BIM
Ireland's Seafood Development Agency

The Business of Seafood 2024

A Snapshot of Ireland's Seafood Sector

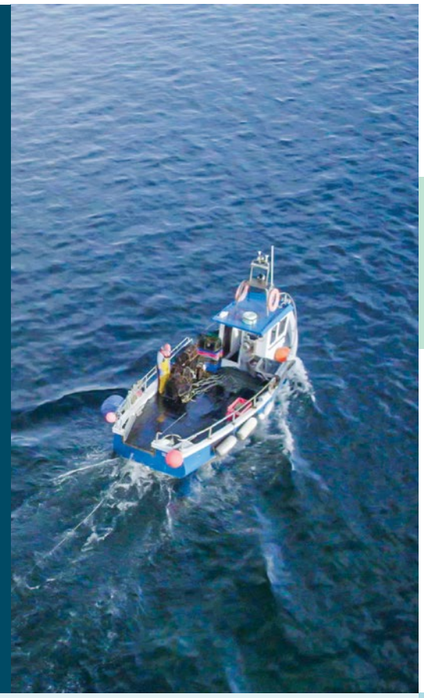
Rialtas na hÉireann
Government of Ireland

Arna chomhchistiú ag an Aontas Eorpach
Co-funded by the European Union

Total GDP of
Irish Seafood industry

€1.24 billion

GDP Growth +4% ↗



Main Export Markets

EU
€385M
+6% ↗

Total Employment

Fishing
2,681

Aquaculture
1,908

Fish Processing
3,407

Total Direct Employment
7,996

Value of Landings

€325M
Irish Fleet

€136M
Non-Irish Fleet

Total Value

Fishing
€461M

Aquaculture
€211M

Fish Processing
€947M

UK
€125M
+21% ↗

ASIA
€78M
+15% ↗

Total Direct and Indirect Employment
16,874

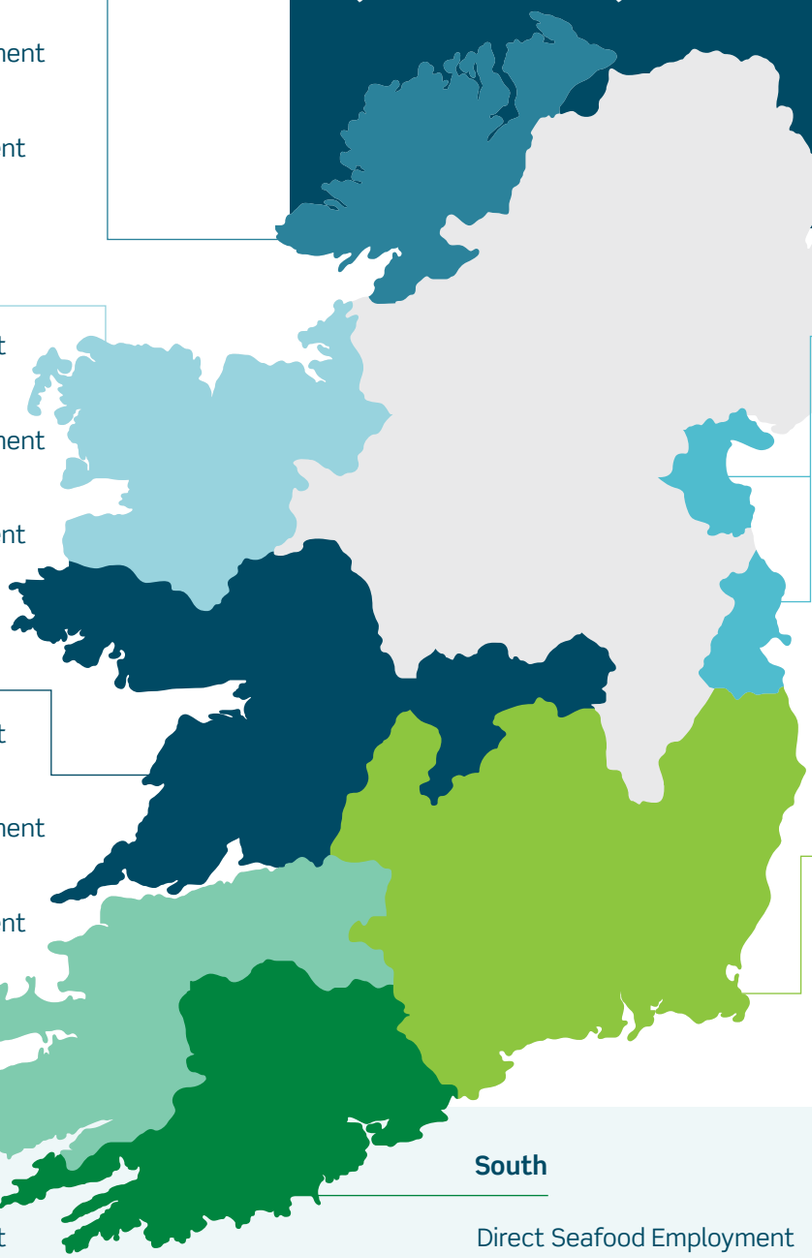
Domestic Sales

Total value of seafood sold
€528M
+3% ↗

Total foodservice value
€195M
+2% ↗

Total retail value
€333M
+3% ↗

Seafood Employment
by Region



National Total

Direct Seafood Employment	Direct and Indirect Employment	Share of Coastal Employment
7,996	**16,874**	**6%**

North

Direct Seafood Employment
1,688

Direct and Indirect Employment
4,270

Share of Coastal Employment
13%

North West

Direct Seafood Employment
531

Direct and Indirect Employment
1,320

Share of Coastal Employment
4%

West

Direct Seafood Employment
802

Direct and Indirect Employment
1,941

Share of Coastal Employment
6%

South West

Direct Seafood Employment
732

Direct and Indirect Employment
946

Share of Coastal Employment
2%

North East

Direct Seafood Employment
1,584

Direct and Indirect Employment
3,608

Share of Coastal Employment
9%

South East

Direct Seafood Employment
953

Direct and Indirect Employment
1,579

Share of Coastal Employment
4%

South

Direct Seafood Employment
1,705

Direct and Indirect Employment
3,210

Share of Coastal Employment
7%

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Foreword

Timmy Dooley TD
Minister of State for Fisheries and the Marine

I am pleased to welcome the publication of the Business of Seafood 2024. This report offers a comprehensive assessment of the seafood sector, and I am heartened by the trends it presents in many of the sectors.

Despite the very real challenges facing the sector including quota pressures, inflation, and biological pressures, the resilience and determination of industry operators across fishing, aquaculture, and processing are clearly reflected in these results.

With GDP from the seafood sector rising by 4% to €1.24 billion, and employment supporting over 16,000 direct and indirect jobs, this report affirms the critical contribution seafood makes to Ireland's coastal communities and national economy. I firmly believe that while challenges remain, there are significant opportunities ahead particularly through continued innovation, investment, and partnership.

I am especially encouraged by the growth in aquaculture production, with a 25% increase in value led by a strong recovery in salmon production. I look forward to the continued implementation of the National Strategic Plan for Sustainable Aquaculture Development 2030, which sets out a clear path to strengthen this sector in an environmentally sustainable and economically viable way.

> "Despite the very real challenges facing the sector including quota pressures, inflation, and biological pressures, the resilience and determination of industry operators across fishing, aquaculture, and processing are clearly reflected in these results."

This progress would not be possible without strategic and well-targeted investment. Through the Seafood Development Programme 2021–2027, the Government is delivering essential support to strengthen competitiveness, sustainability, and employment across the sector. The appointment of a dedicated Minister of State for Fisheries and the Marine reinforces this Governments commitment to ensure that these investments, underpinned by both national and EU funding, are enabling the industry to modernise, adapt, and remain resilient and forward-looking.

I would like to acknowledge the work of BIM in producing this important report and in supporting the seafood sector through its programmes and initiatives nationwide.

Timmy Dooley TD
Minister of State for Fisheries and the Marine

Executive Summary

Ireland's Seafood Economy in 2024:

Building resilience in Ireland's seafood economy

Levels of investment in 2024 signalled continued confidence in the sector at €422.6 million. Private investment increased to €190 million (+12%). Government investment was €23.2 million, a slight decline (-12%) compared to 2023.

Ireland's seafood sector in 2024 demonstrated resilience by navigating a challenging year shaped by external pressures and long-term structural change. Behind the 4% increase in GDP from 2023, bringing the sector's value to €1.24 billion, lies a story of industry adaptation in the face of constrained quotas, changing market dynamics, and growing spatial pressures at sea.

At the heart of Ireland's fishing sector is a heavy reliance on two core species: mackerel and *Nephrops*. In 2024, these species accounted for a combined total of €158 million, just under half of the value of all Irish landings, underlining the sector's vulnerability to quota shifts and market disruption to these species. While mackerel prices reached record highs, a 16% quota cut limited sustainable gains for many vessels. *Nephrops*, meanwhile, remained a stable source of income thanks to strong demand in European markets, but their importance also reveals the narrow base on which much of the demersal fishing sector now depends.

Aquaculture, by contrast, recorded strong growth with a 25% increase in value driven largely by the rebound of salmon production. After a poor harvest in 2023, output for salmon increased by 51%, lifting the overall tonnage output of the sector. However, this masks challenges elsewhere: rope mussel and oyster producers struggled with poor seed settlement, weak export markets, and high mortalities both demonstrating decreased production levels. Salmon remains the primary driver of profitability for Irish aquaculture and continues to shape the overall performance of the sector year on year.

The processing sector demonstrated a modest 3% drop in 2023 the latest year available for the sector. However, backed by over €37 million in support through the EU funded Brexit Adjustment Reserve (BAR) funding, the sector is now undergoing a major capital reinvestment. This includes upgrades in energy efficiency, automation, and product innovation, helping processors prepare for tighter supply chains and greater export competition. This wave of investment will reshape how and where value is added in the seafood supply chain.

Trade performance offered a clear signal of market strength. Exports rose by 9%, and the trade balance improved by €50 million, making a strong contribution to overall GDP. Imports rose sharply in volume (25%), driven by falling prices for species such as salmon, prawns, and tuna, a sign that processors and consumers are increasingly price-sensitive and seeking flexibility. This highlights the need for Ireland's seafood products to remain both premium and competitive in a global market.

Levels of investment in 2024 signalled continued confidence in the sector at €423 million. Private investment increased to €190 million (+12%) while Ireland's Seafood Development Programme, co-funded by the EU and the Government of Ireland investment stood at €233 million.

Looking ahead, 2025 is set to be another year of transition and adjustment. Demersal quotas in the northwest have improved, offering some regional uplift but other demersal stocks in the east and south have experiences reductions. While horse mackerel quota has risen again, some key pelagic stocks face cuts, and spatial pressures from offshore wind development, marine protected areas, and other marine users are intensifying. Reports from ICES and EU policymakers make clear that the squeeze on sea space is no longer a future concern - it's a current reality.

In parallel, the Irish seafood industry continues to face several challenges including labour shortages, rising operational costs, and continuing Brexit legacy issues. However, there is also cause for confidence including a strong export base, rising investment in processing opening innovation opportunities, and hopefully positive impacts for the demersal sector following from the voluntary permanent decommissioning scheme.

BIM's role is to guide and support the sector through this transition. Our focus is on helping businesses build resilience whether through selective gear trials, aquatech innovation, and capital investment support. The sector may be under pressure, but it is also strategically vital to Ireland's coastal communities and food system. With the right support, it can remain a dynamic and sustainable contributor to Ireland's blue economy.

Fisheries

+4% ↗
Total Value Irish Landings 2024

+11% ↗
Total Volume Irish Landings 2024

The Irish fishing sector continues to deliver significant value to coastal communities and the national economy.

In 2024, all landings into Irish ports increased by 11%, reaching nearly 300,000 tonnes. However, one-third of this volume came from foreign-flagged vessels, largely reflecting pelagic landings into Killybegs. For Irish vessels, the story was one of mixed results. Pelagic species such as mackerel and blue whiting continued to dominate, particularly in volume. Mackerel prices reached record highs due to tight supply and strong global demand, but quota cuts limited the overall benefit to the fleet.

At the same time, *Nephrops* remained a lifeline for many vessels, especially in demersal fisheries. Strong prices, especially for larger grades, helped to offset reduced activity in other segments. *Nephrops* and mackerel alone now account for nearly a half of the total value of landings, a reminder that the sector's performance is closely tied to quota allocation and biological variability for a handful of key stocks.

