2014
BIM Annual
Aquaculture Survey

BIM
Bord Iascaigh Mhara
Irish Sea Fisheries Board

OVERVIEW

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.

First sale value of the Irish aquaculture industry was

€115m

NOTES

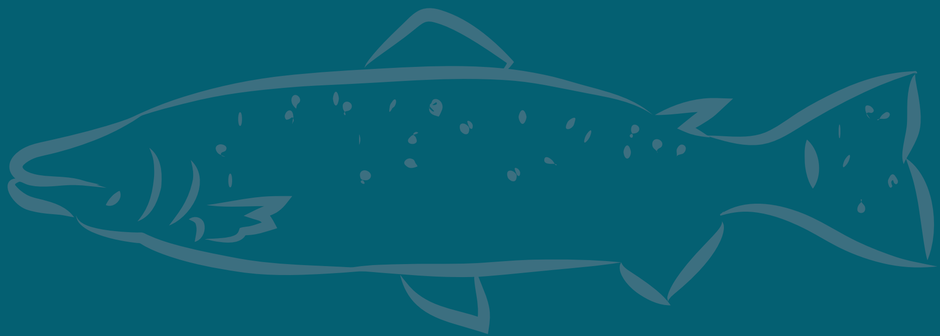
The values and employment figures from this survey only represent the primary production sector of aquaculture and do not include employment or value created by further processing of the aquaculture produce.

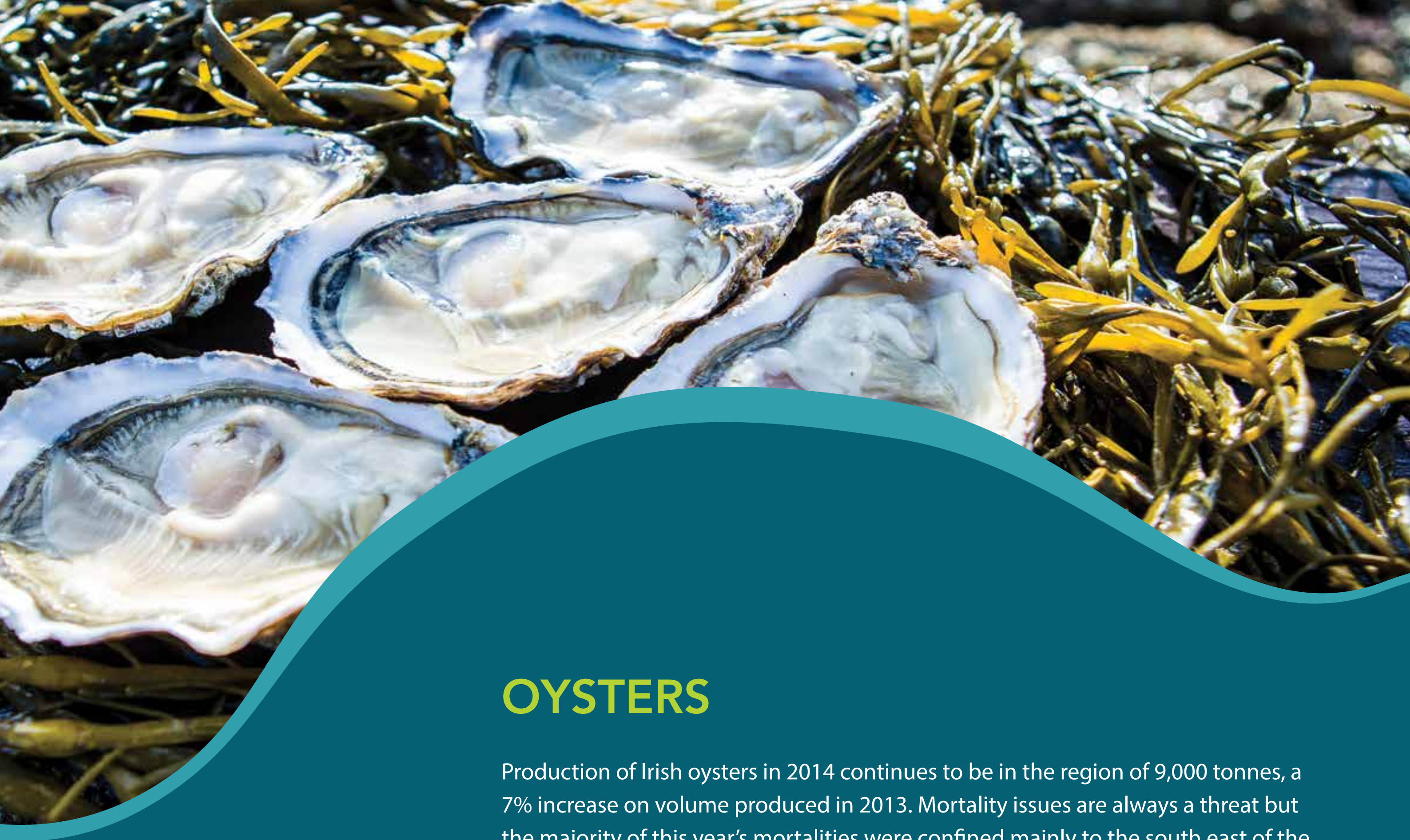
BIM have endeavoured to collate the most accurate information but the material presented from this survey is provided without any guarantees, conditions or warranties as to its accuracy.

