

THE BUSINESS OF SEAFOOD

# 2018

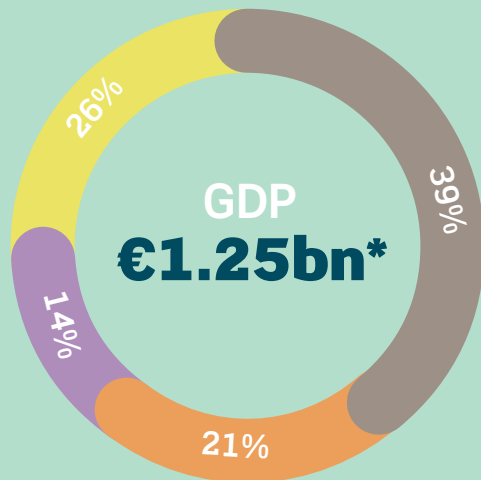
A Snapshot of Ireland's Seafood Sector





# €1.25bn

Estimated GDP of Irish Seafood industry



## The Irish Seafood Economy 2018

Domestic Consumption

**€486M**

+3.2% YOY

Private Investment

**€267M**

+21.7% YOY

Government Investment

**€170M**

+0% YOY

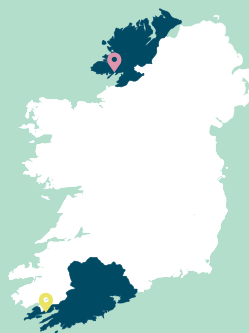
Exports - Imports

**€322M**

-6.5% YOY

\* Actual total €1,245M

## Our Biggest Fishing Ports (Value of Landings)



**€370M**

of seafood was landed by Irish and non-Irish vessels into our ports in 2018:

Irish landings €270M  
Non-Irish €100M

**€176M**

Value of Aquaculture

**-15%**  
growth

**€546M**

Value of Irish Seafood

**-10%**  
growth



## THE BUSINESS OF SEAFOOD

# 2018

**3.4%**  
**GROWTH**  
on 2017



**2,127**

Number of  
registered fishing  
vessels in 2018



**288**

Number of  
aquaculture  
production units



**158**

Number of  
seafood  
processors



**14,359**

people are employed  
around our coast (direct  
and indirect employment)

### Domestic Sales Value

**€486M**



**€297M**  
Retail Value



**€189M**  
Food Service Value

### Top Selling Species



**SALMON** (Up 11%)

**€116M**



**COD** (Down 2%)

**€47M**

**€330M**

worth of seafood was  
imported into Ireland in 2018

**€219M**

worth of seafood was  
imported from the UK (66%)



**€653M**

Export Value

**-4%**  
growth on 2017



### Ireland's Main Export Markets



**EU** (excl. UK)  
**€373M**



**ASIA**  
**€96M**



**UK**  
**€81M**



# RISING TIDE

## 2018: A Year of Challenges and Opportunities

Ireland's seafood economy grew by €40 million (+3.4%) in 2018 to reach a total value of €1.25 billion. Growth was strongly influenced by increased private investment which, at €267 million, was some €47 million (+21.7%) higher than in 2017. Private investment, along with ongoing strong Government support (€170 million) brought overall investment in the sector to €437 million, equivalent to 35% (+1%) of seafood GDP.

Domestic consumption also grew during the year reaching €486 million; an increase of €16 million (+3.2%). However, this was offset somewhat by a decline in our seafood balance of trade (exports – imports) which fell by €23 million (-6.5%) to €322 million.

**3,231**  
**PEOPLE EMPLOYED  
IN FISHERIES**

⋮

**DIRECT AND INDIRECT  
SEAFOOD EMPLOYMENT**

**14,359**





RISING TIDE





Growth in the seafood economy slowed down in 2018 which can largely be explained by the production pattern of Ireland's most valuable seafood export, Irish organic salmon. Due to limited production sites and the production cycle of this key aquaculture species the volume produced in 2018 was lower than the previous year. Improved factors indicate that production should return to previous levels in 2019.

While the economic situation of the sector remains favourable it, like the wider Irish economy, faces a number of potentially significant risks, in particular the potential fallout from Brexit.

### **Consumption: Demand for Irish seafood continues to grow**

Global seafood consumption continues to grow and now stands at more than 20 kg per capita per year. It comes as no surprise, given the exceptionally high quality of our national produce, that Irish seafood is part of this trend and continued to experience high demand throughout 2018. While total exports were down 4% in the year, exports to Asia increased by 23% and now total €96 million per annum. On the back of this growth, Asia has now overtaken the United Kingdom as Ireland's second main regional market. Exports to China increased by 68%, while our export value to the EU and the UK fell by 8% and 4% respectively.

The value of shellfish grew significantly during the year, driven by demand in the Chinese market. Prices grew 41% for crab, 22% for Dublin Bay prawns and 13% for oysters.

On the farmed side, salmon production declined 33% by volume. This was partly offset by increased demand for organic salmon that saw prices increase by 7%.

Among the main pelagic species, the export value of mackerel fell 10%, led by a 13% decrease in volume but offset somewhat by a 4% price increase.

### **Investment in the seafood sector experiences strong growth in 2018**

Government investment in the seafood sector amounted to some €170 million in 2018. This includes investment in fishing ports and harbours (€24 million) and Irish government

support directed through the European Maritime and Fisheries Fund (EMFF). Scientific, regulatory, administrative, marketing and development support was also delivered through various government departments, primarily the Department of Agriculture, Food the Marine and a number of State Agencies.

Private investment, the largest driver of economic growth in 2018, reached €267 million in 2018, an increase of €47 million (+22%). This was driven by several factors including changes in lending practices by financial institutions, growing optimism in the catching sector as the fleet experienced continued profitability, moderate fuel costs, and a relentless growth in the demand for seafood globally.

Some of this investment is also driven by the continued availability of European Union and Irish state aid delivered through the European Maritime and Fisheries Fund (EMFF). During the year BIM administered 14 EMFF grant aid schemes funded by the European Union and the national exchequer. These provided financial support to the seafood sector in key areas including capital investment, sustainability, innovation, skills development, coastal community development and marine safety. Approximately €10.7 million in grant aid was paid directly to seafood enterprises in 2018. This investment leveraged a further €16 million through industry funding, giving a total industry investment of €26.7 million.

### **Production**

The value of wild caught fish declined by 8% in 2018 to €370 million; the value of farmed finfish was down 19% while the value of farmed shellfish fell by 6%. Sales continued to grow within the domestic market. This was largely driven by an increased consumer awareness of the health and wellness properties of seafood.

The overall domestic retail market increased by 2% due to consumers shopping more frequently and paying higher prices. While largely driven by salmon, we also note increased demand for species like pollack and plaice.

Salmon continues to be our most valuable seafood export and market demand remained strong throughout the year, particularly in the organic sector. While domestic production



declined by 39%, increasing demand saw prices reach an all-time high. There are, however, competitive threats emerging from other countries as they increase organic production in line with market demand.

The rope mussel industry had another challenging year with an extremely competitive situation on the European market. This was partly driven by increased competition from Chile and Germany resulting in a drop in demand from key markets including France and the Netherlands. The volume of production has remained relatively static in the rope mussel sector but there was a decline of 39% in the volume of sea bed cultured mussels.

The success story of packing oysters in Ireland for markets in China and Hong Kong continues to grow. Exports to China are up by 93% and have become Ireland's second largest export market for oysters. Production also grew to an all-time high of over 10,000 tonnes.

#### **Planning in place to reduce Brexit impact**

The decision by the United Kingdom to leave the European Union raises the prospect of major challenges ahead for the Irish seafood industry. Throughout the year BIM has supported the Department of Agriculture, Food and the Marine, our sister agencies (Marine Institute, SFPA and Bord Bia) and the seafood industry as we prepare to meet these challenges particularly in the areas of trade and transport logistics.

#### **Ireland's global reputation continues to grow**

Despite uncertainties around Brexit and challenges around sustainability and supply, Ireland's seafood industry grew in 2018. Investment, public and private, is strong and growing, underlining the current confidence within the sector. The economic fundamentals of the sector are robust and point to long-term sustainability and growth with key species such as organic salmon, mackerel, brown crab and Dublin Bay prawns all growing in demand in our key markets. With growing consumer demand for seafood at home and lucrative new markets opening up abroad, the outlook is positive, and with increasing investment and innovation, Ireland's reputation is set to rise over the year ahead.

The economic fundamentals of the sector are robust and point to long-term sustainability and growth with key species such as organic salmon, mackerel, brown crab and Dublin Bay prawns all growing in demand in our key markets.



# Breakdown of Seafood

## GROSS DOMESTIC PRODUCT

GDP Components	2017 Value €M	2018 Value €M	Growth Rate 2018	% of Seafood Economy
DOMESTIC CONSUMPTION	€470	€486	+3.2%	39%
PRIVATE INVESTMENT	€220	€267	+21.7%	21%
GOVERNMENT INVESTMENT	€170	€170	0.0%	14%
EXPORTS - IMPORTS	€345	€322	-6.5%	26%
GDP	€1,205	€1,245	3.4%	100%



Domestic  
Consumption

**39%**

Private  
Investment

**21%**

Government  
Investment

**14%**

Exports -  
Imports

**26%**

## EMPLOYMENT

in the Irish Seafood Sector

**14,359**

Direct and Indirect  
Total Employees

**5,311**

Indirect Total  
Employees

**9,048**

Direct Total  
Employees

**FISHERIES**



**3,231**

Total Employed

**AQUACULTURE**



**1,925**

Total Employed

**PROCESSING**



**3,892**

Total Employed



## Breakdown of **EMPLOYMENT BY REGION**

RISING TIDE

**NORTH 12%**

**NORTH WEST 4%**

**WEST 6%**

**SOUTH WEST 5%**

**SOUTH 6%**

**SOUTH EAST 5%**

**NORTH EAST 5%**



Region	Total Population	Coastal Population	Coastal Employed	Direct Seafood Employment	Direct and Indirect Seafood Employment	Share of Coastal Employment
NORTH	159,192	74,989	27,488	2,000	3,184	12%
NORTH WEST	292,630	64,059	25,328	550	915	4%
WEST	376,875	64,704	27,034	1,068	1,722	6%
SOUTH WEST	342,606	90,323	36,718	1,069	1,740	5%
SOUTH	542,868	115,533	49,815	1,912	3,009	6%
SOUTH EAST	808,737	91,681	36,467	1,251	1,919	5%
NORTH EAST	2,238,957	83,775	36,139	1,198	1,870	5%
REPUBLIC OF IRELAND	4,761,865	585,064	238,989	9,048	14,359	6%



# SOURCE

Where does Irish seafood come from?

