€1.09bn
Estimated GDP of Irish Seafood industry

The Irish Seafood Economy 2020

- Domestic Consumption €406M (-18% YOY)
- Exports - Imports €263M (-10% YOY)
- GDP €1.09bn*
  - Private Investment €213M (-17% YOY)
  - Government Investment €203M (+9% YOY)

Our Biggest Fishing Ports (Value of Landings)
- Killybegs €112M
- Castletownbere €104M
- €346M (-18%)
  - of seafood was landed by Irish and non-Irish vessels into our ports in 2020:
    - Irish landings €214M
    - Non-Irish €132M

Top Selling Species
- SALMON (Up 3%) €120M
- COD (Up 4%) €46M

Ireland’s Main Export Markets
- EU €321M (-16%)
- UK €93M (-17%)
- AFRICA €75M (+87%)

2,030 Number of registered fishing vessels in 2019
160 Number of seafood processors
309 Number of aquaculture production units
16,430 People are employed around our coast (direct and indirect employment)

2020 Export Value €590M (-8% Value Growth)
2019 Export Value €530M

Domestic Sales Value €406M
Retail Value €316M
Food Service Value €90M

2020 Domestic Consumption €406M
2019 Domestic Consumption €409M

2020 Exports - Imports €263M
2019 Exports - Imports €315M

* Actual total €1.085M
Due primarily to the global Covid-19 pandemic Ireland’s seafood economy declined in 2020, with a drop of 12% (-€142 million) compared to 2019, giving a total value of €1.1 billion. This was driven mainly by a reduction of 18% in domestic consumption due to the closure of the food-service sector with additional impacts of a 17% reduction (-€44 million) in private investment and an 8% decline (-€50 million) in exports. Global markets faced severe disruption from the Covid-19 pandemic, and when added to the continued uncertainty from the UK’s departure from the EU, this made for challenging trading conditions.

Despite these challenges the seafood sector remained resilient and adapted to the disruption the market faced. While there was a decrease of 18% in domestic consumption to €406 million, mainly due to a fall in sales in food service, this was somewhat offset by a 6% increase (€18m) in retail sales. There was also a reduction in private investment to €213 million (-17%) reflecting the uncertainty in the markets leading to cautious activity from many seafood businesses. There was also a decline in our seafood balance of trade (exports – imports) which fell by €28 million (-10%) to €263 million. Overall investment in the sector was €416 million, equivalent to 39% of seafood GDP, a slight increase compared to 2019, underlining the importance of strong public sector support through times of economic turbulence.

2,881
People employed in fisheries

16,430
Direct and indirect seafood employment

Rising Tide
Resilience in the face of adversity
The seafood sector remained remarkably resilient in 2020, even in the face of severe market disruption caused by the Covid-19 pandemic, leading to an effective closure of the food service sector globally and a 33% reduction in volume and value of exports to Asia where the markets effectively closed during March and April. Exports to the UK market increased in terms of volume and value while there was a significant increase in exports of pelagic species to Africa to €75 million, an increase of 89%. This resulted in Africa overtaking Asia as Ireland’s third biggest export market.

Reflecting the difficulties in the food service sector globally, domestic consumption declined in 2020 by €90m million to €406 million, representing a reduction of 18% compared to 2019. Sales in the food service sector more than halved to €980 million compared to 2019. This was offset by a 6% increase in retail sales as companies adapted to the restrictions imposed on the hospitality sector because of Covid-19 and leveraged the increased demand from retail that emerged. This very much demonstrated the resilience of the processors, who still managed to trade despite market disruption, inconsistent supply of raw materials and the need to introduce health and safety measures in processing factories that resulted in decreased production.

Production falls overall, but prices remain stable

The value of seafood production fell in 2020 by 12% to €526m million, a decrease of €70 million compared to 2019, with overall volume falling by 3% to 290,400 tonnes. Lower prices due to the lack of market demand and the closure of food service sector resulted in an 18% decrease in the value of wild-caught fish to €346 million, a reduction of €78 million. The landed value of Irish landings decreased significantly by 26%, while landings from non-Irish values remained steady, falling by only 1% compared to 2019.

Among the top 10 most important species for Irish vessels, mackerel and Dublin Bay prawns remained the most valuable species landed. The volume of landings of mackerel increased by 17% while the value of these landings increased by 3% due to lower prices. The volume and value of Dublin Bay prawns’ landings fell significantly by 40% and 36% reflecting the disruption to the international food service sector throughout the year. Despite this, prices for Nephrops remained relatively stable, falling only 3% over the year. Whitefish species such as haddock, hake, whiting and megrim showed a similar pattern with reductions in volume and value but stable prices. The price of monkfish grew by 17% in the year, offsetting the decline in volume so that the overall value only declined by 3%, which reflected the strong demand for this species in the Spanish domestic market.

In contrast to wild caught production the volume and value of the farmed finfish sector increased by 15% in volume and value as salmon production grew, with demand in the organic sector remaining strong despite the global market volatility. The farmed shellfish sector fared less well given its reliance on food service. Volume fell by 7% with value reduced by 15% to €51 million. Production of oysters and seabed cultured mussels fell significantly by 14% and 11% respectively, with a corresponding decrease in value of 19% and 15%.

Continued investment in the seafood sector

In 2020, Government investment in the seafood sector continued to grow, amounting to €213 million, an increase of 9%. Support from the European Maritime and Fisheries Fund (EMFF) along with a national investment programme contributed to a wide range of projects in improving the infrastructure in fishing ports and production facilities, granting fishermen, fish farmers and fish processors, R&D and innovation projects, as well as direct supports to the sector to offset the impacts of Covid-19.

Private investment reduced by €44 million (-17%), totalling €213 million in 2020 reflecting the major uncertainty faced by seafood businesses during the Covid-19 pandemic. However, confidence in the seafood sector by financial lending institutions remained strong and helped to encourage private investment to continue to invest where in a position to do so.

Private investment was also aided by the continued availability of grant aid through the EMFF and government grants. During the year, BIM continued to administer 14 grant aid schemes providing financial support in key areas including capital investment, sustainability, innovation, skills development, coastal community development and safety.

The Brexit deal brings future challenges

In addition to the disruption to the markets, the UK’s decision to leave the European Union continued to bring uncertainty for the Irish seafood industry in 2020 with fears over loss of access to UK waters and difficulties in importing and exporting seafood to and from Ireland. As the year progressed and, with the prospect of a no-deal scenario intensifying, anxiety grew in the sector, particularly amongst the catching sector, given more than 30% of landings by Irish vessels are traditionally caught in UK waters.

