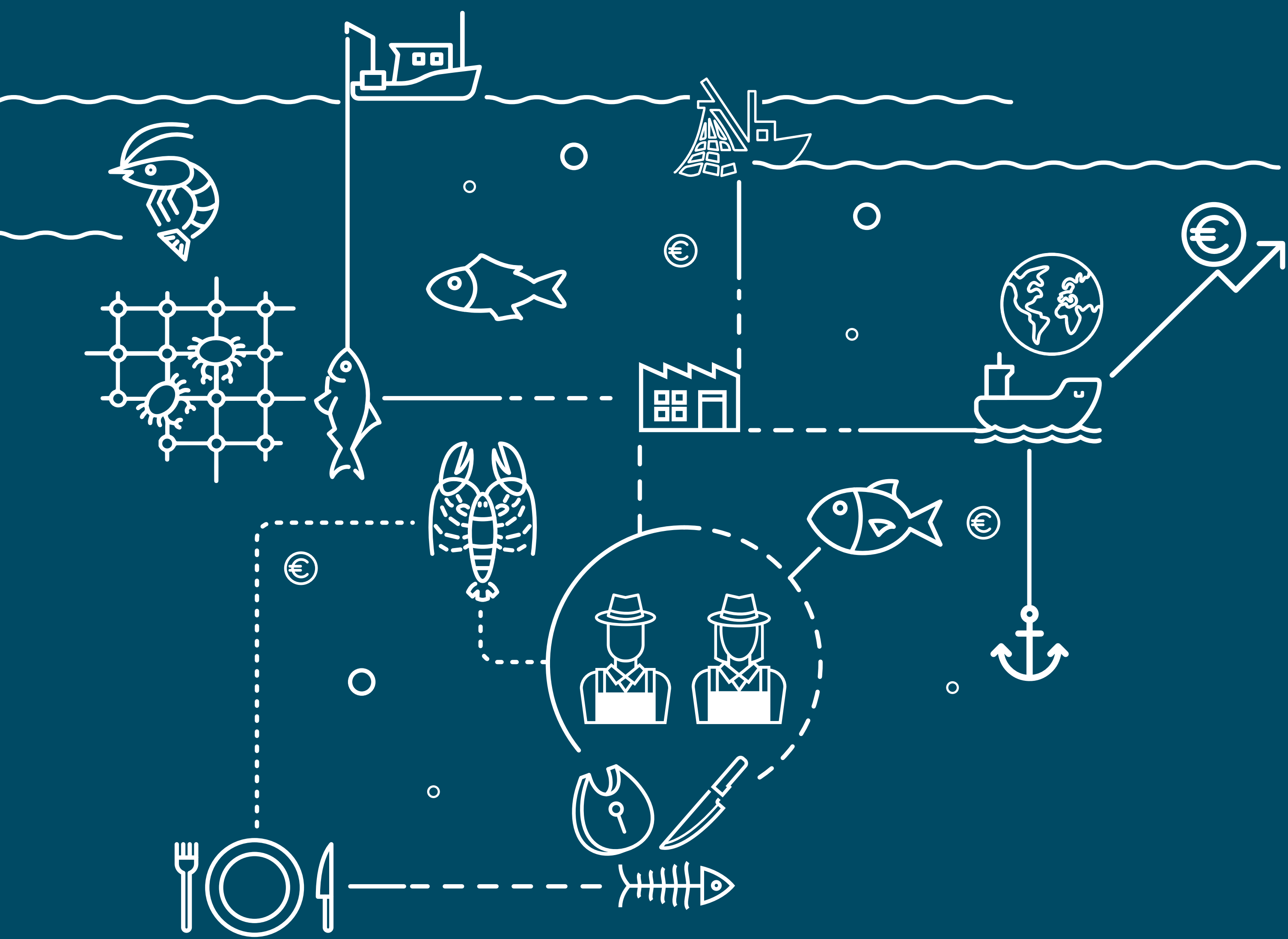
BIM Ireland's Seafood Development Agency

