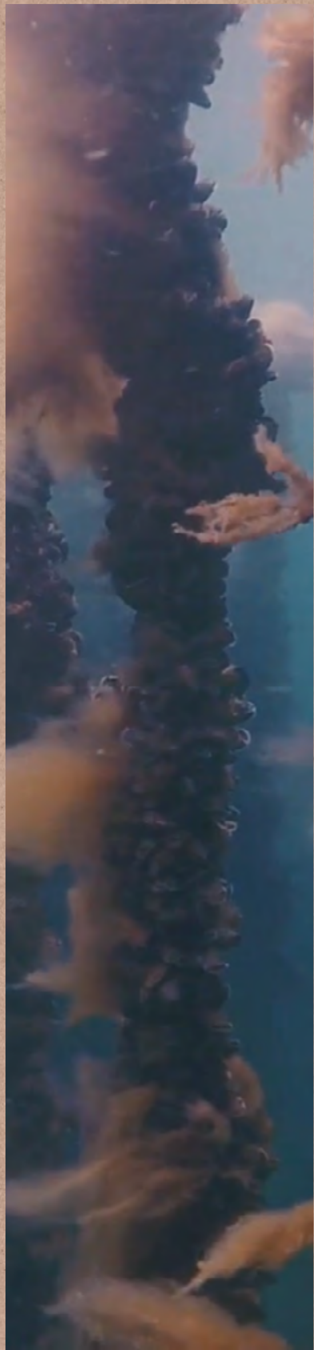
Bord Iascaigh Mhara
Irish Sea Fisheries Board

BIM Annual Aquaculture Survey 2016

Overview

Data form the BIM Annual Aquaculture Survey showed that 2015 saw a strong recovery in aquaculture production volume increasing by over 27% to 40,140 tonnes. A similar upturn was recorded for aquaculture value increasing by €33m to a total first point sale value of €149m. The primary driver in these results is a recovery of the salmon sector from the effects of AGD on juvenile inputs. Other sectors have remained stable or showed a modest increase in volume output. Employment of 1,841 and number of production units of 280 overall has not changed significantly since 2014, with a modest number of business start-ups in the oyster sector, offset by reductions/amalgamations in the rope and seabed cultured mussel sectors. Unit value overall has dipped in the oyster and seabed cultured mussel sectors while marginally improved in the rope mussel sectors. The latter, however, remains critically marginal in profitability, with the principal product, fresh mussels only reaching between €700 and €750 per tonne at best. Other sectors remain relatively unchanged at primary production level, though an increasing amount of value-added activity, product differentiation and marketing strategy is paying dividends for certain companies particularly in the oyster sector. The harvest volume potential of gigas oysters has been curtailed by a combination of weather induced stress and mortalities. These have occurred throughout the age classes in 2015, into the mature stocks in early 2016.

Despite these and other challenges the overall picture for 2015 remains positive. There is continual shift for this primary production sector to engage in finding more direct and profitable routes to market. The approach of continued innovation, market development and collaboration has proved to be a successful combination for those producers who can diversify their businesses in this direction.



Salmon

Sea production has recovered from under 10,000 tonnes worth €58 million in 2014 to over 13,000 tonnes, worth €90 million, in 2015. All production is now to an organic standard, with unit value increasing to €6850 per tonne, whole round, on average nationally in 2015. Within the salmon sector both hatchery and on-growing facilities produced stock valued at €94.7 million and directly employed 191 persons. In addition to this, a further 142 persons were employed in processing salmon and over 80 associated with specialised services such as sales, maintenance crews, divers etc. Direct employment in the sector is provided from Donegal to Cork on 15 production units, working more than 32 sites with a new production unit due to come on stream in 2016. Primary salmon production, while not the biggest employing sector of itself provides mainly full-time employment. It has the most diverse and lucrative economic knock on effects in terms of employment creation, product range and value and all services required to bring these high value products from production site to table.

