2018

# BIM Annual
# Aquaculture Survey

BIM
Ireland's Seafood Development Agency

# Summary

**The 2018 Aquaculture Survey indicates that Irish Aquaculture output in 2017 increased to 47,147 tonnes of farm-gate produce, worth €208.4 million. Production continued to expand in both overall volume (plus 7%), value (plus 24%) and unit value from 2016.**

The salmon sector was the major contributor to the increase in both overall volume and value, while the oyster sector output continued to expand but at a decreasing rate compared to 2016. The unit value of both these sectors continues to increase, as does the recognition of the Irish product quality. The organic salmon market continues to be undersupplied. The rope mussel sector output decreased in volume, while the bottom mussel sector continued to recover in 2017 though seed supply uncertainty remains a threat to this. The trout sector has remained stable while production in the minor sectors decreased in 2017.

The industry employed 1,913 people directly on 280 primary production units in 2017. Employment and number of businesses fell back slightly. Full-time equivalent employment dropped by 2% to 1,012 persons and number of active businesses by 1.6% to 249, reflecting further amalgamation of enterprises in some sectors.

Amount of farm-gate produced in 2017

**47,147**

tonnes

## Salmon

The salmon on-grown sector, dominating the national trends, is up 15.6% in volume to 19,305 tonnes, whole-round and value is up 26% to €141.2 million. Smolt production reached 650 tonnes worth €5.3 million. Employment in the salmon sector is mainly full-time with a total of 210 in direct employment at primary production sites alone, which is at the start of a lucrative economic chain. Salmon production occurs off the coasts of Donegal, Mayo, Galway, Kerry and Cork and at a number of land-based facilities. The product, grown to exclusively organic certification standards, is exported to diverse markets; to the EU, North America and the Near and Far East.

## Oysters

The farmed oyster (gigas) sector continued to expand by 2% in volume to 9,879 tonnes and 3.2% in overall value to €43.3 million, but at a decreasing rate compared to 2016. Oyster unit value is holding. Combined oyster employment is close to 1,300, mainly on gigas oyster farms. Just under half of this total is full-time employment. Production is widespread along the coast with concentrations of production in the South-east and North-west regions. The market for Irish grown oysters was mainly France, but while this is still the main destination, the product is increasingly going to other European markets and to the Far East. Increasingly, home-branded product is being sold directly to retail.

## Other Sectors

The trout sector has remained stable with a slight decrease in volume, offset by a slight increase in unit value. Production in the minor sectors, including scallop, abalone, perch and seaweed species decreased in 2017.

## Mussels

### Seabed Cultured

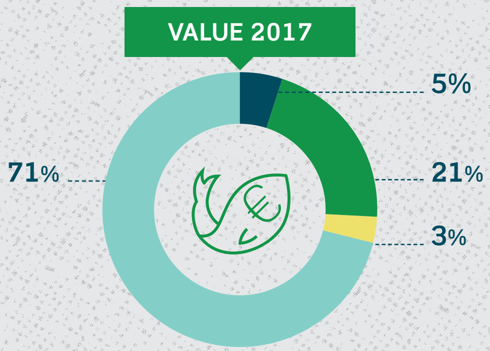
The bottom mussel sector production continued to recover in 2017; by 20% in volume to 7,781 tonnes and by 56% in value to €9.2 million in 2017. The sectors businesses, recently decimated in number by several poor seed settlement years and despite the shortage, poor unit prices, has stabilised at 24 from 46 businesses. Bottom culture operates currently in Carlingford Lough, Wexford Harbour and Castlemaine Harbour, employing 114 persons. The industry has not, thus far, recovered in the North-west. The industry continues to depend almost exclusively on the extent of annual wild seed settlement, while cost effective alternative seed sources are pursued.

