2011 BIM Annual Aquaculture Survey

Bord Iascaigh Mhara (BIM) the Irish seafood development agency carries out an annual survey of all licensed aquaculture producers within the Republic of Ireland. Apart from a statutory obligation of producers this data provides vital information for the future development of this important industry. The following document provides a snapshot of the primary aquaculture sectors and more comprehensive data can be provided upon request.

Key Points from 2011

- First sale value of the Irish aquaculture industry was in €127m.
- Salmon culture remains the highest value sector of the industry accounting for 58% of the value.
- Over 1700 people are employed in aquaculture production. The oyster sector provides the highest proportion of employment with 852 jobs.
- Aquaculture in Ireland produced over 44,000 tonnes of produce in 2011.
- The majority of aquaculture is still carried out along the western seaboard with highest value of aquaculture production in Donegal where the industry provides first point of sale value of €48m.

The following pages detail the results from 2011 the survey. We would like to thank all the aquaculture producers who take the time to participate in this survey each year.

Notes

The values and employment figures from this survey only represent the primary production sector of aquaculture and do not include employment or value created by further processing of the aquaculture produce.
BIM have endeavoured to collate the most accurate information as possible but the material presented from this survey is provided without any guarantees, conditions or warranties as to its accuracy.

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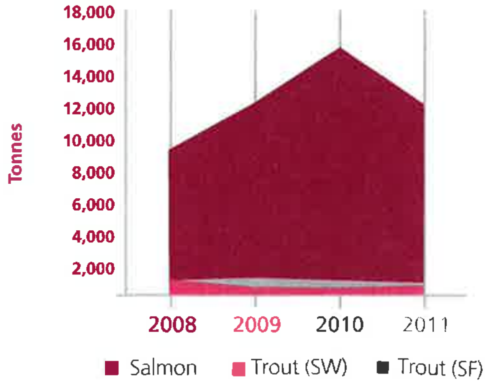
Salmon & Trout

Production of Salmon & Trout 2008 - 2011



Salmon & Trout Production Tonnes by County 2011

Donegal
- 350 Sea Reared Trout
- 5711 Salmon

Mayo
- 250 Sea Reared Trout

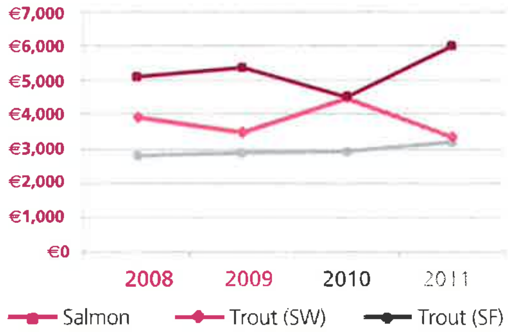
Galway
- 15 Fresh Reared Trout
- 3522 Salmon

Kilkenny
- 220 Freshwater Trout

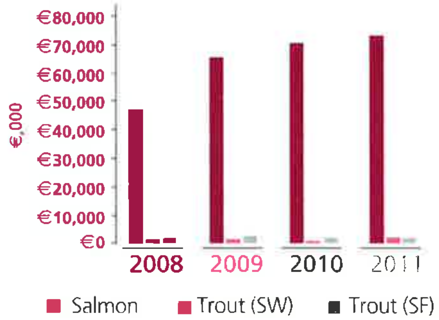
Wicklow
- 276 Freshwater Trout

Cork
- 90 Freshwater Trout
- 2460 Salmon
- 503 Salmon Smolt

Average Price* of Salmon & Trout 2008-2011



First Point of Sale Value of Salmon & Trout 2008-2011



Employment

Total Full and Part Time in the Salmon and Trout Industry

	Salmon	Trout (SW)	Trout (SF)
2008	186	21	19
2009	193	12	19
2010	213	10	21
2011	193	12	23

Salmon Trout (SW) Trout (SF)