Oysters

The largest employing primary production sector with approximately 1,200 in 2015 for gigas and native oysters combined. Although oyster production is conducted around the entire coast of Ireland the most concentrated production areas are in the Southeast and Northwest. Overall production volume marginally increased to over 9,000 tonnes (gigas). Overall harvest value and average unit value have dipped slightly. This is due to the shift in preference for smaller sizes of product before the industry here could adjust and the overall reduction in French demand. Continuing diversification into markets outside France and product differentiation is gradually reducing over-dependence on the French market. In fact, overall volume of exports to France has decreased by 10% in 2015 as evidence of this market diversification. France remains the main market for Irish oysters accounting for over 76% of all exports.

Productivity has been limited to some extent by the effects of mortality not just in juvenile but also in older to mature size classes throughout 2015 and into 2016.

Mussels

Seabed Cultured

The increase in seed stock to the producing bays around the country has now reversed the negative trend of recent years with production back to over 5,000 tonnes in 2015. One phenomenon noted has been the further amalgamation of companies in this business reducing from 46 in 2014 to 40 in 2015. Production is now concentrated in three bays Carlingford Lough, Wexford Harbour and Castlemaine Harbour.

The Irish seabed cultured mussel industry is now in its third year of accreditation to the Marine Stewardship Council certification. With the majority of these mussels exported to The Netherlands this accreditation has been vital in sustaining this export market. With further increases in seed collection in recent years a continued development in production is projected for this sector.

Rope

Concentrated in the Southwest and to a lesser extent, the Northwest, production volume is back to over 10,000 tonnes an increase of 21% on 2014 volumes. The low price of mussels in the European market has translated into a reduction in prices in the fresh mussel market for Irish producers who are only achieving unit values of between €700 and €750 per tonne. France and The Netherlands are the primary markets for rope mussels with demand from The Netherlands increasing as processors there have developed techniques for handling and packaging of rope mussels. The decrease in volumes in the seabed cultured mussels has also contributed to this demand but unfortunately prices remain challenging for the sector.

Despite this the sector contributes to employment of over 270 persons in the primary production part of the business. Cork is by far the most important rope mussel production region in Ireland with over 60% of those employed in this county.

Other Sectors

The remaining aquaculture species such as abalone, urchin, scallop, perch, trout and seaweed remain relatively unchanged in output and employment sustained. Seaweed cultivation, although at the early stages of development, is showing some positive indications with doubling of production to 70 tonnes.

Salmon & Sea Reared Trout

7 companies

Value

€90.3m (60.8%)

Tonnage

13214

Top 20% provide **75%** of production by tonnage

Gigas Oysters

159 companies

Value

€35.3m (23.8%)

Tonnage

9037

Top 20% provide **63%** of production by tonnage

Rope Mussels

68 companies

Value

€6.7m (4.5%)

Tonnage

10318

Top 20% provide **65%** of production by tonnage

Seabed Cultured Mussels

40 companies

Value

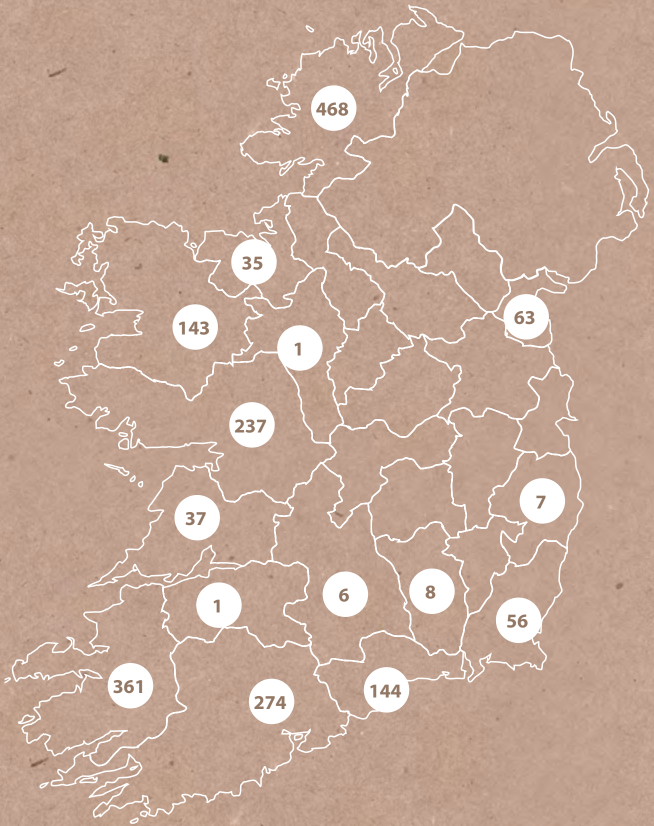
€6.0m (4%)