As it transpired the Trade and Cooperation Agreement (TCA) was signed with the UK on Christmas Eve. While the TCA guaranteed continued access to UK waters, it came at the price of transfer of significant quota from the EU to the UK over the period 2021 to 2026 onwards estimated around €1.9 billion based on 2020 quota levels. The aggregate final (2026) quota transfer by Ireland is estimated to be €43m which amounts to a 1.5% reduction compared to the overall value of the 2020 Irish quotas. These quota reductions are front-loaded in 2021 and will increase the pressure on the catching and processing sectors due to a reduction of raw material available.

Additionally, with the UK no longer in the European Union, there will be new requirements and increased documentation for seafood businesses exporting and importing to and from the UK, which will increase costs and make the logistics of transiting through the UK landbridge to mainland Europe much more difficult. It remains to be seen how the sector will adapt to the new challenges introduced by the TCA, combined with the continued disruption caused by the Covid-19 pandemic. However, the seafood sector has demonstrated its resilience and adaptability during 2020 which will help to maintain Ireland’s strong global reputation for producing high quality, sustainably sourced seafood going forward.
Breakdown of Seafood Gross Domestic Product

<table>
<thead>
<tr>
<th>GDP Components</th>
<th>2018 Value (€M)</th>
<th>2019 Value (€M)</th>
<th>2020 Value (€M)</th>
<th>Growth Rate 2020</th>
<th>% of Seafood Economy</th>
</tr>
</thead>
<tbody>
<tr>
<td>DOMESTIC CONSUMPTION</td>
<td>€486</td>
<td>€493</td>
<td>€406</td>
<td>-18%</td>
<td>37%</td>
</tr>
<tr>
<td>PRIVATE INVESTMENT</td>
<td>€267</td>
<td>€257</td>
<td>€213</td>
<td>-17%</td>
<td>20%</td>
</tr>
<tr>
<td>GOVERNMENT INVESTMENT</td>
<td>€170</td>
<td>€185</td>
<td>€203</td>
<td>+9%</td>
<td>19%</td>
</tr>
<tr>
<td>EXPORTS - IMPORTS</td>
<td>€316</td>
<td>€292</td>
<td>€263</td>
<td>-10%</td>
<td>24%</td>
</tr>
<tr>
<td>GDP</td>
<td>€1,239</td>
<td>€1,227</td>
<td>€1,085</td>
<td>-12%</td>
<td>100%</td>
</tr>
</tbody>
</table>

THE IRISH SEAFOOD ECONOMY 2020

Domestic Consumption 37%
Private Investment 20%
Exports - Imports 24%
Government Investment 19%

Employment in the Irish Seafood Sector

<table>
<thead>
<tr>
<th></th>
<th>Direct and Indirect Total Employees</th>
<th>Direct Total Employees</th>
<th>Indirect Total Employees</th>
<th>Total Employed</th>
</tr>
</thead>
<tbody>
<tr>
<td>FISHERIES</td>
<td>16,430</td>
<td>2,881</td>
<td>7,840</td>
<td>8,590</td>
</tr>
<tr>
<td>AQUACULTURE</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PROCESSING</td>
<td></td>
<td>1,852</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>3,857</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Breakdown of Employment By Region

<table>
<thead>
<tr>
<th>Region</th>
<th>Total Population</th>
<th>Coastal Population</th>
<th>Coastal Employed</th>
<th>Direct Seafood Employment</th>
<th>Downstream Seafood Employment</th>
<th>Share of Coastal Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>NORTH</td>
<td>159,192</td>
<td>74,989</td>
<td>27,488</td>
<td>2,008</td>
<td>4,481</td>
<td>16%</td>
</tr>
<tr>
<td>NORTH WEST</td>
<td>292,630</td>
<td>64,059</td>
<td>25,328</td>
<td>614</td>
<td>1,085</td>
<td>4%</td>
</tr>
<tr>
<td>WEST</td>
<td>376,875</td>
<td>64,704</td>
<td>27,034</td>
<td>998</td>
<td>1,718</td>
<td>6%</td>
</tr>
<tr>
<td>SOUTH WEST</td>
<td>342,606</td>
<td>90,323</td>
<td>36,718</td>
<td>883</td>
<td>1,462</td>
<td>4%</td>
</tr>
<tr>
<td>SOUTH</td>
<td>542,868</td>
<td>115,533</td>
<td>49,815</td>
<td>1,787</td>
<td>3,458</td>
<td>7%</td>
</tr>
<tr>
<td>SOUTH EAST</td>
<td>808,737</td>
<td>91,681</td>
<td>36,467</td>
<td>1,170</td>
<td>1,948</td>
<td>5%</td>
</tr>
<tr>
<td>NORTH EAST</td>
<td>2,238,957</td>
<td>83,775</td>
<td>36,139</td>
<td>1,130</td>
<td>2,278</td>
<td>6%</td>
</tr>
<tr>
<td>REPUBLIC OF IRELAND</td>
<td>4,761,865</td>
<td>585,064</td>
<td>238,989</td>
<td>8,590</td>
<td>16,430</td>
<td>7%</td>
</tr>
</tbody>
</table>
The volume of seafood produced by the Irish seafood sector surpassed 220,000 tonnes with a value of €394m. While less than 20% of this volume was produced by the aquaculture sector it contributed 46% of the total value.

The volume of landings into Irish ports fell by 4% in 2020, to 252,000 tonnes, this decline being driven by the Irish fleet, landing 10% less than 2019 while landing volumes of non-Irish vessels increased by 17%. The value of landings fell 18% in 2020 to €346m with the Irish fleet contributing the most to this decline falling by 26% in value. Most ports saw a decline in the volume and value of landings in 2020 with Killybegs seeing a 9% decline in volume (8% in value) and Castletownbere landings declining by 16% in volume (20% in value). Mackerel was the most valuable species landed by the Irish fleet with over 60,000 tonnes landed worth €80m. This was an increase in value of 3% on 2019. Landings of Dublin Bay prawn declined by around 40% in volume and value terms after a difficult year in which many of the main international markets for this species were shut down.

Aquaculture production decreased by 1% in volume however value increased by 2% to €180m. This growth was again led by salmon production with volumes and value up by 15% year on year. The collapse of international demand had significant impacts on prices and production of oysters and mussels with volume declining 7% to 24,000 tonnes with value declining 15% to €51m.

Source
Where does Irish seafood come from?