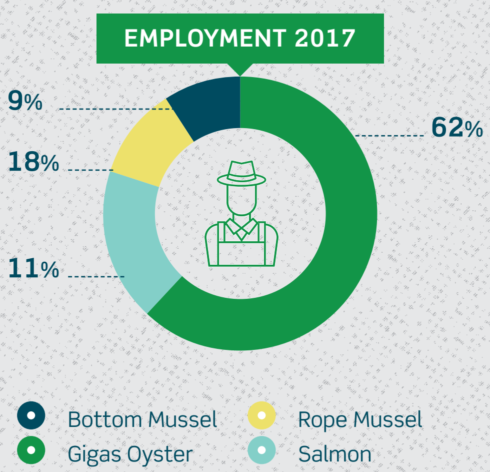
### Rope Mussels

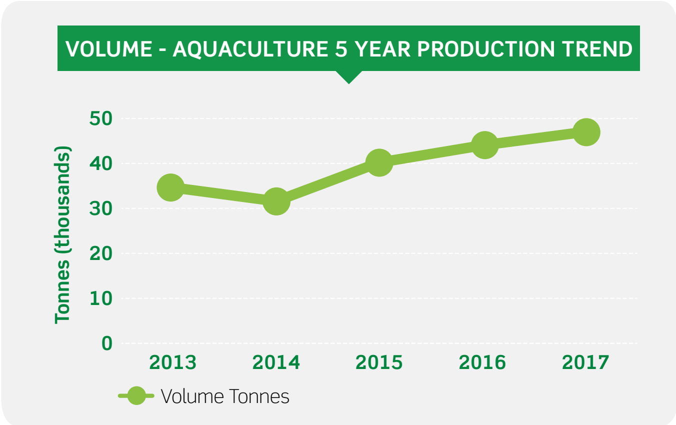
The rope mussel sector production in 2017 decreased by 12.4% in volume to 8,549 tonnes and 11.1% in overall value to €5.75 million with a slight increase in unit value. The difference in unit value of produce for the fresh market and that sold to processors decreased to insignificance in some areas due to poor meat yields. The number of businesses operating is 55 and the number of employed at 238, continues to decline as the sector continues to streamline into larger units with specialist crews and equipment servicing a greater number of these. Production is concentrated in the South-west; Cork and Kerry and to a lesser extent in the North-west, from Killary Harbour to Mulroy Bay. France and Holland remain the market destinations of the fresh product, and unit value remains between €650 and €750 in most cases, with some more valuable exceptions. While red tide closures obstruct continuous production flow, the biggest impediment to the sectors growth remain the reliance on those markets that have a large home production stock, leading to periods of over-supply.

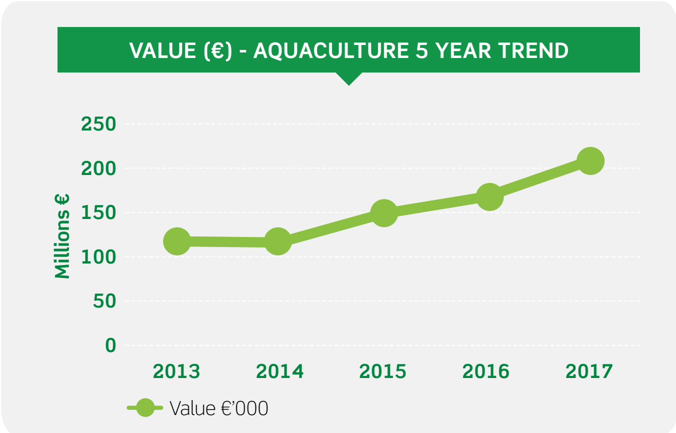
# Overview

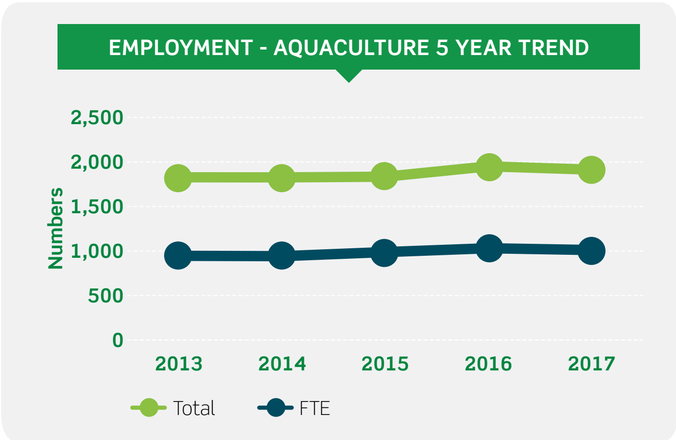

TONNES 2017
17%
42%
19%
22%


VALUE 2017
5%
71%
21%
3%


EMPLOYMENT 2017
9%
62%
18%
11%
Bottom Mussel
Rope Mussel
Gigas Oyster
Salmon


VOLUME - AQUACULTURE 5 YEAR PRODUCTION TREND
Tonnes (thousands)
50
40
30
20
10
0
2013
2014
2015
2016
2017
Volume Tonnes


