two organisations namely, Irish Co-Operative Organisation Society (ICOS) and the Scottish Shellfish Marketing Group (SSMG) discussed their experiences with the Group.

As a result of the presentations and subsequent discussions, the Group agreed that BIM should take the initiative to investigate a route to market strategy for the Irish seafood sector. The initiative would take into account each step in the chain from producer, processing, distribution to end-customer for both domestic and export markets. The scope of the exercise will include analysis of scale, availability, costs, competitors and potential partnerships.

To advance this critical issue, the Group recommends that:

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**BIM should take the lead role in bringing forward proposals for developing a route to market strategy for the seafood sector. Early in 2009, BIM should, in consultation with the industry, actively engage at regional level to examine whether the current route to market model is appropriate or if there is an alternative model(s) that is more suitable. From this process, proposals for the most appropriate structure for production, processing and supply to market should emerge.**

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## Appendix 1

### Membership of the Irish Seafood Market Initiative Group

#### **Bord Iascaigh Mhara (BIM)**

Mr. Jason Whooley, Chairman

Ms. Lorraine Hardiman, Secretary

#### **Irish Association of Seafood Companies (IASC)**

Ms. Martina Clarke

Mr. Martin McLoughlin

#### **Irish Farmers Association (IFA)**

Mr. Richie Flynn

Mr. Pat Connors

#### **First Point of Sale Group (FPOS)**

Mr. Sean Griffin

#### **Irish Fish Processors & Exporters Association (IFPEA)**

Mr. Liam Quinlan

Mr. Tommy O'Callaghan

#### **Federation of Irish Co-operatives**

Mr. John Nolan

#### **Federation of Irish Fishermen (FIF)**

Mr. Lorcan O'Conneide

Mr. Gerard O'Flynn

Mr. Michael Walsh

Mr. Sean O'Donoghue

## Appendix 2

### Presentations made to ISMIG<sup>5</sup>

#### 1. Labelling Irish Seafood – Tom Scanlon BIM

A presentation outlining the legal requirements with regard to food labelling highlighted some of the lessons to be learned from the experience of other sectors. A proposal regarding the production of a national scheme for labelling Irish sheep meat and pork which had been submitted by Ireland to the European Commission was discussed. The Commission has responded to the request stating that the proposed labelling be approached on a pan-European rather than on a national basis.

#### 2. Consumers and Seafood Buyers Perspective – Geraldine Lane BIM

The Group was presented with the findings of a market research survey to identify the key factors in the decision to purchase seafood and the type of product information which consumers require. The research showed:

1. The most popular frequency of fish purchase is once weekly.
2. Frequency of fish purchases increases with age with regular purchasers being mainly female, in the 45 years+ age category and in a higher income bracket.
3. Half of respondents claimed they are satisfied with the quality of information provided by retail outlets.
4. The main information sought when purchasing fish includes the country of origin, catching date and whether fish is farmed or wild.

#### 3. View from the Seafood Buyer – James Burke, Retail Consultant

Mr. Burke covered the areas of pricing, product, distribution options, challenges for suppliers to meet buyer expectations and level of service required by the buyers.

#### 4. Quality Programmes and Labelling – Donal Maguire BIM

The presentation on the BIM Quality Seafood Programme showed how Irish product may be differentiated in the marketplace through adoption of certified and accredited Quality Assurance Schemes. BIM is combining the different technical schemes for fisheries and aquaculture to promote and build awareness of seafood under one umbrella, namely Quality Irish Seafood.

#### 5. BIM's Promotional Programmes – Geraldine Lane BIM

A presentation on BIM's promotional and awareness programmes detailed the efforts to raise the profile of seafood from a nutritional aspect and as a desirable meal option. Copies of promotional material were circulated to the Group.

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<sup>5</sup> Also available on [www.bim.ie](http://www.bim.ie)

## 6. Case Study from ICOS

ICOS, the co-ordinating organisation for co-operatives in Ireland, was represented by its Director General, John Tyrell, and Dairy Policy Executive, George Kearns. Mr. Tyrell outlined the process of rationalisation in the dairy industry in Ireland from a sector which was highly fragmented in the 1960s to the consolidation into the large dairy co-ops which constitute the Irish dairy sector today.

The presentation outlined the important insights from the Co-op experience as:

- The need for control of processing
- The ability to adapt to changing conditions
- Good management and corporate governance
- The need to bring in professional managers

The stages involved in the co-op amalgamation process were also explained to the Group. The outcome of this process was the large, rationalised co-ops/PLCs operating today.