Tonnage

5697

Top 20% provide **88%** of production by tonnage

Employment



Clare

Gigas Oyster	29
Hatchery Gigas	6
Rope Mussel	2

Cork

Abalone	3
Freshwater Trout	3
Gigas Oyster	73
Native Oyster	7
Rope Mussel	152
Salmon	23
Scallop	3
Seaweed	3
Smolt/parr/ova	4
Urchin	3

Donegal

Seabed Mussel	12
Gigas Oyster	250
Native Oyster	125
Rope Mussel	14
Salmon	40
Scallop	5
Smolt/parr/ova	22

Galway

Abalone	4
Freshwater Trout	1
Gigas Oyster	40
Hatchery Gigas	1
Native Oyster	57
Rope Mussel	45
Salmon	52
Scallop	23
Smolt/parr/ova	14

Kerry

Seabed Mussel	32
Gigas Oyster	70
Hatchery Gigas	3
Native Oyster	206
Rope Mussel	38
Salmon	6
Scallop	3
Seaweed	3

Kilkenny

Freshwater Trout	8

Limerick

Gigas Oyster	1

Louth

Seabed Mussel	35
Gigas Oyster	28

Mayo

Gigas Oyster	71
Native Oyster	35
Rope Mussel	10
Salmon	20
Sea Reared trout	3
Smolt/parr/ova	3
Scallop	1

