



2012 BIM Annual Aquaculture Survey



Bord Iascaigh Mhara
Irish Sea Fisheries Board



*83% of all employment in Irish aquaculture
is along the western seaboard*



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.

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.

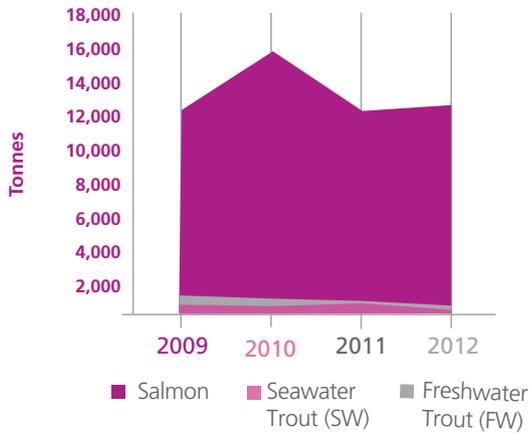
BIM have endeavoured to collate the most accurate information possible but the material presented from this survey is provided without any guarantees, conditions or warranties as to its accuracy.



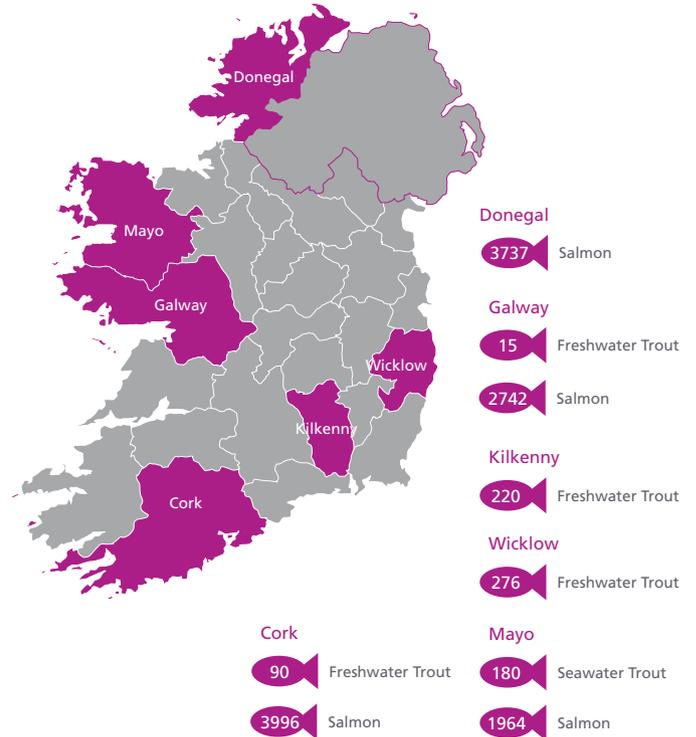


Salmon & Trout

Production of Salmon and Trout 2009 - 2012



Salmon and Trout Production Tonnes by County



DID YOU KNOW?

Over **80%** of all Irish salmon production is certified organic

Key Points

Salmon production is the key finfish species reared production was stable at c.12,000 tonnes in 2012.

Donegal and Cork are the main production areas accounting for over 60% of all Irish salmon production.

Freshwater trout production is concentrated in counties Kilkenny and Wicklow which account for 83% of all production.

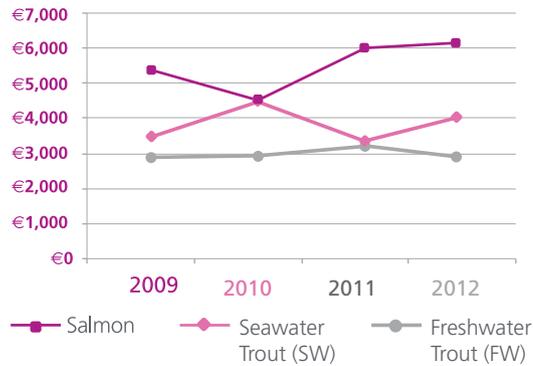
Production of sea reared and freshwater reared trout totalled c.780 tonnes. Sea reared levels were reduced.

Average salmon prices maintained extremely positive prices above €6,000 in 2012.