Elsewhere, whitefish landings were constrained by early-season weather and limited quota access and overall, the demersal sector saw a 14% decrease in value. Monkfish, hake, and megrim remained economically important, particularly in southern ports. Inshore and shellfish fisheries provided stability in some areas, though market conditions for crab and lobster remained difficult, particularly for large grades and bulk exports.

Looking ahead, improved quotas for certain demersal species in the northwest offer hope, but the sector will continue to face rising operational costs, crewing challenges, and increasing competition for space at sea, including from offshore renewable energy. BIM will continue to support fishers in building resilience through innovation, training, and selective fishing practices that allow businesses to adapt to these changing conditions

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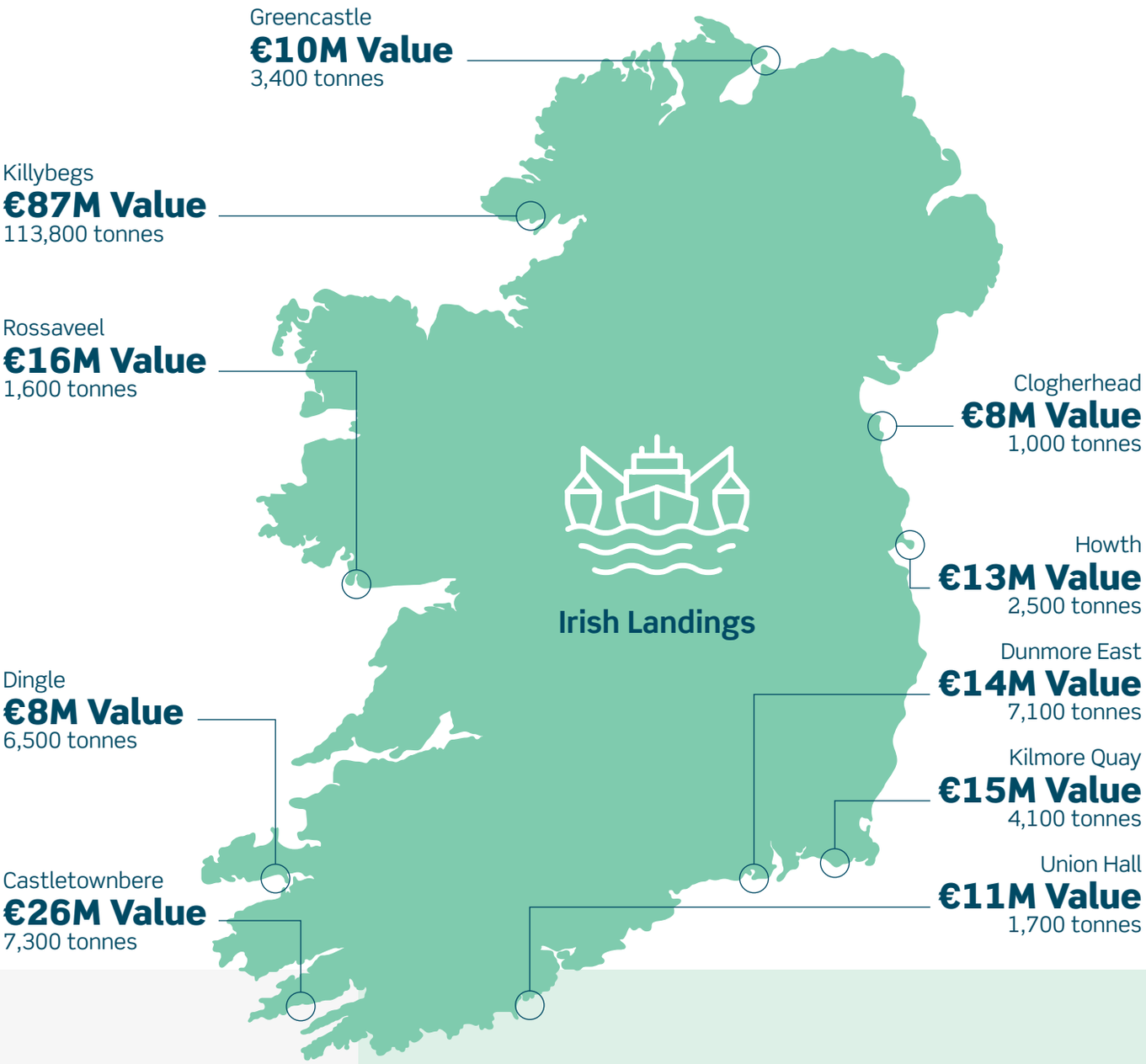
Fisheries Regional
Value & Volume of Irish Landings



All other ports

€118M

Value

58,100 tonnes

Total value in 2024

€324M

+4% ↑

Total volume

207,100

tonnes

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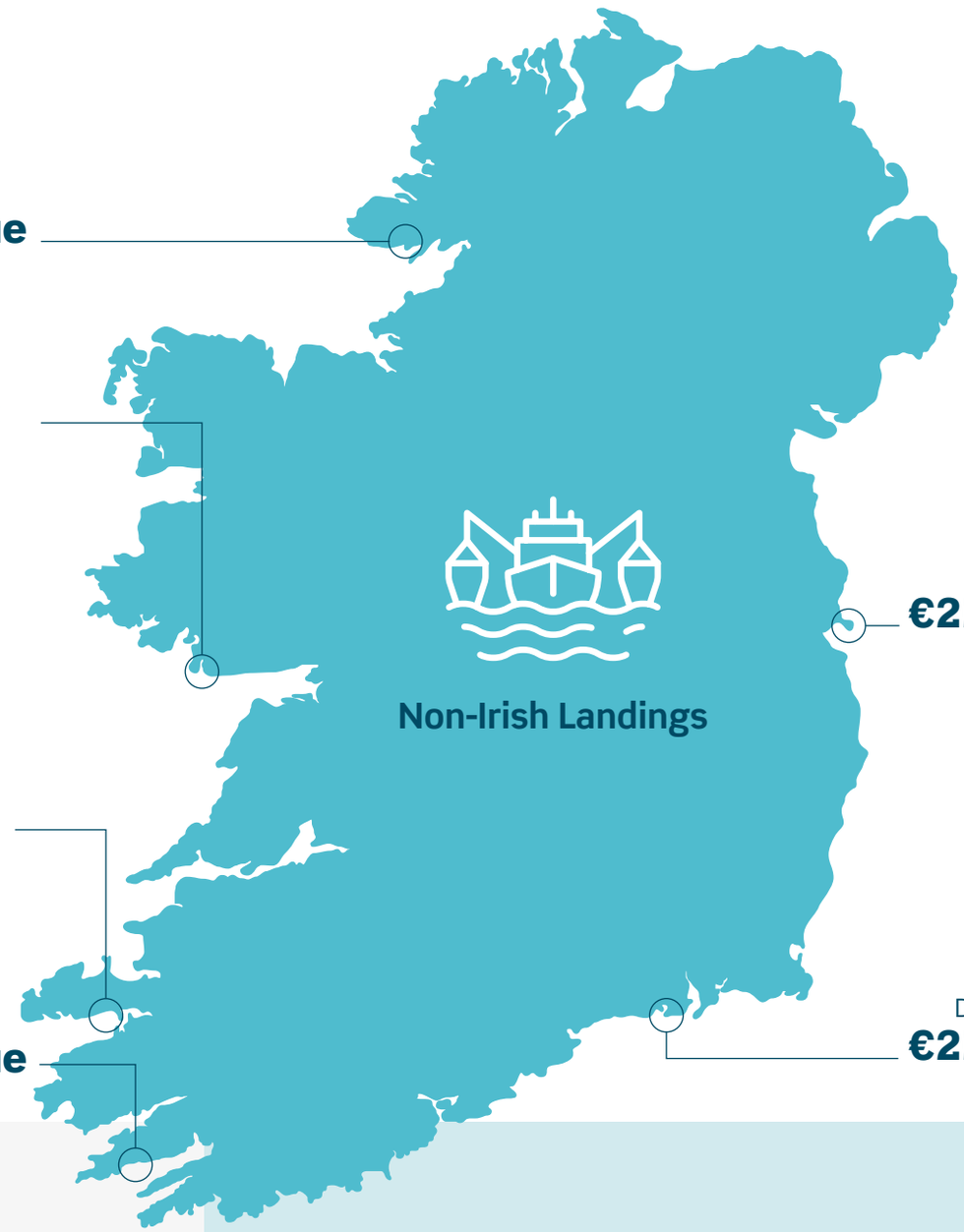
Value & Volume of Non-Irish Landings