The Business of Seafood 2016

A Snapshot of Ireland's Seafood Sector



The Business of Seafood 2016

In 2016, the GDP of the Irish Seafood industry is estimated at **€1.1bn**

€167M

of fish and shellfish are farmed

13% increase on 2015

The value of fish landed and farmed before any value is added is

€543M

Irish seafood exports are worth

€559M

1%

OUR BIGGEST FISHING PORTS

(VALUE OF LANDINGS)

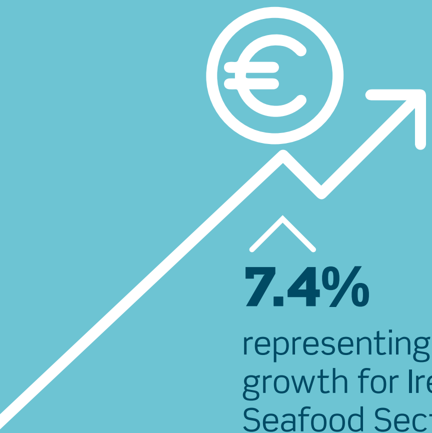
Castletownbere **€111M**

Killybegs **€85M**

Killybegs is the biggest port for domestic landings with 65% of fish landed into Castletownbere from foreign vessels

11,000

people are employed around our coast (directly and indirectly)



7.4%

representing a 7.4% growth for Ireland's Seafood Sector

Ireland imported

€276M

worth of seafood in 2016

UK was main import country worth

€186M (67%)

IRELAND'S MAIN EXPORT MARKETS:

EU (incl. UK)

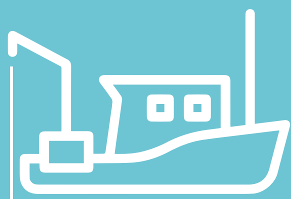
€429M

Asia

€46M

Nigeria/N. Africa

€46M



€376M

of seafood was landed by Irish and foreign vessels into our ports in 2016 (includes vessels under and over 10 metres)

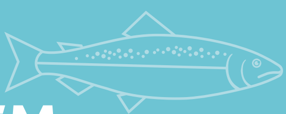
DOMESTIC SALES:

€380M

Retail: €239M
Food Service: €141M

TOP SELLING SPECIES:

Salmon



€94.5M
(up 11.5%)

Cod

€47.5M

156

number of seafood processors

2,039

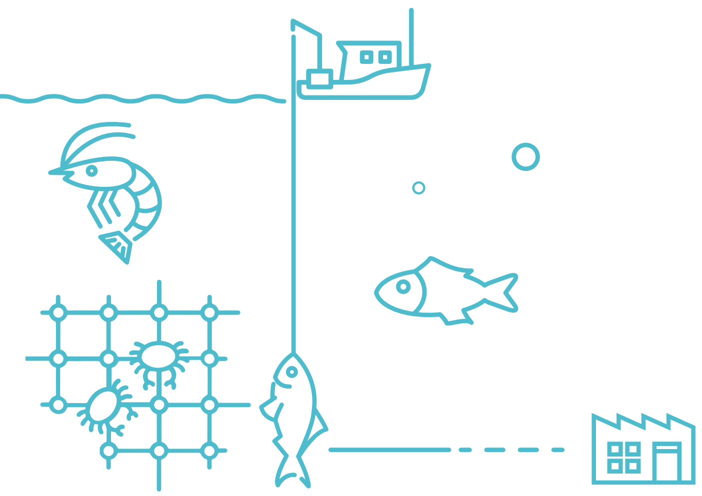
number of registered fishing vessels in 2016

SECTION 1

Irish Seafood: planning for success

2016 has been a strong year for Ireland's seafood industry. The sector is growing and plays an important role in the country's economy, contributing €1.1 billion in GDP. Continued investment and support combined with buy-in from the industry itself has created a firm foundation on which to build and develop for the future. Irish seafood has become an industry with the resilience to withstand potential challenges and the drive and passion to reach its full potential.