The overall value of seafood landed in Irish ports fell by 8% in 2018. Foreign landings dropped 15% in value, driven by declining volumes of high-value species. Irish landings also decreased in value by 5% as volumes of pelagic and demersal species fell. The fall in volume was offset somewhat by the rise in prices of some species: mackerel prices increased by 19%, Dublin Bay prawns increased by 13% and brown crab increased by 58%. Rising crab prices, in particular, benefited coastal communities around Ireland as this species is fished mainly by small-scale inshore fishermen.

**€176M**  
**VALUE OF AQUACULTURE  
PRODUCTION**



**TOTAL VOLUME  
IN TONNES**

**37,000**





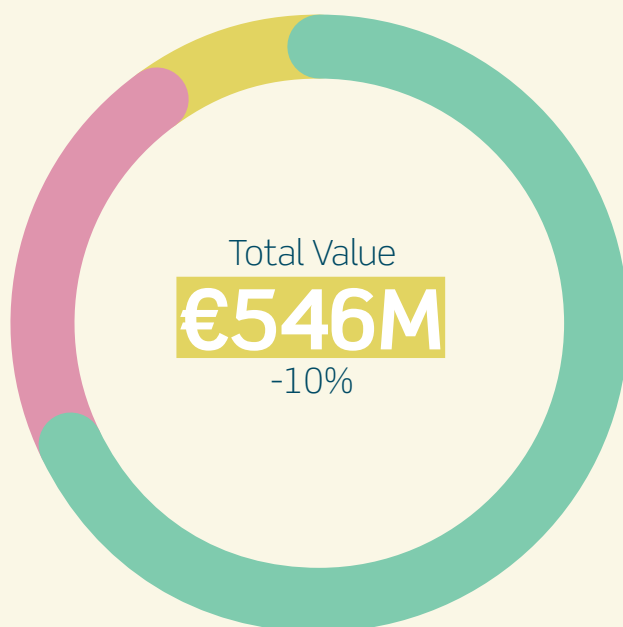
SOURCE





# The Source of IRISH SEAFOOD

## BY VALUE (€)



### Wild-Caught Fish

**€370M** -8%

Irish €270m -5%

Non Irish €100m -15%

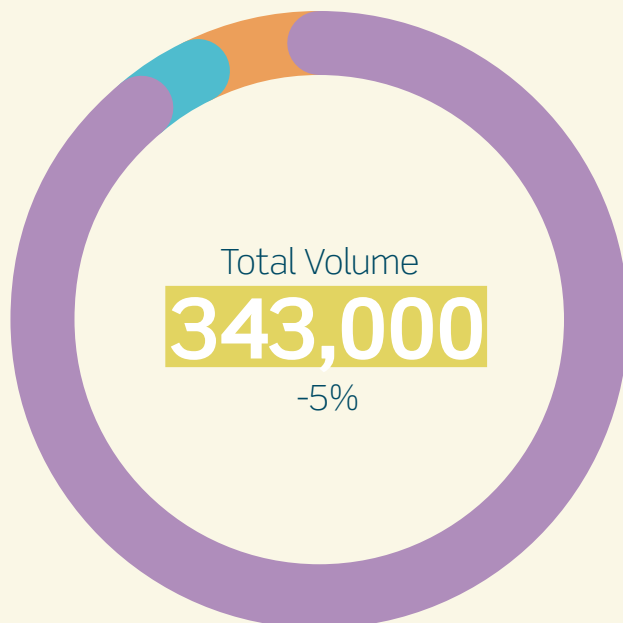
### Farmed Finfish

**€120M** -19%

### Farmed Shellfish

**€56M** -6%

## BY VOLUME (TONNES)



### Wild-Caught Fish

**306,000** -3%

Irish 213,000 -13%

Non Irish 93,000 +33%

### Farmed Finfish

**12,800** -38%

### Farmed Shellfish

**24,200** -8%



# Regional value of DOMESTIC FISH LANDINGS

€370M

in 2018

306,000 tonnes

-8%



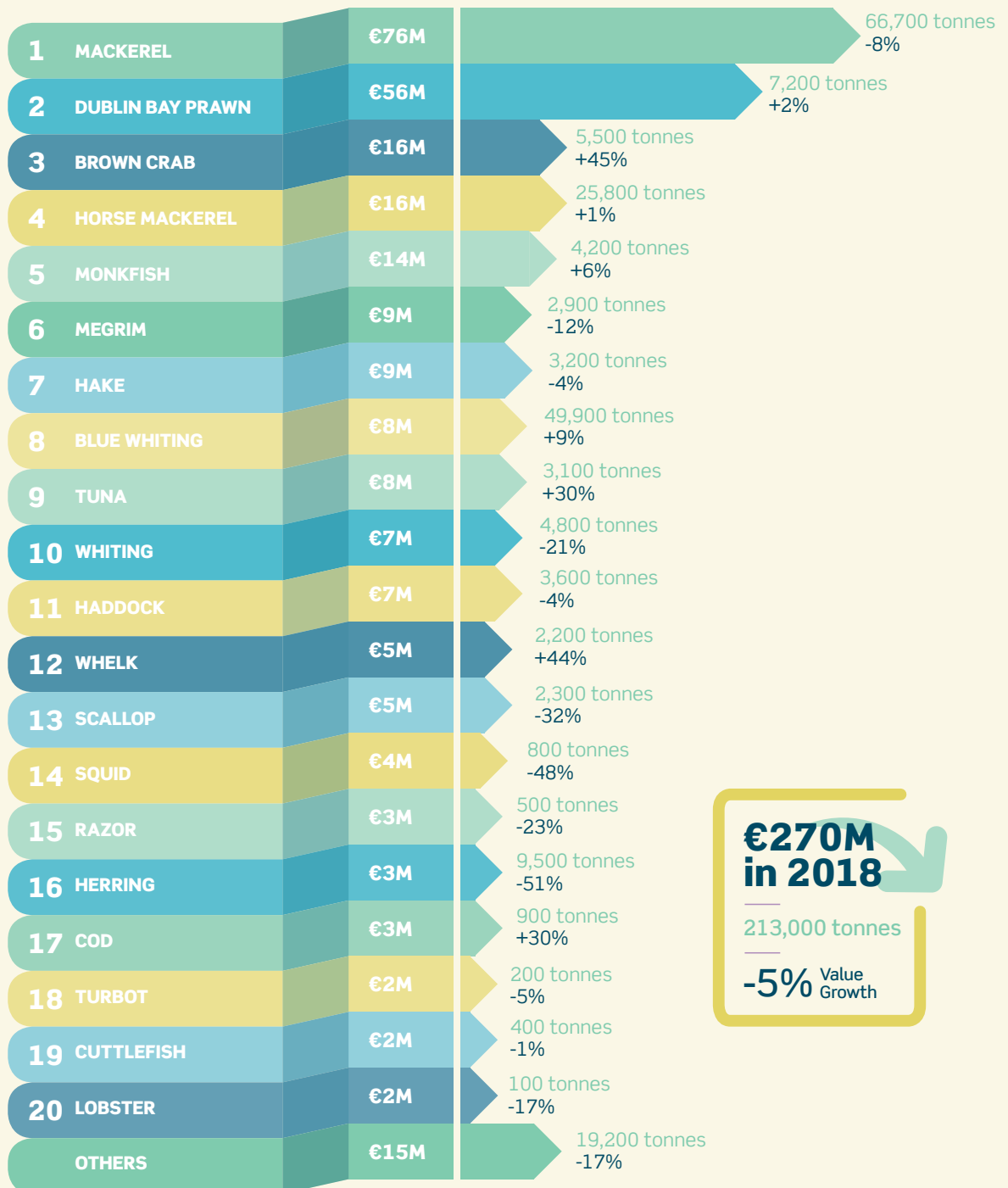
SOURCE

	Value of Landings €M				Volume of Landings Tonnes			
Port	Irish	Non-Irish	Total	Share of Non-Irish	Irish	Non-Irish	Total	Share of Non-Irish
KILLYBEGS	91	23	114	20%	130,000	69,700	199,700	35%
CASTLETOWNBERE	34	59	93	64%	9,400	18,100	27,500	66%
DINGLE	7	10	17	59%	3,900	3,300	7,200	46%
ROS A MHIL	15	2	17	12%	3,300	200	3,500	6%
DUNMORE EAST	12	0.4	12.4	4%	5,500	200	5,700	2%
KILMORE QUAY	11	0	11	0%	3,700	0	3,700	3%
HOWTH	9	0.3	9.3	3%	3,400	100	3,500	0%
UNION HALL	8	1	9	7%	1,900	200	2,100	11%
GREENCASTLE	7	0.3	7.3	2%	2,900	100	3,000	2%
CLOGHERHEAD	7	0	7	0%	1,300	0	1,300	0%
OTHER PORTS	69	4	73	5%	47,700	1,100	48,800	2%
TOTAL	270	100	370	27%	213,000	93,000	306,000	30%