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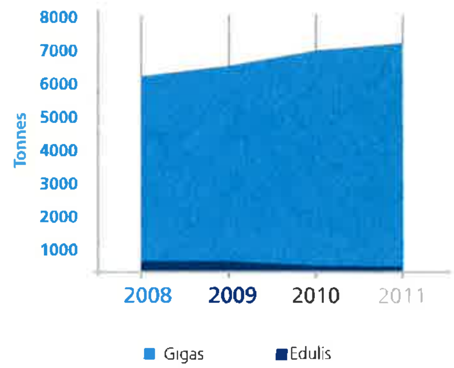
Note
SW: Denotes Sea reared trout
FW: Denotes Fresh water reared trout

Key Points

- Salmon production is the key finfish species reared. There was a slight drop in production to 12,000 tonnes in 2011.
- Donegal accounts for nearly 50% of all Irish salmon production.
- Freshwater trout production is concentrated in counties Kilkenny and Wicklow which account for 83% of all production.
- Production of sea reared and freshwater reared trout was c.600 tonnes for each sector in 2011 and sold mainly on the domestic market.
- Average salmon prices increased to over €6,000 in 2011. Sea reared trout prices declined during this time to match those of freshwater trout.
- Total value of all these finfish has a first sales value of nearly €80m making it Ireland's most valuable aquaculture sector.

Oysters

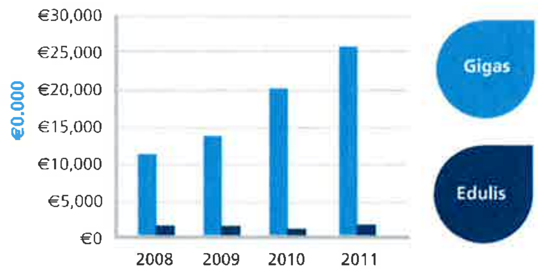
Production of Gigas and Edulis Oysters
2008 - 2011



Gigas Oyster Production Tonnes by County 2011

2390 Donegal
358 Louth
7 Sligo
353 Mayo
253 Galway
179 Care
6 Limerick
123 Kerry
323 Cork
2997 Waterford
266 Wexford

First Point of Sale Value of Gigas and Edulis Oyster 2008-2011



Key Points

- Total gigas oyster production for 2011 was 7255 tonnes and edulis production was 272 tonnes for the same period.
- There are approximately 130 companies producing gigas oysters in Ireland with the top 15 companies accounting for nearly 70% of production.
- Counties Donegal and Waterford account for 74% of gigas production by volume.
- Total employment in the oyster industry in 2011 was 852.
- France is the key destination country for Irish oysters and accounted for 82% of all Irish oyster exports in 2011.

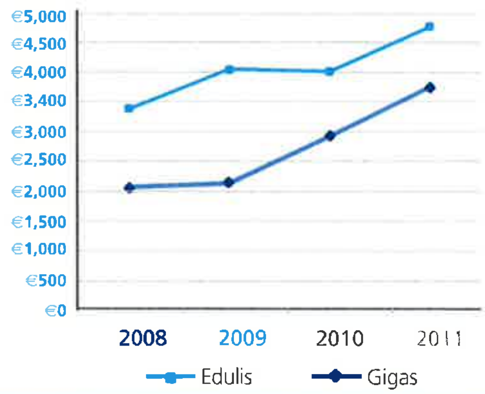
Employment

Total Full and Part Time in the Gigas and Native Oyster Industry 2008 - 2011

	Gigas	Edulis	T
2008	499	524	1023
2009	462	619	1081
2010	523	321	844
2011	608	244	852