This puts our sector in a solid position to take advantage of the world's ever-increasing appetite for seafood. The world is now eating more fish per person than ever before – approximately 20 kilos a year – and this is expected to increase by 50% by 2030. Demand is projected to be particularly high in Asia with its strong cultural preference for seafood. Combine this with the growing trend towards health and wellness and the opportunities for seafood are significant.



Ireland has the ambition to position itself as an international leader in the global seafood industry. Building on its natural advantages, including access to some of the most productive fishing grounds in the EU, a commitment to sustainable fishing and the development of a high-quality aquaculture sector, the industry is committed to meeting the ambitious targets set out in the Food Wise 2025 strategy.

It is now receiving more financial support than ever before through the European Maritime Fisheries Fund (EMFF), and combined with increased investment from the private sector, demonstrates a growing confidence in the sector.

As Ireland's Seafood Development Agency, BIM is working closely with the industry to ensure that this increased investment is channelled into areas that will deliver the best results: driving growth in the short and medium term, but also future-proofing to cope with the unexpected. These efforts will benefit the Irish economy as a whole, as well as the industry and our coastal communities, which are its backbone.

Driving growth

We have seen a strong rise in domestic retail sales, which are now worth €239 million. Salmon and cod are the two top-selling species, with salmon in particular experiencing double digit growth (11.5%) last year.

There has also been significant new investment in the seafood industry, with financial support from the EMFF and private investment both contributing to a more modern fleet, increased processing capacity, and a focus on new product development and innovation.

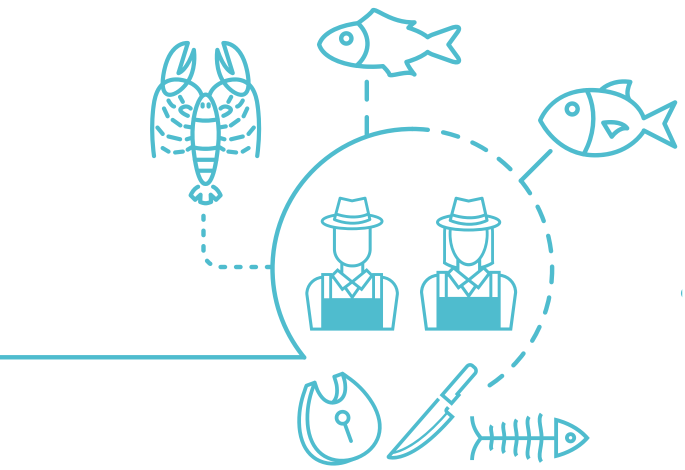
Greater sales and investment have led to a welcome expansion in employment. There are more than 9,200 people working in the fishing, aquaculture and processing sectors, and this figure rises to 11,000 when ancillary employment is included. Most of this employment is centred in Ireland's coastal communities.

The growth in these three key areas: domestic sales, investment and employment has resulted in a positive outlook within the industry and a strong sense for forward momentum.

Future-proofing the industry

The task facing Irish seafood now is to build on this momentum and to position Ireland as a key player in the supply of quality, sustainably-sourced seafood to a global market. BIM is supporting the industry's efforts to achieve this goal through a range of initiatives built around: skills, sustainability, competitiveness and innovation.

BIM already has a strong reputation for providing training but we are also looking at the big picture, and working with the entire sector to ensure it has the appropriate skills to develop and thrive. Not only must fishermen concentrate on their catch and vessel, they must also speak the language of finance and sustainability. Our seafood processors need to invest in R&D talent and business expertise and our fishmongers need to offer convenient pre-prepared fish to their customers. Initiatives such as the Seafood Development Centre Graduate programme have produced a new generation of talented individuals who are driving the industry forward.