Killybegs
€20M Value
62,500 tonnes

Rossaveel
€1M Value
100 tonnes

Howth
€2M Value
400 tonnes

Dingle
€9M Value
2,300 tonnes

Castletownbere
€89M Value
23,500 tonnes

Dunmore East
€2M Value
300 tonnes

All other ports
€12M
Value
2,600 tonnes

Total value in 2024
€136M
-13% ↓

Total volume
91,900
tonnes

Fishery landings

Top 5 species value

1

Mackerel

€82 million

+4% ↗

2

Nephrops

€76M

+9% ↗

3

Crab

€20M

0% ↗

4

Blue Whiting

€17M

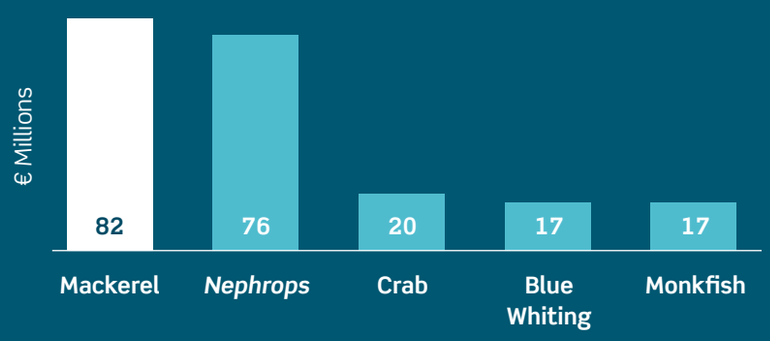
+21% ↗

5

Monkfish

€17M

-11% ↘



Fishery landings

Top 10 pelagic species

1 Mackerel
€82 million
+4%

2 Blue Whiting
€17M
+21%

3 Tuna
€10M
+100%

4 Boarfish
€6M
+50%

5 Sprat
€5M
+410%

6 Herring
€3M
+50%

7 Horse mackerel
€1M
+22%

8 Sardines
€1M
+4%

9 Swordfish
€0.3M
+24%

10 Bluefin Tuna
€0.1M
-22%

Fishery landings

Top 10 demersal species

1 Monkfish
€17 million
-11% ↘

2 Hake
€12M
+9% ↗

3 Haddock
€9M
-25% ↘

4 Megrim
€5M
-17% ↘

5 Sole
€3M
0%

6 Cod
€2M
0%

7 Whiting
€1M
-50% ↘

8 Turbot
€1M
-27% ↘

9 John dory
€1M
-13% ↘

10 Lemon Sole
€1M
-34% ↘

Fishery landings

Top 10 shellfish species

1 ***Nephrops***
€76 million
+9% ↗

2 **Crab**
€20M
0%

3 **Lobster**
€13M
+18% ↗

4 **Whelk**
€8M
-11% ↘

5 **Scallop**
€6M
-54% ↘

6 **Shrimp**
€5M
+25% ↗

7 **Razor Clam**
€5M
-17% ↘

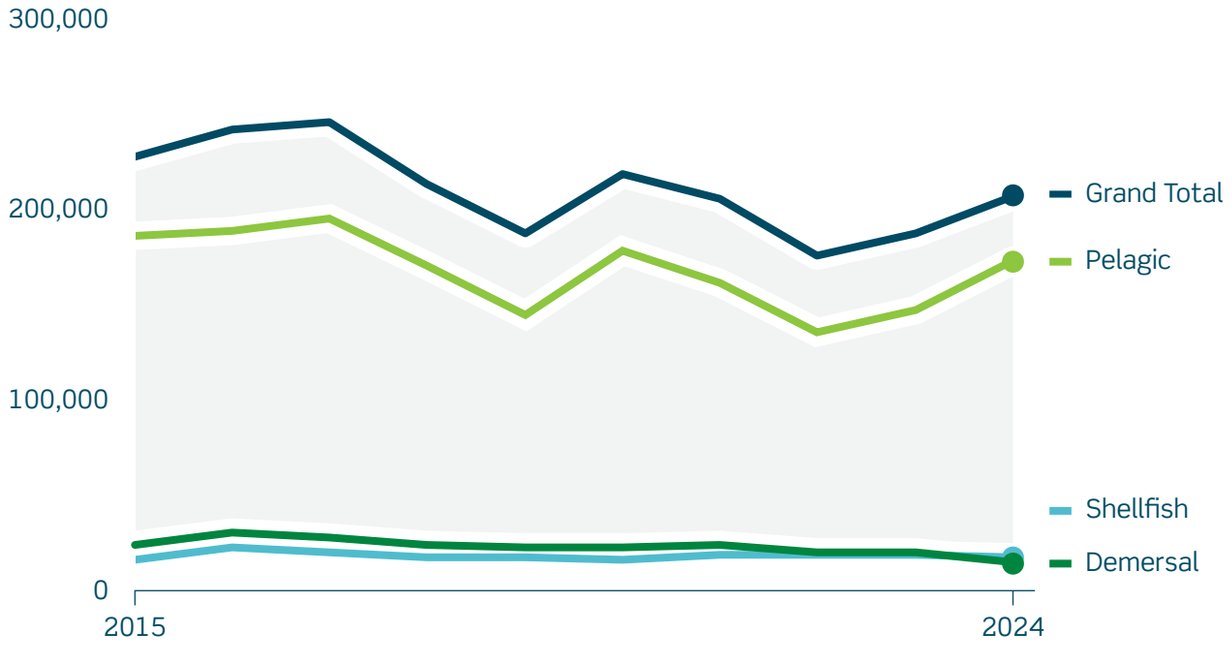
8 **Spiny Lobster**
€3M
+50% ↗

9 **Oyster**
€1M
+208% ↗

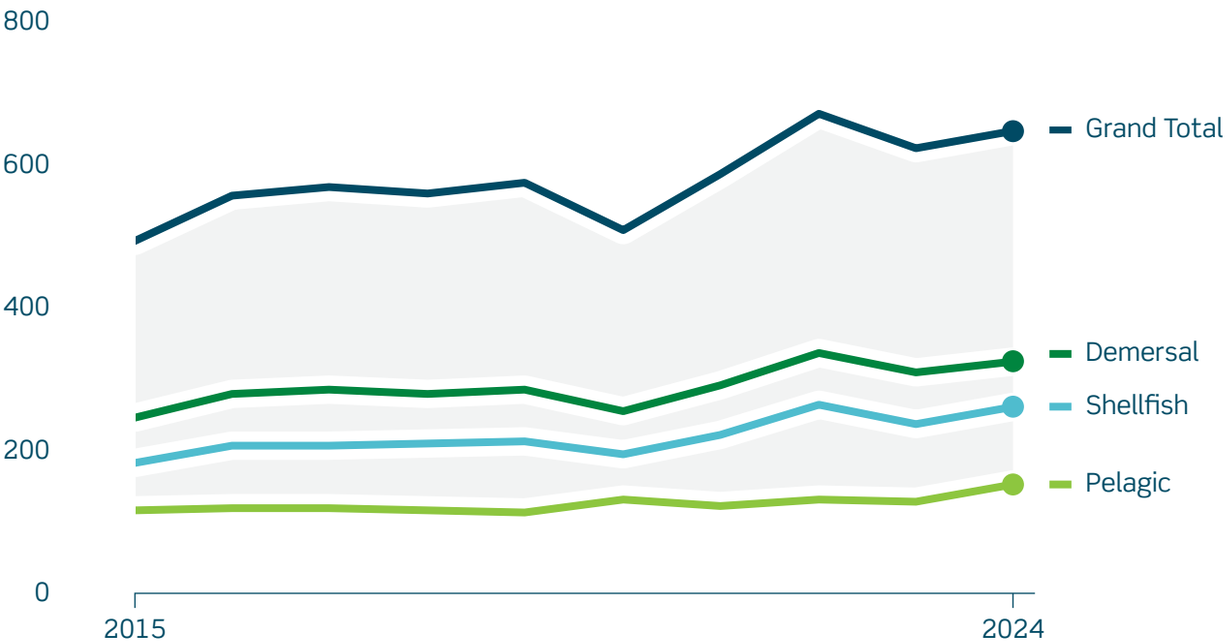
10 **Velvet Crab**
€1M
+10% ↗

Time Series of
Fishery Landings, 2015-2024

Volume of Fish Landing Categories 2015-2024 (Tonnes)



Value of Fish Landing Categories 2015-2024 (€M)



Aquaculture

+25% ↗
Total Value
Increase 2024

+6% ↗
Total volume
Increase 2024

+18% ↗
Average
Price Growth

Aquaculture remains a central pillar of Ireland's seafood economy, with the potential to deliver employment and revenues to many bays and their hinterlands. Aquaculture performed strongly in 2024, growing by 25% in value and 6% in volume, largely due to the rebound in salmon production.

After a low output year in 2023, salmon volumes bounced back by over 50%, reaching over 14,000 tonnes, the highest since 2017. This alone accounted for a 44% increase in the value of salmon production. However, such dominance comes with risk. Fluctuations in salmon harvests can distort the overall view of aquaculture performance, obscuring underlying challenges in the sector. Those challenges were clear in other parts of the sector in 2024.

Rope mussel producers, particularly in the southwest faced several challenges including reduced seed availability, poor prices, and tube worm fouling which reduced the marketability of some stock. Rock oysters saw weaker prices and lower volumes, partly due to a difficult French market and some mortality. Seabed mussels, by contrast, performed strongly during 2024, with value rising by 39% on the back of higher prices and improved yields. However, this growth is not expected to continue, as shortages in mussel seed during 2023 and 2024 will likely result in lower production volumes over the next two years.

Total employment in aquaculture fell by 4%, though full-time jobs held steady. In some regions, such as the North and West, salmon helped drive growth. In others, declines in mussel or oyster production hit local output and income.

Looking ahead, access to spat/seed and stable environmental conditions will be essential, particularly for bivalve producers. BIM continues to work with and support the sector through its work programmes and grant schemes to help the industry address the challenges it faces. A more balanced aquaculture sector where shellfish, seaweed, and new species complement salmon is both a challenge and a long-term goal.

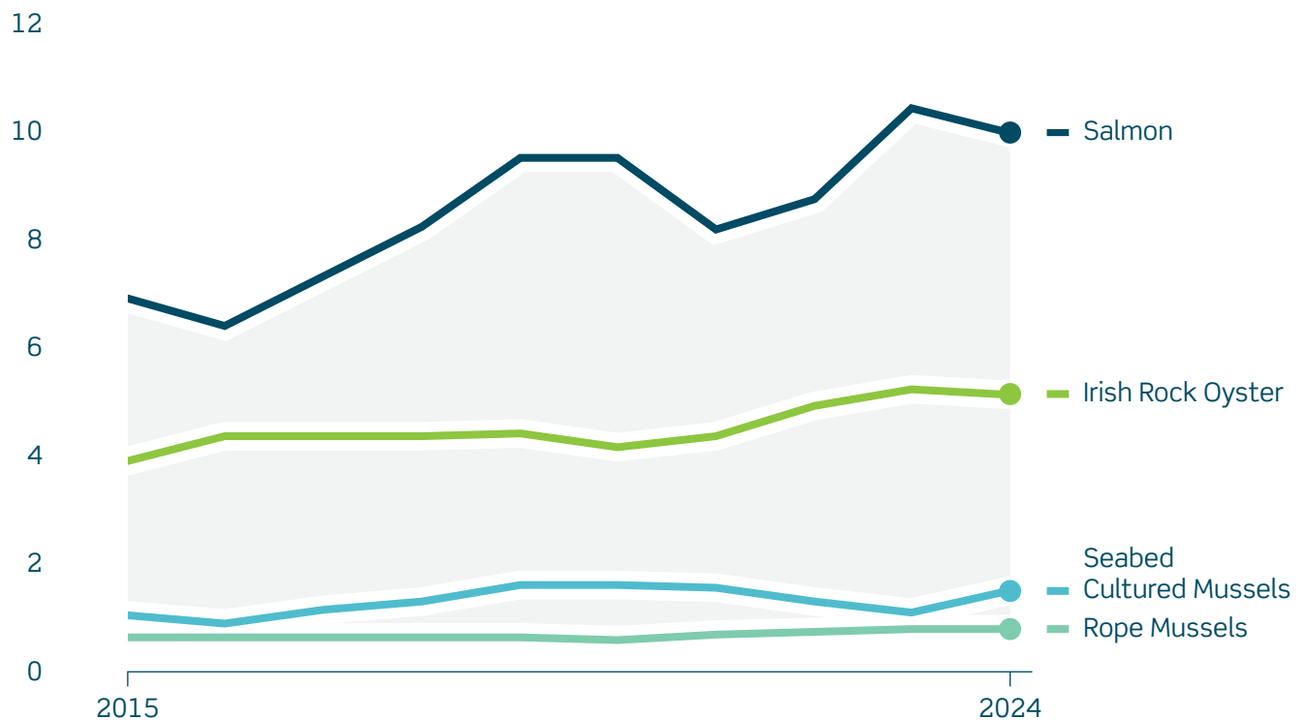
Breakdown of
Aquaculture Production

1	Salmon	€142M	+44%
2	Irish Rock Oyster	€49M	-2%
3	Rope Mussels	€7M	-20%
4	Seabed Cultured Mussels	€6M	+39%
5	Other Shellfish	€2M	-25%
6	Other Finfish	€3M	+31%
7	Seaweed	€0.5M	-24%

€211M
total value
in 2024

+25% Value Growth

Average Price Main Aquaculture Species, 2015-2024 (€ / KG)