Gigas   Edulis   T Total

Average Price of Gigas and Edulis Oysters 2008-2011



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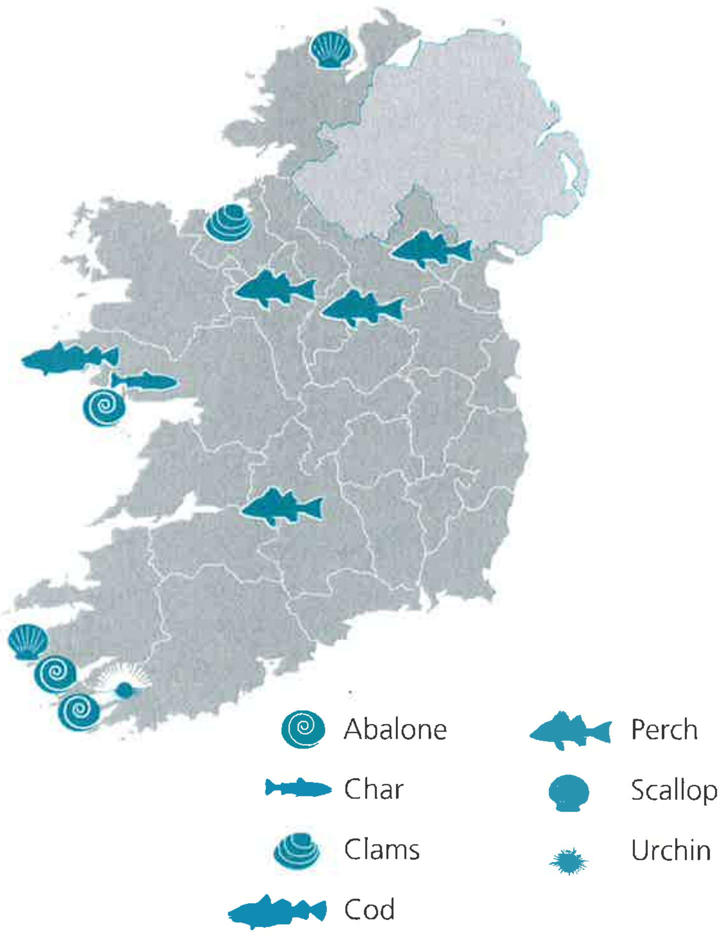
Novel Species

Novel Species by Location

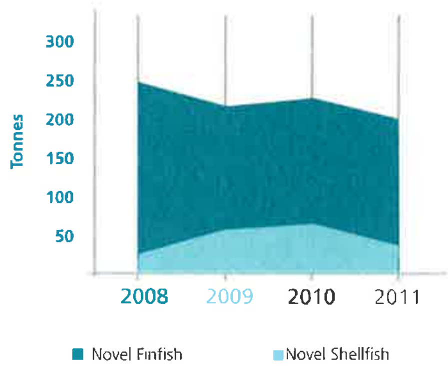


Employment

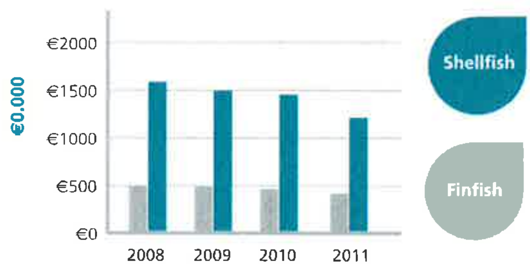
Total Full and Part Time in Novel Species and Shellfish

2008	2009	2010	2011
36 | 98	20 | 169	20 | 172	19 | 124

Production of Novel Finfish and Shellfish 2008 - 2011



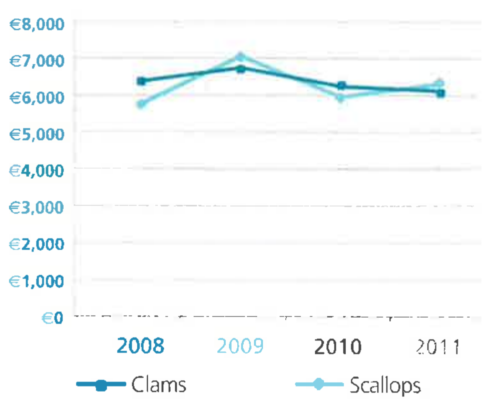
First Point of Sale Value of Novel Finfish & Shellfish 2008 - 2011



Key Points

- Total production value of this sector is valued at just over €1.7m with the main value derived from clam and scallop culture.
- Within the finfish section char are the predominant species accounting for over 95% of all production in terms of value.
- Clams are the main species in the shellfish sector valued at €903,000 in 2011.
- Scallop and clam first point of sale prices have mirrored each other over last number of years