VALUE (€) - AQUACULTURE 5 YEAR TREND
Millions €
250
200
150
100
50
0
2013
2014
2015
2016
2017
Value €'000

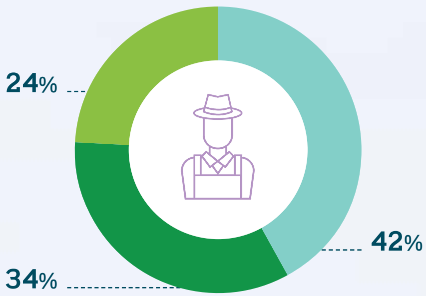

EMPLOYMENT - AQUACULTURE 5 YEAR TREND
Numbers
2,500
2,000
1,500
1,000
500
0
2013
2014
2015
2016
2017
Total
FTE

# Employment

**Employment fell slightly in 2017 across a number of sectors, despite output growth. Employment ratios between full-time and part-time and between the shellfish and finfish remain unchanged since the 2016 report.**

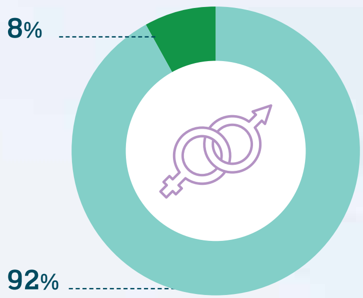
**While finfish production (salmon) contributes the most value in primary production, bivalve shellfish production provides the greatest overall employment at the primary level. The proportion of female employment rose by 1% to 8%.**