Roscommon

Perch	1

Sligo

Gigas Oyster	33
Hatchery Gigas	2

Tipperary

Perch	3
Smolt/parr/ova	3

Waterford

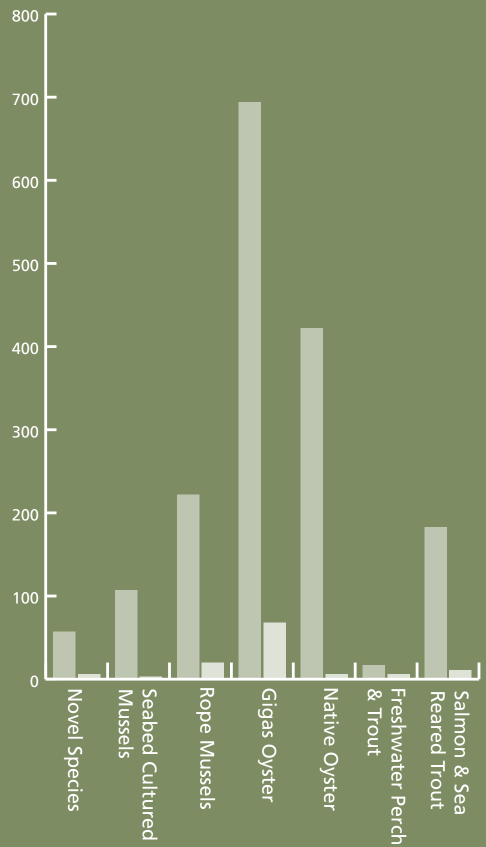
Gigas Oyster	144

Wexford

Seabed Mussel	28
Gigas Oyster	24
Smolt/parr/ova	4

Wicklow

Freshwater Trout	7



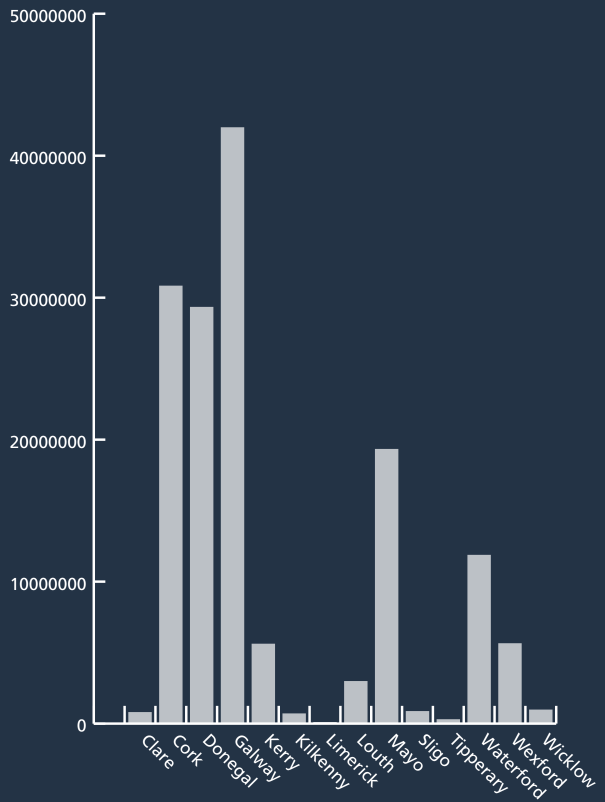
Total Employment in the aquaculture sector is

1841

7% female

93% male

Value



50000000
40000000
30000000
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10000000
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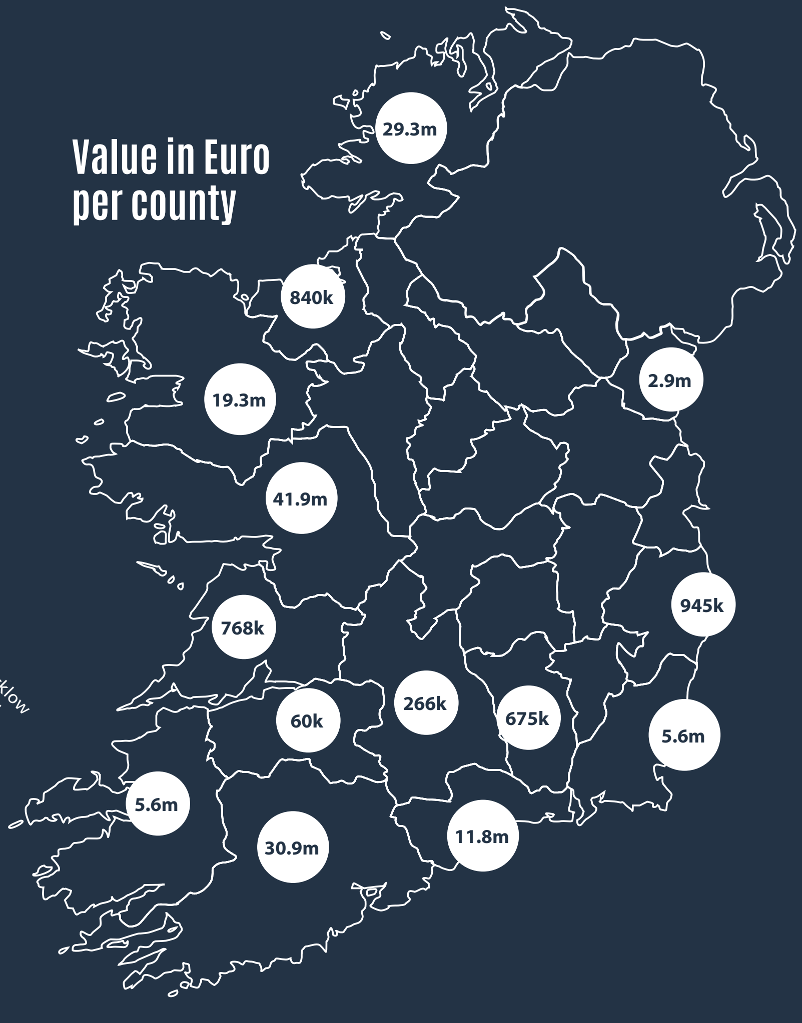
Clare
Cork
Donegal
Galway
Kerry
Kilkenny
Limerick
Louth
Mayo
Sligo
Tipperary
Waterford
Wexford
Wicklow