# Value of total seafood LANDINGS BY IRISH FLEET

## BREAKDOWN OF TOP 20 LANDED SPECIES BY VALUE

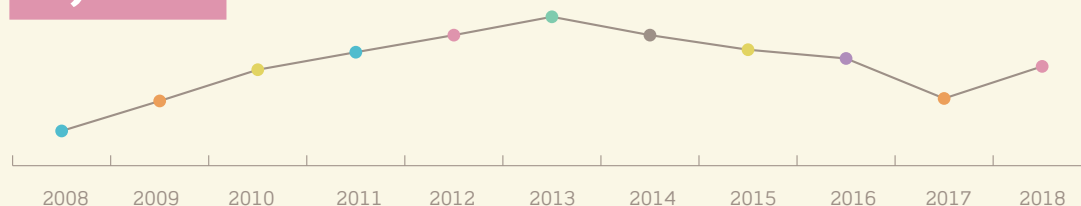




# Irish FISHING FLEET

## Total Irish Fishing Vessels

**2,127**



SOURCE

Segment	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Polyvalent General	1,276	1,305	1,356	1,401	1,434	1,466	1,431	1,411	1,421	1,380	1,407
Polyvalent Potting	493	491	492	488	487	490	489	477	440	395	435
Specific	132	147	156	149	150	148	139	134	146	142	148
Aquaculture	33	67	81	87	96	106	107	109	102	97	100
RSW Pelagic	23	23	23	24	23	23	23	23	23	23	23
Beam Trawl	15	11	11	12	12	13	13	13	14	13	14
Grand Total	1,972	2,044	2,119	2,161	2,202	2,246	2,202	2,167	2,146	2,050	2,127

### POLYVALENT FLEET

This segment, comprising the polyvalent general and potting sectors represent the vast majority of the fleet. They are multi-purpose and include small inshore vessels (netters and potters) and medium to large offshore vessels targeting whitefish, pelagic fish and bivalve molluscs.

### SPECIFIC FLEET

Vessels that are permitted to fish for bivalve molluscs and aquaculture species.

### AQUACULTURE FLEET

These vessels must be exclusively used in the management, development and servicing of aquaculture areas and can collect spat from wild

mussel stocks as part of a service to aquaculture installations.

### REFRIGERATED SEAWATER (RSW) PELAGIC FLEET

Vessels engaged predominantly in fishing for pelagic species (herring, mackerel, horse mackerel and blue whiting).

### BEAM TRAWLER FLEET

Vessels dedicated to beam trawling, a trawling method used in some Irish Inshore waters where it is used to catch flatfish such as sole and plaice.



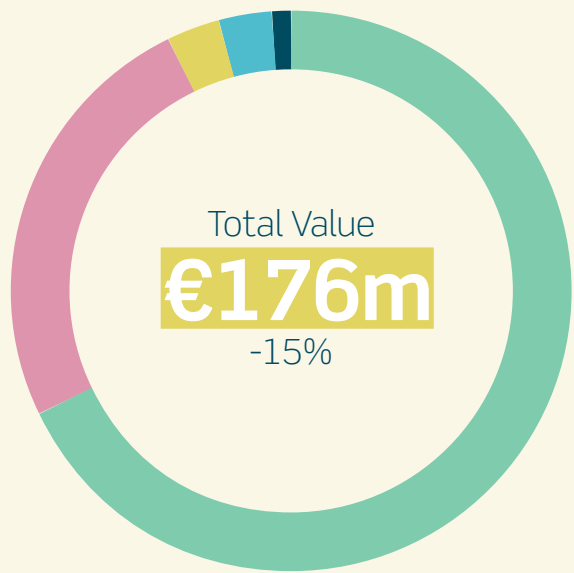




# AQUACULTURE PRODUCTION

By value/volume

## BY VALUE (€)

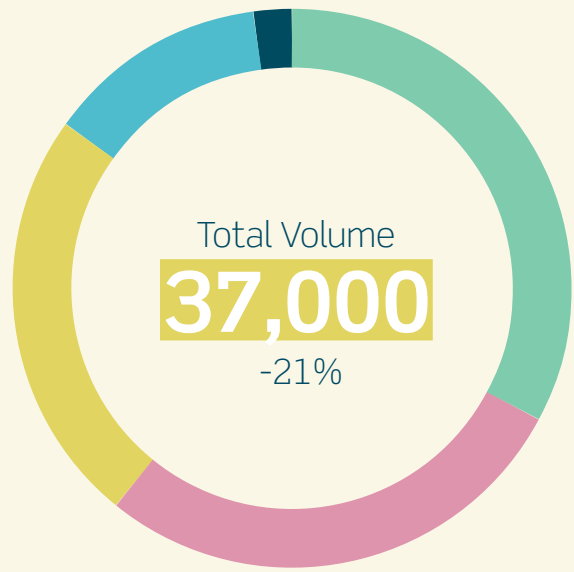


Salmon	<b>€119M</b>	-19%
Rope Mussels	<b>€6M</b>	+1%
Other Finfish	<b>€1M</b>	-37%

Irish Rock Oysters	<b>€44M</b>	+3%
Seabed Cultured Mussels	<b>€5.7M</b>	-37%
Other Shellfish	<b>€0.3M</b>	-80%

SOURCE

## BY VOLUME (TONNES)



Salmon	<b>12,200</b>	-39%
Rope Mussels	<b>9,000</b>	+6%
Other Finfish	<b>600</b>	0%

Irish Rock Oysters	<b>10,300</b>	+7%
Seabed Cultured Mussels	<b>4,800</b>	-38%
Other Shellfish	<b>100</b>	-67 %



# PROCESSING

## Irish Seafood Processing

The processing sector came under strain in 2018, as rising raw material costs impacted Ireland's large number of smaller processing businesses. Overall, there was a 3% decline in the number of companies in the sector and a 6% drop in employment. However, shellfish processors bucked that trend with growth of 14%. The value of the sector remains significant, more than doubling in the past 10 years, and consumer demand for more convenient seafood products shows no signs of decreasing.

**158**

**COMPANIES  
PROVIDE**

**3,762**

**JOBS INCLUDING  
FULL TIME, PART  
TIME AND CASUAL  
EMPLOYMENT**





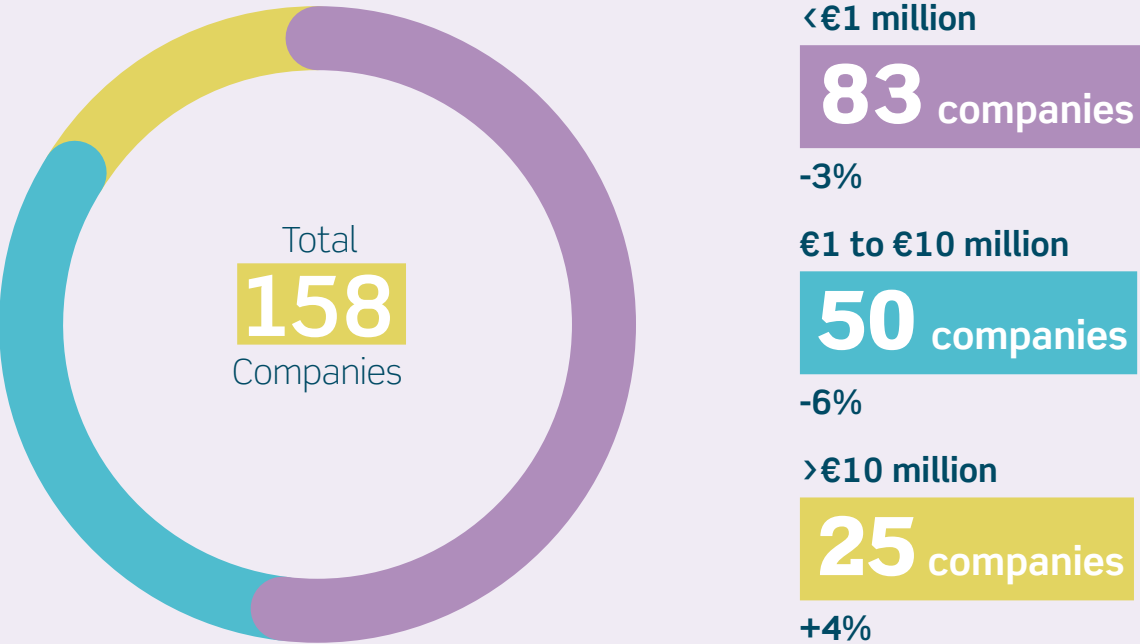


PROCESSING



# Number of Seafood PROCESSING COMPANIES

## BREAKDOWN BY REVENUE



## BREAKDOWN BY REVENUE AND BY MAIN SEAFOOD CATEGORY

Category	< €1M	€1M - €10M	> €10M	Total	Annual Growth
WHITEFISH	35	23	10	68	-6%
SHELLFISH	31	12	5	48	+14%
SALMONIDS	15	12	3	30	-12%
PELAGIC	2	3	7	12	-20%
TOTAL	83	50	25	158	-3%
BREAKDOWN OF INDUSTRY	53%	32%	15%	100%	