SALMON

Irish salmon aquaculture had another successful year with production increasing marginally and prices remaining relatively strong. The Christmas market though has been more challenging than in recent years. Increased production from Norway and restrictions on exports to Russia created excess supply of certain size classes in the European market. This was coupled with a drop in demand in the main European market, France. Despite this, the demand for organic salmon remains extremely strong and prices have not altered to the same extent as for conventional salmon.

The outlook for 2015 is for the demand of organic salmon to remain strong and prices for all grades are likely to be maintained right through to 2016. World production should increase slightly but the continued development of new markets in Asia and continued growth in North America should ensure stability for 2015. Production in Ireland will increase only marginally in 2015 and will continue to be well below market demand for Irish organic salmon.





OYSTERS

Production of Irish oysters in 2014 continues to be in the region of 9,000 tonnes, a 7% increase on volume produced in 2013. Mortality issues are always a threat but the majority of this year's mortalities were confined mainly to the south east of the country. Prices remained positive right up to the Christmas period when a number of factors such as increased production of large sized oysters from France, this has had a significant negative effect on prices. This coupled with lack of promotion and possible reduction in demand in the French market has caused a ripple of anxiousness that has not been seen for a number of years in sales of oysters from Ireland. Despite this, where producers have diversified away from the French market prices has remained more stable and Asian markets have offered a good outlet for high grade oysters.

Looking forward to 2015 we should see a retraction of prices mainly in the French market. But the continued development of other markets for Irish oysters is vital in order to avoid this reliance on a single market. Currently, sales to Asia only contribute less than 5% of total oyster production and while these markets are competitive they offer a real opportunity to find customers looking for high quality product.

MUSSELS

The production of rope and seabed-reared mussels decreased significantly in 2014 but for very different reasons. Rope mussel production has been hampered by bay closures due to biotoxins. While the seabed-reared mussel industry has had a significant reduction in production due to the difficulty in collection of wild mussel seed. On a more positive note, collections in 2014 have been the highest in years and this bodes well for production in the next few years. However, market conditions remain challenging and continued diversification into organic production coupled with marketing activities are essential in maintaining a point of difference in the market for Irish mussels.

NOVEL SPECIES

BIM continue to work with a wide range of developing aquaculture species from abalone, urchin, scallop and finfish such as perch and char. The most recent success in this area has been in perch farming. While production of perch in Ireland is modest at 40 tonnes, it has been extremely well received in export markets. Switzerland is the key export destination and a niche market for Irish farmed perch is now established there. While volumes remain low, the techniques and response from the market place are encouraging for the future in this area of Irish aquaculture.

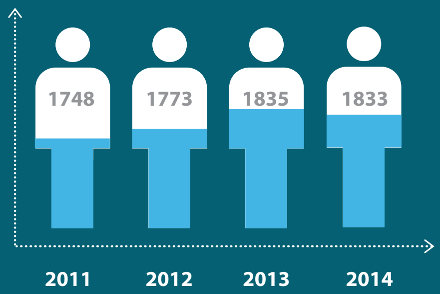
EMPLOYMENT

Oyster production continues to be the dominant employer with

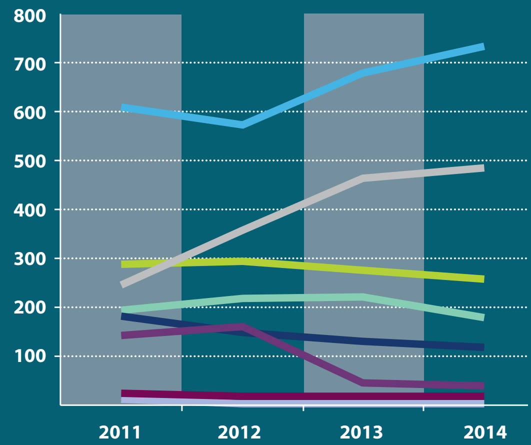
over 1200 persons

deriving direct employment from the gigas and edulis oyster industries.