The volume of seafood produced by the Irish seafood sector surpassed 220,000 tonnes with a value of €394m. While less than 20% of this volume was produced by the aquaculture sector it contributed 46% of the total value.

The volume of landings into Irish ports fell by 4% in 2020, to 252,000 tonnes, this decline being driven by the Irish fleet, landing 10% less than 2019 while landing volumes of non-Irish vessels increased by 17%. The value of landings fell 18% in 2020 to €346m with the Irish fleet contributing the most to this decline falling by 26% in value. Most ports saw a decline in the volume and value of landings in 2020 with Killybegs seeing a 9% decline in volume (8% in value) and Castletownbere landings declining by 16% in volume (20% in value). Mackerel was the most valuable species landed by the Irish fleet with over 60,000 tonnes landed worth €80m. This was an increase in value of 3% on 2019. Landings of Dublin Bay prawn declined by around 40% in volume and value terms after a difficult year in which many of the main international markets for this species were shut down.

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The Source of Irish Seafood

By Value (€)
- Total Value: €526M, -12%
- SEA-CAUGHT FISH: €346M, -18%
- FARMED FINFISH: €129M, +15%
- FARMED SHELLFISH: €51M, -15%

By Volume (tonnes)
- Total Volume: 290,400, -3%
- SEA-CAUGHT FISH: 252,400, -4%
- FARMED FINFISH: 14,000, +15%
- FARMED SHELLFISH: 24,000, -7%

Regional value of Domestic Fish Landings

- Total Value: €346M in 2020, -18% Value Growth
- Total Volume: 252,400 tonnes, -3%

<table>
<thead>
<tr>
<th>Port</th>
<th>Irish</th>
<th>Non-Irish</th>
<th>Total</th>
<th>Share of Non-Irish</th>
<th>Irish</th>
<th>Non-Irish</th>
<th>Total</th>
<th>Share of Non-Irish</th>
</tr>
</thead>
<tbody>
<tr>
<td>KILLYBEGS</td>
<td>103</td>
<td>9</td>
<td>112</td>
<td>8%</td>
<td>113,800</td>
<td>30,300</td>
<td>144,100</td>
<td>21%</td>
</tr>
<tr>
<td>CASTLETOWNBERE</td>
<td>21</td>
<td>83</td>
<td>104</td>
<td>79%</td>
<td>7,100</td>
<td>22,000</td>
<td>29,100</td>
<td>76%</td>
</tr>
<tr>
<td>KILMORE QUAY</td>
<td>6</td>
<td>8</td>
<td>14</td>
<td>57%</td>
<td>3,300</td>
<td>2,300</td>
<td>5,600</td>
<td>0%</td>
</tr>
<tr>
<td>DINGLE</td>
<td>11</td>
<td>0</td>
<td>11</td>
<td>0%</td>
<td>3,400</td>
<td>0</td>
<td>3,400</td>
<td>42%</td>
</tr>
<tr>
<td>HOWTH</td>
<td>11</td>
<td>0</td>
<td>11</td>
<td>0%</td>
<td>4,600</td>
<td>0</td>
<td>4,600</td>
<td>0%</td>
</tr>
<tr>
<td>DUNMORE EAST</td>
<td>8</td>
<td>0</td>
<td>8</td>
<td>0%</td>
<td>2,600</td>
<td>0</td>
<td>2,600</td>
<td>0%</td>
</tr>
<tr>
<td>CLOGHERHEAD</td>
<td>7</td>
<td>0</td>
<td>7</td>
<td>0%</td>
<td>1,000</td>
<td>0</td>
<td>1,000</td>
<td>0%</td>
</tr>
<tr>
<td>ROS A MHL</td>
<td>7</td>
<td>0</td>
<td>7</td>
<td>0%</td>
<td>1,200</td>
<td>0</td>
<td>1,200</td>
<td>0%</td>
</tr>
<tr>
<td>GREENCastle</td>
<td>7</td>
<td>0</td>
<td>7</td>
<td>0%</td>
<td>2,400</td>
<td>0</td>
<td>2,400</td>
<td>0%</td>
</tr>
<tr>
<td>UNION HALL</td>
<td>7</td>
<td>0</td>
<td>7</td>
<td>0%</td>
<td>1,500</td>
<td>0</td>
<td>1,500</td>
<td>0%</td>
</tr>
<tr>
<td>OTHER</td>
<td>26</td>
<td>32</td>
<td>58</td>
<td>55%</td>
<td>40,500</td>
<td>16,400</td>
<td>56,900</td>
<td>73%</td>
</tr>
<tr>
<td>GRAND TOTAL</td>
<td>214</td>
<td>132</td>
<td>346</td>
<td>38%</td>
<td>181,400</td>
<td>71,000</td>
<td>252,400</td>
<td>38%</td>
</tr>
</tbody>
</table>
**Value of total seafood Landings by Irish Fleet**

**Breakdown of Top 10 Landed Species by Value**

<table>
<thead>
<tr>
<th></th>
<th>Species</th>
<th>Value 2020</th>
<th>Volume 2020</th>
<th>Percentage Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Mackerel</td>
<td>€80M</td>
<td>62,400 tonnes</td>
<td>+3%</td>
</tr>
<tr>
<td>2</td>
<td>Dublin Bay Prawn</td>
<td>€35M</td>
<td>5,000 tonnes</td>
<td>-40%</td>
</tr>
<tr>
<td>3</td>
<td>Monkfish</td>
<td>€16M</td>
<td>4,000 tonnes</td>
<td>-3%</td>
</tr>
<tr>
<td>4</td>
<td>Horse Mackerel</td>
<td>€12M</td>
<td>16,500 tonnes</td>
<td>-30%</td>
</tr>
<tr>
<td>5</td>
<td>Blue Whiting</td>
<td>€9M</td>
<td>34,900 tonnes</td>
<td>-14%</td>
</tr>
<tr>
<td>6</td>
<td>Hake</td>
<td>€9M</td>
<td>2,700 tonnes</td>
<td>-23%</td>
</tr>
<tr>
<td>7</td>
<td>Haddock</td>
<td>€7M</td>
<td>3,600 tonnes</td>
<td>-23%</td>
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<tr>
<td>8</td>
<td>Mergim</td>
<td>€6M</td>
<td>2,000 tonnes</td>
<td>-29%</td>
</tr>
<tr>
<td>9</td>
<td>Whiting</td>
<td>€3M</td>
<td>2,100 tonnes</td>
<td>-28%</td>
</tr>
<tr>
<td>10</td>
<td>Scallop</td>
<td>€3M</td>
<td>900 tonnes</td>
<td>-61%</td>
</tr>
</tbody>
</table>

*The landed volumes are estimates based on provisional data provided by the SFPA and should be considered as preliminary.

