2017 BIM ANNUAL AQUACULTURE SURVEY

BIM Ireland's Seafood Development Agency

SUMMARY

Data from the BIM Annual Aquaculture Survey showed that 2016 aquaculture production has increased by 9% in volume to reach 44,000 tonnes. The value of production at first point of sale has also increased by c.13% to a value of €167m. The primary driver of these results is the continued development of the gigas oyster and salmon industry.

Production of gigas oysters increased to almost 10,000 tonnes up from just over 9,000 in 2015. More significant was the increase in value from €35m to €41m. Gigas oyster production now accounts for 25% of overall aquaculture production by value and in terms of shellfish it accounts for 74% of the value of shellfish aquaculture.

Salmon production had an extremely successful year with production reaching 16,300 tonnes valued at €105m, an increase of 24% and 16% respectively.

Aquaculture in Ireland contributed to providing over 1,900 jobs which is an increase of 6% on the survey data for 2015. The oyster industry remains the largest employer providing nearly 1,300 of these positions. The dominance of males employed in the sector continues with over 92% of the workforce in this category. This is broadly similar to the 2015 data.

The seabed cultured and rope mussel sector experienced another challenging year in production with combined production volume of 16,000 tonnes and a value of €12m. This value is slightly down on 2015 values and reflects the continued challenge of acquiring seed mussels in the seabed cultured sector and a competitive market. Despite this, the seed settlement in previous years has increased and this should become evident in the returns for 2017. Both sectors though are unfortunately subject to difficult market conditions in Europe at the moment.

Novel species such as perch, abalone and urchin continue to be in production at stable levels. Perch production is due to be increased in 2017.

SALMON

Sea production of salmon has increased by 24% to 16,300 tonnes worth €105 million in 2016 a significant increase on the 2015 data. Within the salmon sector, hatchery facilities also produced stock valued at €4 million.

Primary salmon production provides mainly full-time employment and has the most diverse and lucrative economic knock on effects.

OYSTERS

The largest employing primary production sector with approximately 1,300 jobs in 2016 for gigas and native oysters combined. Although oyster production is carried out around the entire coast of Ireland the most concentrated production areas are in the South-east and North-west.

Overall production volume increased to nearly 10,000 tonnes (gigas) this was coupled with a significant increase in overall value to €41m, an increase of 18%. This was driven mainly by first point of sale price increasing from €3.9 per kg to €4.3 per kg on average.

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 6,000 tonnes in 2016. One phenomenon of the previous decline has been the further amalgamation of companies in this business reducing from 46 in 2014 to 25 in 2016. Production is now concentrated in three bays, Carlingford Lough, Wexford Harbour and Castlemaine Harbour.

ROPE MUSSELS

Concentrated in the South-west and to a lesser extent the North-west, production volume is nearly 10,000 tonnes, a minor decrease on 2015 levels. 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 from previous years has also contributed to this demand but unfortunately prices remain challenging for the sector.

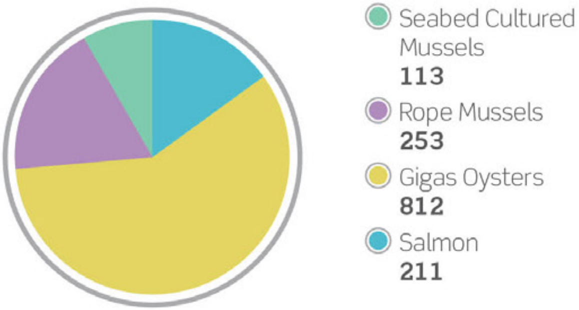
Despite this, the sector contributes to employment of over 250 persons in the primary production part of the business.

OTHER SECTORS

The remaining aquaculture species such as abalone, urchin, scallop, perch, trout and seaweed are at relatively low levels.