Full & Part-Time Employment 2011 - 2014

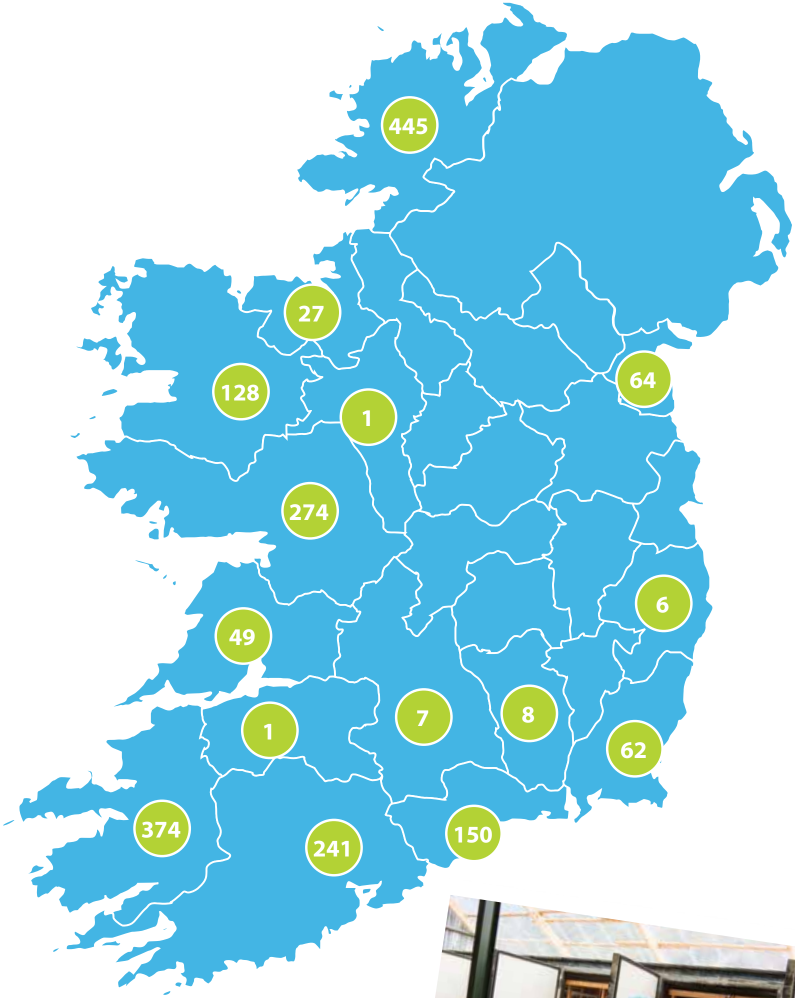


Full & Part-Time Employment 2011 - 2014



- Oysters Gigas
- Mussels Rope
- Oysters Native
- Salmon
- Mussels Seabed
- Others
- Trout Freshwater
- Trout Sea-reared

EMPLOYMENT

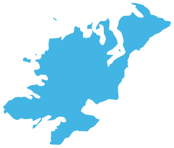


Clare

Gigas Oyster	47
Rope Mussel	2

Cork

Abalone	4
Freshwater Trout	3
Gigas Oyster	61
Native Oyster	3
Rope Mussel	139
Salmon	17
Scallop	2
Seaweed	3
Smolt/parr/ova	6
Urchin	3



Donegal

Seabed Mussel	12
Gigas Oyster	223
Native Oyster	127
Rope Mussel	15
Salmon	46
Scallop	4
Smolt/parr/ova	18

Galway

Abalone	4
Arctic Char	4
Freshwater Trout	1
Gigas Oyster	36
Native Oyster	113
Rope Mussel	43
Salmon	44
Scallop	1
Smolt/parr/ova	28