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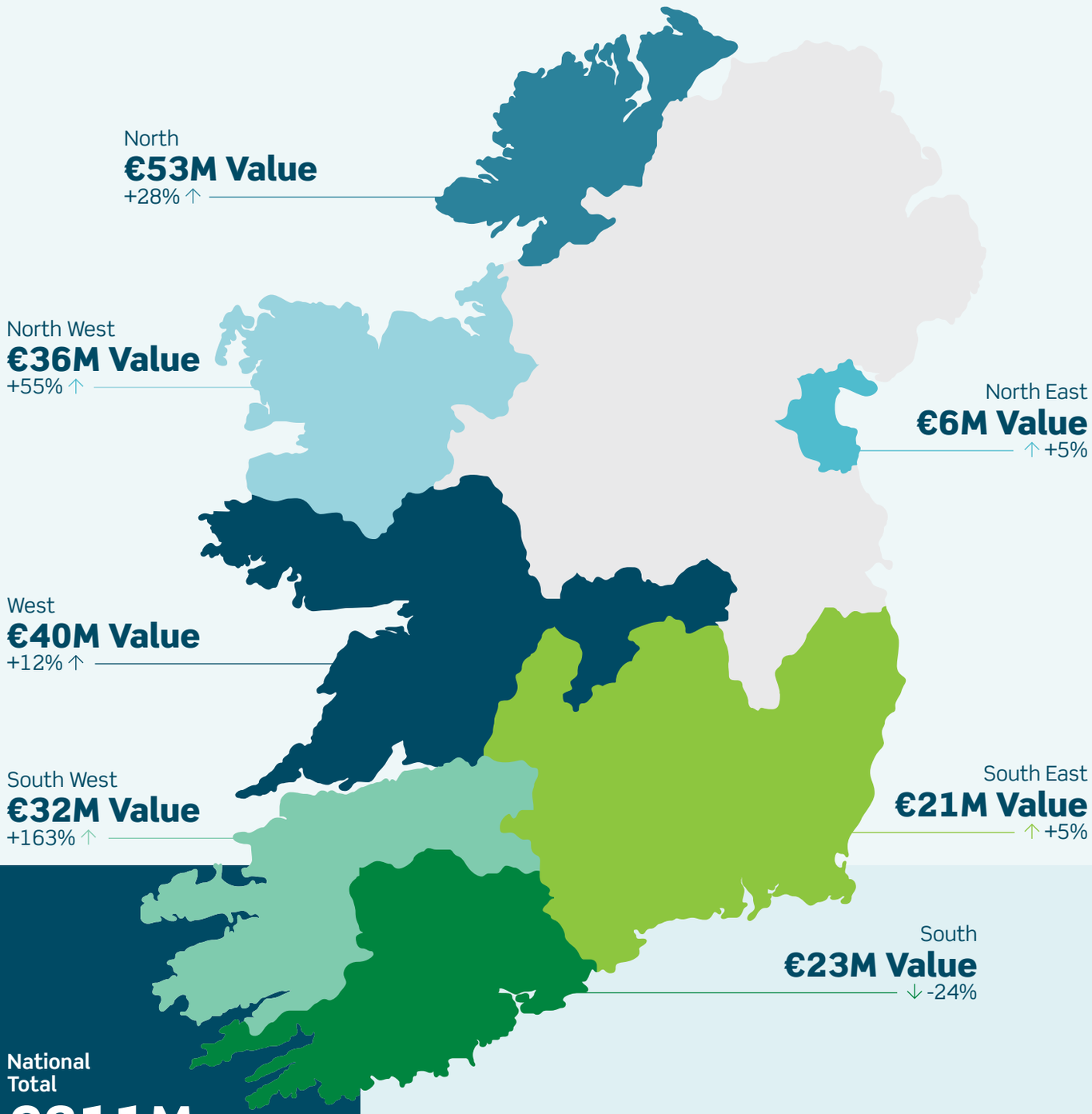
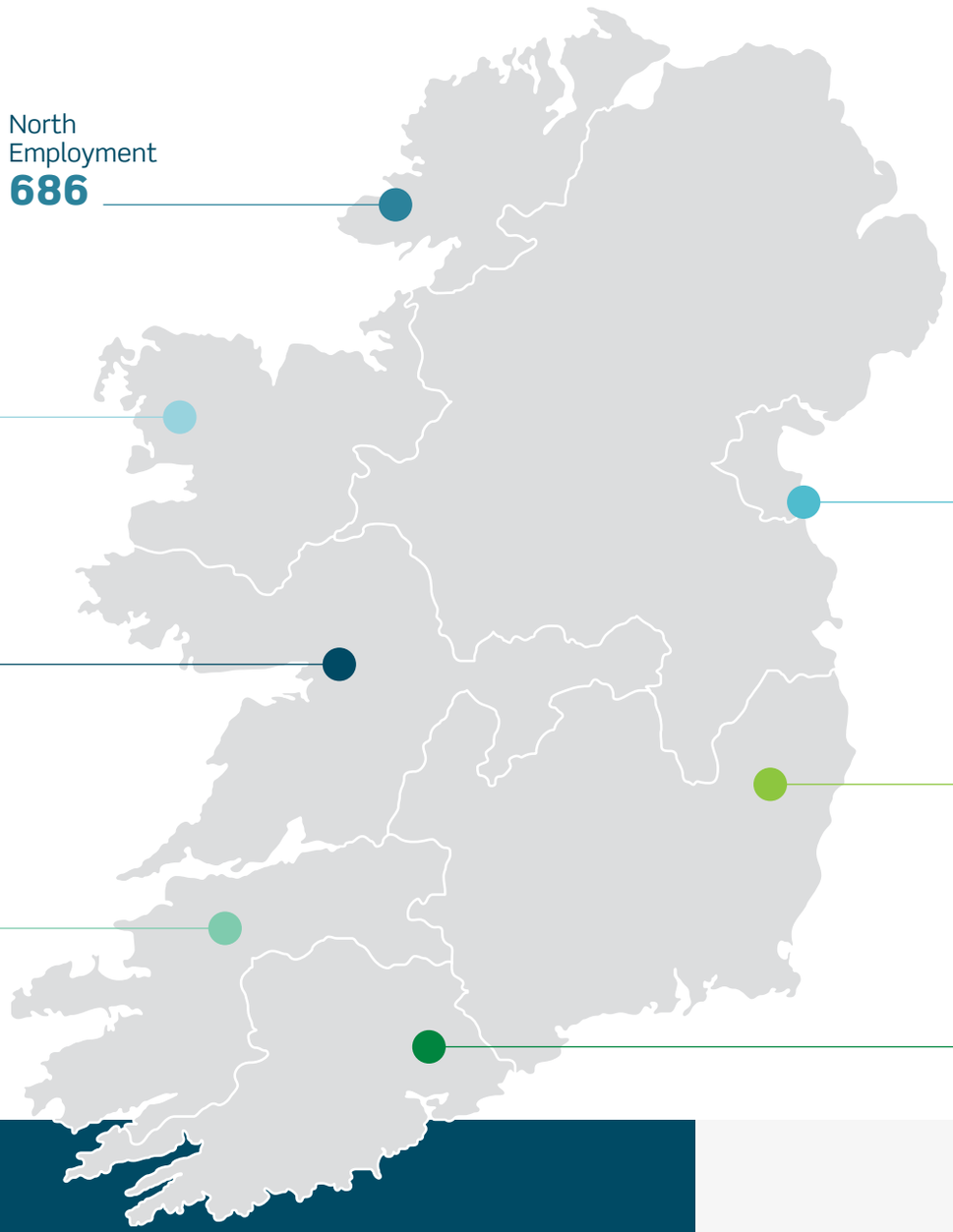
Regional Aquaculture Output
Value in 2024



National Total
€211M
+25% ↑

Regional Aquaculture Output
Employment in 2024



Total Employment
1,908

Processing

-3% ↘
Total Value Change 2023

-1% ↘
Total Employment Change 2023

Ireland's seafood processing sector is changing, not just in size, but in its structure. The most recent data, from 2023, shows a modest decline in value (-3%) and employment (-1%), but these figures do not tell the full story. What's happening behind the scenes is also important: a wave of investment is transforming the industry, supported by significant public capital.

The EU funded Brexit Adjustment Reserve (BAR) fund, delivered €37 million in 2023. A further €1.3 million was delivered through Ireland's Seafood Development Programme, co-funded by the EU and the Government of Ireland in 2024. This enabled helping processors to invest in energy efficiency, automation, cold storage, and product development and is helping the sector prepare for future challenges while strengthening its position in international markets.

Processing remains a major employer across coastal Ireland, with over 3,200 people in full-time work in 2023. Multispecies processors working with salmon, whitefish, and other species now dominate, generating the majority of the sector's value and employment. Pelagic and shellfish processors struggled with falling volumes and price volatility but have remained resilient and continue to adapt to these challenging business conditions.

Regionally, the northeast (including Dublin) continues to lead in value and employment, but growth is also being seen in the west and south where modernisation is taking hold.

With raw material supply becoming increasingly uncertain, particularly due to reduced pelagic quotas and pressure on shellfish stocks, investment in efficiency, product innovation, and sustainability is now essential. BIM will continue to support this transition and ensure that Ireland's processors are well positioned to meet the demands of tomorrow's seafood markets.

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Main Fish Processing Sectors
2023