**AQUACULTURE EMPLOYMENT LEVEL 2017**



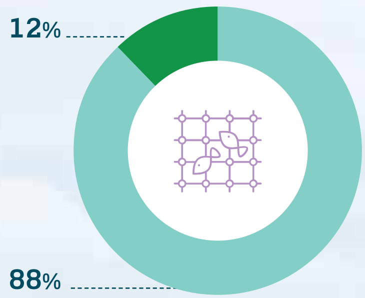

Full-time
Part-time
Casual

**AQUACULTURE EMPLOYMENT GENDER RATIO 2017**



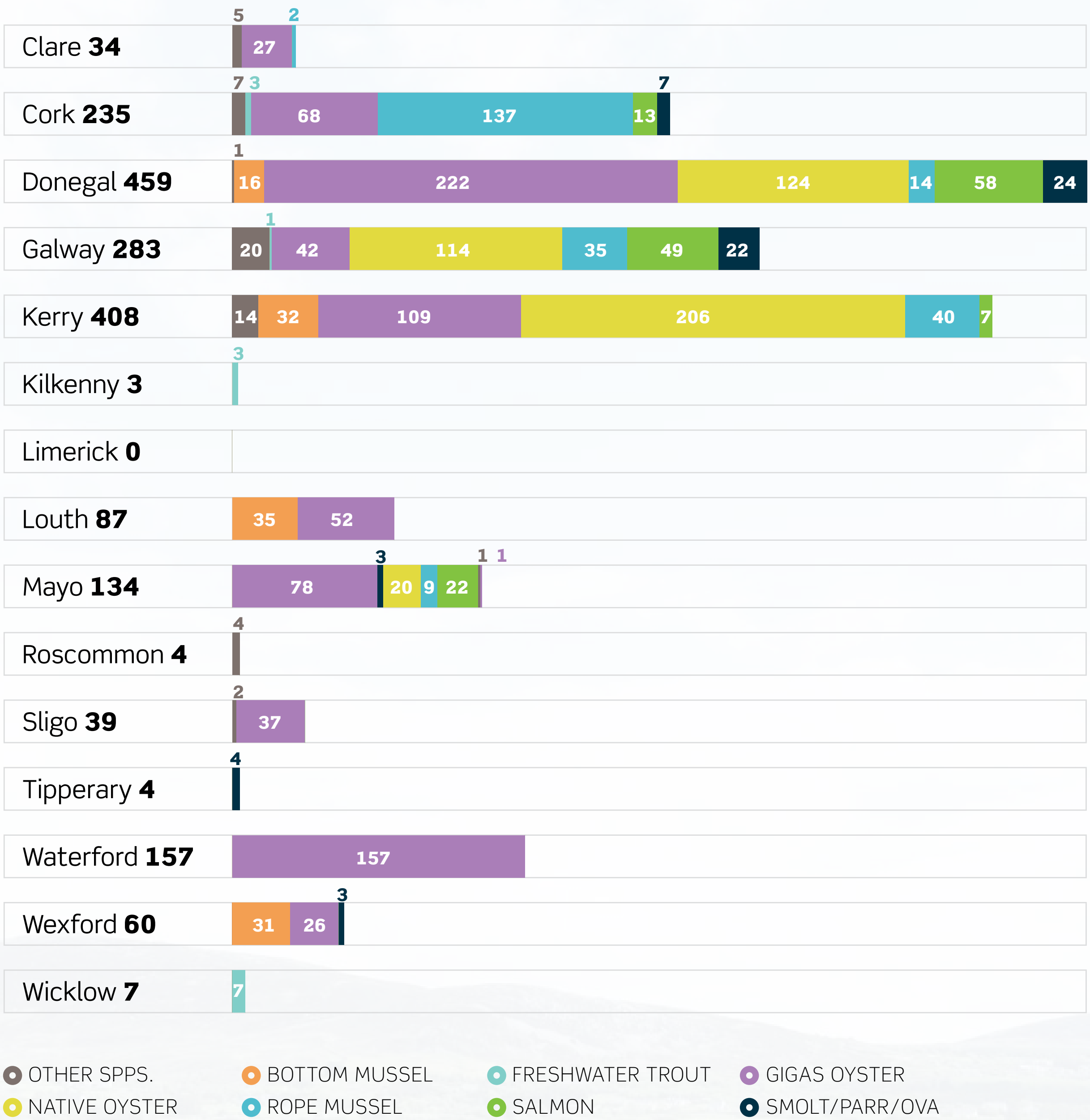

Male
Female

**AQUACULTURE EMPLOYMENT FINFISH V SHELLFISH 2017**




Total Shellfish
Total Finfish

## EMPLOYMENT BY COUNTY AND SPP. IN 2017

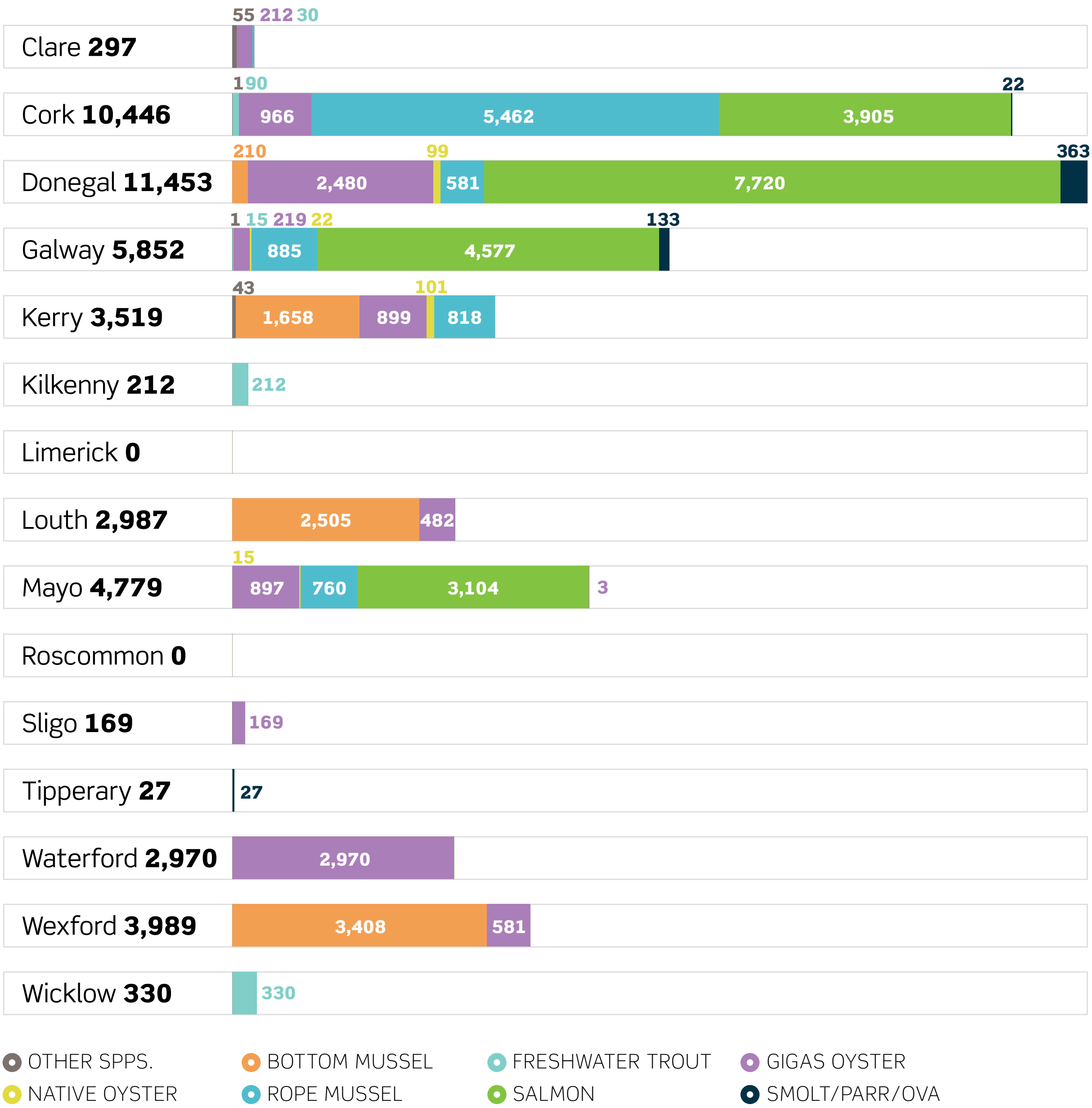


# Volume (Tonnes) 2017

Total volume increased by 7% to over

**47,000** tonnes

## PRODUCTION TONNAGE BY COUNTY 2017

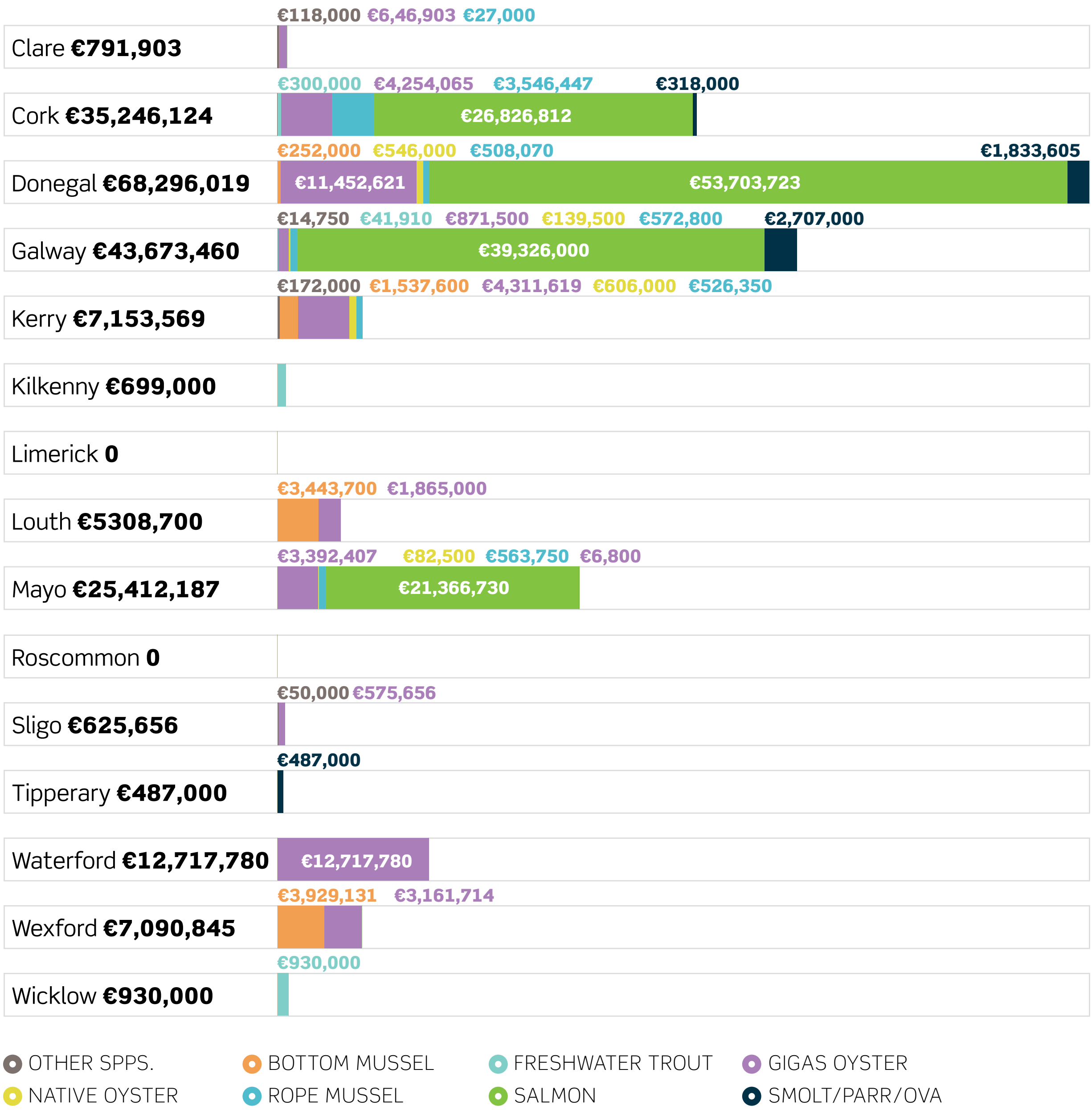


# Production Value

Production value has increased by 24% from €168.6 million to over