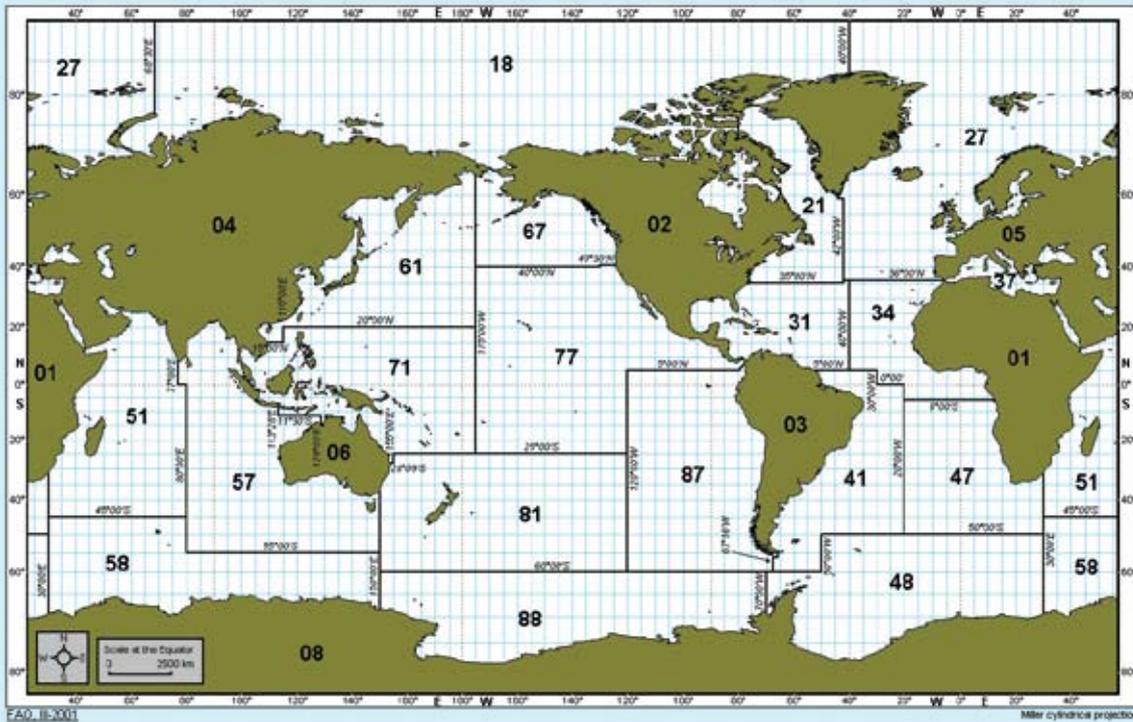
## 7. Case Study from an International Experience – SSMG

The international experience was provided by Mr. Walter Speirs, Chairman of Scottish Shellfish Marketing Group (SSMG) which is based in Argyll, Scotland. SSMG is the premier sales organisation for farmed shellfish in the United Kingdom, comprising 18 mussel growers and employing 60 at two processing factories.

Mr. Speirs informed the Group that the objective of forming the SSMG was to get a structure in place for shellfish companies in Scotland and to help eliminate barriers to profitable operations created by poor infrastructure and distance to market. Mr. Speirs discussed setting up a transport hub to allow product to get access to the multiples, enabling SSMG members to eliminate competition and consolidate prices. This gave way for a market-led approach to processing, added value and quality control. The benefits achieved by the Scottish mussel growers through collaboration in terms of leverage on prices, quality and access to multiples, were substantial.

## Appendix 3

### Annex I: FAO Map of the major fishing areas of the world



Catch area	Identification of the area <sup>(1)</sup>
North-West Atlantic	FAO area 21
North-East Atlantic <sup>(2)</sup>	FAO area 27
Baltic Sea	FAO area 27.IIIId
Central-Western Atlantic	FAO area 31
Central-Eastern Atlantic	FAO area 34
South-West Atlantic	FAO area 41
South-East Atlantic	FAO area 47
Mediterranean Sea	FAO areas 37.1, 37.2 and 37.3
Black Sea	FAO area 37.4
Indian Ocean	FAO areas 51 and 57
Pacific Ocean	FAO areas 61, 67, 71, 77, 81 and 87
Antarctic	FAO areas 48, 58 and 88

<sup>(1)</sup> FAO yearbook. Fishery statistics. Catches. Vol. 86/1. 2000.  
<sup>(2)</sup> Excluding the Baltic Sea.





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