Ireland's green credentials enjoy an excellent reputation in our key markets, as can be seen from the success of Bord Bia's Origin Green programme. The fact that seafood companies are one of the programme's most engaged participants by sector is testament to their commitment to sustainability. BIM is supporting that commitment with programmes for the entire industry, from fishermen to farmers to processors, ensuring that Ireland can continue to develop its sustainable practices.

Building competitiveness is essential to increase profitability and market share. To achieve this, Ireland's fragmented seafood industry can restructure into organised networks that share resources and information. It must attract new investment, expand the raw material base by attracting new landings to Irish ports, measure itself against international competitors and build scale so it can compete in the global market.

One of the biggest opportunities for increasing the value of the seafood sector is through greater innovation. Currently, Ireland exports 70% of its seafood as a bulk commodity but the way of the future is value-added seafood – and to achieve this, it will be necessary to develop new consumer-friendly products as well as innovative techniques that can overcome the challenges of shelf life and transportation. BIM is working closely with the industry and other agencies, both in Ireland and internationally to build our innovation capabilities.

The seafood industry has faced many challenges in the past and has shown itself to be resilient and resourceful in meeting and overcoming those challenges. The realities of Brexit are still uncertain, but BIM will support industry to minimise the effects of a changing relationship with the UK.

Supporting coastal communities

The Irish seafood industry has a global perspective but it remains an industry rooted in our coastal communities. Success for the industry is also success for these communities.

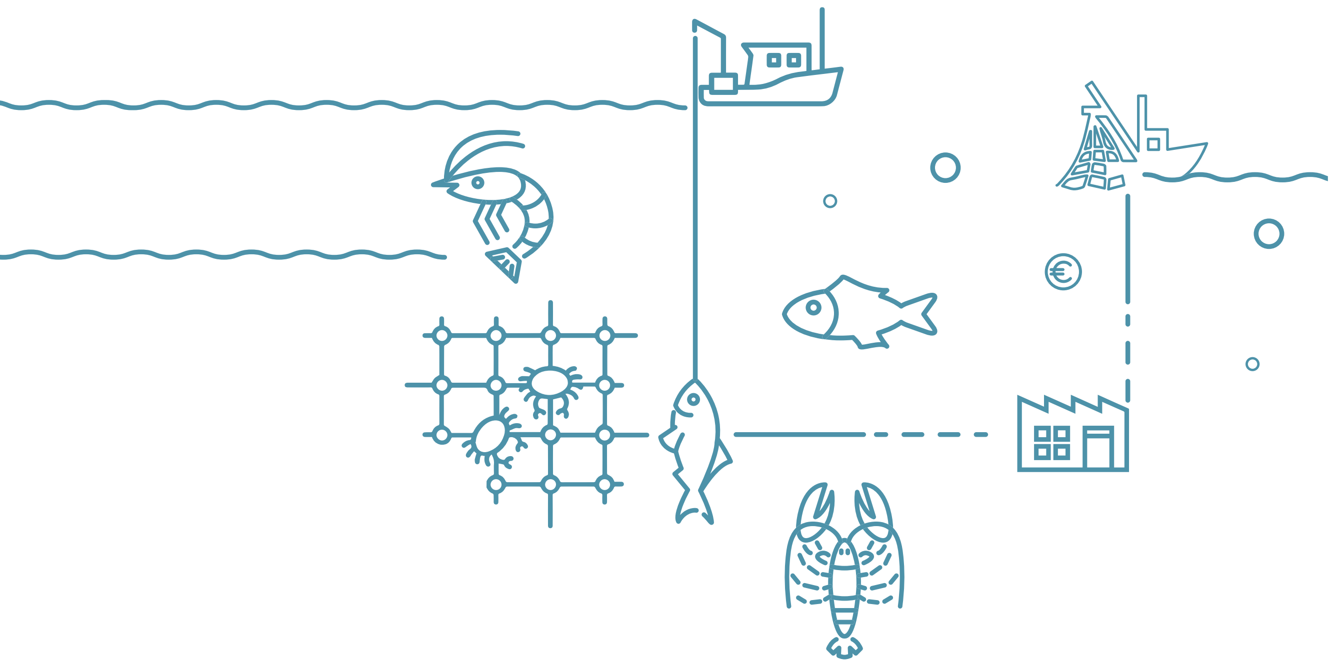
The value of landings in Irish ports shows potential for growth, opportunities can be realised to add value. Aquaculture activities are helping Ireland expand its raw material base.