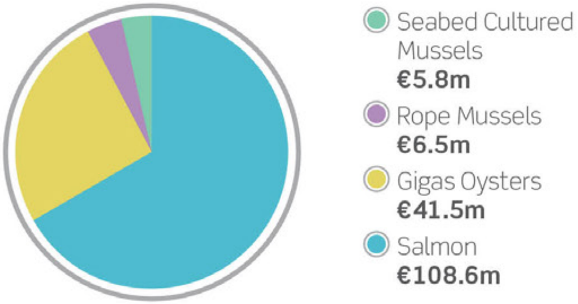
OVERVIEW

Persons Employed*

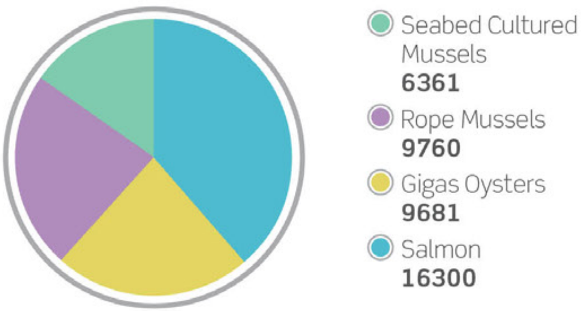


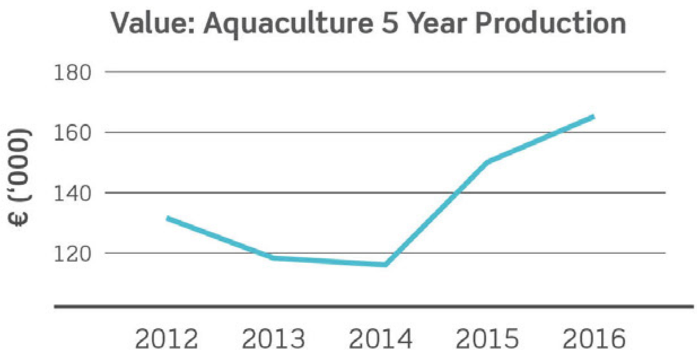
* Only in primary production

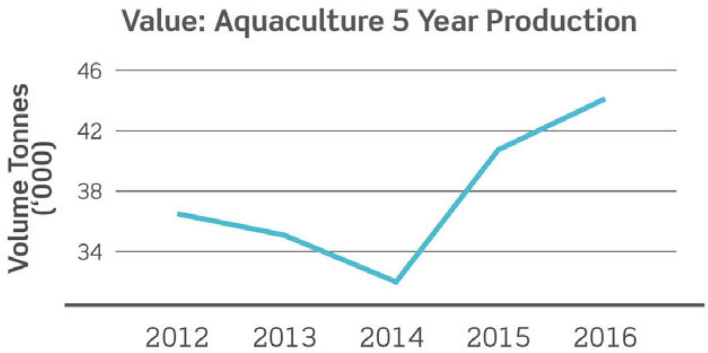
Value



Tonnage







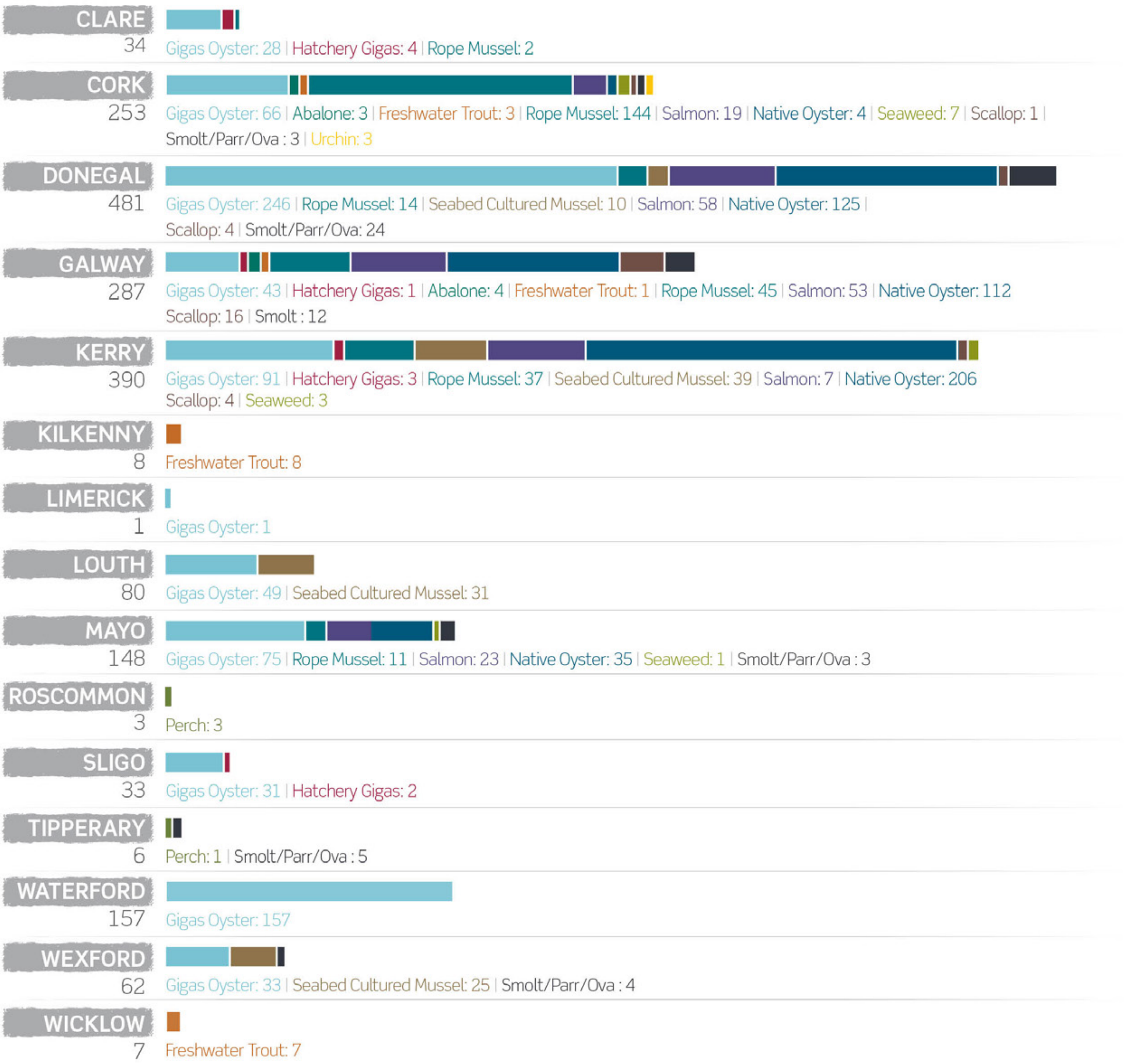
EMPLOYMENT

Total Employment in the aquaculture sector is:

1,949

8% FEMALE

92% MALE


CLARE
34
Gigas Oyster: 28 | Hatchery Gigas: 4 | Rope Mussel: 2
CORK
253
Gigas Oyster: 66 | Abalone: 3 | Freshwater Trout: 3 | Rope Mussel: 144 | Salmon: 19 | Native Oyster: 4 | Seaweed: 7 | Scallop: 1 | Smolt/Parr/Ova : 3 | Urchin: 3
DONEGAL
481
Gigas Oyster: 246 | Rope Mussel: 14 | Seabed Cultured Mussel: 10 | Salmon: 58 | Native Oyster: 125 | Scallop: 4 | Smolt/Parr/Ova: 24
GALWAY
287
Gigas Oyster: 43 | Hatchery Gigas: 1 | Abalone: 4 | Freshwater Trout: 1 | Rope Mussel: 45 | Salmon: 53 | Native Oyster: 112 Scallop: 16 | Smolt : 12
KERRY
390