# Irish Seafood Processing

## COMPANIES BY REGION

**NORTH 24**

**NORTH WEST 9**

**WEST 26**

**SOUTH WEST 14**

**SOUTH 26**

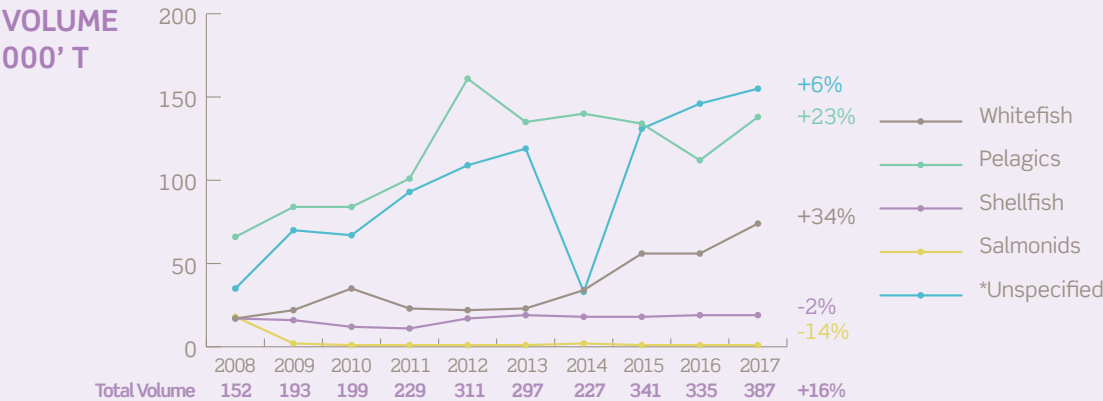
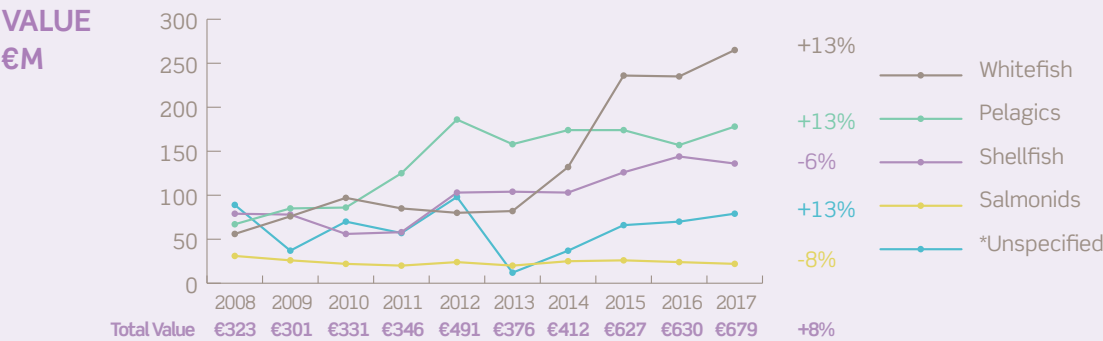
**SOUTH EAST 31**

**NORTH EAST 28**



PROCESSING

## TIME SERIES OF THE VALUE AND VOLUME OF THE IRISH PROCESSING SECTOR



\* Unspecified data are not detailed for confidentiality concerns and so may include seafood from the whitefish, pelagic, shellfish and salmonids categories. \* Data for 2018 will be released by the CSO in August 2019



# RETAIL

## Irish Seafood Retail

Irish seafood retail sales rose by 2% in 2018 to €297M. Driven by increased consumer demand for healthy, sustainably sourced proteins. This was reflected in the type of seafood people bought, with sales of loose fish increasing by 7.7% while pre-packed fish increased by 1.1%. Growth in the foodservice sector continued upwards, increasing by 5% in 2018 reflecting the overall increase in consumer spending. Salmon remained a top seller, followed by cod, tuna, prawns and pollock, but there was a trend towards lesser known species, as well as growing consumer awareness of sustainability and provenance of seafood.

**€486M**

**ESTIMATED VALUE  
OF SEAFOOD  
CONSUMPTION IN  
IRELAND**

**2018 ESTIMATED VALUE  
OF SEAFOOD IN  
FOODSERVICE SECTOR**

**€189M**

**+5% GROWTH**







# THE GOOD FISH CO

IMPORTERS OF THE FINEST QUALITY SEAFOOD

## ~~~~~CATCH OF THE DAY~~~~~

We can make  
any fish  
in garlic & herbs, lemon & olive oil  
or Cajun marinade  
Just  
ask for it from  
the staff

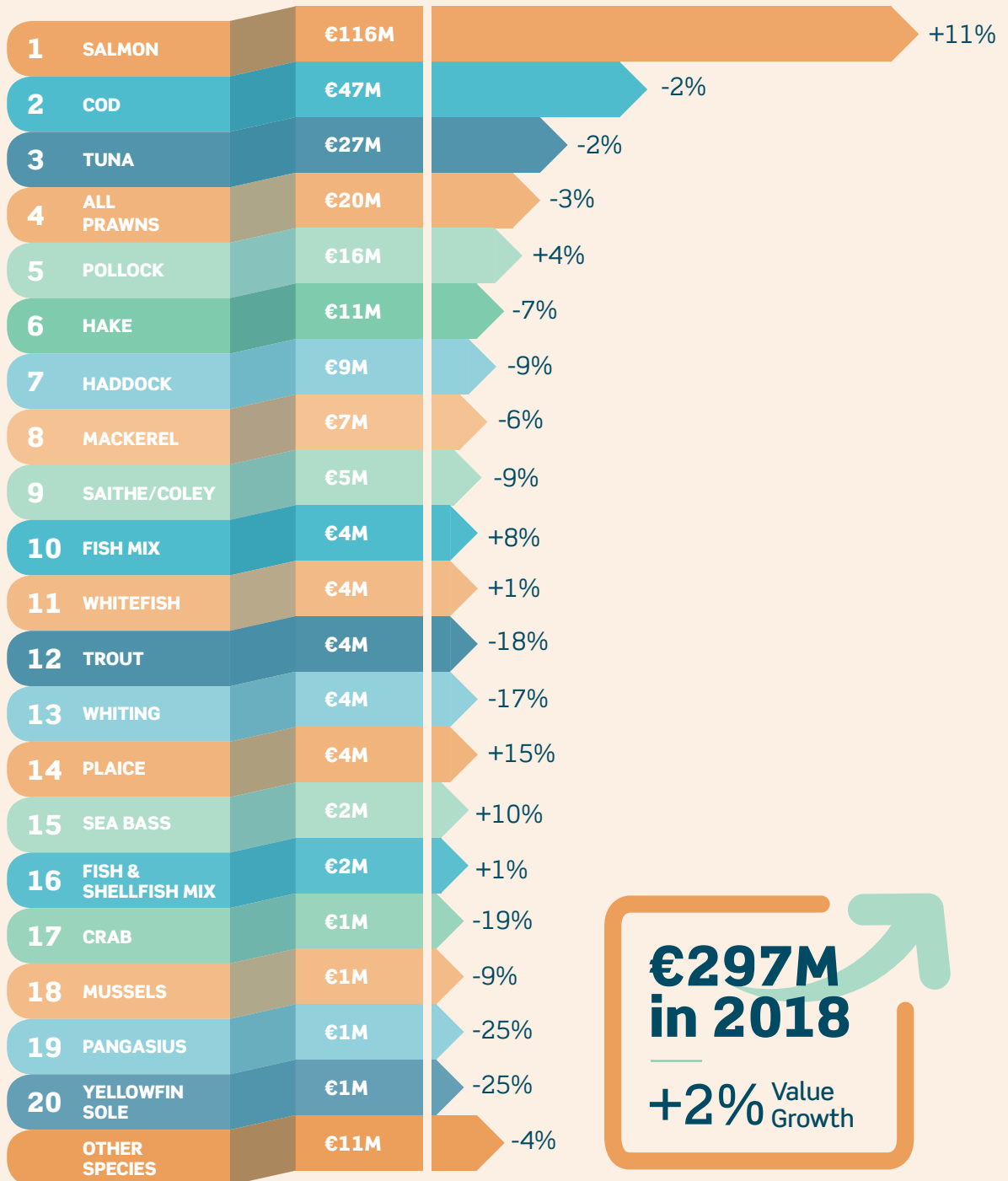
RETAIL



# VALUE OF SEAFOOD

## in the Irish Retail Sector

### TOP 20 RETAIL SPECIES BY VALUE 2018





## Average Number of **PURCHASES BY SPECIES IN 2018**

SPECIES	2018	% CHANGE	PRICE CHANGE
SALMON	14.7	+10%	+1%
COD	8.5	-1%	-2%
ALL PRAWNS	6.1	-3%	+1%
POLLOCK	5.5	+6%	-4%
HAKE	4.8	-6%	+1%
WHITING	4.6	+2%	+2%
MACKEREL	4.3	+8%	-3%
SAITHE/COLEY	4.1	+2%	0%
HADDOCK	4.0	0%	+5%
PLAICE	4.0	+25%	+21%
FISH & SHELLFISH MIX	3.8	+15%	+45%
OTHER SPECIES	3.7		-12%
TROUT	3.6	0%	+6%
FISH MIX	3.6	+38%	+3%
WHITEFISH	3.5	+13%	-4%
TUNA	3.2	0%	+1%
SEA BASS	3	-12%	-16%
YELLOWFIN SOLE	2.5		+4%
PANGASIU	2.4	-11%	+1%
MUSSELS	2.4		+5%
CRAB	1.9	-10%	-1%

RETAIL



# TRADE

## Imports and Exports of Seafood

Despite increased prices, the value of trade fell slightly in 2018, due largely to reduced volumes of key species being traded. Exports were down 4% to €653 million while imports fell by 2% to €330 million. Salmon dominated the export story, falling 30% in value, while the value of mackerel fell 10%. This was balanced somewhat by higher prices and a strong performance in the lucrative Asian market, particularly China. A drop in the price of sterling affected the value of imports from the UK; these fell 5% in value despite increasing in volume. Conversely imports from non-EU markets rose in value while the volume declined reflecting the impact of rising prices on performance.