Total value of all these finfish has a first sales value of nearly €80m making it Ireland's most valuable aquaculture sector.

Salmon & Trout

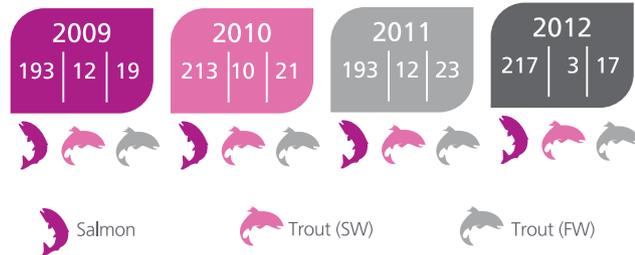
Average Price of Salmon and Trout 2009 - 2012



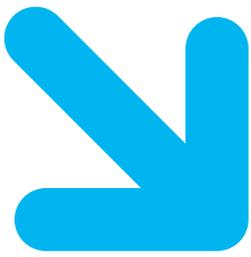
First Point of Sale Value of Salmon and Trout 2009 - 2012



Employment
Total Full and Part Time in the
Salmon and Trout Industry



*Total exports of
salmon, mussels
and oysters
amounted to
€116m in 2012
an increase of 21%
from the previous year*



Oysters

Key Points

Total gigas oyster production for 2012 was 7,313 tonnes and edulis production was 247 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 68% of gigas production by volume.

Total employment in the oyster industry in 2012 was 933.

France is the key destination country for Irish oysters and accounted for 86% of all Irish oyster exports by volume in 2012.

Gigas and Edulis Oyster Production in Tonnes by County



Clare
170 Gigas Oysters

Cork
479 Gigas Oysters

Donegal
1503 Gigas Oysters

Galway
187 Gigas Oysters

83 Edulis Oysters

Kerry
372 Gigas Oysters

160 Edulis Oysters

Limerick
30 Gigas Oysters

Louth
360 Gigas Oysters

Mayo
415 Gigas Oysters

4 Edulis Oysters

Waterford
3461 Gigas Oysters

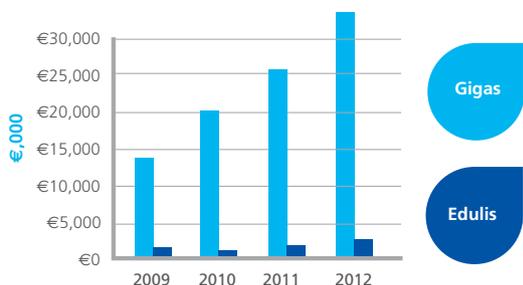
Wexford
289 Gigas Oysters



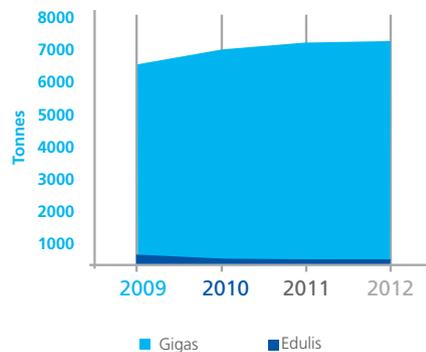


Oysters

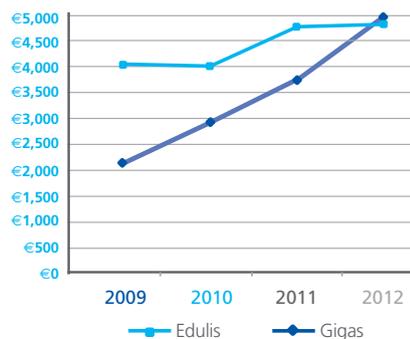
First Point of Sale Value of Gigas and Edulis Oysters