Gigas Oyster: 91 | Hatchery Gigas: 3 | Rope Mussel: 37 | Seabed Cultured Mussel: 39 | Salmon: 7 | Native Oyster: 206 Scallop: 4 | Seaweed: 3
KILKENNY
8
Freshwater Trout: 8
LIMERICK
1
Gigas Oyster: 1
LOUTH
80
Gigas Oyster: 49 | Seabed Cultured Mussel: 31
MAYO
148
Gigas Oyster: 75 | Rope Mussel: 11 | Salmon: 23 | Native Oyster: 35 | Seaweed: 1 | Smolt/Parr/Ova : 3
ROSCOMMON
3
Perch: 3
SLIGO
33
Gigas Oyster: 31 | Hatchery Gigas: 2
TIPPERARY
6
Perch: 1 | Smolt/Parr/Ova : 5
WATERFORD
157
Gigas Oyster: 157
WEXFORD
62
Gigas Oyster: 33 | Seabed Cultured Mussel: 25 | Smolt/Parr/Ova : 4
WICKLOW
7
Freshwater Trout: 7

VALUE

"Value increased by €19m to a total of **€167m**"

CLARE
€801,550
Gigas Oyster: €724,550 | Hatchery Gigas: €50,000 | Rope Mussel: €27,000

CORK
€33,180,411
Gigas Oyster: €3,236,236 | Abalone: €60,000 | Freshwater Trout: €300,000 | Rope Mussel: €4,097,122 | Salmon: €25,200,526
Smolt: €264,000 | Urchin: €22,500