Multi-species/ Whitefish
€648M Value

Companies **58**
Employment **2,189**

Pelagic
€122M Value

Companies **10**
Employment **323**

Shellfish
€103M Value

Companies **13**
Employment **529**

Salmonids
€74M Value

Companies **14**
Employment **236**

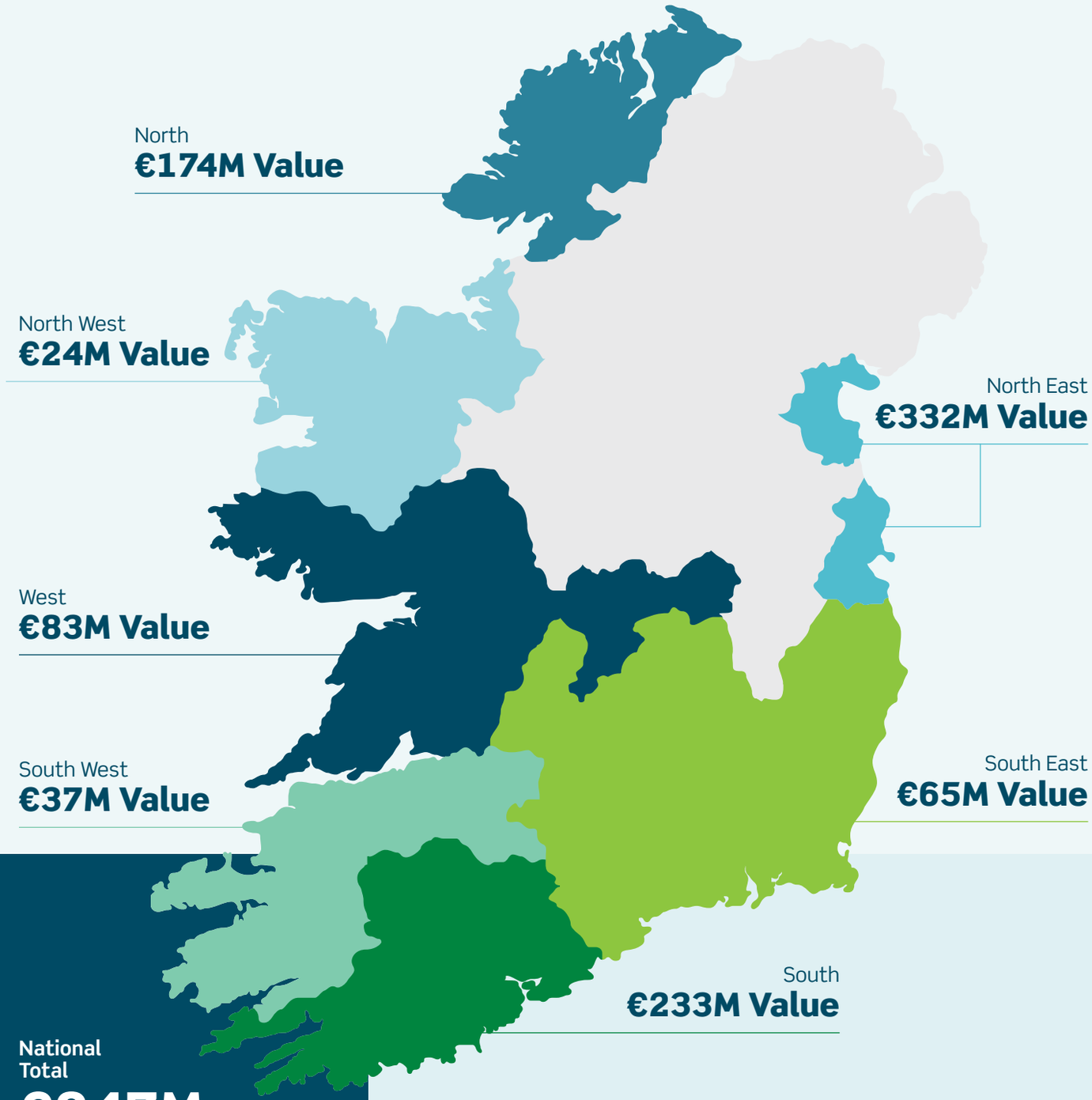
Processing Sector
€947M
Total Value

95
Companies

3,277
Employment

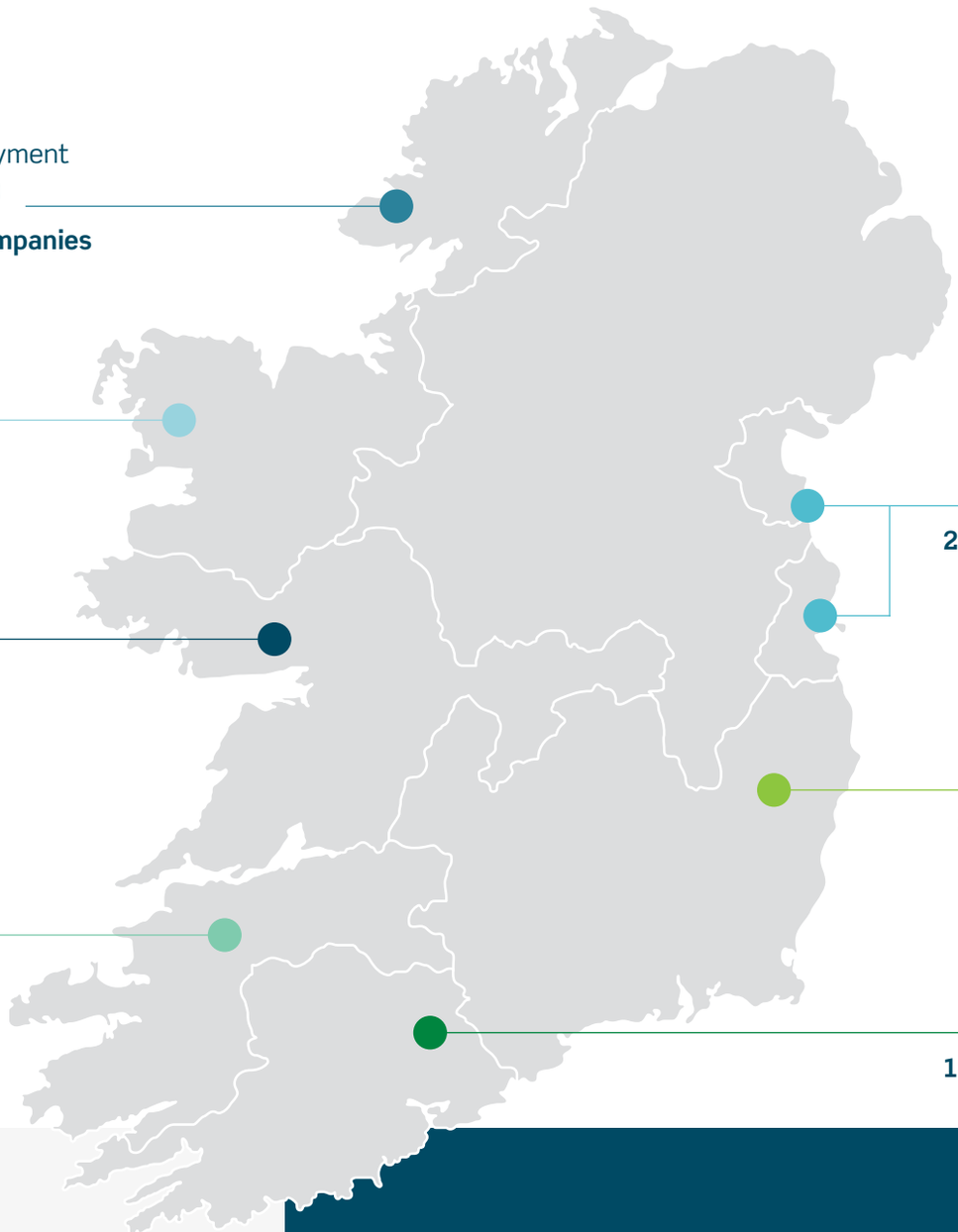
Regional Fish Processing Output

Value in 2023



National Total
€947M

Regional Fish Processing Output
Employment & Companies in 2023



North
Employment
530
19 Companies

North West
Employment
152
5 Companies

West
Employment
212
13 Companies

North East
Employment
1,149
21 Companies

South East
Employment
279
8 Companies

South West
Employment
183
11 Companies

South
Employment
772
18 Companies

Total Number of Companies
95

Total Employment
3,277

Trade: Imports and Exports

+25% ↗
Total Volume Increase of Imports

+8% ↗
Total Volume Increase of Exports

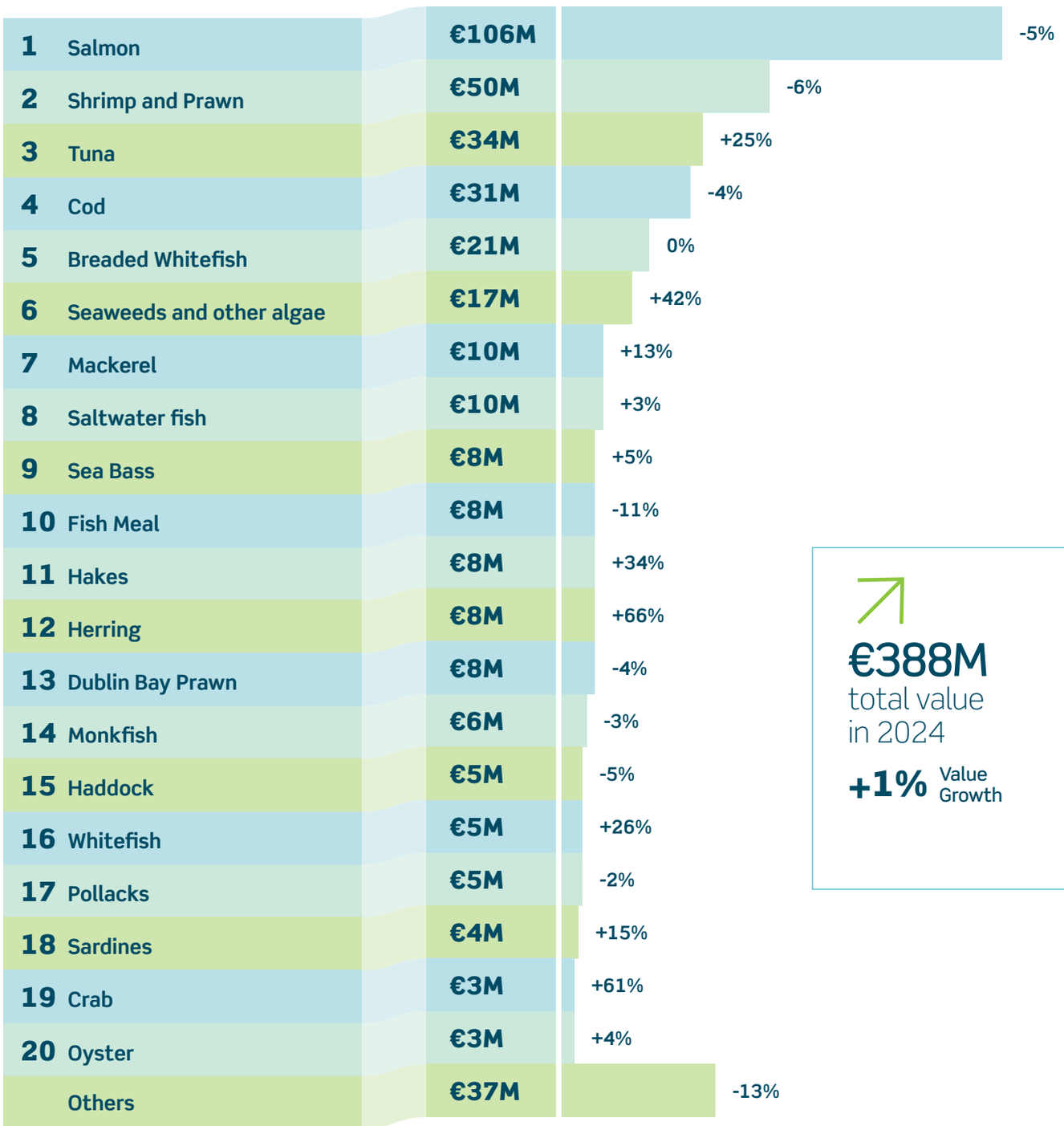
Trade remained strong for the Irish seafood economy in 2024. Exports increased by 9% in value, led by salmon, mackerel, and Nephrops. At the same time, imports surged in volume by 25%, but only increased 1% in value, reflecting steep price drops for key species like salmon, prawns, tuna, and frozen salmon.

The trade balance remained an important indicator in 2024, with Ireland recording a €50 million gain in net export value, contributing to overall GDP. Export growth was recorded across key markets including the EU, the UK, and Asia, supported by strong salmon sales and steady demand for Nephrops and crab. In contrast, weaker prices for shellfish, including Nephrops, crab, oysters and mussels, particularly in bulk and lower-grade categories, continued to limit returns in the shellfish trade. The increase in import volumes reflects consumer and processor sensitivity to price, especially in the retail and foodservice channels. More affordable imports are filling gaps in species supply and cost structures. But this also underlines the importance of value-added Irish exports that can stand out in premium and niche markets.

Looking ahead, the challenge will be to maintain Ireland's reputation as a high-quality producer while staying agile in a global market. Trade development, branding, and new product formats will be key. BIM will continue to support producers and processors to navigate these international opportunities.

Over time there is a clear strong correlation between price and volume for the main species imported.

Top 20 Imported Species
by Value



€388M
total value
in 2024

+1% Value Growth

Main Import Partners

Top 10 import countries

1

United Kingdom

€80M ↘

-10%

Salmon
31%

Monkfish
7%

Fish Meal
7%

2

Netherlands

€69M ↗

+10%

Salmon
25%

Shrimp and Prawn
17%

Cod
10%

3

Sweden

€25M ↘

-19%

Salmon
94%

Fish Fats and Oils
3%

Saltwater fish
2%

4

Iceland

€23M ↗

+49%

Seaweeds and other algae
64%

Cod
17%

Salmon
7%

5

France

€21M

0%

Salmon
21%

Shrimp and Prawn
16%

Saltwater fish
14%

6

Norway

€20M ↘

-1%

Salmon
95%

Crab
4%

Cod
1%

7

Spain

€18M ↗

+28%

Tuna
23%

Shrimp and Prawn
12%

Nephrops
11%

8

Denmark

€17M ↘

-12%

Shrimp and Prawn
22%

Cod
16%

Breaded Whitefish
16%

9

Germany

€16M ↘

-43%

Breaded Whitefish
54%

Salmon
12%

Cod
11%

10

China

€12M ↘

-9%

Cod
56%

Pollack
13%

Shrimp and Prawn
8%

4
F2

Top 20 Exported Species
by Value

1	Salmon	€132M	+23%
2	Mackerel	€94M	-3%
3	*Nephrops*	€74M	+9%
4	Crab	€46M	+8%
5	Seaweeds and algae	€40M	+10%
6	Oyster	€37M	-14%
7	Fish Meal	€35M	+23%
8	Lobsters	€29M	+23%
9	Shrimp and Prawn	€21M	+7%
10	Blue Whiting	€19M	+39%
11	Mussels	€17M	-5%
12	Whelk	€16M	-3%
13	Monkfish	€14M	+8%
14	Fish Fats and Oils	€11M	+23%
15	Tuna	€10M	+38%
16	Horse Mackerel	€8M	+14%
17	Clams and Cockles	€8M	-26%
18	Megrim	€7M	-14%
19	Scallops	€7M	-2%
20	Cod	€6M	+12%
	Others	€46M	+9%

€677m
total value
in 2024

+9% Value Growth

Main Export Partners

Top 10 export countries

1

France

€141M ↗

+2%

Salmon	Oysters	Crab
34%	15%	12%

2

United Kingdom

€125M ↗

+22%

Fish Meal
23%

Salmon
18%

Fish Fats and Oils
9%

3

Italy

€64M

0%

Dublin Bay Prawn
77%

Shrimp and Prawn
6%

Mackerel
5%

4

Spain

€59M ↗

+6%

Crab
16%

Monkfish
14%

Lobster
11%

5

Poland

€39M ↗

+65%

Salmon
84%

Mackerel
11%

Seaweeds and algae
3%

6

China

€28M ↗

+52%

Crab
27%

Dublin Bay Prawn
25%

Mackerel
9%

7

Nigeria

€28M ↘

-32%

Mackerel
49%

Blue Whiting
47%

Herring
3%

8

Netherlands

€22M ↗

+69%

Mussels
26%

Salmon
23%

Fish Meal
15%

9

Japan

€18M ↗

+12%

Mackerel
73%

Horse Mackerel
14%

Seaweeds and algae
5%

10

Germany

€17M ↘

-17%

Salmon
53%

Mackerel
22%

Seaweeds and algae
9%

Retail and Foodservice

€528M
Value of seafood sales in 2024

€333M
Total value of seafood sold in retail sector

€195M
Value of seafood sold in foodservice sector

Retail seafood sales in Ireland reached €333 million in 2024, marking a 3% increase on the previous year. This growth was driven by small gains in both prices and volumes. After several years of decline, purchase volumes rose slightly, with a 1% increase recorded. A total of 93% of Irish households purchased fresh and frozen seafood during the year. While this remains a strong level of engagement, it is down from a peak of 96% in 2017, indicating a shift in buying habits.