Average Price of Novel Shellfish Species 2008-2011



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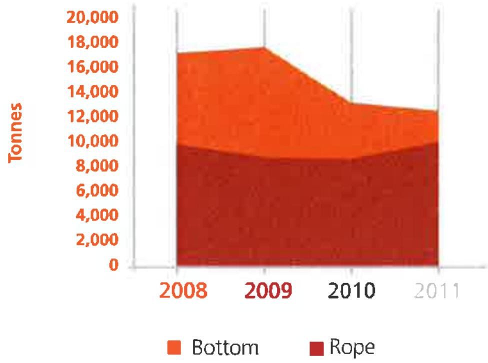
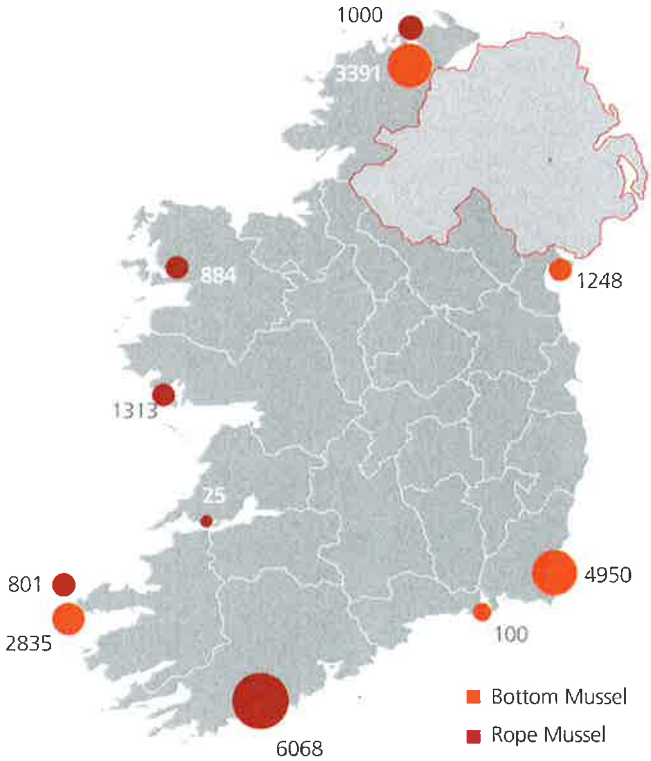
Note
Shellfish: abalone, clams, scallop, urchin
Finfish: char, cod, perch

Mussels

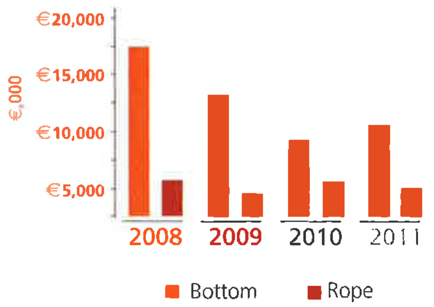


Mussel Production Tonnes by County 2011



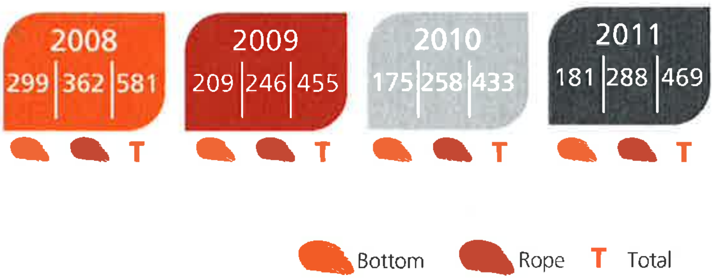
Average Price of Bottom & Rope Cultured Mussels 2008-2011

First Point of SaleValue of Bottom & Rope Cultured Mussesl 2008-2011



Employment

Total Full and Part Time employment in the Bottom and Rope Mussel Industry 2008-2011



Key Points

- Bottom mussel production declined in 2011 to a total of c.13,000 tonnes while rope mussel production is around 10,000 tonnes and has increased each year since 2009.
- Three counties Donegal, Kerry and Wexford accounted for 90% of all bottom mussel cultivation in 2011. Rope mussel production is predominant in the south west with Cork and Kerry accounting for 68% of production in 2011.
- Total employment in the mussel industry in 2011 was 469 an increase of 36 from 2010.
- Fresh mussel exports continue to be the main format for export. Fresh mussel exports accounted for nearly 70% of all exports by value in 2011. This was an increase of 21% on the previous year.

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