**€208 million**

## PRODUCTION VALUE BY SPP. AND COUNTY 2017



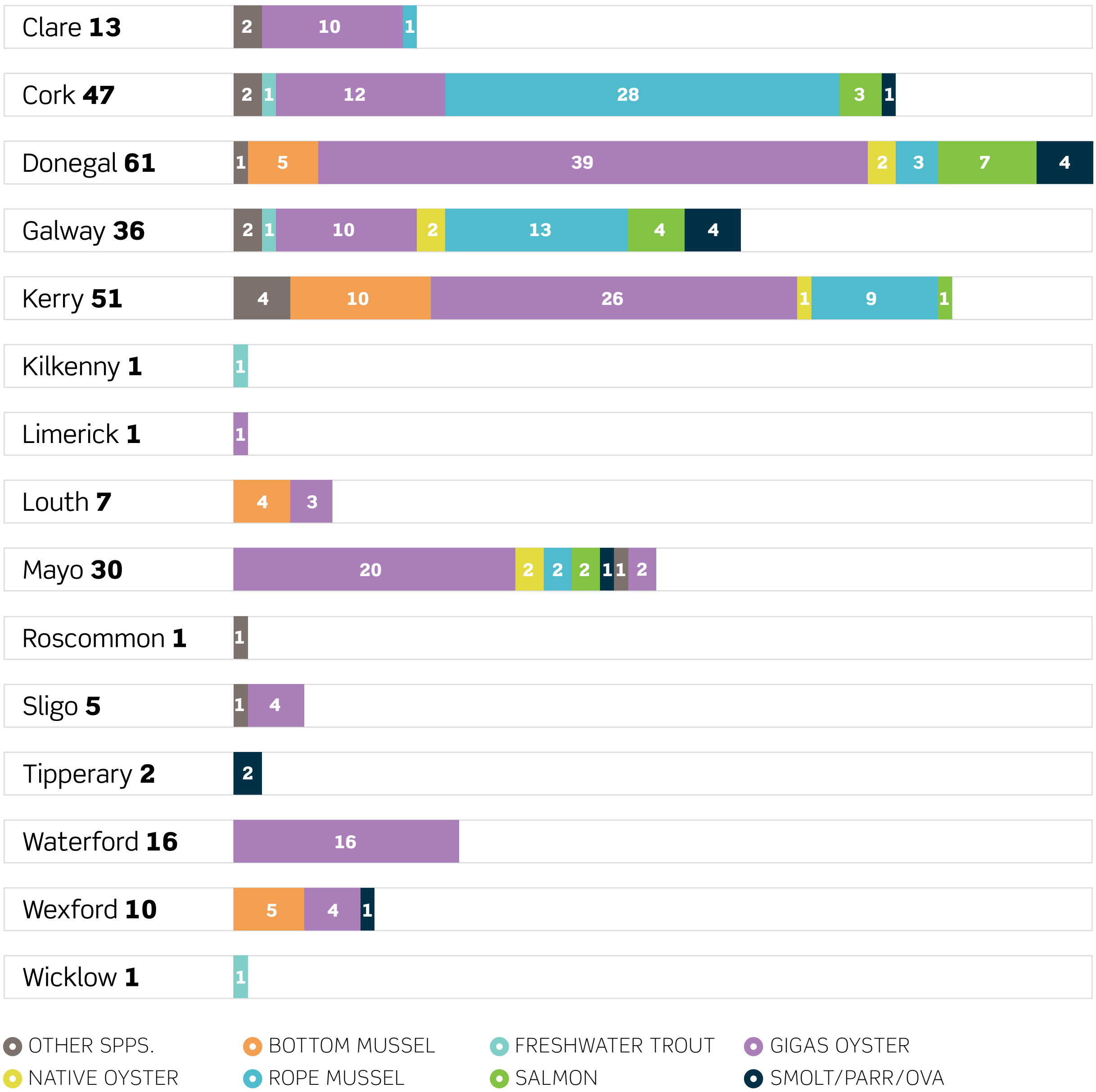
# Production Units

**249** businesses operating

**282**

production units

## PRODUCTION UNITS BY COUNTY AND SPP. 2017



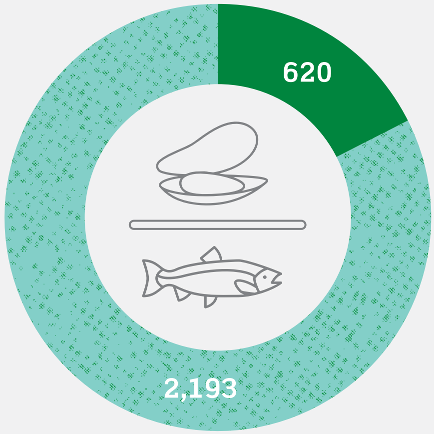
# Oyster Meat Yield Study 2017-2018

**A study of farmed Irish oyster meat yields at selected sites around the coast was conducted over a 12 month period to explore the possibility of using yields as a product marketing tool. As a study reference, French industry standard measurements were used. According to this standard 'Speciales' or