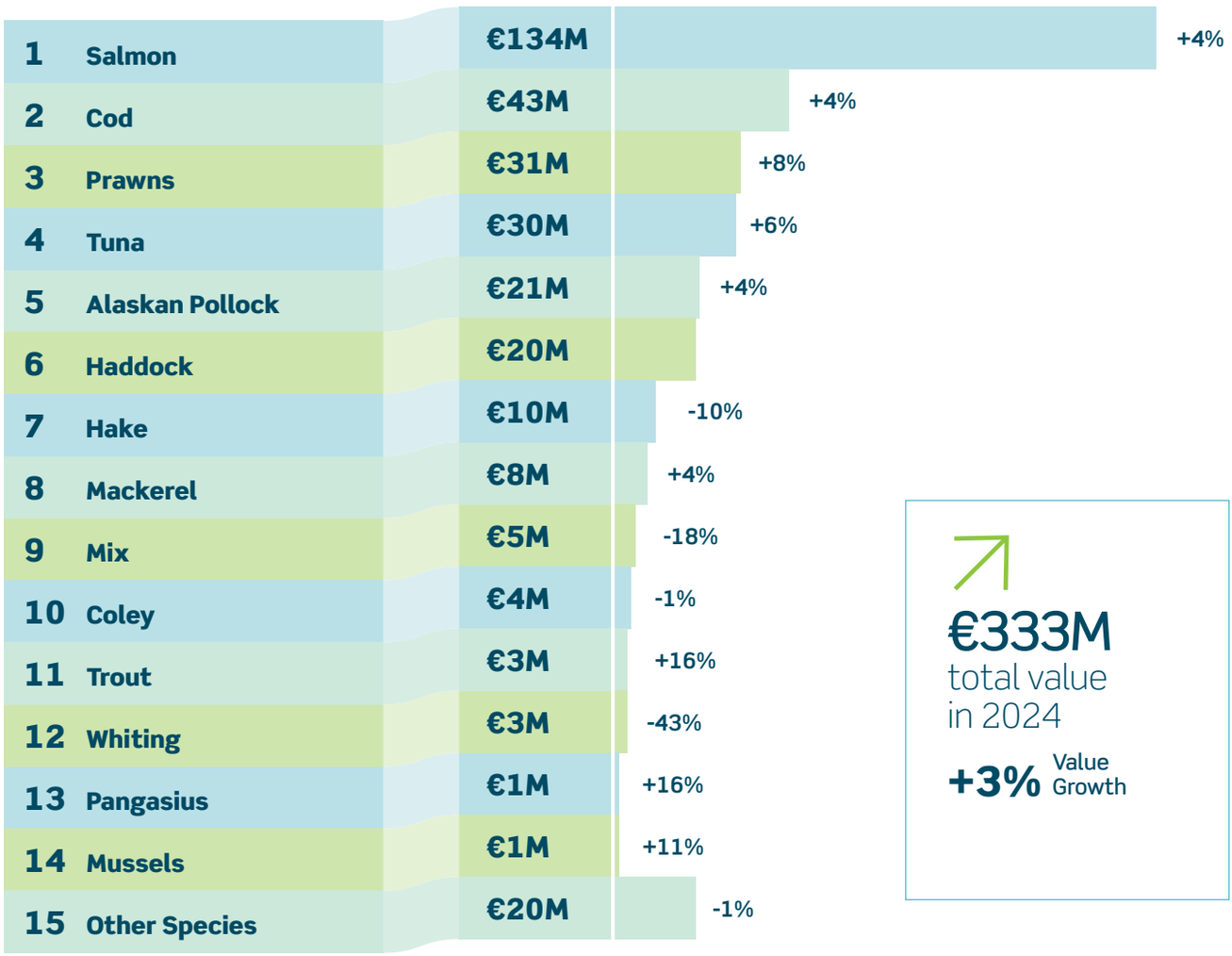
Growth in retail value was concentrated in a small number of species. Salmon remained the top seller, generating €134 million in sales and accounting for 40% of the total retail market. Prawns, tuna, and haddock also recorded notable growth, reflecting continued demand for accessible, versatile seafood products. In contrast, whiting, hake, and mix experienced significant declines, pointing to reduced consumer interest in less familiar or less widely available species.

Frozen and prepacked products continued to perform well, particularly for species like warm water prawns, haddock, and tuna. Loose fresh seafood declined, in line with broader trends in convenience, portion control and longer shelf life. These shifts suggest that consumers are becoming more selective, favouring products that offer ease of preparation and consistency in quality.

In the foodservice sector, seafood sales increased at a slower pace and were outperformed by other proteins such as poultry and beef. However, the wider foodservice market in the Republic of Ireland reached €7.34 billion in 2024, continuing its recovery from pandemic-related disruptions. This presents a growing opportunity for Irish seafood, particularly where quality, origin and sustainability are valued by chefs and consumers alike.

BIM continues to support the sector through consumer research, product innovation and supporting Bord Bia's targeted promotional campaigns aimed at growing demand and improving visibility across both retail and hospitality channels.

Top Retail Species
by Value 2024



€333M
total value
in 2024

+3% Value Growth

Aquatech

+6% ↗
Total Employment Change 2023

-1% ↘
Total Value Change 2023

The aquatech sector in Ireland continues to develop as a vital part within Ireland's economy. It includes a wide range of companies providing products and services such as marine engineering, genetics, bioscience, feed additives, data technologies, and health solutions. Many of these innovations are directly linked to the global aquaculture sector, particularly in salmon and shrimp production, while others serve the needs of Irish shellfish and seaweed operators.

In 2023, the sector comprised of 76 companies with an overall estimated value of €165 million (-1%) employing 905 full-time jobs employment (+ 6%). This reflects a continued investment in technical and scientific capacity, and the sector's ability to attract and retain skilled workers across coastal and urban regions.

Seaweed remains a key focus, accounting for over one-third of active companies, more than two-thirds of sectoral value, and around half of total employment. Other growing areas include bioscience, digital monitoring tools, environmental services, and specialist equipment with a noticeable increase in activity from companies with backgrounds in agriculture and fisheries, applying their expertise to aquaculture.

As demand for sustainable and efficient aquaculture production grows globally, Ireland's aquatech sector is well placed to contribute both domestically and internationally. BIM continues to work with industry, researchers and regional clusters to foster innovation, support investment, and ensure aquatech solutions are aligned with the practical needs of producers and processors.

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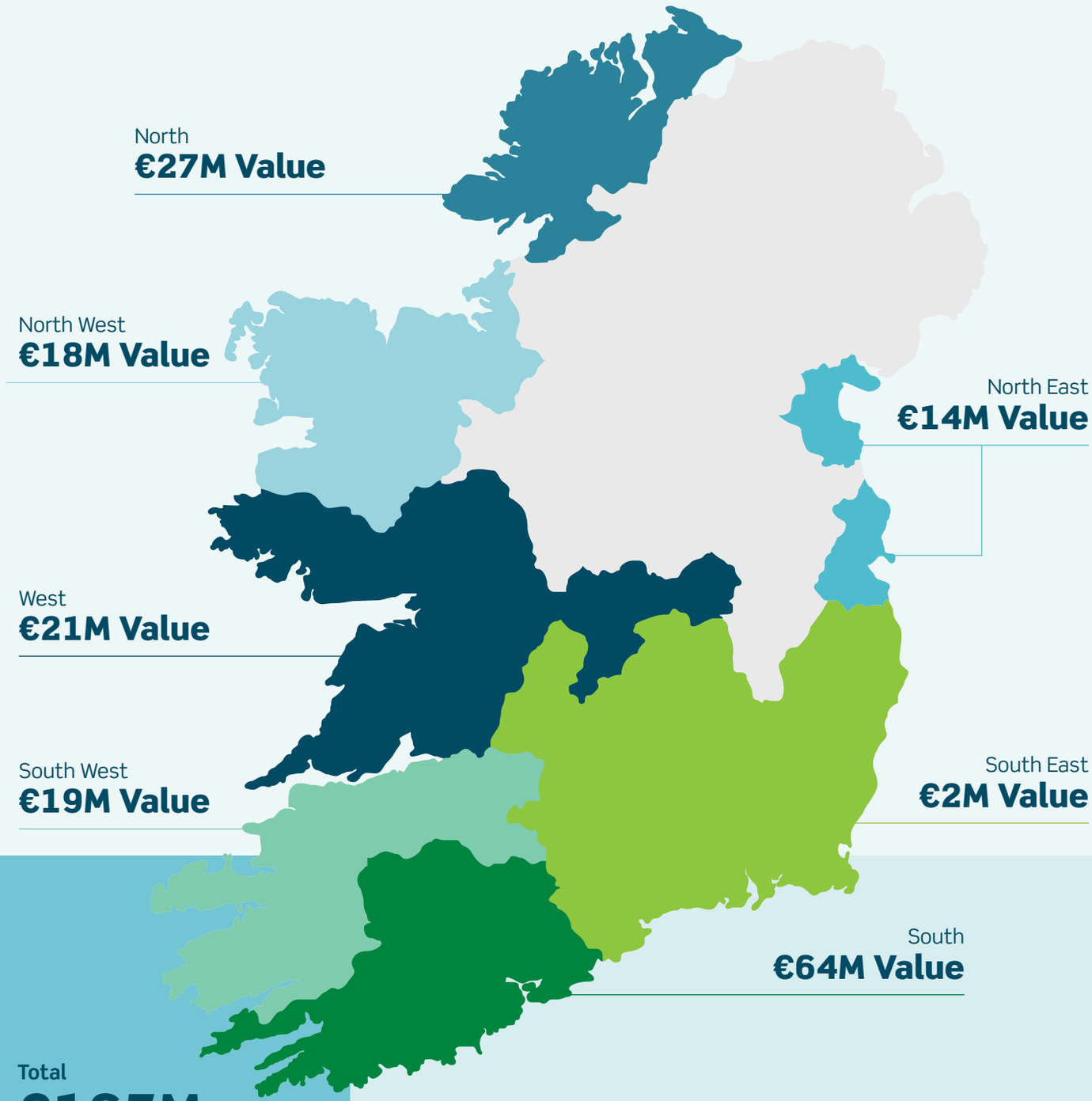
Regional Aquatech Output
Value in 2023