Kerry

Seabed Mussel	31
Gigas Oyster	72
Native Oyster	206
Rope Mussel	45
Salmon	6
Scallop	11
Seaweed	3

Kilkenny

Freshwater Trout	8

Louth

Seabed Mussel	37
Gigas Oyster	27

Mayo

Gigas Oyster	64
Native Oyster	35
Rope Mussel	12
Salmon	12
Sea Reared trout	2
Smolt/parr/ova	3

Roscommon

Perch	1

Sligo

Gigas Oyster	27

Tipperary

Perch	4
Smolt/parr/ova	3

Waterford

Gigas Oyster	150

Wexford

Seabed Mussel	39
Gigas Oyster	18
Smolt/parr/ova	5

Wicklow

Freshwater Trout	6

Limerick

Gigas Oyster	1

1833
Jobs in 2014

Total employment is stable in 2014 with a total of 1833 jobs in the aquaculture sector.

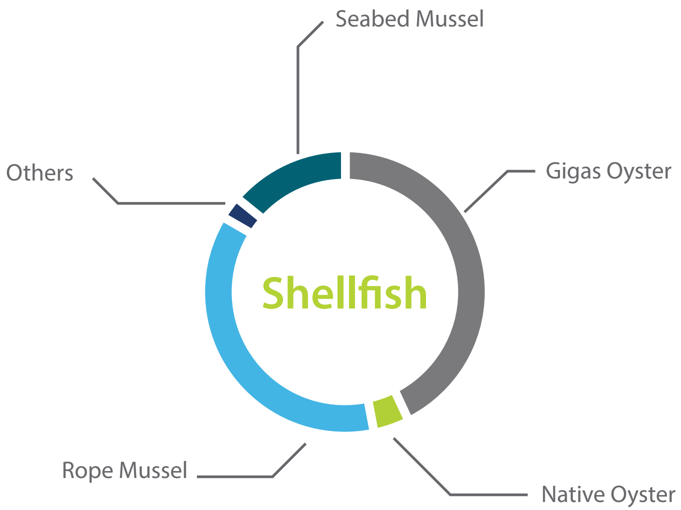
8%
Increase in Employment

Employment in the gigas oyster industry increased by nearly 8% in 2014.

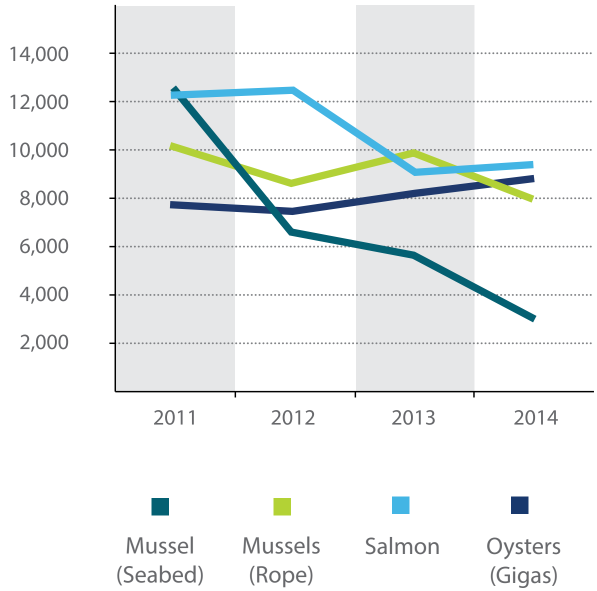
The industry continues to be a male dominated industry with over 93% of employees in aquaculture production male.