**EXPORTS**

**TOTAL VALUE  
DECREASE OF 4%**

**TOTAL VALUE  
DECREASE OF 2%**

**IMPORTS**





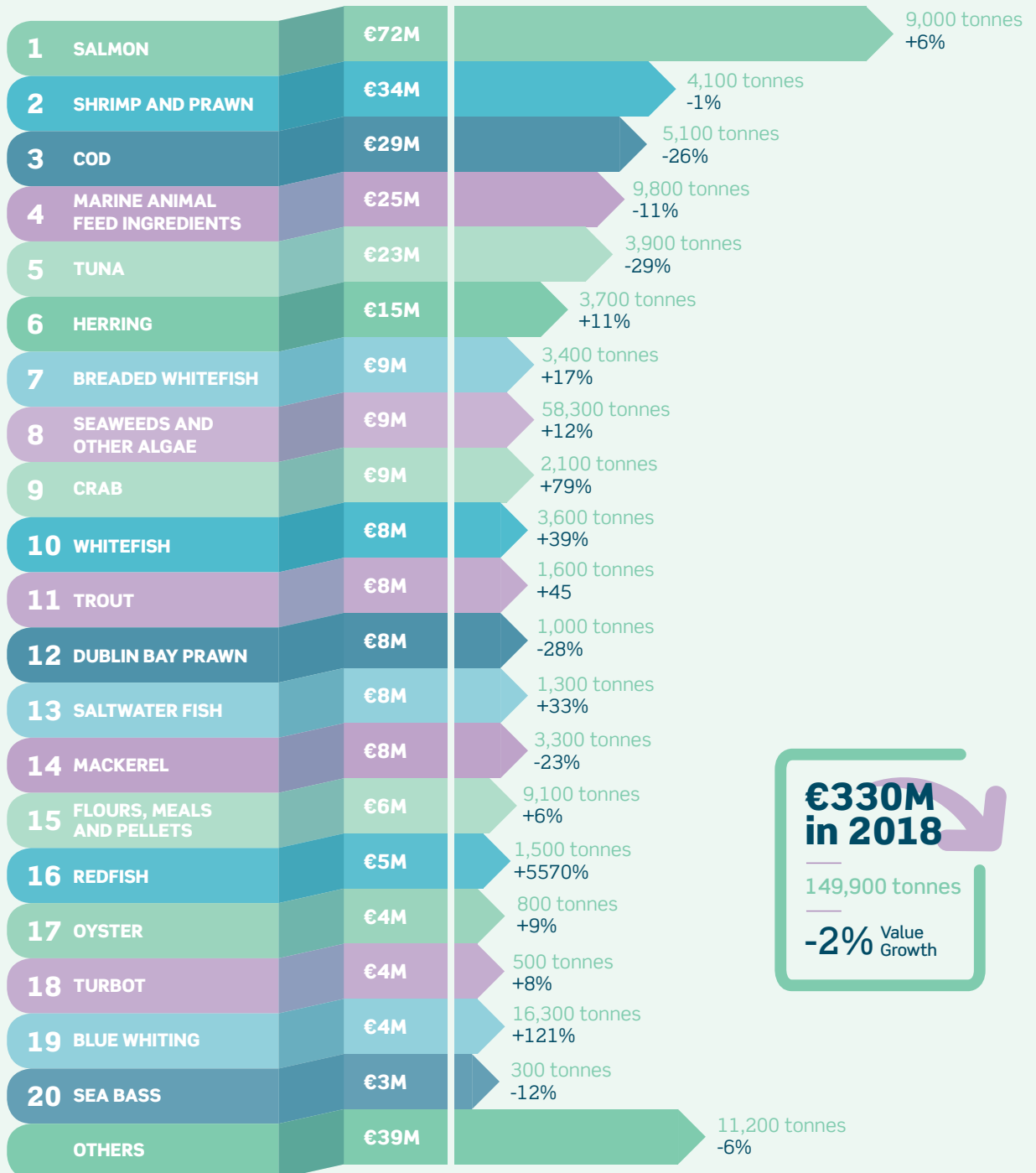


TRADE



# IRISH SEAFOOD IMPORTS

## BREAKDOWN OF TOP 20 IMPORTED SPECIES BY VALUE





# MAIN IMPORT MARKETS



**UK**  
**€219M**



**EU** (excl. UK)  
**€85M**



**NORDICS** (non-EU)  
**€11M**



**ASIA**  
**€8M**



**REST OF WORLD**  
**€4M**



**AFRICA**  
**€3M**

TRADE

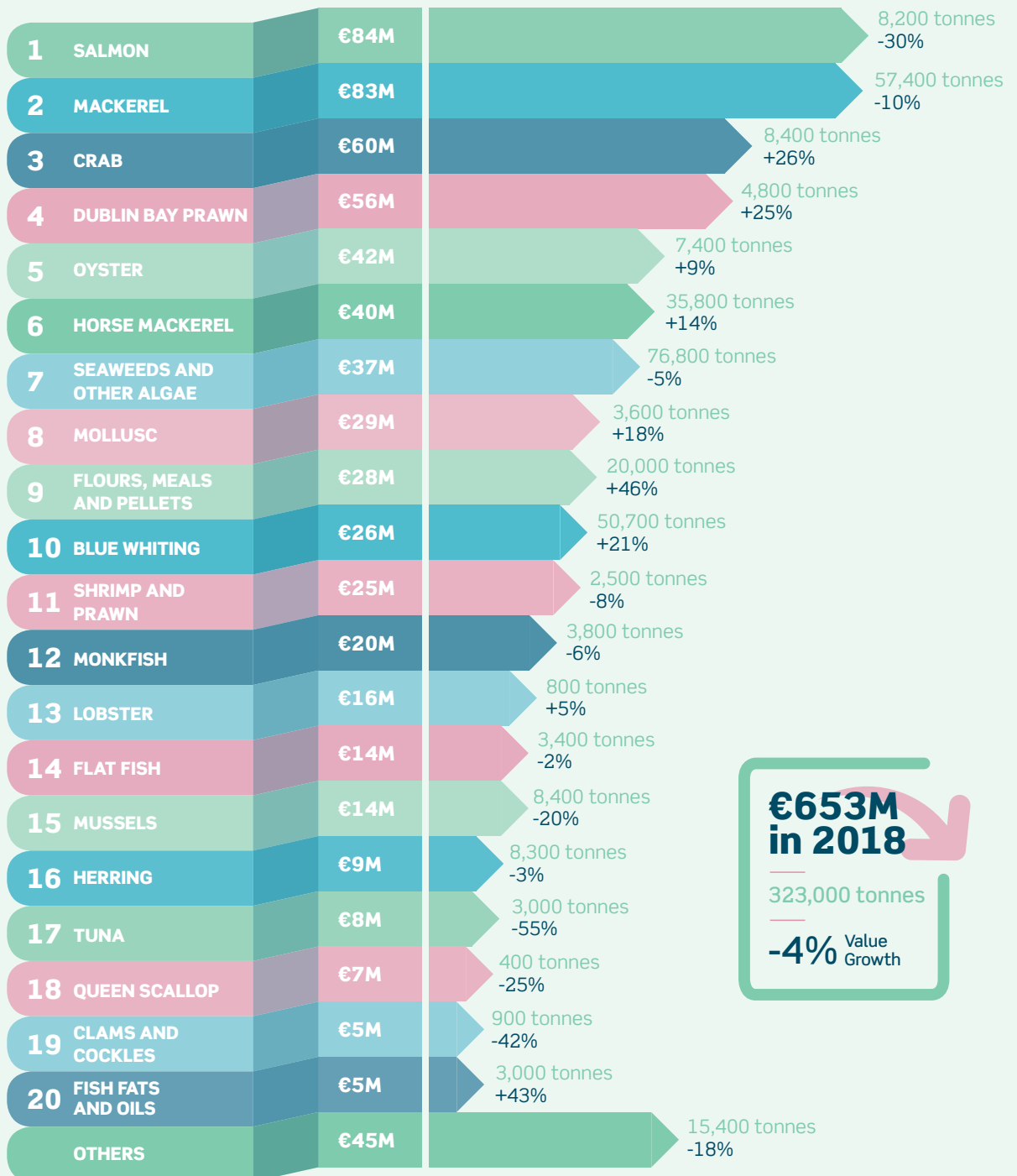
## IMPORT MARKETS

Main Markets	Value (€M)			000' Tonnes	
	2017	2018	Value growth in 2018	2017	2018
UNITED KINGDOM	230	219	-5%	67,100	68,800
EUROPEAN UNION (EXCL. UK)	75	85	+13%	23,900	19,400
NORDICS (NON-EU)	10	11	+8%	53,300	58,600
ASIA	7	8	+23%	1,400	1,800
REST OF WORLD	4	4	+17%	600	700
AFRICA	10	3	-68%	2,200	600
GRAND TOTAL	336	330	-2%	148,500	149,900



# IRISH SEAFOOD EXPORTS

## BREAKDOWN OF TOP 20 EXPORTED SPECIES BY VALUE





# MAIN EXPORT MARKETS

 **EU** (excl. UK)  
**€373M**

 **ASIA**  
**€96M**

 **UK**  
**€81M**

 **AFRICA**  
**€62M**

 **REST OF WORLD**  
**€27M**

 **MIDDLE EAST**  
**€14M**

TRADE

## EXPORT MARKETS

Main Markets	Value (€M)			000' Tonnes	
	2017	2018	Value growth in 2018	2017	2018
EUROPEAN UNION (EXCL. UK)	407	373	-8%	122,600	113,200
ASIA	77	96	+23%	33,400	36,400
UNITED KINGDOM	85	81	-4%	45,200	50,900
AFRICA	67	62	-7%	84,000	79,900
REST OF WORLD	22	27	+23%	20,500	25,700
MIDDLE EAST	22	14	-39%	17,300	16,900
GRAND TOTAL	680	653	-4%	323,000	323,000