DONEGAL
€28,038,3948
Gigas Oyster: €10,520,079 | Rope Mussel: €490,145 | Seabed Cultured Mussel: €118,500 | Salmon: €14,739,074
Native Oyster: €546,000 | Scallop: €105,000 | Smolt: €1,519,600

GALWAY
€37,961,140
Gigas Oyster: €1,590,900 | Hatchery Gigas: €5,000 | Abalone: €25,200 | Freshwater Trout: €41,910 | Rope Mussel: €637,880
Salmon: €34,040,000 | Native Oyster: €634,000 | Scallop: €41,250 | Smolt: €945,000

KERRY
€21,888,672
Gigas Oyster: €4,573,413 | Hatchery Gigas: €120,000 | Rope Mussel: €663,270 | Salmon: €14,269,239
Seabed Cultured Mussel: €1,200,750 | Native Oyster: €1,015,000 | Scallop: €12,000 | Seaweed: €35,000

KILKENNY
€675,000
Freshwater Trout: €675,000

LOUTH
€3,582,400
Gigas Oyster: €1,763,000 | Seabed Cultured Mussel: €1,819,400

MAYO
€21,148,267
Gigas Oyster: €4,297,360 | Rope Mussel: €557,630 | Salmon: €16,229,277 | Native Oyster: €64,000

SLIGO
€860,800
Gigas Oyster: €810,800 | Hatchery Gigas: €50,000

TIPPERARY
€673,000
Perch: €105,000 | Smolt: €568,000

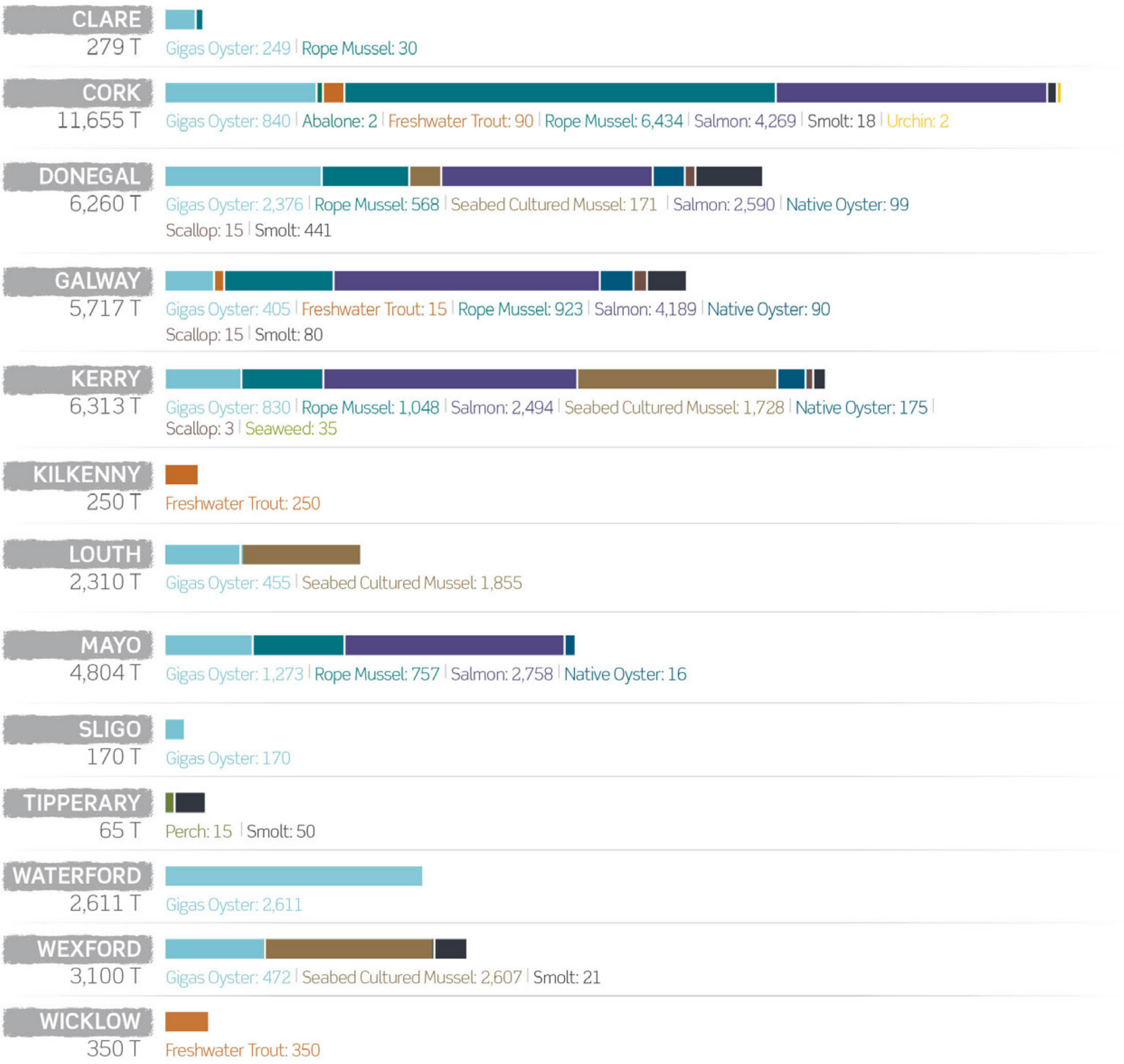
WATERFORD
€11,644,400
Gigas Oyster: €11,644,400