Value in Euro per county
29.3m
840k
2.9m
19.3m
41.9m
945k
768k
266k
60k
675k
5.6m
5.6m
30.9m
11.8m


Value increased by €33m
to a total of €149m

Value

Clare

Gigas Oyster	€713,645
Hatchery Gigas	€40,000
Rope Mussel	€15,200

Cork

Abalone	€60,000
Freshwater Trout	€300,000
Gigas Oyster	€2,823,684
Rope Mussel	€3,714,205
Salmon	€23,653,008
Seaweed	€35,000
Smolt/parr/ova	€264,000
Urchin	€22,500

Donegal

Gigas Oyster	€8,108,386
Native Oyster	€982,000
Rope Mussel	€779,522
Salmon	€14,428,918
Scallop	€147,000
Smolt/parr/ova	€4,862,158

Galway

Abalone	€90,000
Freshwater Trout	€41,910
Gigas Oyster	€1,234,750
Hatchery Gigas	€5,000
Native Oyster	€522,000
Rope Mussel	€788,930
Salmon	€37,641,659
Scallop	€75,000
Smolt/parr/ova	€1,560,000

Kerry

Seabed Cultured Mussel	€1,327,150
Gigas Oyster	€2,492,075
Hatchery Gigas	€120,000
Native Oyster	€1,015,000
Rope Mussel	€583,670
Salmon	
Scallop	€11,550
Seaweed	€35,000

Kilkenny

Freshwater Trout	€675,000

Limerick

Gigas Oyster	€60,000

Louth

Seabed Cultured Mussel	€1,781,500
Gigas Oyster	€1,173,000

Mayo

Gigas Oyster	€3,677,480
Native Oyster	€64,000
Rope Mussel	€949,090
Salmon	€14,112,150
Sea Reared trout	€500,000