# MAIN EXPORT PARTNERS

## TOP 10 EXPORT PARTNERS



**FRANCE**  
**€147M**  
-15%

- Salmon 29%
- Oyster 19%
- Crab 15%



**UNITED KINGDOM**  
**€81M**  
-4%

- Flours, Meals and Pellets 33%
- Salmon 7%
- Dublin Bay Prawn 6%



**SPAIN**  
**€75M**  
-3%

- Monkfish 18%
- Flat Fish 16%
- Crab 11%



**ITALY**  
**€60M**  
+29%

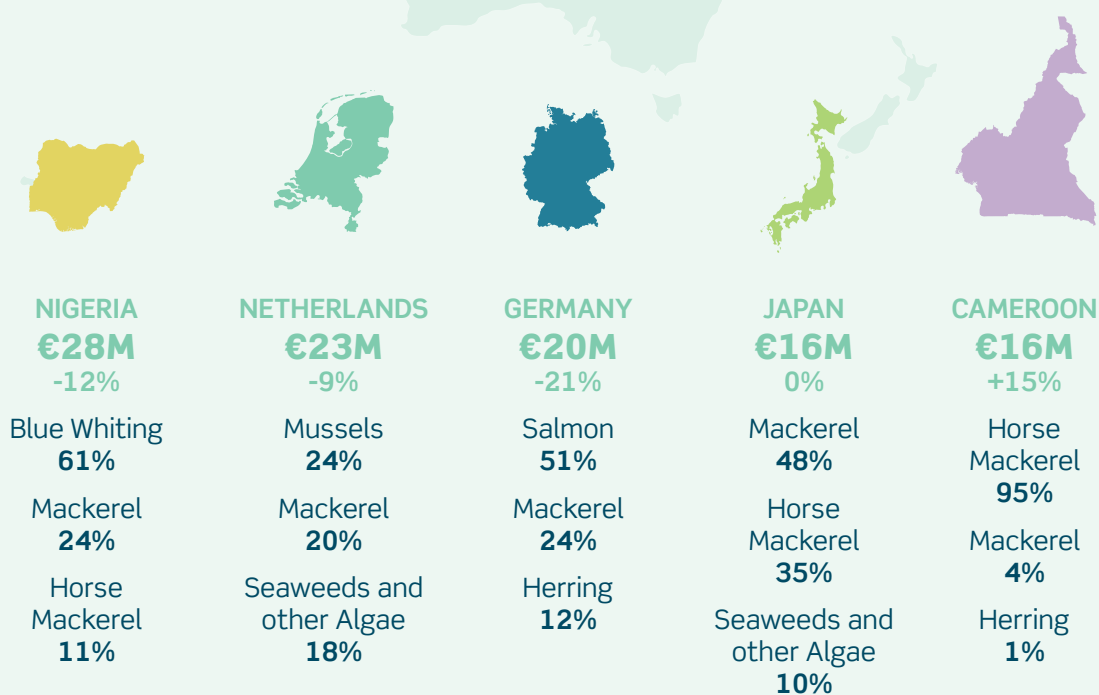
- Dublin Bay Prawn 65%
- Shrimps and Prawns 14%
- Salmon 5%



**CHINA**  
**€47M**  
+68%

- Crab 35%
- Mollusc 23%
- Mackerel 18%







# IRISH FLEET PERFORMANCE

Economic Performance of Ireland's  
offshore fishing fleet

Ireland's offshore fleet is estimated to have generated a gross profit of some €58 million in 2017 (24% gross margin) and, with the exception of the drift and fixed net fleet, all segments recorded both positive gross and net profits. The economic performance of the vessels over the period 2008 – 2018 reveals the changing fortunes of the fleet over the past decade. This includes the economic downturn from 2008 to 2013 and a major increase in fuel prices in 2008 and again between 2011 and 2014.

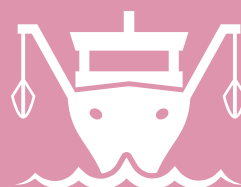
**178**

**VESSELS  
IN TOTAL**



**TOTAL NUMBER  
OF DAYS AT SEA**

**34,984**







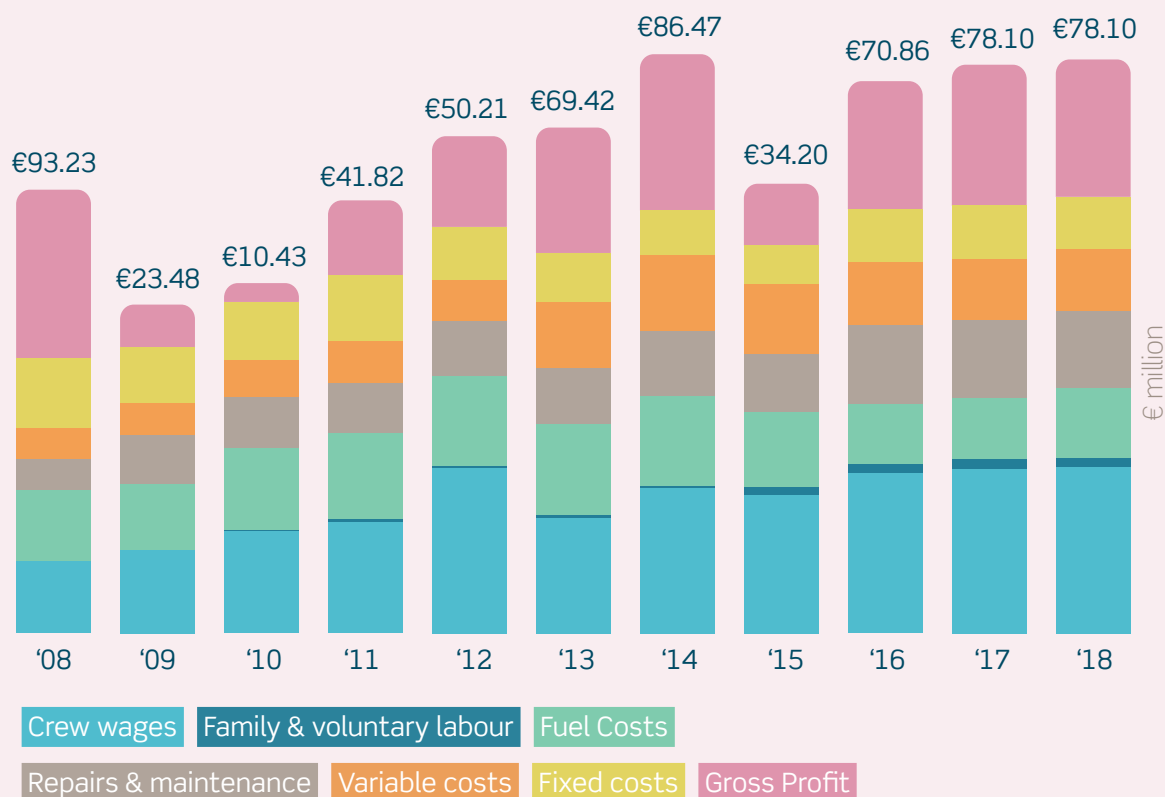
IRISH FLEET  
PERFORMANCE



## ECONOMIC PERFORMANCE of the Offshore Fleet

Fleet	Length (Overall)	National Segment	Number of vessels	Days at Sea	Employment FTE	
Mid-water Trawlers	≥ 40 metres	Pelagic	20	1,462	202	
	24 - 40 metres	Pelagic & Polyvalent	12	1,458	109	
Demersal Trawlers & Seiners	24 - 40 metres	Polyvalent	45	10,735	387	
	18 - 24 metres	Polyvalent	67	14,780	366	
Drift & Fixed Nets	18 - 24 metres	Polyvalent	13	1,884	49	
Beam Trawlers	24 - 40 metres	Beam Trawl	14	3,043	95	
Dredgers	24 - 40 metres	Specific	7	1,622	54	
			178	34,984	1,262	

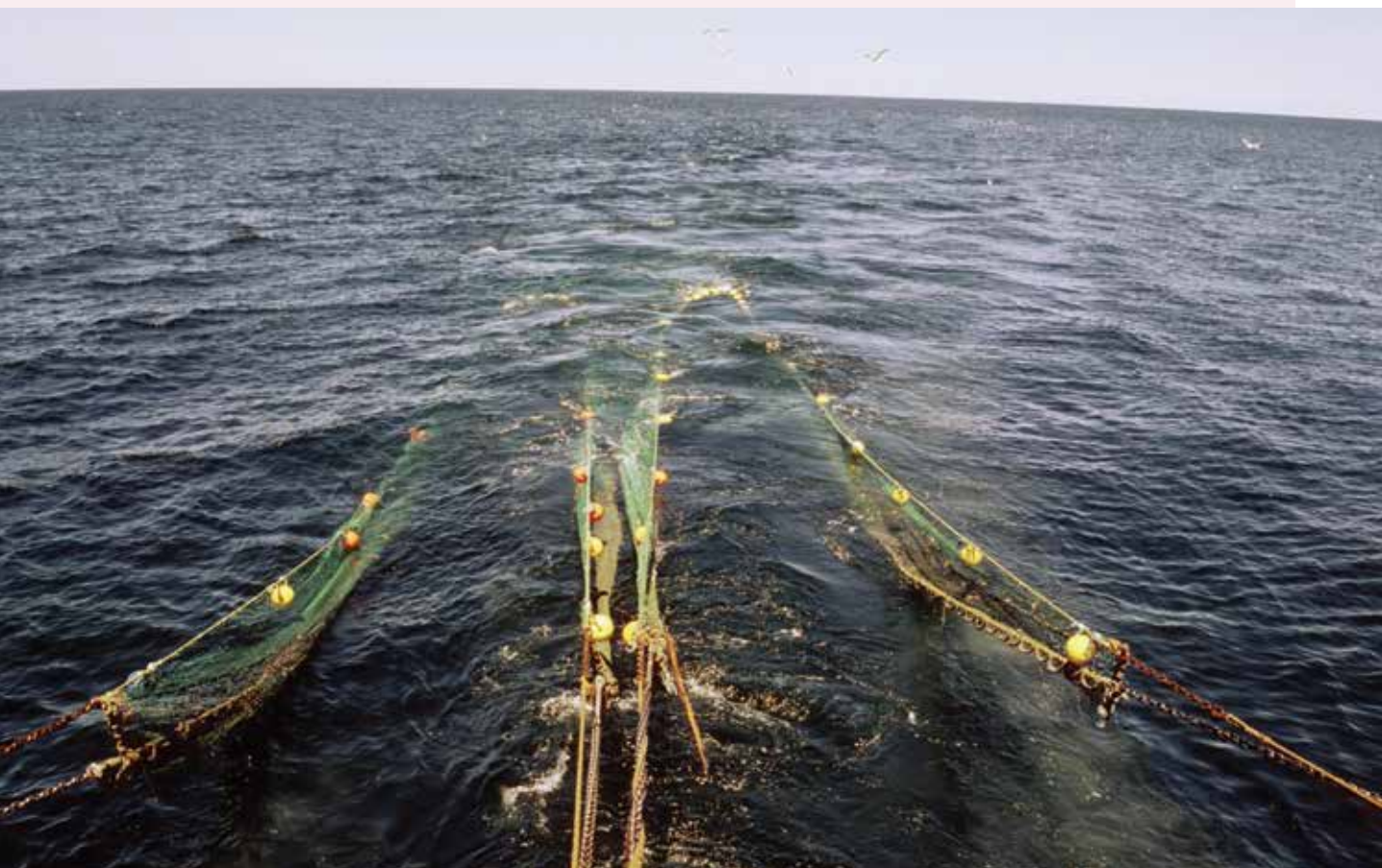
## ECONOMIC PERFORMANCE of the Irish Fishing Fleet 2008 - 2018