PRODUCTION

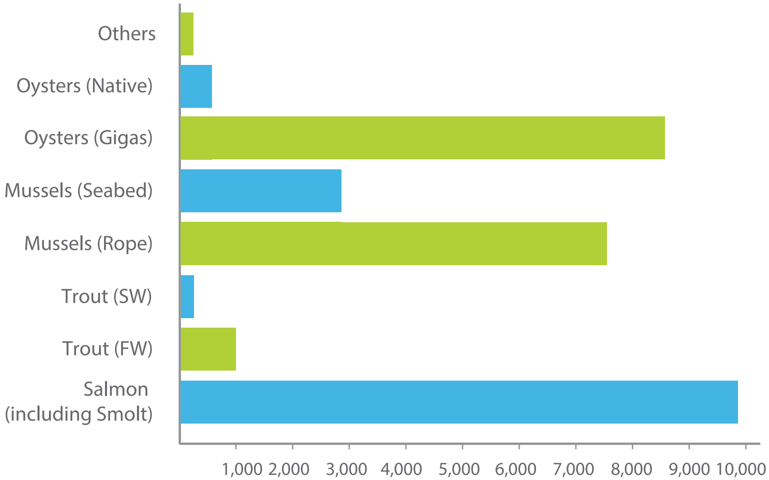
Key Aquaculture Species Production 2014



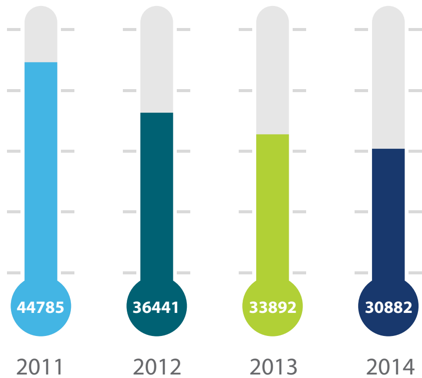
Key Aquaculture Species Production 2011-2014



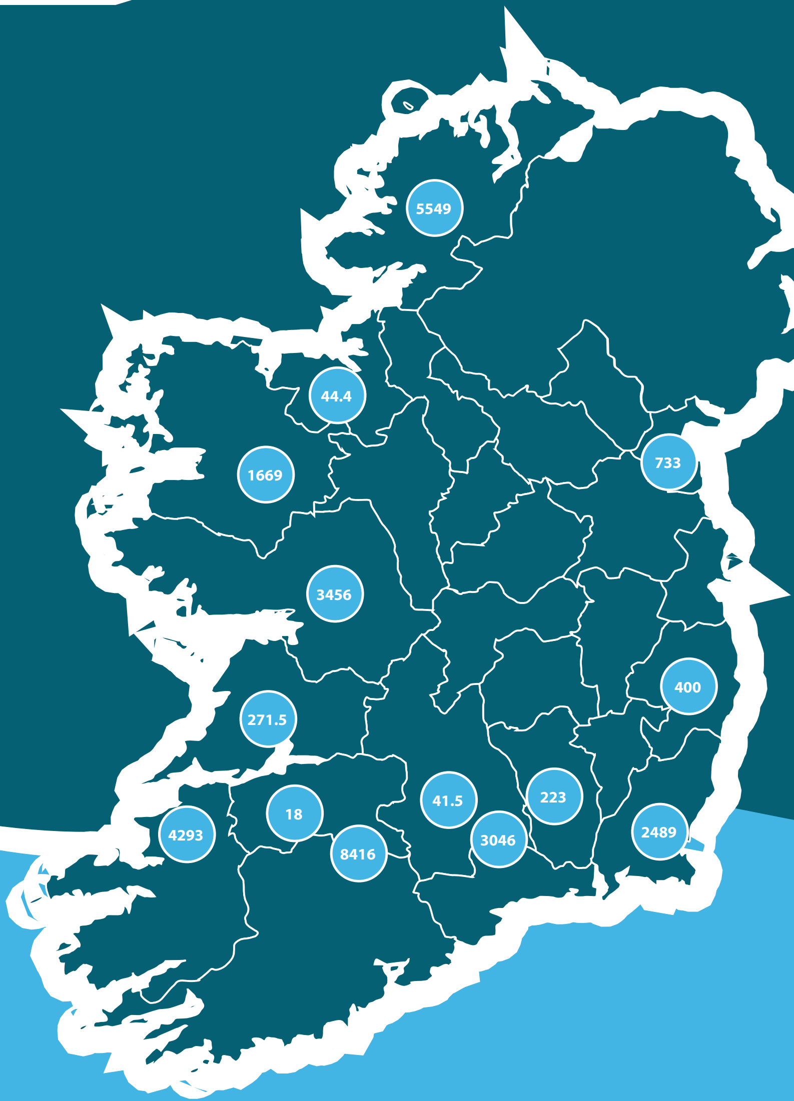
Production in Tonnes by Species 2014



Total Aquaculture in Tonnes 2011-2014



PRODUCTION



Clare

Gigas Oyster	252
Rope Mussel	20

Cork

Abalone	2
Freshwater Trout	90
Gigas Oyster	647
Rope Mussel	4170
Salmon	3467
Seaweed	2
Smolt/parr/ova	38
Urchin	2