North
€27M Value

North West
€18M Value

North East
€14M Value

West
€21M Value

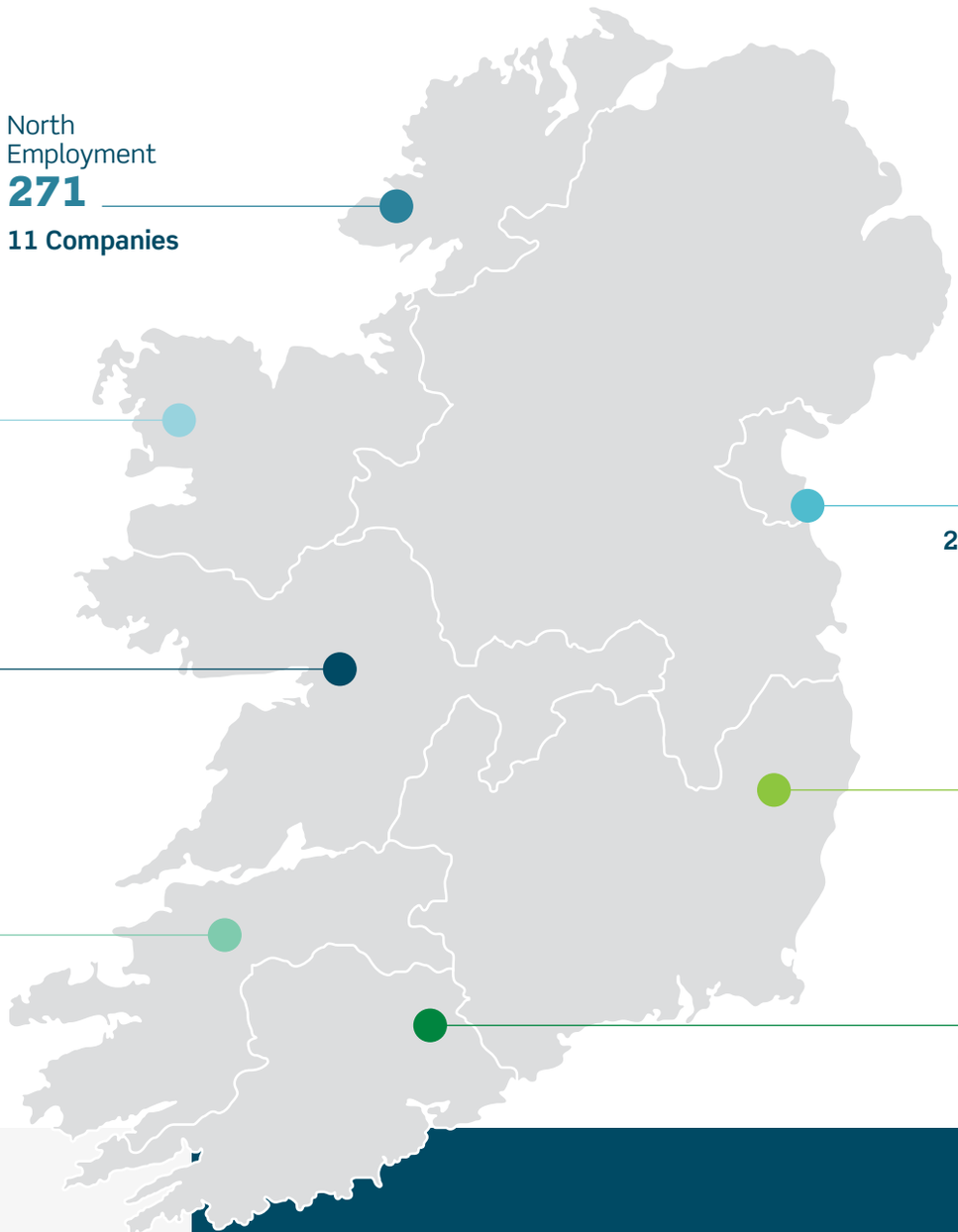
South West
€19M Value

South East
€2M Value

South
€64M Value

Total
€165M

Regional Aquatech Output
Employment & Companies in 2023



North
Employment
271
11 Companies

North West
Employment
95
7 Companies

West
Employment
116
17 Companies

South West
Employment
73
3 Companies

North East
Employment
96
26 Companies

South East
Employment
17
3 Companies

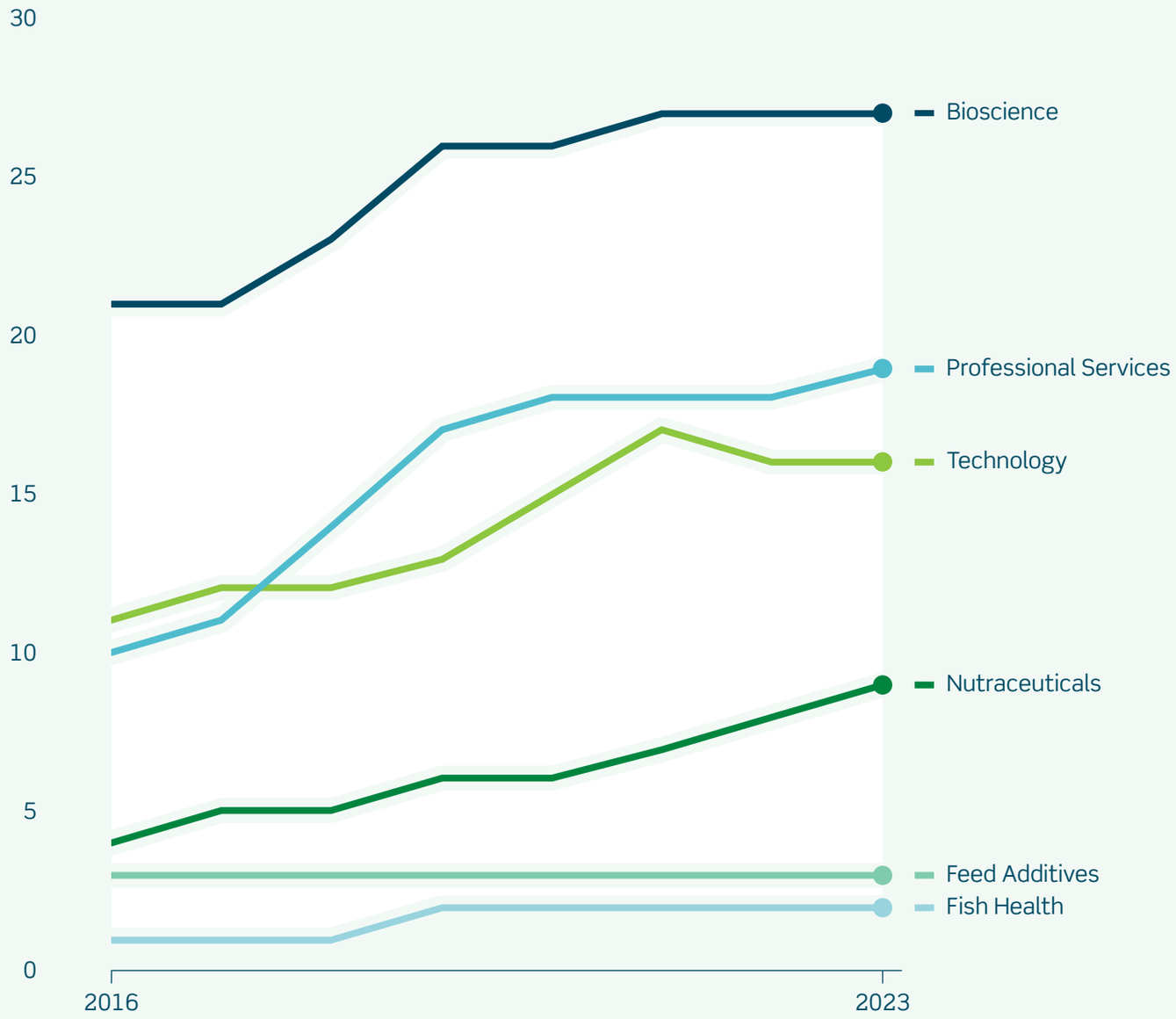
South
Employment
236
9 Companies

Total Number of Companies
76

Total Employment
905

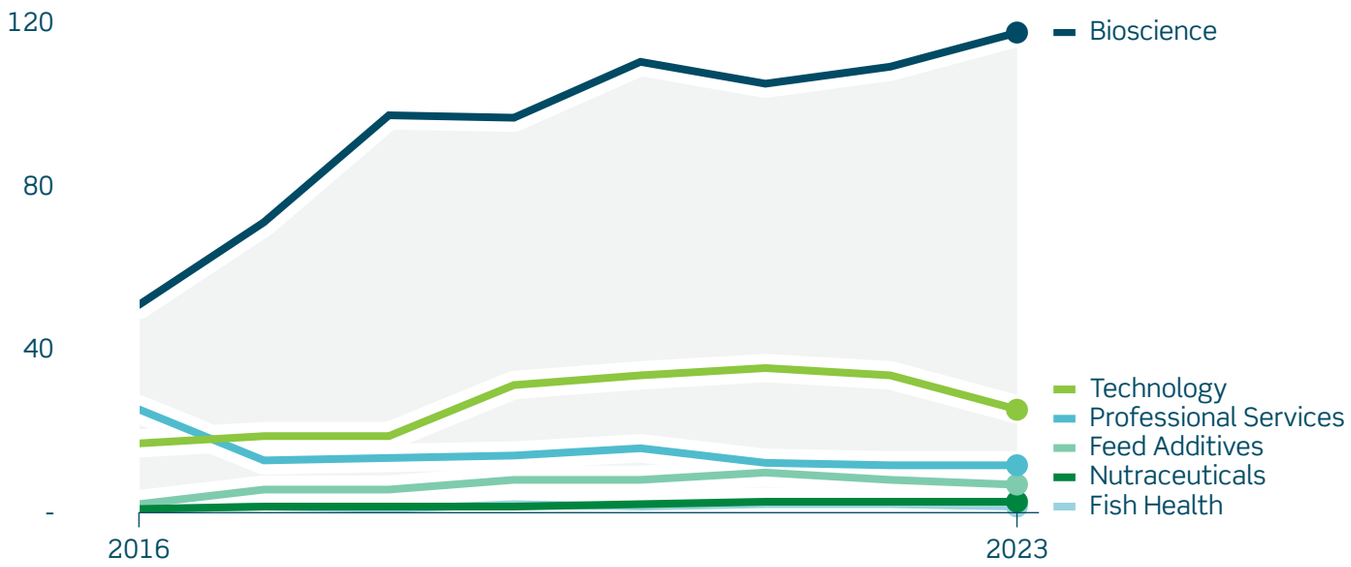
Time Series of Main Aquatech Sectors
2016 - 2023

Number of Companies

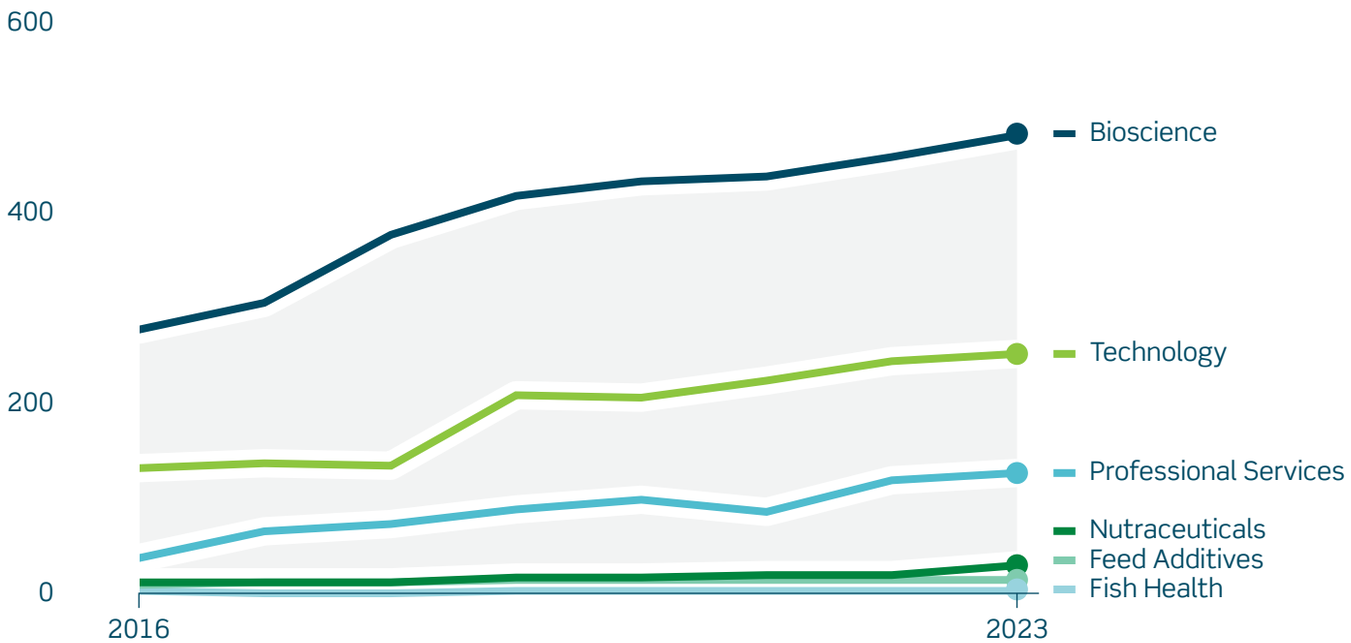


Time Series of Main Aquatech Sectors
2016 - 2023

Aquatech Value €M



Employment



Quotas

182,000 Tonnes
Total quota available to the Irish fleet

Estimated value of 2025 quota
€247M

Quota allocations for 2025 rose by 3% in volume but fell 2% in value a reflection of changing stock conditions and market prices.

The pelagic sector saw sharp cuts to mackerel and blue whiting, offset by a major increase in the horse mackerel quota which stabilised the overall pelagic total. In the demersal segment, Area VI (off Donegal) saw strong increases in monkfish, haddock, and whiting a positive signal for the northwest.

These shifts will affect how and where effort is concentrated in 2025. Some ports will see renewed opportunity, while others will need to adapt to tighter limits. Long-term, access to quota and space at sea are the two defining pressures on the fleet and remain key areas where BIM continues to work with stakeholders, scientists, and policymakers to ensure Irish fishers have a viable future.