**Irish Fishing Fleet**

**Total Irish Fishing Vessels**

2,030

**Polyvalent Segment**

This segment contains the vast majority of the fleet. These vessels are multi-purpose and include small inshore vessels (netters and potters), and medium and large offshore vessels targeting whitefish, pelagic fish and bivalve molluscs.

**Specific Segment**

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

**Refrigerated Seawater (RSW) Pelagic Fleet**

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

**Beam Trawler Fleet**

Vessels dedicated to beam trawling, a simple trawling method used predominantly in Irish inshore waters except in the southeast, where it is used to catch flatfish such as sole and plaice.

**Aquaculture Segment**

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.

**Value of Top 10 Landed Species by Value**

<table>
<thead>
<tr>
<th>Rank</th>
<th>Species</th>
<th>Value 2020</th>
<th>Volume 2020</th>
<th>Percentage Change</th>
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<td>900 tonnes</td>
<td>-61%</td>
</tr>
</tbody>
</table>

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Aquaculture Production
By value/volume

**By Value (€)**

<table>
<thead>
<tr>
<th>Product</th>
<th>Value (€)</th>
<th>Change (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salmon</td>
<td>€127M</td>
<td>+13%</td>
</tr>
<tr>
<td>Irish Rock Oysters</td>
<td>€37M</td>
<td>-19%</td>
</tr>
<tr>
<td>Seabed Cultured Mussels</td>
<td>€7M</td>
<td>-15%</td>
</tr>
<tr>
<td>Rope Mussels</td>
<td>€6M</td>
<td>-11%</td>
</tr>
<tr>
<td>Other Finfish</td>
<td>€2M</td>
<td>+12%</td>
</tr>
<tr>
<td>Other Shellfish</td>
<td>€1M</td>
<td>-6%</td>
</tr>
</tbody>
</table>

**Total Value**

€180m +2%

**By Volume (tonnes)**

<table>
<thead>
<tr>
<th>Product</th>
<th>Volume</th>
<th>Change (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salmon</td>
<td>13,400</td>
<td>+14%</td>
</tr>
<tr>
<td>Irish Rock Oysters</td>
<td>9,000</td>
<td>-14%</td>
</tr>
<tr>
<td>Seabed Cultured Mussels</td>
<td>4,400</td>
<td>-11%</td>
</tr>
<tr>
<td>Rope Mussels</td>
<td>10,300</td>
<td>-1%</td>
</tr>
<tr>
<td>Other Finfish</td>
<td>600</td>
<td>-1%</td>
</tr>
<tr>
<td>Other Shellfish</td>
<td>300</td>
<td>-1%</td>
</tr>
</tbody>
</table>

**Total Volume**

38,000 -1%
Covid-19 emerged in early 2020 and escalated as a severe disrupter in many key markets, having a profound impact on the processing sector. Rolling lockdowns and travel restrictions curtailed demand for higher value shellfish and whitefish products, particularly as food service channels imploded on the continent, as the normally busy holiday seasons were essentially cancelled. This collapse was somewhat mitigated by processors adapting to the surge in demand for packaged fresh and frozen retail products and pivoting towards online home delivery opportunities. Markets for the more affordable pelagic products remained robust in West Africa and Asia, however escalating logistics costs and freight bottlenecks, particularly in China, remained stubbornly problematic.
Number of Seafood Processing Companies

Breakdown by Revenue

- Total 160 Companies
  - <€1M: 85 companies
  - €1M to €10M: 48 companies
  - >€10M: 27 companies

Breakdown by Revenue and by Main Seafood Category

<table>
<thead>
<tr>
<th>Category</th>
<th>&lt;€1M</th>
<th>€1M - €10M</th>
<th>&gt;€10M</th>
<th>Total</th>
<th>Growth 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Whitefish</td>
<td>39</td>
<td>20</td>
<td>14</td>
<td>72</td>
<td>-2%</td>
</tr>
<tr>
<td>Shellfish</td>
<td>29</td>
<td>14</td>
<td>3</td>
<td>46</td>
<td>-2%</td>
</tr>
<tr>
<td>Salmonids</td>
<td>13</td>
<td>13</td>
<td>4</td>
<td>29</td>
<td>-2%</td>
</tr>
<tr>
<td>Pelagic</td>
<td>4</td>
<td>2</td>
<td>7</td>
<td>13</td>
<td>-2%</td>
</tr>
<tr>
<td>Total</td>
<td>85</td>
<td>48</td>
<td>27</td>
<td>160</td>
<td>-2%</td>
</tr>
<tr>
<td>Breakdown of Industry</td>
<td>53%</td>
<td>30%</td>
<td>17%</td>
<td>100%</td>
<td></td>
</tr>
</tbody>
</table>

Irish Seafood Processing Companies by Region

- North: 22 companies
- North West: 8 companies
- West: 22 companies
- South West: 17 companies
- South: 29 companies
- South East: 30 companies
- North East: 32 companies

Time Series of the value and average turnover of the Irish Processing Sector

- **Value (€M)**
  - Total: 2015, 2017, 2019
  - Whitefish: 2015, 2017, 2019
  - Pelagics: 2015, 2017, 2019
  - Shellfish: 2015, 2017, 2019
  - Salmonids: 2015, 2017, 2019
  - Unspecified: 2015, 2017, 2019

- **Average Turnover (€M)**
  - Pelagics 2015, 2016, 2017, 2018, 2019
  - Shellfish 2015, 2016, 2017, 2018, 2019
  - Salmonids 2015, 2016, 2017, 2018, 2019
  - Unspecified 2015, 2016, 2017, 2018, 2019
Overall, seafood consumption in Ireland fell 18% in 2020 to €406m, this decline was driven by the closures of the hospitality sector throughout the year.

**Food Consumption – Retail**
Sales of seafood in the retail sector rose by 6% in 2020 to €316m. The format of sales varied significantly with less perishable forms seeing stronger increases as consumers purchased larger volumes of products throughout the various lockdowns. Frozen sales increased by 17% in value with ambient sales increasing by 10%. Fresh sales increased by 2% with one major retailer removing fresh counters from its stores. Modest growth of 3% and 4% was seen in sales of the most popular species, salmon and cod. Strong growth was seen in sales of prawns, pollock, tuna and mackerel while the highest growth rates were achieved for sales of mussels (72%) and crab (57%).