WEXFORD
€5,780,327
Gigas Oyster: €2,290,480 | Seabed Cultured Mussel: €2,619,847 | Smolt: €870,000

WICKLOW
€917,000
Freshwater Trout: €917,000

VOLUME

"Total volume of aquaculture production increased by **9%** to over **44,000** tonnes."


CLARE
279 T
Gigas Oyster: 249 | Rope Mussel: 30
CORK
11,655 T
Gigas Oyster: 840 | Abalone: 2 | Freshwater Trout: 90 | Rope Mussel: 6,434 | Salmon: 4,269 | Smolt: 18 | Urchin: 2
DONEGAL
6,260 T
Gigas Oyster: 2,376 | Rope Mussel: 568 | Seabed Cultured Mussel: 171 | Salmon: 2,590 | Native Oyster: 99
Scallop: 15 | Smolt: 441
GALWAY
5,717 T
Gigas Oyster: 405 | Freshwater Trout: 15 | Rope Mussel: 923 | Salmon: 4,189 | Native Oyster: 90
Scallop: 15 | Smolt: 80
KERRY
6,313 T
Gigas Oyster: 830 | Rope Mussel: 1,048 | Salmon: 2,494 | Seabed Cultured Mussel: 1,728 | Native Oyster: 175 |
Scallop: 3 | Seaweed: 35
KILKENNY
250 T
Freshwater Trout: 250
LOUTH
2,310 T
Gigas Oyster: 455 | Seabed Cultured Mussel: 1,855
MAYO
4,804 T
Gigas Oyster: 1,273 | Rope Mussel: 757 | Salmon: 2,758 | Native Oyster: 16
SLIGO
170 T
Gigas Oyster: 170
TIPPERARY
65 T
Perch: 15 | Smolt: 50
WATERFORD
2,611 T
Gigas Oyster: 2,611
WEXFORD
3,100 T
Gigas Oyster: 472 | Seabed Cultured Mussel: 2,607 | Smolt: 21
WICKLOW
350 T
Freshwater Trout: 350

PRODUCTION UNITS


CLARE
12 UNITS
Gigas Oyster: 10 | Hatchery Gigas: 1 | Rope Mussel: 1
CORK
48 UNITS
Gigas Oyster: 11 | Abalone: 1 | Freshwater Trout: 1 | Rope Mussel: 27 | Salmon: 3 | Native Oyster: 1 | Scallop: 1 | Seaweed: 1 | Smolt: 1 | Urchin: 1
DONEGAL
60 UNITS
Gigas Oyster: 37 | Rope Mussel: 3 | Seabed Cultured Mussel: 6 | Salmon: 7 | Native Oyster: 2 | Scallop: 1 | Smolt: 4
GALWAY
46 UNITS
Gigas Oyster: 17 | Abalone: 1 | Freshwater Trout: 1 | Rope Mussel: 15 | Salmon: 3 | Native Oyster: 3 | Hatchery Gigas: 1 | Scallop: 1 | Smolt: 4
KERRY
50 UNITS
Gigas Oyster: 24 | Hatchery Gigas: 1 | Rope Mussel: 9 | Seabed Cultured Mussel: 11 | Native Oyster: 1 | Scallop: 2 | Seaweed: 1 | Salmon: 1
KILKENNY
1 UNIT
Freshwater Trout: 1
LIMERICK
1 UNIT
Gigas Oyster: 1
LOUTH
9 UNITS
Gigas Oyster: 3 | Seabed Cultured Mussel: 6
MAYO
26 UNITS
Gigas Oyster: 18 | Rope Mussel: 3 | Salmon: 2 | Native Oyster: 1 | Smolt: 1 | Seaweed: 1
ROSCOMMON
1
Perch: 1
SLIGO
5 UNITS
Gigas Oyster: 4 | Hatchery Gigas: 1
TIPPERARY
3 UNITS
Smolt: 2 | Perch: 1
WATERFORD
17 UNITS
Gigas Oyster: 17
WEXFORD
11 UNITS
Gigas Oyster: 4 | Seabed Cultured Mussel: 6 | Smolt: 1
WICKLOW
1 UNIT
Freshwater Trout: 1