Production of Gigas and Edulis Oysters 2009 - 2012

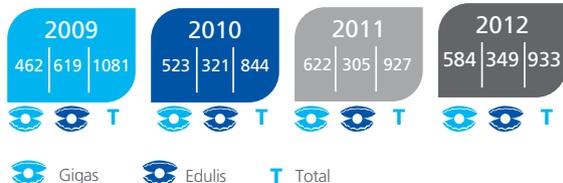


Average Price of Gigas and Edulis Oysters 2009 - 2012



Employment

Total Full and Part Time in the Gigas and Edulis Industry



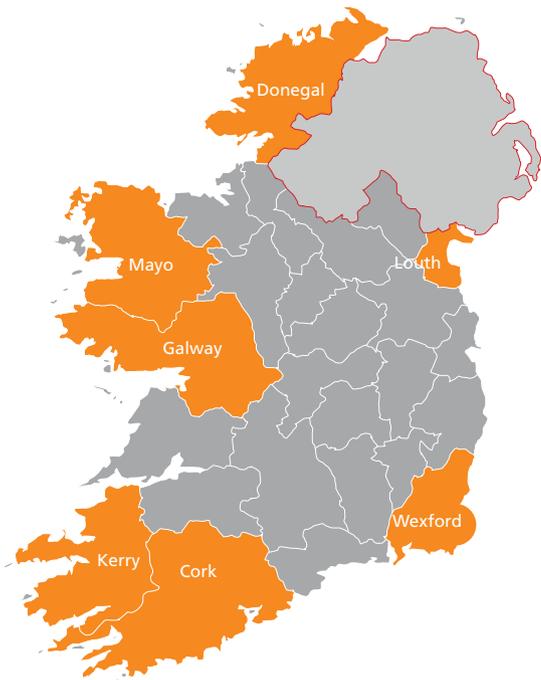
DID YOU KNOW?

EXPORTS OF IRISH OYSTERS IN 2012 WERE VALUED AT OVER €35M



Mussels

Mussel Production Tonnes by County 2012



Cork
5307 Rope Mussel

Donegal
740 Rope Mussel

265 Bottom Mussel

Galway
1012 Rope Mussel

Kerry
704 Rope Mussel

1694 Bottom Mussel

Louth
1670 Bottom Mussel

Mayo
941 Rope Mussel

Wexford
2855 Bottom Mussel

Key Points

Bottom mussel production declined in 2012 with production of just over 6,000 tonnes. Rope mussel production also declined to a lesser extent with production around 9,000 tonnes.

Three counties, Louth, Kerry and Wexford accounted for 96% of all bottom mussel cultivation in 2012. Rope mussel production is predominant in the south west with county Cork alone accounting for 61% of production in 2012.

Total employment in the mussel industry in 2012 was 444 jobs.

Total mussel exports were valued at over €20m. Fresh mussels continue to be the main format exported accounting for over 90% of all mussel exports.

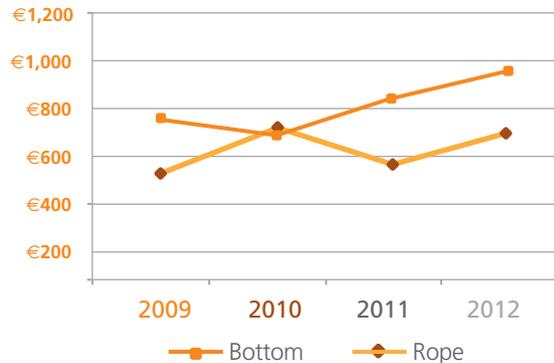
Over 50% of the Irish mussel industry in now certified organic production.

50% of **all** mussel production is certified **organic**

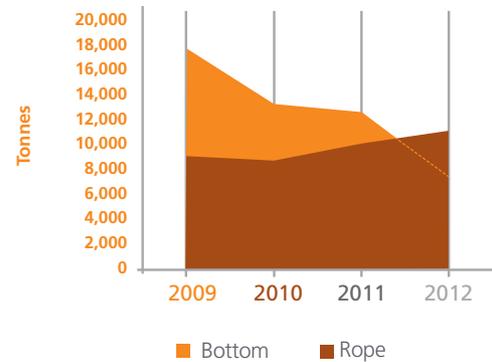


Mussels

Average Price of Bottom and Rope Cultured Mussels 2009 - 2012

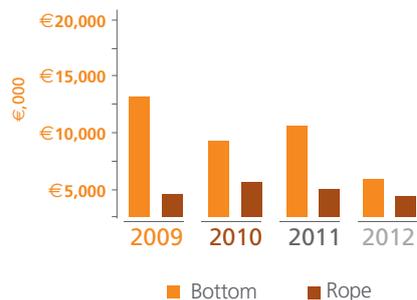


Production of Bottom and Rope Cultured Mussels 2009 - 2012



76% of all aquaculture production is conducted along the **western seaboard**. With county **Donegal** accounting for **26%** of **all national** production.