**Food Consumption – Hospitality**
The food service sector was severely impacted in 2020, suffering the highest impact of all economic sectors in the country. Throughout the various lockdowns no indoor dining was permitted and in the periods of less restrictions dining indoors was strictly limited. The sector adapted as much as possible offering food to go and delivery. The impact in 2020 showed a 56% decrease in the estimated value of the seafood hospitality sector. Among protein food categories the estimated impact on the seafood sector was the highest, with bacon and dairy the other sectors to see an impact above 50%.

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**Seafood Consumption in Ireland**

Overall, seafood consumption in Ireland fell 18% in 2020 to €406m, this decline was driven by the closures of the hospitality sector throughout the year.

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### FOOD CONSUMPTION – Retail

#### Top 20 Retail Species by Value 2020

<table>
<thead>
<tr>
<th>Rank</th>
<th>Species</th>
<th>Value (€M)</th>
<th>Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>SALMON</td>
<td>120</td>
<td>+3%</td>
</tr>
<tr>
<td>2</td>
<td>COD</td>
<td>46</td>
<td>+4%</td>
</tr>
<tr>
<td>3</td>
<td>ALL PRAWNS</td>
<td>24</td>
<td>+20%</td>
</tr>
<tr>
<td>4</td>
<td>TUNA</td>
<td>22</td>
<td>+9%</td>
</tr>
<tr>
<td>5</td>
<td>POLLOCK</td>
<td>19</td>
<td>+15%</td>
</tr>
<tr>
<td>6</td>
<td>HADDOCK</td>
<td>11</td>
<td>+3%</td>
</tr>
<tr>
<td>7</td>
<td>HAKE</td>
<td>9</td>
<td>-6%</td>
</tr>
<tr>
<td>8</td>
<td>MACKEREL</td>
<td>9</td>
<td>+10%</td>
</tr>
<tr>
<td>9</td>
<td>FISH MIX</td>
<td>7</td>
<td>+4%</td>
</tr>
<tr>
<td>10</td>
<td>COLEY</td>
<td>5</td>
<td>-12%</td>
</tr>
<tr>
<td>11</td>
<td>TROUT</td>
<td>4</td>
<td>-9%</td>
</tr>
<tr>
<td>12</td>
<td>WHITEFISH</td>
<td>4</td>
<td>9%</td>
</tr>
<tr>
<td>13</td>
<td>WHITING</td>
<td>2</td>
<td>-3%</td>
</tr>
<tr>
<td>14</td>
<td>SEA BASS</td>
<td>2</td>
<td>-18%</td>
</tr>
<tr>
<td>15</td>
<td>FISH &amp; SHELLFISH MIX</td>
<td>2</td>
<td>-16%</td>
</tr>
<tr>
<td>16</td>
<td>PLAICE</td>
<td>2</td>
<td>+19%</td>
</tr>
<tr>
<td>17</td>
<td>MUSSELS</td>
<td>1</td>
<td>+72%</td>
</tr>
<tr>
<td>18</td>
<td>CRAB</td>
<td>1</td>
<td>+57%</td>
</tr>
<tr>
<td>19</td>
<td>PANGASIUS</td>
<td>1</td>
<td>+14%</td>
</tr>
<tr>
<td>20</td>
<td>OTHER SPECIES</td>
<td>25</td>
<td>+25%</td>
</tr>
</tbody>
</table>

**€316M in 2020**

### FOOD CONSUMPTION – Hospitality

#### Foodservice Sector Impact Republic of Ireland 2020

<table>
<thead>
<tr>
<th>Sector</th>
<th>Impact (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Foodservice</td>
<td>-48%</td>
</tr>
<tr>
<td>Limited service</td>
<td>-33%</td>
</tr>
<tr>
<td>Pubs</td>
<td>-65%</td>
</tr>
<tr>
<td>Hotels</td>
<td>-56%</td>
</tr>
<tr>
<td>Full Service</td>
<td>-57%</td>
</tr>
<tr>
<td>Cafes</td>
<td>-34%</td>
</tr>
<tr>
<td>Other comm. Institutional</td>
<td>-69%</td>
</tr>
</tbody>
</table>

#### Foodservice Purchases 2020 Impact

- **TOTAL** -47%
- **LAMB** -47%
- **SEAFOOD** -53%
- **POULTRY** -45%
- **PORK** -51%
- **DAIRY** -52%
- **BACON** -49%
- **BEEF** -49%
Trade
Imports and Exports of Seafood

There were significant impacts on trade of seafood throughout 2020 due to the varying waves of infection occurring across countries and continents. Overall, the sector performed very strongly considering the turmoil that affected the world with volume exported actually increasing by 2%. Prices fell 9% leading to an overall decline in export value of 8%. The shellfish sector saw the highest impact with volume and value declining 33% and 29% respectively. The closure of the hospitality sectors in Europe and Asia had significant impacts on the Irish shellfish sector with Dublin Bay prawns, crab, oysters, whelks, shrimps and prawns all seeing value declines above 25%. The pelagic sector grew in value by 7%, driven by exports of blue whiting, horse mackerel and mackerel, mainly to African countries. Exports of salmon continued to increase in 2020 by 10% despite a 3% decrease in volume. The average price of Irish organic salmon continued to increase, growing by 13% in the year.

Imports of seafood increased 1% in volume but decreased by 6% in value due to lower prices. The volume of salmon imported declined by 15%, with increasing prices leading to a 9% decline in value. Shrimps and prawns, tuna and breaded whitefish were the main products imported that saw increases, reflecting the increase in sales in retail of less perishable seafood products in the frozen and ambient sectors. Dependence on the UK as a source of seafood imports continued to decline with volumes falling 18% in 2020 (value declined 17%). Major substitution of imports occurred from the EU with volumes increasing by 110% driven by a price decrease of 44% resulting in a value increase of 17%. This suggests that Irish importers of seafood are increasingly diversifying the source of their products away from the UK in response to Brexit.
Irish Seafood Imports