Sligo

Gigas Oyster	€719,950
Hatchery Gigas	€120,000

Tipperary

Perch	€266,000

Waterford

Gigas Oyster	€11,842,910

Wexford

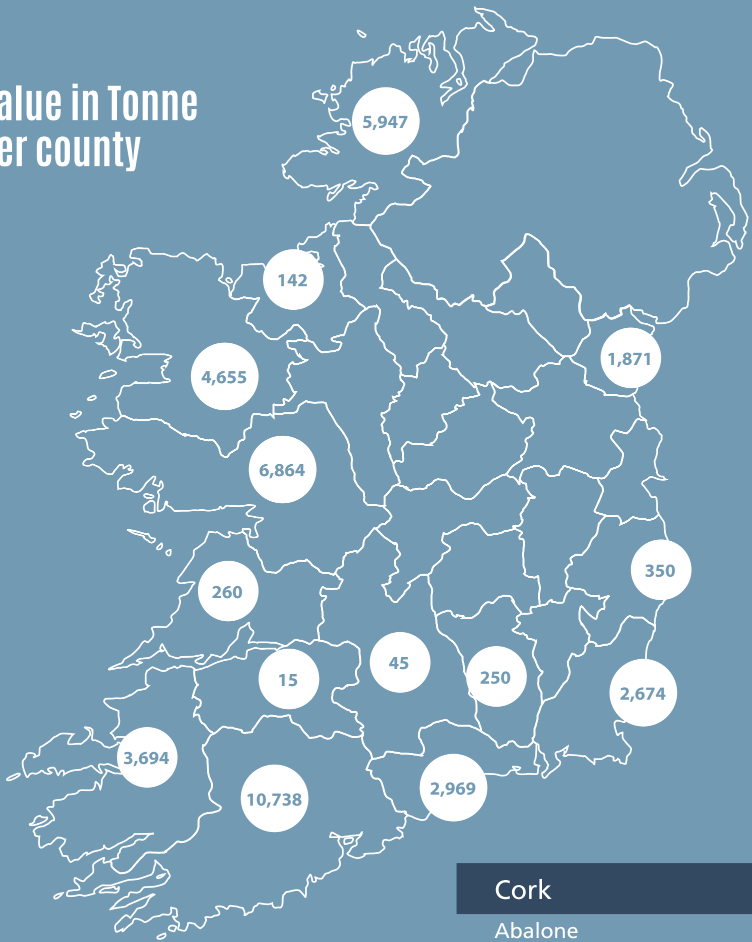
Seabed Cultured Mussel	€2,906,880
Gigas Oyster	€2,121,152
Smolt/parr/ova	€590,000

Wicklow

Freshwater Trout	€945,000

Volume

Value in Tonne per county



Donegal

Gigas Oyster	2002
Native Oyster	200
Rope Mussel	855
Salmon	2128
Scallop	17
Smolt/parr/ova	745

Galway

Abalone	2
Freshwater Trout	15
Gigas Oyster	323
Native Oyster	80
Rope Mussel	1043
Salmon	5274
Scallop	30
Smolt/parr/ova	97

Kerry

Seabed Cultured Mussel	2033
Gigas Oyster	533
Native Oyster	175
Rope Mussel	915
Scallop	3
Seaweed	35

Kilkenny

Freshwater Trout	250

Limerick

Gigas Oyster	15

Louth

Seabed Cultured Mussel	1453
Gigas Oyster	418

Clare

Gigas Oyster	240
Rope Mussel	20

Cork

Abalone	1
Freshwater Trout	90
Gigas Oyster	816
Rope Mussel	6193
Salmon	3586
Seaweed	35
Smolt/parr/ova	15
Urchin	2

Mayo

Gigas Oyster	1128
Native Oyster	16
Rope Mussel	1286
Salmon	2128
Sea Reared Trout	98

Sligo

Gigas Oyster	142

Tipperary

Perch	45

Waterford

Gigas Oyster	2969

Wexford

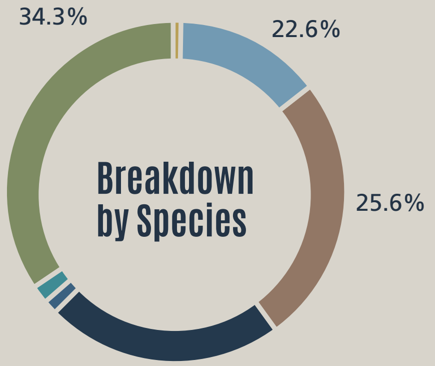
Seabed Cultured Mussel	2211
Gigas Oyster	432
Smolt/parr/ova	31