	Landings: Live weight (Tonnes)	Revenue €'000	Fuel oil used per tonne landed Lit/Tonne	Gross profit margin %	Net profit margin %	Profitability
	142,644	€88,748	137	30%	14%	Reasonable
	33,115	€22,050	166	19%	1%	Weak
	20,864	€55,971	1,023	23%	15%	Reasonable
	20,641	€57,238	1,096	24%	17%	Reasonable
	1,500	€4,092	1,307	-15%	-19%	Weak
	2,731	€7,128	639	71%	66%	High
	2,415	€6,221	686	41%	37%	High
	223,910	€241,448	332	24%	12%	

IRISH FLEET  
PERFORMANCE





# QUOTAS

Ireland's quota of the total allowable catch (TAC) amounts to 193,619 tonnes valued at €260 million in 2019. While the scientific advice supported large increases in a number of stocks of importance including haddock (+21%), hake (+28%) and megrims (+47%) in the Celtic Sea; haddock (+20%) and cod (+16%) in the Irish Sea; and an overall increase of 30% in whitefish quota, including offshore haddock (+92%), for the North West, there were some notable reductions. In the interests of sustainability, we accepted a cut to our prawn quota of 32%, in line with scientific advice, while the mackerel quota was down 20% based on the most recent scientific assessment by the International Council for the Exploration of the Sea (ICES).