Breakdown of Top 20 Imported Species by Value 2020

1. SALMON  - €62M  - 8,400 tonnes  -9%
2. SHRIMP - $PRAWNS  - €37M  - 4,700 tonnes  -1%
3. COD  - €33M  - 5,200 tonnes  -14%
4. TUNA  - €30M  - 5,800 tonnes  +12%
5. MARINE ANIMAL FEED INGREDIENTS - €28M  - 9,100 tonnes  -19%
6. HERRING  - €16M  - 4,000 tonnes  +6%
7. BREADED WHITEFISH  - €12M  - 3,100 tonnes  +29%
8. SEAWEEDS  - €10M  - 64,700 tonnes  +33%
9. MACKEREL  - €10M  - 4,800 tonnes  +23%
10. WHITEFISH  - €7M  - 1,600 tonnes  +4%
11. SALTWATER FISH  - €6M  - 1,500 tonnes  +3%
12. REDFISH  - €6M  - 1,500 tonnes  +3%
13. DUBLIN BAY PRAWN  - €5M  - 800 tonnes  -14%
14. BLUE WHITING  - €5M  - 1,500 tonnes  +31%
15. CRAB  - €4M  - 1,200 tonnes  +10%
16. POLLACKS  - €4M  - 1,000 tonnes  +7%
17. SEA BASS  - €4M  - 500 tonnes  -6%
18. WHITING  - €4M  - 500 tonnes  -6%
19. TILAPIA  - €4M  - 700 tonnes  +30%
20. OTHER FRESHWATER  - €4M  - 700 tonnes  +17%
OTHERS  - €37M  - 14,900 tonnes  +101%

Main Import Markets

UK  - €188M  - 62,600 tonnes  -17%
EU  - €98M  - 84,000 tonnes  +17%
ASIA  - €15M  - 4,700 tonnes  -9%
NORDICS (non-EU)  - €12M  - 13,000 tonnes  -3%
REST OF WORLD  - €10M  - 2,100 tonnes  +107%
AFRICA  - €4M  - 800 tonnes  +20%

Grand Total  - €327M  - 152,800 tonnes  -6%
Irish Seafood Exports

Breakdown of Top 20 Exported Species by Value 2020

<table>
<thead>
<tr>
<th>Rank</th>
<th>Species</th>
<th>Value (€M)</th>
<th>2019 Tonnes</th>
<th>2020 Tonnes</th>
<th>Value Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>SALMON</td>
<td>€111M</td>
<td>9,400</td>
<td>9,400</td>
<td>0%</td>
</tr>
<tr>
<td>2</td>
<td>MACKEREL</td>
<td>€99M</td>
<td>59,500</td>
<td>59,500</td>
<td>+0%</td>
</tr>
<tr>
<td>3</td>
<td>DUBLIN BAY PRAWN</td>
<td>€43M</td>
<td>3,700</td>
<td>3,700</td>
<td>-25%</td>
</tr>
<tr>
<td>4</td>
<td>HORSE MACKEREL</td>
<td>€40M</td>
<td>33,000</td>
<td>33,000</td>
<td>+12%</td>
</tr>
<tr>
<td>5</td>
<td>CRAB</td>
<td>€34M</td>
<td>4,400</td>
<td>4,400</td>
<td>+32%</td>
</tr>
<tr>
<td>6</td>
<td>SEAWEEDS</td>
<td>€31M</td>
<td>80,600</td>
<td>80,600</td>
<td>+32%</td>
</tr>
<tr>
<td>7</td>
<td>FLOURS, MEALS AND PELLETS</td>
<td>€30M</td>
<td>20,400</td>
<td>20,400</td>
<td>+14%</td>
</tr>
<tr>
<td>8</td>
<td>OYSTERS</td>
<td>€25M</td>
<td>3,800</td>
<td>3,800</td>
<td>-31%</td>
</tr>
<tr>
<td>9</td>
<td>BLUE WHITING</td>
<td>€22M</td>
<td>40,800</td>
<td>40,800</td>
<td>+28%</td>
</tr>
<tr>
<td>10</td>
<td>WHELK</td>
<td>€19M</td>
<td>2,300</td>
<td>2,300</td>
<td>-37%</td>
</tr>
<tr>
<td>11</td>
<td>MUSSELS</td>
<td>€15M</td>
<td>9,000</td>
<td>9,000</td>
<td>+2%</td>
</tr>
<tr>
<td>12</td>
<td>SHRIMPS AND PRAWNS</td>
<td>€14M</td>
<td>1,110</td>
<td>1,110</td>
<td>-31%</td>
</tr>
<tr>
<td>13</td>
<td>MONKFISH</td>
<td>€14M</td>
<td>2,700</td>
<td>2,700</td>
<td>-23%</td>
</tr>
<tr>
<td>14</td>
<td>LOBSTERS</td>
<td>€13M</td>
<td>700</td>
<td>700</td>
<td>-23%</td>
</tr>
<tr>
<td>15</td>
<td>TUNA</td>
<td>€8M</td>
<td>2,300</td>
<td>2,300</td>
<td>-9%</td>
</tr>
<tr>
<td>16</td>
<td>MEGRIM</td>
<td>€8M</td>
<td>1,800</td>
<td>1,800</td>
<td>-26%</td>
</tr>
<tr>
<td>17</td>
<td>HERRING</td>
<td>€6M</td>
<td>4,400</td>
<td>4,400</td>
<td>-17%</td>
</tr>
<tr>
<td>18</td>
<td>WHITEFISH</td>
<td>€6M</td>
<td>600</td>
<td>600</td>
<td>+108%</td>
</tr>
<tr>
<td>19</td>
<td>FISH FATS AND OILS</td>
<td>€5M</td>
<td>3,300</td>
<td>3,300</td>
<td>+17%</td>
</tr>
<tr>
<td>20</td>
<td>SCALLOPS</td>
<td>€5M</td>
<td>200</td>
<td>200</td>
<td>-36%</td>
</tr>
<tr>
<td></td>
<td>OTHERS</td>
<td>€43M</td>
<td>11,800</td>
<td>11,800</td>
<td>-1%</td>
</tr>
</tbody>
</table>

Main Export Markets

<table>
<thead>
<tr>
<th>Market</th>
<th>Value (€M)</th>
<th>2019 Tonnes</th>
<th>2020 Tonnes</th>
<th>Value Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU</td>
<td>€321M</td>
<td>106,000</td>
<td>87,800</td>
<td>-16%</td>
</tr>
<tr>
<td>UK</td>
<td>€93M</td>
<td>50,600</td>
<td>52,600</td>
<td>+4%</td>
</tr>
<tr>
<td>AFRICA</td>
<td>€75M</td>
<td>40,400</td>
<td>49,400</td>
<td>+23%</td>
</tr>
<tr>
<td>ASIA</td>
<td>€54M</td>
<td>38,900</td>
<td>49,400</td>
<td>+28%</td>
</tr>
<tr>
<td>MIDDLE EAST</td>
<td>€25M</td>
<td>20,200</td>
<td>27,400</td>
<td>+36%</td>
</tr>
<tr>
<td>REST OF WORLD</td>
<td>€22M</td>
<td>25,200</td>
<td>28,000</td>
<td>+11%</td>
</tr>
<tr>
<td>GRAND TOTAL</td>
<td>€640M</td>
<td>290,300</td>
<td>295,800</td>
<td>+2%</td>
</tr>
</tbody>
</table>
Covid-19

In early 2020 the main trade impacts occurred in China, the origin of COVID-19, in January, normally the period of highest exports to that market. High volumes of exports go to China in the early months of the year leading up to the Chinese New Year celebrations. As can be seen in the figure, exports declined significantly in January and nearly completely in February and March. Exports only recovered somewhat in the second half of the year.