Near-Speciales are animals with a yield of approximately 12%. How do Irish oysters measure up?**

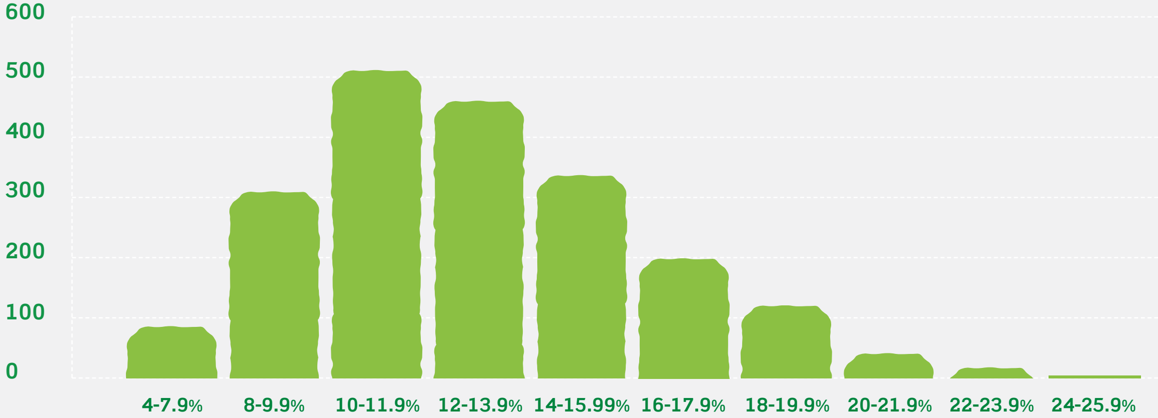
Two samples, a top product and a standard of 30 oysters each, were taken from 12 sites around the coast from Louth to Donegal, every three months. Each animal was weighed, shucked, meats dried on tissue for several minutes and weighed, from which individual meat yields were derived.

## Average proportions of meat yield less than or greater than 10% over study period 2017-2018

- < 10%
- 10% or greater




## Range of % yields overall




The results show, from a total number of 2,813 measurements that 78% of all yields measured were of 10% or more. 52% of yields overall were 12% or more. Top products averaged 13% in yield and standards averaged 12.1% for the study period. A farther study in China also highlighted that Irish oyster quality and value matched if not exceeded competitors.


For further information on product quality studies or their set-up, please contact Richard Donnelly, Development & Innovation Services: **Richard.Donnelly@bim.ie**

BIM
Ireland's Seafood Development Agency

www.bim.ie
@BordIascMhara
01 214 4100

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