Area VI

Demersal stocks

Cod	VIa	131	-29%
Cod	VIb	11	-8%
Common sole	VI	46	0%
Haddock	Vb VIa	1,304	-2%
Haddock	VIb XII XIV	622	+144%
Megrims	VI	614	-5%
Monkfish	VI	890	+166%
Nephrops	VI	184	+4%
Plaice	VI	224	0%
Pollack	VI	11	-15%
Saithe	VI	366	0%
Whiting	VI	1,435	+53%

4,520
Tonnes in 2024
5,838
Tonnes in 2025
+29% change

Area VI & VII

Demersal stocks

Hake	VI, VII	1,730	-20%
Skates & Rays	VI, VIIa-c, & e-k	1,145	-4%
Small-eyed ray	VIIfg	8	+14%
Undulate ray	VIIe	381	-6%
Tusk	V, VI, VII	381	0%
Blue Ling	II,IV international waters	2	0%
Blue Ling	Vb,VI,VII	30	+3%
Ling	VI, VII, VIII, IX, X, XII, XIV	752	-1%
Greenland Halibut	IIa, IV, VI	20	-31%
Spurdog/dogfish	I, II, IIII, IV, V, IV, IVV, VIII, XII, XIV	2,325	+23%
Cod	I,II	290	+3%

7,139
Tonnes in 2024
7,064
Tonnes in 2025
-1% change

Area VII

Demersal stocks

Cod	VII b-k	335	0%
Cod	VIIa	82	0%
Megrims	VII	3,038	-10%
Monkfish	VII	3,367	-2%
Haddock	VII b-k	1,182	-22%
Haddock	VIIa	692	-18%
Whiting	VIIa	258	-2%
Whiting	VIIb-k	8,759	+37%
Nephrops	VII	5,313	-13%
Plaice*	VII bc	13	0%
Plaice	VII fg	40	-72%
Plaice	VII hjk	53	-2%
Plaice	VIIa	396	-31%
Pollack	VII	48	-17%
Saithe	VII	690	-20%
Common sole*	VII bc	14	0%
Common sole	VII fg	33	-11%
Common sole	VII hjk	77	0%
Common sole	VIIa	94	-1%

24,253
Tonnes in 2024

24,484
Tonnes in 2025

+1% change

* quotas here are for 2024 as the advice for 2025 did not include these stocks

Deepwater stocks

Alfonsinos	I, II, III, IV, V, VI, VII, VIII, IX, X, XII, XIV	5	0%
Black Scabbardfish	V, VI, VII, XII	39	0%
Red Seabream	VI, VII, VIII	3	0%
Roundnose Grenadier	Vb, VI, VII	86	-20%
Roundnose Grenadier	VIII, IX, X, XII, XIV	2	-33%

158
Tonnes in 2024
135
Tonnes in 2025
-15% change

Pelagic stocks

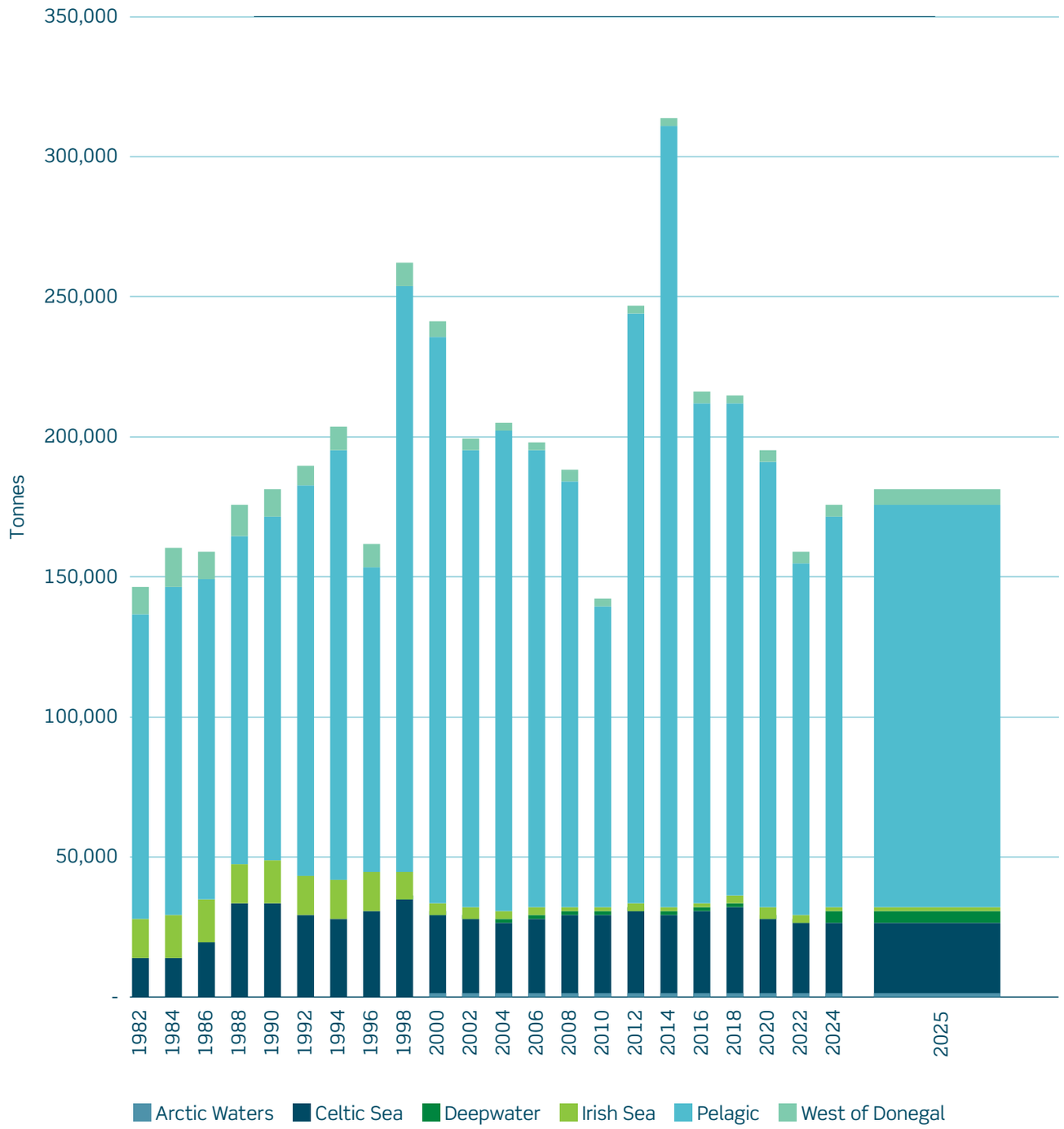
Greater silver smelt	III, IV	8	+60%
Greater silver smelt	V, VI, VII	635	+7%
Boarfish	VI, VII,VIII	26,462	+40%
Herring	I, II	2,080	+3%
Herring	VIaN	403	+113%
Herring	VIaS, VIIbc	2,600	+26%
Herring	VII ghjk	750	0%
Herring	VIIa	52	-76%
Blue whiting	I, II,III, IV,V, VI, VII, VIII a,b,d,e XII,XIV	51,263	-14%
Mackerel	VI, VII	39,914	-16%
Horse mackerel	IIa, IVa, VI, VIIa-c, VIIe-k, VIIIa,b,e	16,406	+416%
Horse mackerel	IVb, IVc, and VIId	16	-92%
Albacore	north.atl	3,968	-8%
Blue Shark	Atlantic Ocean, North of 5 degrees	1	0%

139,921
Tonnes in 2024
144,557
Tonnes in 2025
+3% change

Evolution of Irish quota 1982-2025

Fishing opportunities for all stocks by regional sea 1982 - 2025

Quotas were first introduced into European fisheries in 1982. Since their introduction, Ireland's quota has fluctuated quite significantly from lows of 162,000 tonnes in 1996 and 142,000 tonnes in 2010, to highs of 262,000 tonnes in 1997 and 314,000 tonnes in 2014. These peaks and troughs have mainly been driven by variability in pelagic quotas, such as blue whiting, horse mackerel and boarfish. Quotas for demersal stocks across the sea areas have been remarkably stable since 2000, averaging around 35,000 tonnes. In 2025 Irish quota volumes have risen slightly for pelagic stocks and demersal stocks West of Donegal. Boarfish and horse mackerel see the highest growth among pelagic stocks while whiting and monkfish are the main contributors in the West of Donegal.



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Glossary and data sources

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, whiting and flatfish such as sole, turbot, plaice and megrim.

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.

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 Authority (SFPA), www.sfpa.ie.

Value of landings are estimated by BIM.

Aquaculture data are 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).

Aquatech sector employment and estimated turnover based on data sourced from Bureau van Dijk Orbis.

Population data is sourced from the CSO Census 2022, www.cso.ie.

Seafood population and employment statistics estimated by BIM using CSO Census 2022 data and BIM National Seafood Survey (NSS) data.

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

Retail data, figures and information was supplied by KANTAR.

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

The total processing employment includes wild seaweed harvesters.

Import and Export data supplied by EUROSTAT via IHS Markit.

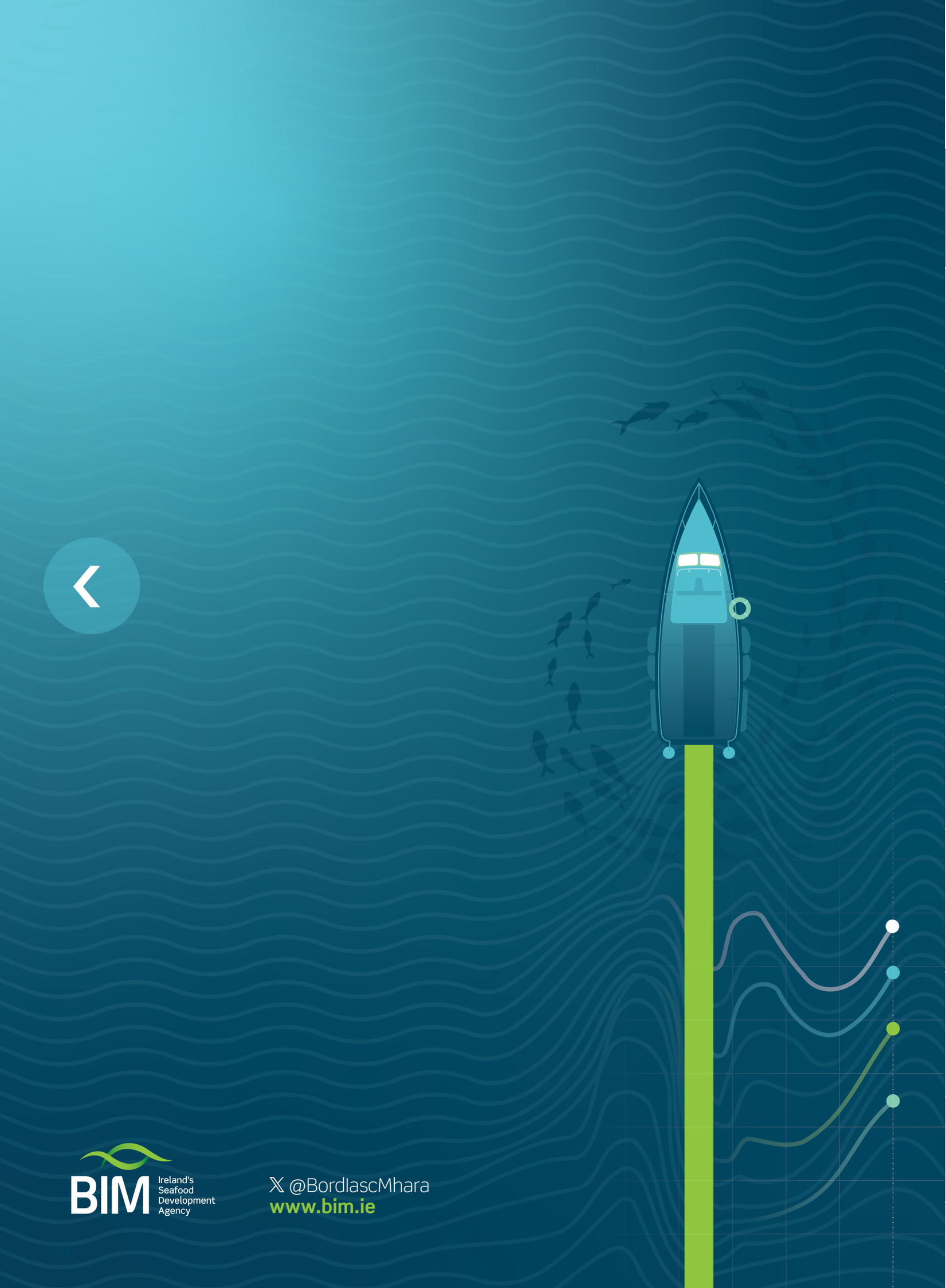
Government investment is sourced from the Revised Estimates for Public Services of the Government of Ireland.

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.



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