Exports to France were impacted in January due to low supply of salmon with the main Covid-19 impacts occurring in March and April. Exports recovered well for the remainder of the year until December which saw a 30% decline compared with 2019.

Monthly exports to Italy were already down 25% in January before Covid-19 impacts due to oversupply of Dublin bay prawns with the highest impact occurring in April, with a decline in value of around 50%. By July, trade had recovered to previous levels, but further partial lockdowns ensured a 25% volume decline for the remainder of the year.

Of our major EU markets trade with Spain has been affected the least due to the strong demand for seafood in the retail sector. Major impacts can be seen in March at the height of the pandemic and again, in November and December when seafood sales in the hospitality sector predominate.

Exports to the UK actually increased in 2020, by 4% in volume and 9% in value driven by increased volumes of mackerel and fish meal with very strong price growth in salmon exports, particularly in the run up to Christmas.

Export Value to China
-71%  
- €31M in 2020

Exports to France
-€33M  
-22% growth
Covid 19 Market Value Impact

Top Export Markets Value Growth 2020

- **China**
  - Value: €13M in 2019, €115M in 2020
  - Value Growth: -71% in 2020

- **Spain**
  - Value: €53M in 2019, €115M in 2020
  - Value Growth: -18% in 2020

- **UK**
  - Value: €93M in 2019, €139M in 2020
  - Value Growth: +9% in 2020

- **France**
  - Value: €39M in 2019, €13M in 2020
  - Value Growth: -32% in 2020

- **Italy**
  - Value: €39M in 2019, €39M in 2020
  - Value Growth: -22% in 2020
Irish Fleet Performance

Economic Performance of Ireland’s offshore fishing fleet

The capacity of the national fleet has remained relatively stable over the period 2008 – 2019 albeit with small temporal fluctuations in the vessel numbers. The economic performance of Ireland’s offshore fleet (which comprises 220 vessels over 18 metres) during the period 2009 - 2020 indicates a general recovery since the height of the economic downturn in 2010. Since 2016 the offshore fleet has generated consistent strong gross profits above €50m per annum.

The fleet continues to face significant challenges, including increased operating costs as well as the sourcing and retention of skilled crew. While some segments of the offshore fleet are highly profitable, others demonstrate weak profitability reflecting the distinct issues facing different fisheries exploited by the offshore fleet, such as market access, global demand and supply factors.
### Economic Performance of the Offshore Fleet

#### Mid-water Trawlers
- **≥ 40 metres Pelagic**: 20 vessels, 1,374 days at sea, 231 FTE, 122,895,278 landings, 95,956,822 revenue, 139 fuel oil used per tonne landed, 52% gross profit margin, 52% net profit margin, High profitability.
- **24 - 40 metres Pelagic & Polyvalent**: 11 vessels, 1,109 days at sea, 74 FTE, 27,784,257 landings, 25,411,237 revenue, 100 fuel oil used per tonne landed, 17% gross profit margin, -4% net profit margin, Weak profitability.

#### Demersal Trawlers & Seiners
- **24 - 40 metres Polyvalent**: 68 vessels, 14,038 days at sea, 435 FTE, 16,544,248 landings, 56,728,897 revenue, 1,398 fuel oil used per tonne landed, 16% gross profit margin, 7% net profit margin, Reasonable profitability.
- **12 - 18 metres Polyvalent**: 40 vessels, 4,398 days at sea, 121 FTE, 3,300,239 landings, 11,224,900 revenue, 1,227 fuel oil used per tonne landed, 27% gross profit margin, 17% net profit margin, High profitability.
- **18 - 24 metres Polyvalent**: 47 vessels, 11,032 days at sea, 377 FTE, 21,137,702 landings, 51,745,099 revenue, 1,431 fuel oil used per tonne landed, 3% gross profit margin, -4% net profit margin, Weak profitability.

#### Drift & Fixed nets
- **18 - 24 metres Polyvalent**: 13 vessels, 1,911 days at sea, 52 FTE, 1,339,872 landings, 3,817,250 revenue, 1,893 fuel oil used per tonne landed, -1% gross profit margin, -10% net profit margin, Weak profitability.

#### Beam Trawlers
- **24 - 40 metres Beam Trawl**: 14 vessels, 3,399 days at sea, 99 FTE, 2,868,839 landings, 8,860,826 revenue, 2,462 fuel oil used per tonne landed, -3% gross profit margin, -5% net profit margin, Weak profitability.

#### Dredgers
- **24 - 40 metres Specific**: 7 vessels, 1,443 days at sea, 51 FTE, 2,161,023 landings, 12,255,595 revenue, 813 fuel oil used per tonne landed, 86% gross profit margin, 86% net profit margin, High profitability.

#### Subtotal
- **Total**: 220 vessels, 38,704 days at sea, 1,440 FTE, 198,031,458 landings, 265,998,626 revenue, 448 fuel oil used per tonne landed, 29% gross profit margin, 18% net profit margin, High profitability.

### Cost Structure and Profitability of the Irish Offshore Fleet

#### Cost Structure € millions
- Crew Wage
- Family & voluntary labour
- Fuel Costs
- Repairs & maintenance
- Variable costs
- Fixed costs
- Gross Profit

#### Gross Profit € millions
- '08: 100
- '09: 90
- '10: 80
- '11: 70
- '12: 60
- '13: 50
- '14: 40
- '15: 30
- '16: 20
- '17: 10
- '18: 0
- '19: 0
- '20*: 0

#### Profitability
- High
- Reasonable
- Weak
After lengthy negotiations throughout 2020, the EU and UK finally agreed a Trade and Cooperation Agreement (TCA) on the 24th December. As part of the TCA, the EU agreed to the transfer of quota to the UK, recognising the level of catches by EU vessels operating in UK waters.