First Point of Sale Value of Bottom and Rope Cultured Mussels



Employment

Total Full and Part Time in the Bottom & Rope Mussel Industry





Novel Species

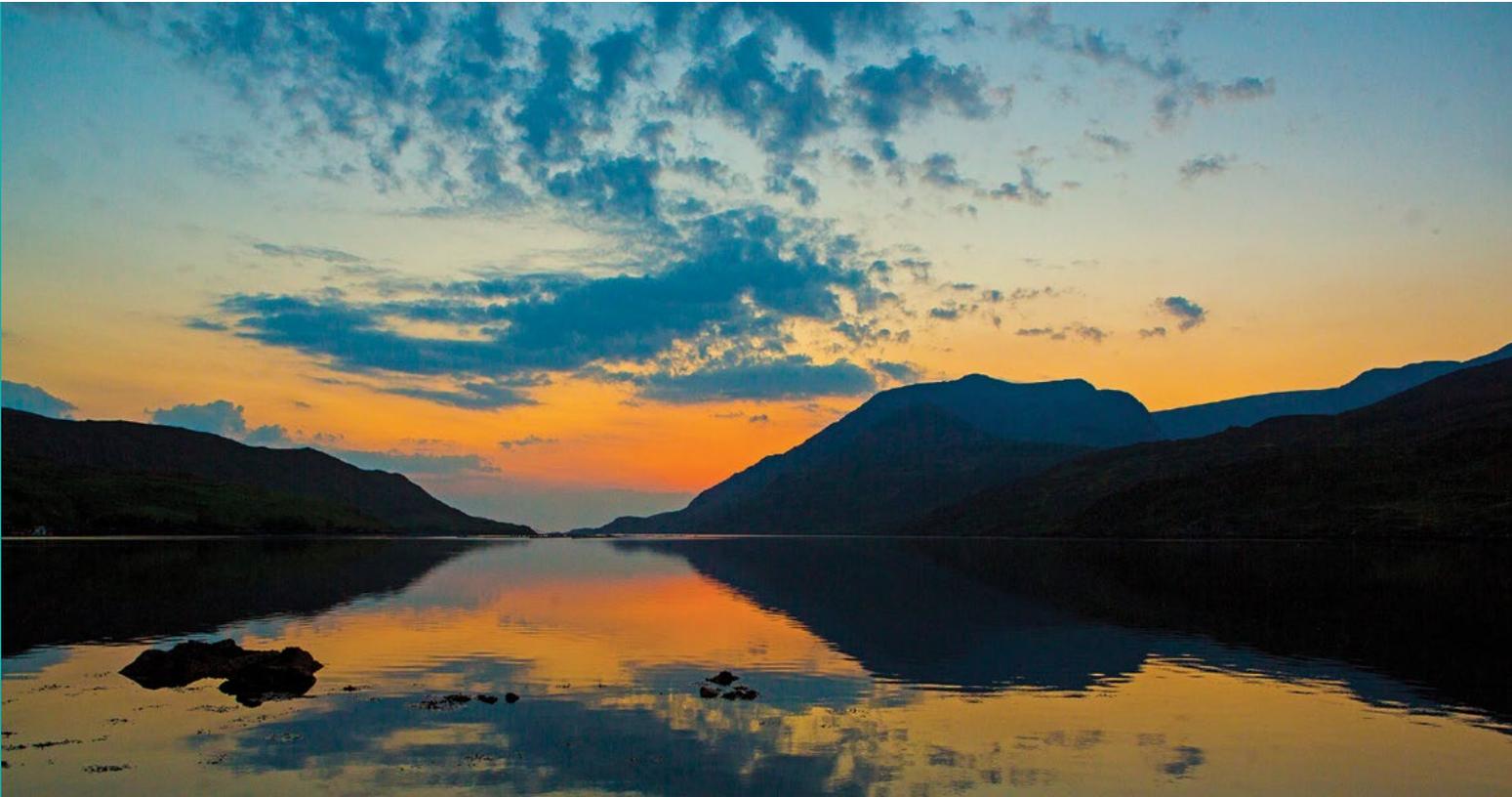
Key Points

This sector is geared at developing new species for production in Ireland. While volumes may not be large it is crucial for the future development of aquaculture within the country.