Donegal

Seabed Mussel	50
Gigas Oyster	2150
Native Oyster	208
Rope Mussel	900
Salmon	2019
Scallop	12
Smolt/parr/ova	210

7%

INCREASE IN OYSTER PRODUCTION

Volumes of oyster (Gigas) production increased by 7% in 2014

Galway	
Abalone	1
Arctic Char	40
Freshwater Trout	15
Gigas Oyster	182
Native Oyster	72
Rope Mussel	1259
Salmon	1788
Scallop	2
Smolt/parr/ova	97

Kerry	
Seabed Mussel	541
Gigas Oyster	530
Native Oyster	260
Rope Mussel	821
Salmon	2094
Scallop	12
Seaweed	35

Kilkenny	
Freshwater Trout	223

Limerick	
Gigas Oyster	18

Louth	
Seabed Mussel	313
Gigas Oyster	420

Mayo	
Gigas Oyster	892
Native Oyster	16
Rope Mussel	681
Sea Reared trout	80

Sligo	
Gigas Oyster	44

Tipperary	
Perch	38
Smolt/parr/ova	4

Waterford	
Gigas Oyster	3046

Wexford	
Seabed Mussel	2002
Gigas Oyster	459
Smolt/parr/ova	28

Wicklow	
Freshwater Trout	400

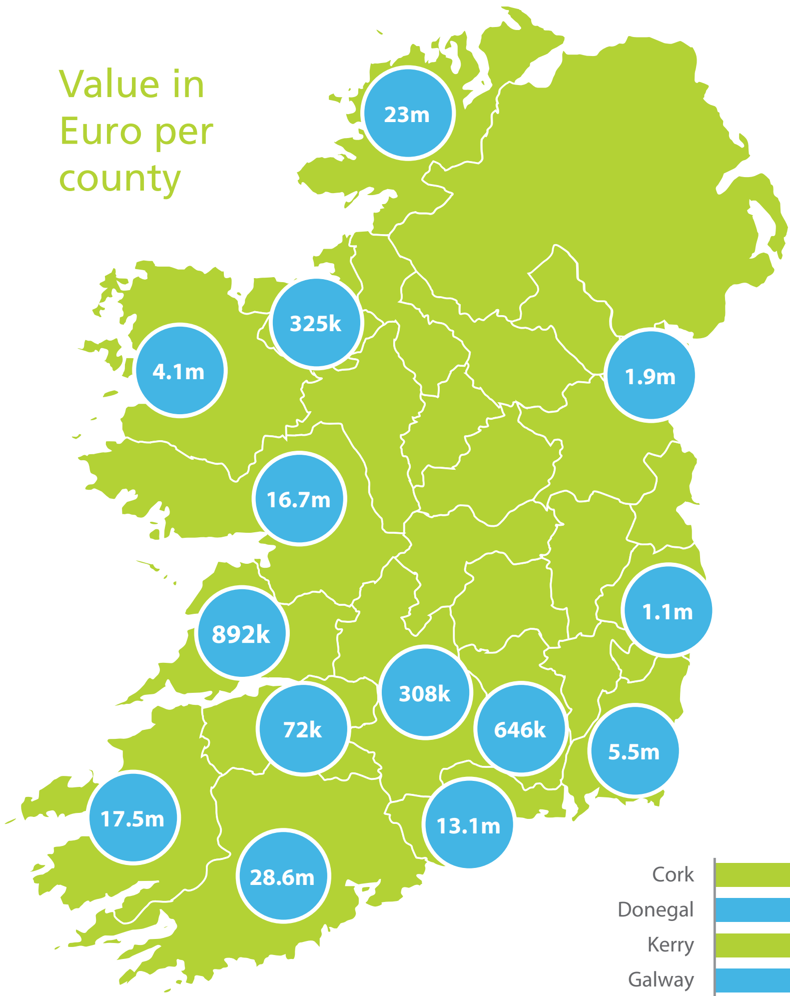
There was a minor decline in the volume of aquaculture species produced last year. This was primarily due to another drop in the harvest of seabed-reared mussels. There was also a less dramatic drop in the production of rope mussels.