**193,619**

**TONNES, IRELAND'S TOTAL  
ALLOWABLE CATCH (TAC)**

**ESTIMATED VALUE**

**€260M**

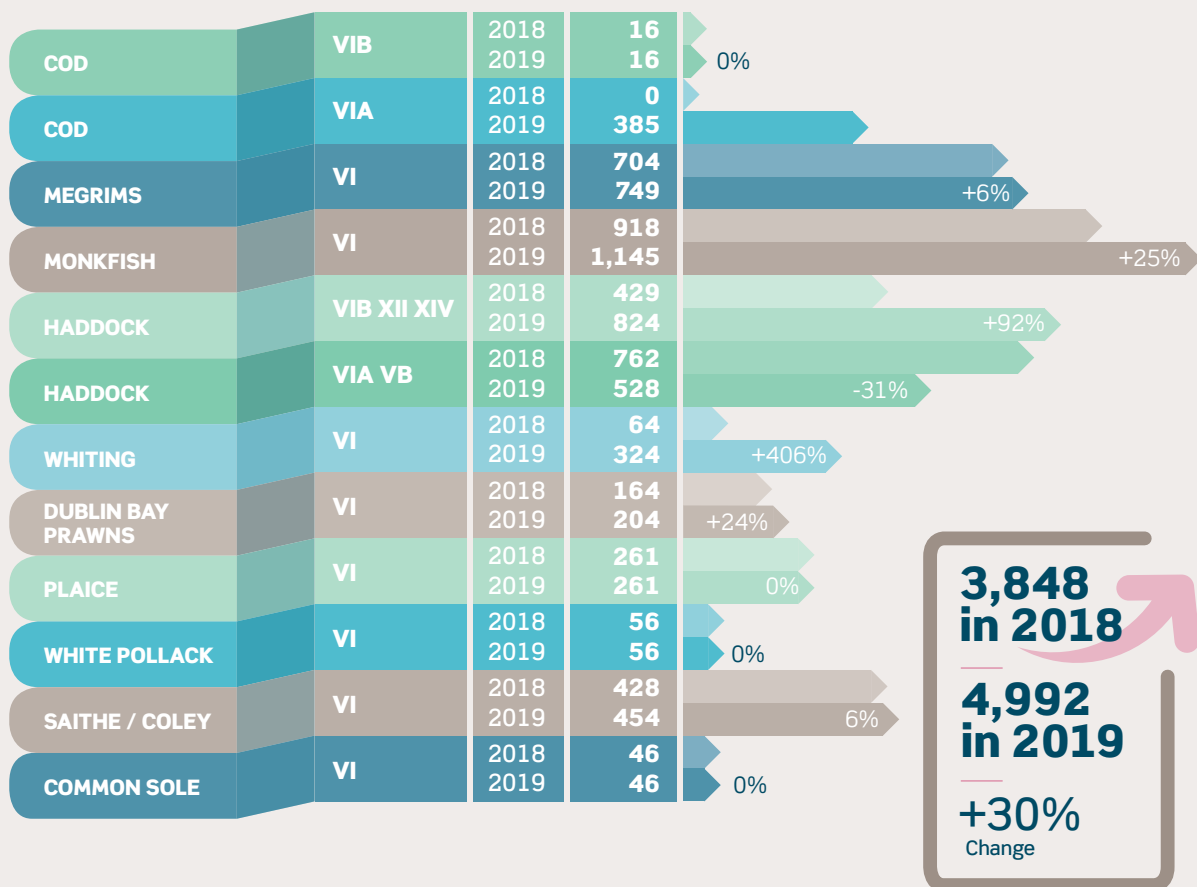




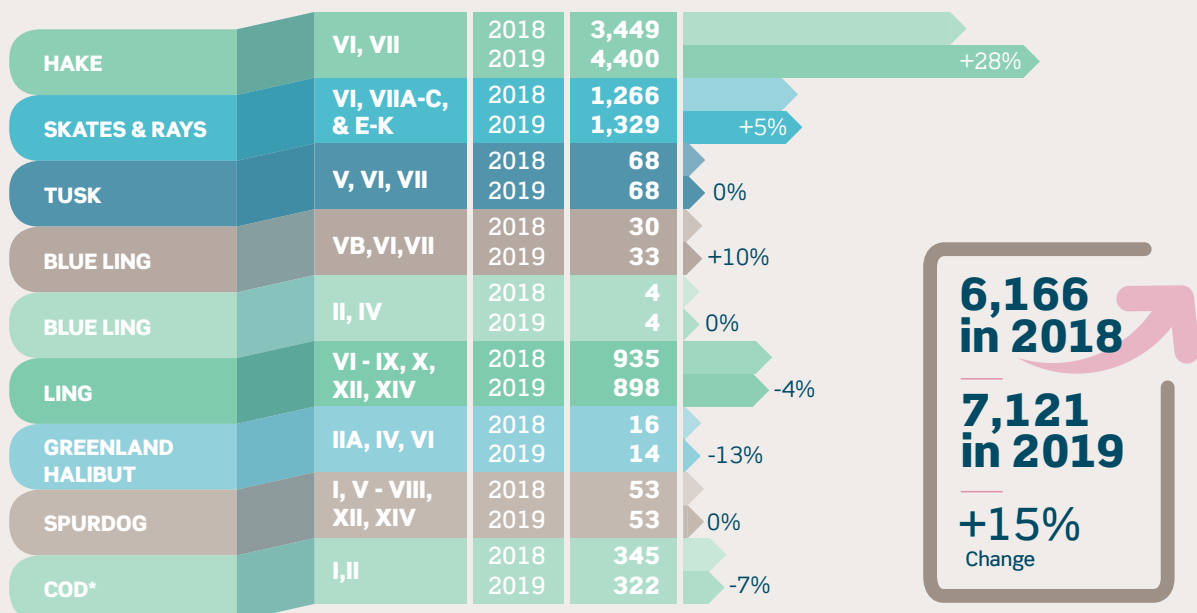
QUOTAS



## AREA VI DEMERSAL STOCKS



## AREA VI & VII DEMERSAL STOCKS



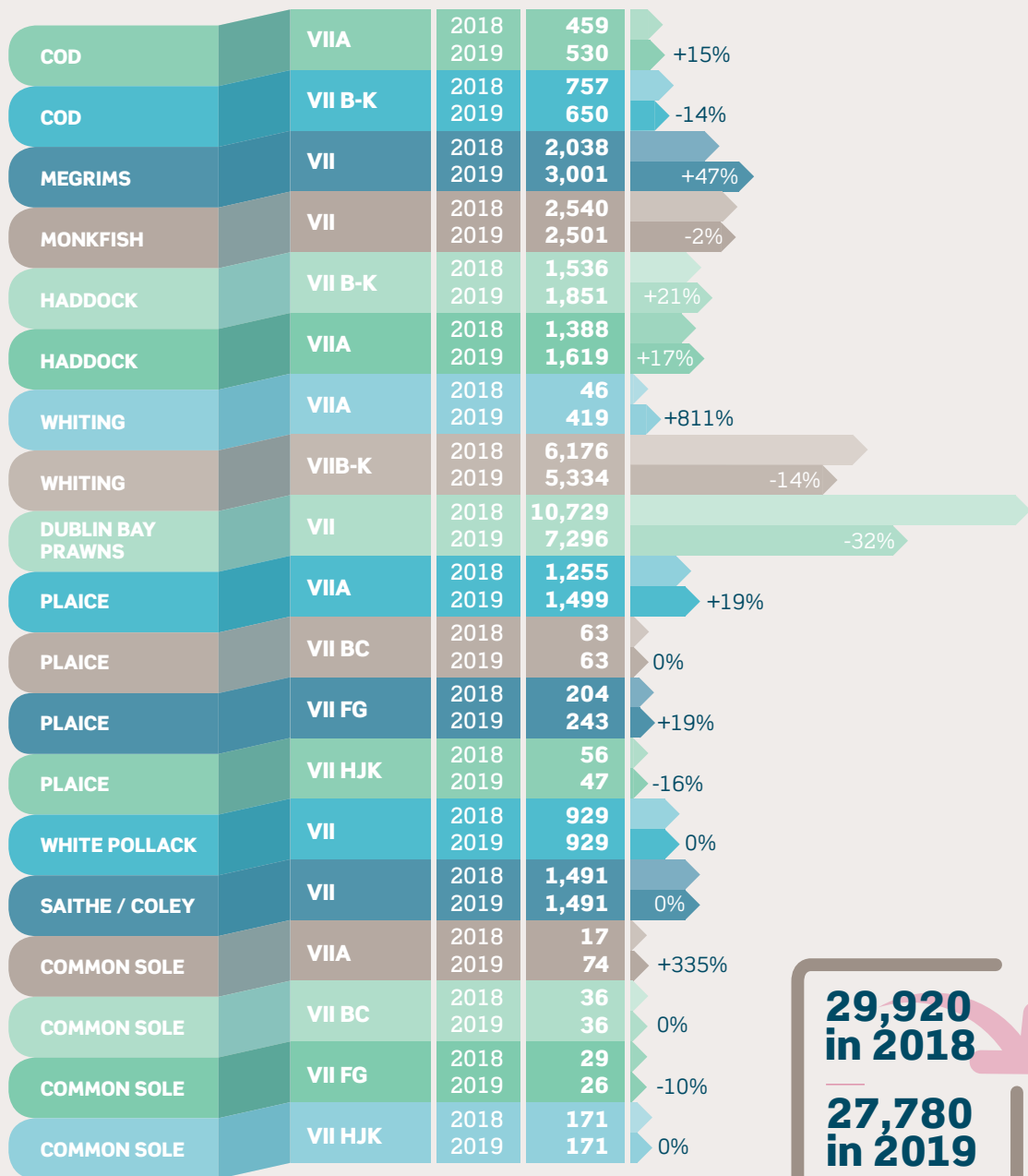


## FISHERIES MANAGEMENT ZONES





## AREA VII DEMERSAL STOCKS



**29,920**  
in 2018

**27,780**  
in 2019

**-7%**  
Change



## DEEPWATER STOCKS

BLACK SCABBARDFISH	V, VI, VII, XII	2018	74	
		2019	71	-4%
ALFONSINOS	I - X, XII, XIV	2018	9	
		2019	8	+11%
ROUNDNOSE GRENADIER	VB, VI, VII	2018	203	
		2019	166	-18%
ROUNDNOSE GRENADIER	VIII, IX, X, XII, XIV	2018	3	
		2019	3	0%
RED SEABREAM	VI, VII, VIII	2018	4	
		2019	3	-25%

**293  
in 2018**

**251  
in 2019**

**-14%**  
Change

QUOTAS

## PELAGIC STOCKS

GREATER SILVER SMELT	III, IV	2018	8	
		2019	8	0%
GREATER SILVER SMELT	V, VI, VII	2018	329	
		2019	329	0%
BOARFISH	VI, VII, VIII	2018	14,084	
		2019	15,086	+7%
HERRING	VIAN	2018	630	
		2019	630	0%
HERRING	VIAS, VIIIC	2018	1,482	
		2019	1,482	0%
HERRING	VIIA	2018	1,826	
		2019	1,795	-2%
HERRING	VII GHJK	2018	8,751	
		2019	4,097	-53%
BLUE WHITING	I - VIII A,B, D,E XII,XIV	2018	47,451	
		2019	37,800	-20%
MACKEREL	VI, VII	2018	69,141	
		2019	55,313	-20%
HORSE MACKEREL	IVB, IVC, AND VIID	2018	376	
		2019	376	0%
HORSE MACKEREL	IIA,IVA,VI, VIIA-C,E-K, VIIIBE	2018	25,625	
		2019	30,306	+18%
HERRING	I, II	2018	2,512	
		2019	3,399	+35%
ALBACORE	NORTH ATLANTIC	2018	2,845	
		2019	2,854	0%

**175,060  
in 2018**

**153,475  
in 2019**

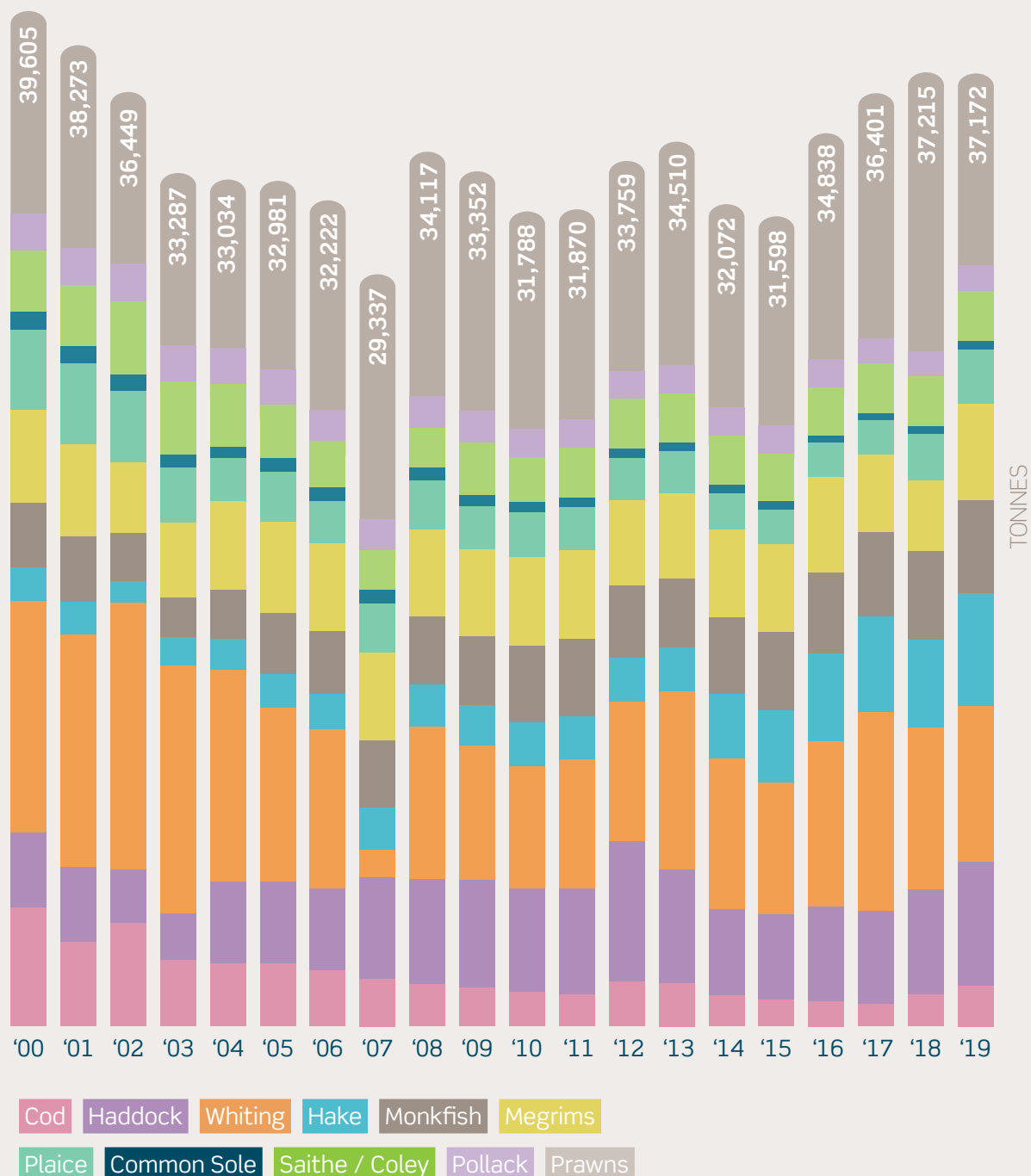
**-12%**  
Change



# FISHING OPPORTUNITIES

for key demersal stocks 2000 – 2019

Ireland's 2019 share of the total allowable catch (TAC) of key demersal stocks, while marginally less than 2018, is 109% of the average quotas received over the period 2000 – 2019. While some key stocks have continued to decline, others have increased, most notably hake (+338% of the 2000 quota), haddock (+165%) and monkfish (+144%). In 2018-2019 Irish demersal fishermen have access to more of these key demersal stocks than at any other time since 2000 – 2001.









# TERMS OF REFERENCE

## PELAGIC FISH

Pelagic fish swim in mid-waters or near the surface. Oil rich fish such as mackerel, herring, boarfish and tuna are common examples.

## DEMERSAL FISH

Demersal fish are those which live on or near the sea bed. Round and flat white fish fall into this category and include cod, hake, haddock and flatfish such as flounder, sole, turbot, plaice and halibut

## REGIONS BY COUNTY:

**North:** Donegal

**North West:** Mayo, Sligo and Leitrim

**West:** Galway and Clare

**South West:** Kerry and Limerick

**South:** Cork

**South East:** Wicklow, Wexford and Waterford

**North East:** Louth, Meath and Dublin

## DATA SOURCES

Landings data are supplied by the Sea Fisheries Protection Agency (SFPA), [www.sfpa.ie](http://www.sfpa.ie).

Value of landings are estimated by BIM.

Aquaculture data is collected through the BIM Annual Aquaculture Survey.

Processing data is collected through the Data Collection Framework and economic data is provided by the Central Statistics Office (CSO).

Population data is sourced from the CSO Census 2016, [www.cso.ie](http://www.cso.ie).

Seafood population and employment statistics estimated by BIM using Census 2016 data.

Employment data in seafood sector collected through the Data Collection Framework by BIM.

Retail data is supplied by KANTAR World Panel.

Foodservice consumption estimated by BIM using Bord Bia 'Irish Foodservice Channel Insights' data.

The total processing employment on page 7 includes wild seaweed harvesters.

Import and Export data supplied by EUROSTAT.

Please note some figures have been rounded for the purposes of this publication.

The data used in this publication includes provisional data which may be subject to updates throughout the year.

Please consult the data sources cited above for original and updated data.



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