Within the novel finfish sector char remain the predominant species accounting for over 95% of all production in terms of value. But markets have been positive for Irish grown perch.

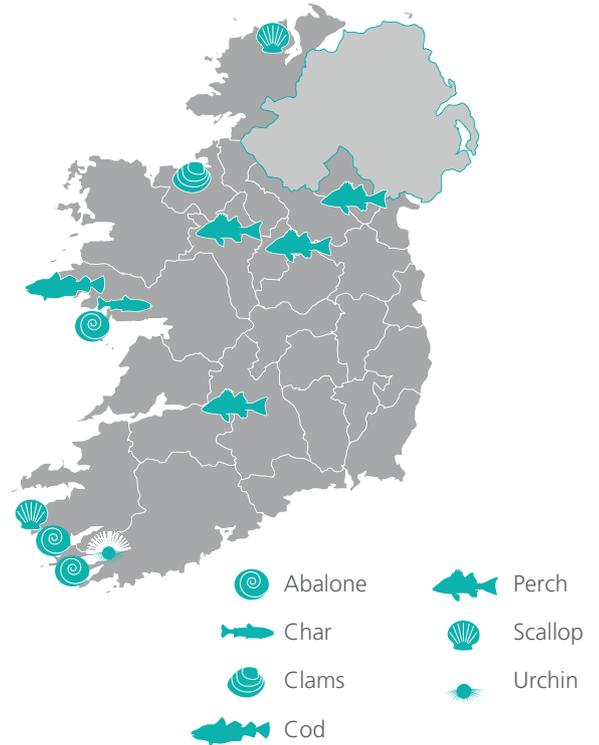
Clams were the main species in the novel shellfish sector but have been hampered due to challenges related to disease issues.

Scallop prices have remained strong despite the competitive market situation highlighting the high quality product produced.





Novel Species



DID YOU KNOW?

First sale value of Irish aquaculture in 2012 was **€133m** an increase of **5%** from 2011

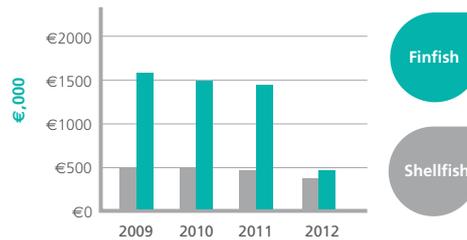


Novel Species

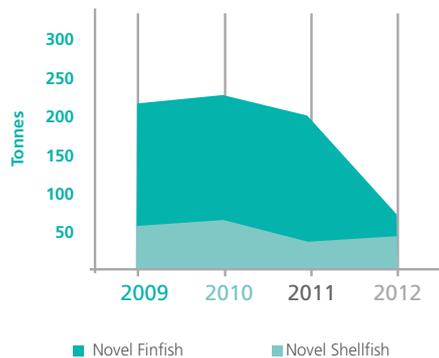
Average Price of Clams and Scallops
2009 - 2012



First Point of Sale Value of Novel
Finfish and Shellfish 2009 - 2012

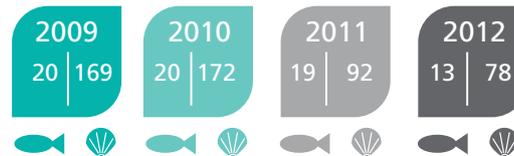


Production of Novel Finfish and
Shellfish 2009 - 2012



Employment

Total Full and Part Time in the Novel
Species Industry 2009 - 2012



Shellfish: abalone, clam, scallop, urchin

Finfish: char, cod, perch



Over 1,700 people are directly employed in the primary sector of the aquaculture industry in 2012, an increase of 5%

A scenic sunset over a body of water. The sky is a gradient of orange, red, and purple, with some dark clouds. The water is a deep blue, and the landmasses in the foreground and background are silhouetted against the bright sky. The text is overlaid on the upper half of the image.

*First sale value of Irish aquaculture
produce increased by 30% in
the last four years*



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