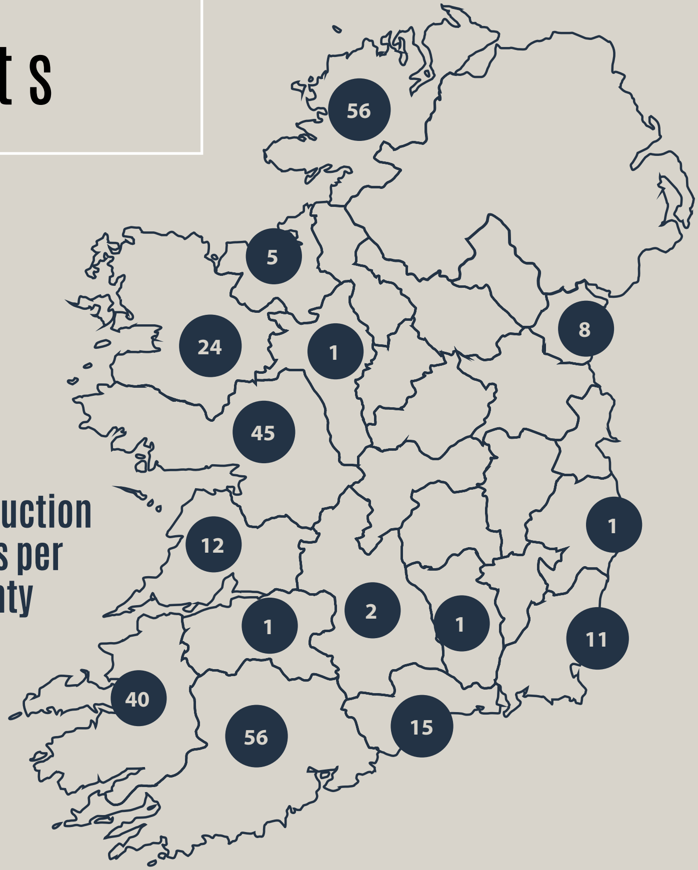
Wicklow

Freshwater Trout	350

Total volume of aquaculture production increased by 27% to over 40,000 tonnes

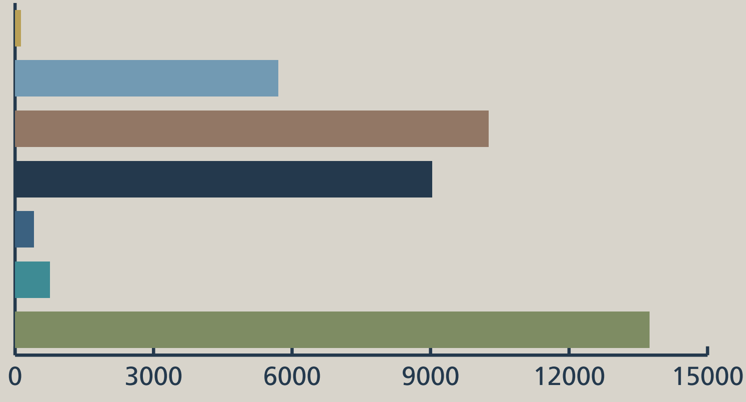
Production Units





Production Units per county

- Salmon & Sea Reared Trout
- Freshwater Perch & Trout
- Native Oyster
- Gigas Oyster
- Rope Mussels
- Seabed Cultured Mussels
- Novel Species

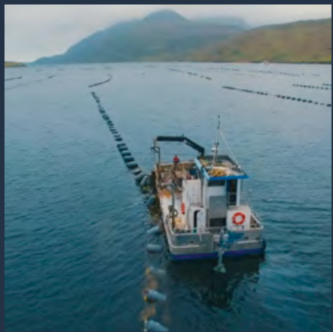


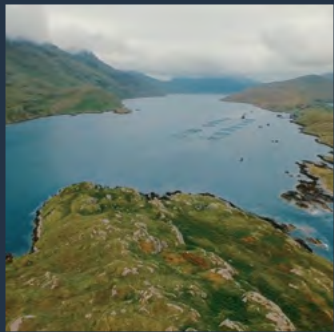
Total
In-Shore
Sea Area

Total area allocated to pending or active aquaculture in Ireland is **14,700 hectares.**

This is equivalent to **0.2% of our land area** in Ireland or less than 1% of the in-shore sea area

> 1% allocated to aquaculture





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