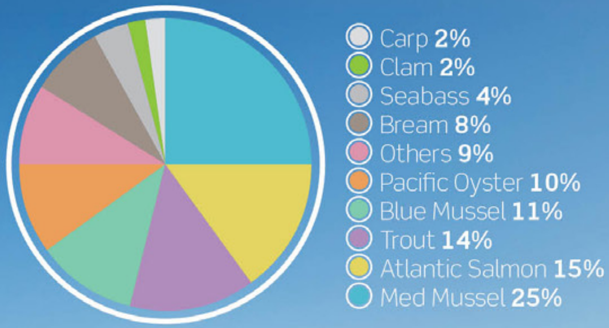
STECF REPORT

The Scientific Technical and Economic Committee for Fisheries (STECF) is the body that commissions the Joint Research Centre (JRC) to produce the bi-annual report on the performance of the EU aquaculture sector.

This report describes the status of EU production within global production, the principle EU species cultured and the state of production within each member state by species cultured. The structure, financial state and socio-economic make-up of aquaculture EU-wide and by member state is also reported. BIM is charged with the preparation and presentation of the Irish contribution to this report.

Aquaculture production in the EU28 reached 1.55 million tonnes and accounted for €3.8 billion in 2014. Blue mussel and Gigas Oyster production accounts for 21% of this volume, 325,000 tonnes, of which the Irish contribution is 7.53 %

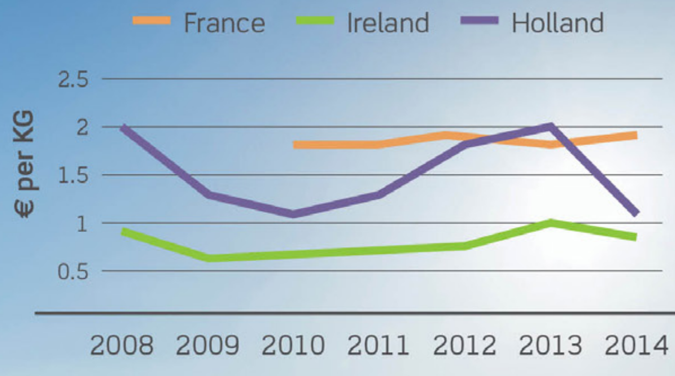
% of EU production breakdown by Specis



The STECF report is available on the JRC website: https://ec.europa.eu/jrc or from BIM upon request

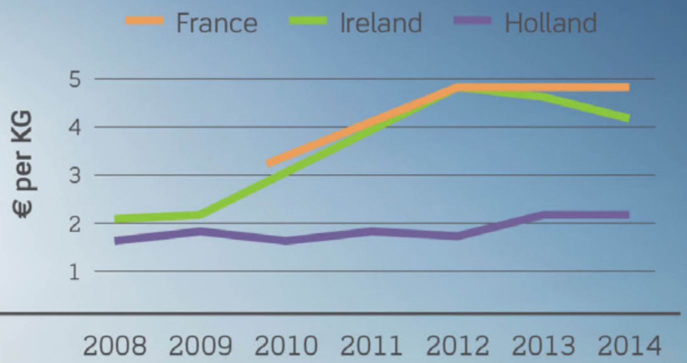
BLUE MUSSELS

The major competitors for Ireland are France, where culture is intensive (Bouchot and suspended rope) and Holland where culture is extensive. Virtually all Dutch mussels are exported, principally to Belgium and France. The demand for Irish mussel has suffered in the face of abundant Dutch supply.



OYSTERS

Irish oysters have become recognised in France for their quality and there is a growing recognition of this in the French market.



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