The transfer of quota from the EU to UK is set out in an Annex to the TCA. It contains a list of 105 fish stocks of which the UK will receive an increased quota share for 64 of these over the next five years from 2021.

In total, the quota transfers across EU Member States are estimated at €199 million based on 2020 quota shares and prices. For Ireland this equates to an overall loss of quota of €43 million, which amounts to a 15% reduction compared to the overall value of the 2020 Irish quotas. In 2021, the reduction of quota is estimated at €26 million. The main impact on the Irish fleet is from Ireland’s two biggest fisheries, mackerel and Dublin Bay prawns, which see quota losses of 26% and 14% respectively.

In terms of the overall value of EU fleets, the estimated impact shows the Irish fleet with the highest losses in the short and longer term (9% in 2021 increasing to 15% by 2026). The impact on the French fleet leads to only a 4% reduction in fleet value while for the Netherlands, Germany and Belgium, the other main fleets affected, the estimated losses in fleet value are 9%, 8% and 8% respectively.

Undoubtedly, Ireland has been disproportionally impacted by the quota transfers under the TCA compared to other Member States and the loss of quota will have a significant impact on the longer-term viability of the Irish fleet.

**The impacts of Brexit**

- €43M **Loss in Irish Quota Value**
- -15% **Impact on Fleet Value**
Value of EU Quotas shared with UK

Impact on Value of EU Fishing Fleets

Value Impact by Main Stocks

LONG-TERM IMPACT

Mackerel All Areas
Sole North Sea
Dublin Bay Prawn Celtic Sea
Cod Arctic
Monkfish Celtic Sea
Herring North Sea
Hake Celtic Sea
Monkfish North Sea
Saithe North Sea
Monkfish West of Donegal
Others
Impact on Value of shared quota on EU fishing fleets

Impact on Total Value of EU Fleets
The seafood sector is a primary driver of rural economies around the coastline of Ireland and acts as an anchor in these locations around which other supporting service sectors develop. In many of the ports and hinterlands assessed in this study common characteristics describe regions of poor agriculture land, at significant distance from major urban settlements, with low levels of transport connectivity.

The 10 ports selected here are the ports with the highest volume and value of seafood landings in Ireland and are located all around the coastline in the northeast, east, southeast, southwest, west and northwest corners of the island. The hinterlands around these ports were designated as the local zones of influence of these ports through dialogue with local stakeholders and to capture all the major seafood activity in the localities.

From 859 seafood producers identified within the port hinterlands, 435 participated in the survey with a return rate of 50%.

The main findings were:

For every 4 employed in Seafood sector

3 EMPLOYED DOWNSTREAM

Highest employment multiplier (2.12)  Highest GVA multiplier (2.28)
KILLYBEGS HOWTH

Highest wage multiplier (2.17)
CASTLETOWNBERE
The seafood sector employs 2,133 FTEs, 1,006 directly (378 fishing, 146 aquaculture, 482 processing) and 1,127 downstream.

**Killybegs**
- Processing is main driver of seafood economy.
- Highest multiplier for employment; every 100 jobs generates 112 jobs downstream.
- In the Killybegs hinterland the seafood economy accounts for 29% of all economic activity and 45% of all employment.

**Ros an Mhil**
- Aquaculture main driver of seafood economy.
- Highest multiplier for wages; every €1,000 wages generates €1,000 in wages downstream.
- In the Ros an Mhil hinterland the seafood economy accounts for 12% of economic activity and 17% of employment.

**Dingle**
- Processing is main driver of seafood economy.
- Highest multiplier for wages; every €1,000 wages generates €940 in wages downstream.
- In the Dingle hinterland the seafood economy accounts for 8% of all economic activity and 12% of all employment.

**Castletownbere**
- Fishing is main driver of seafood economy.
- Highest multiplier for wages; every €1,000 wages generates €1,170 in wages downstream.
- In the Castletownbere hinterland the seafood economy accounts for 42% of all economic activity and 53% of all employment.

**Union Hall**
- Processing is main driver of seafood economy.
- Highest multiplier for wages; every €1,000 wages generates €1,040 in wages downstream.
- In the Union Hall hinterland the seafood economy accounts for 17% of economic activity and 18% of employment.

**Dunmore East**
- Fishing is main driver of seafood economy.
- Highest multiplier for wages; every €1,000 wages generates €670 in wages downstream.
- In the Dunmore East hinterland the seafood economy accounts for 6% of economic activity and 12% of employment.

**In the Killybegs hinterland the seafood economy accounts for 29% of all economic activity and 45% of all employment.**

**In the Ros an Mhil hinterland the seafood economy accounts for 12% of economic activity and 17% of employment.**

**In the Dingle hinterland the seafood economy accounts for 8% of all economic activity and 12% of all employment.**

**In the Castletownbere hinterland the seafood economy accounts for 42% of all economic activity and 53% of all employment.**

**In the Union Hall hinterland the seafood economy accounts for 17% of economic activity and 18% of employment.**

**In the Dunmore East hinterland the seafood economy accounts for 6% of economic activity and 12% of employment.**
The seafood sector employs 839 FTEs, 500 directly (240 fishing, 52 aquaculture, 208 processing) and 339 downstream.

The seafood sector employs 488 FTEs, 330 directly (202 fishing, 67 aquaculture, 61 processing) and 158 downstream.

The seafood sector employs 814 FTEs, 441 directly (199 fishing, 4 aquaculture, 238 processing) and 373 downstream.

The seafood sector employs 481 FTEs; 262 directly (182 fishing, 0 aquaculture, 80 processing) and 219 downstream.

Fishing is main driver of seafood economy.

Processing is main driver of seafood economy.

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Processing is main driver of seafood economy.

In the Kilmore Quay hinterland the seafood economy accounts for 36% of economic activity and 37% of employment.

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Fishing is main driver of seafood economy.

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In the Howth hinterland the seafood economy accounts for 6% of economic activity* and 8% of employment.

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In the Greencastle hinterland the seafood economy accounts for 11% of economic activity and 13% of employment.

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*NB: this does not include the contribution of seafood to tourism in Howth which is the main driver of the local economy here.
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.
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.
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.
Government investment is sourced from the Revised Estimates for Public Services of the Government of Ireland.
Economic performance of the fishing fleet is sourced from BIM’s Data Collection Framework data.
Data on quotas is sourced from the Official Journal of the European Union.
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.