4%

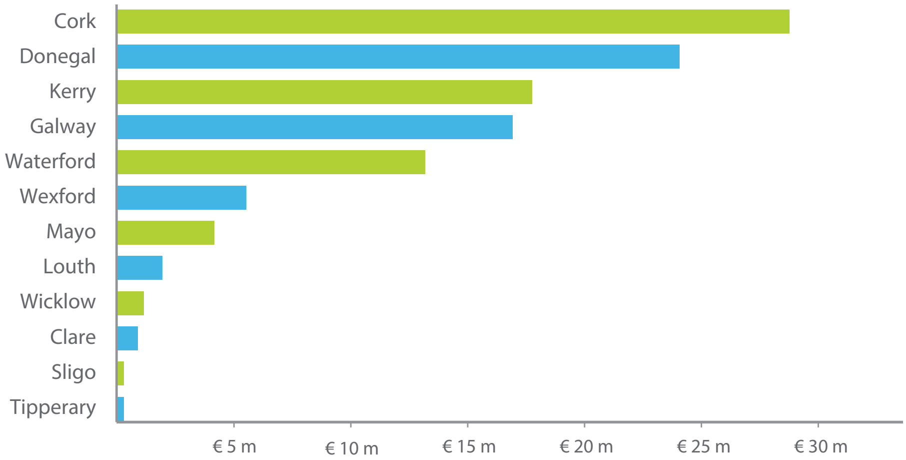
INCREASE IN SALMON PRODUCTION

Salmon production has reversed the trend of recent years and stands at total production of 9,368 tonnes an increase of 4% on 2013 levels.

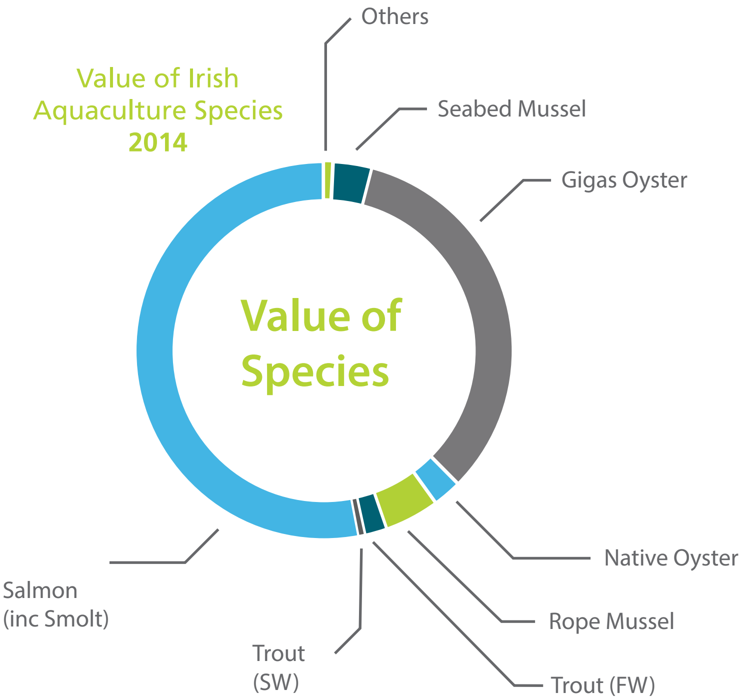
VALUE



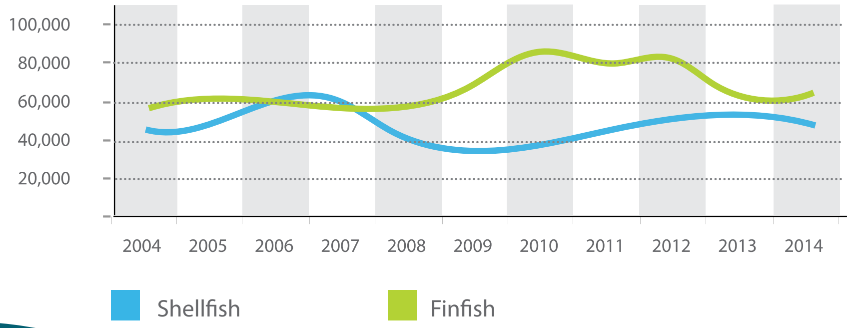
County by Aquaculture Value
2014



Value of Irish Aquaculture Species 2014



Finfish & Shellfish Aquaculture Value 2004 - 2014



€115 million
OVERALL VALUE

The overall value of Irish aquaculture production in 2014 was relatively stable amounting to €115million.

80%
ALONG THE WEST

80% of aquaculture value is derived along the western seaboard

CORK
HIGHEST SALES

Cork is the county which generates the highest first point of sale value from aquaculture at €28m

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