Ireland's seafood industry has demonstrated its capacity to be dynamic, exciting and brimming with potential. BIM is working with the industry to ensure this potential is harnessed and that the sector receives the support it needs to achieve its ambition.

SECTION 2

Where does our seafood come from?

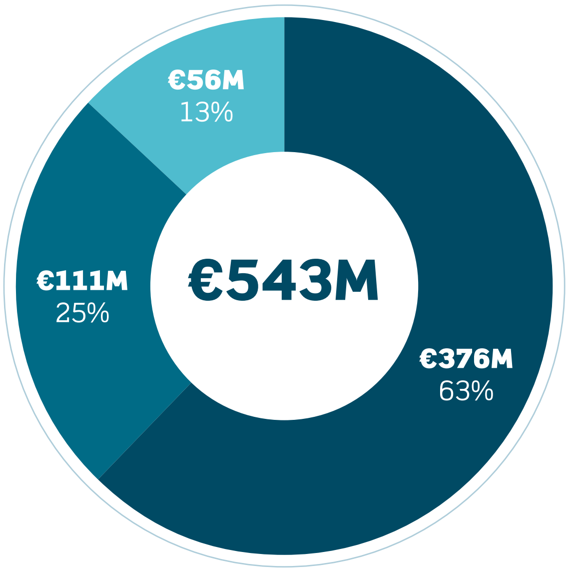
Ireland's Seafood Industry is a diverse and valuable industry. Irish seafood, caught and farmed, produced 325,000 tonnes of quality seafood worth €543 million in 2016. Wild caught seafood represents the majority of production at 281,000 tonnes or €376 million. Farmed fish and shellfish comes in second at 43,900 tonnes or €167 million.



Where Does Irish Seafood Come From?

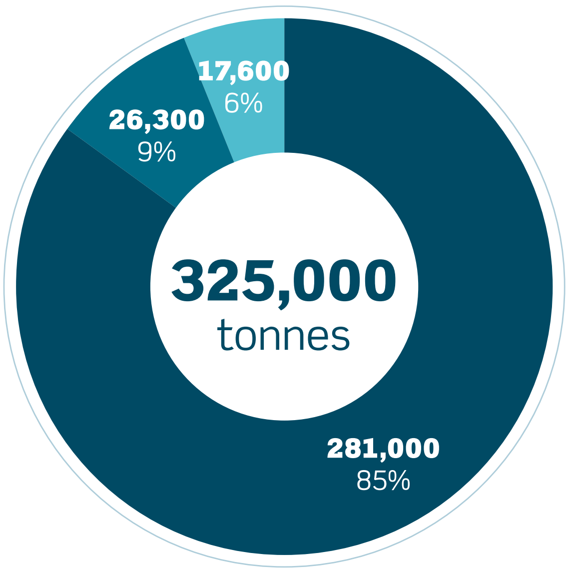
By Value (€)

- Capture Fisheries
  €376M
  63% of total value
- Farmed Finfish
  (Salmon, Trout and Perch)
  €111M
  25% of total value
- Farmed Shellfish
  (Oysters, Mussels and others)
  €56M
  13% of total value



By Volume (tonnes)

- Capture Fisheries
  281,000 tonnes
  85% of total volume
- Farmed Shellfish
  (Oysters, Mussels and others)
  26,300 tonnes
  9% of total volume
- Farmed Finfish
  (Salmon, Trout and Perch)
  17,600 tonnes
  6% of total volume



FOR MORE INFORMATION ON **EMPLOYMENT IN THE IRISH SEAFOOD SECTOR**
See Page 8

Regional Value of Fish Landings

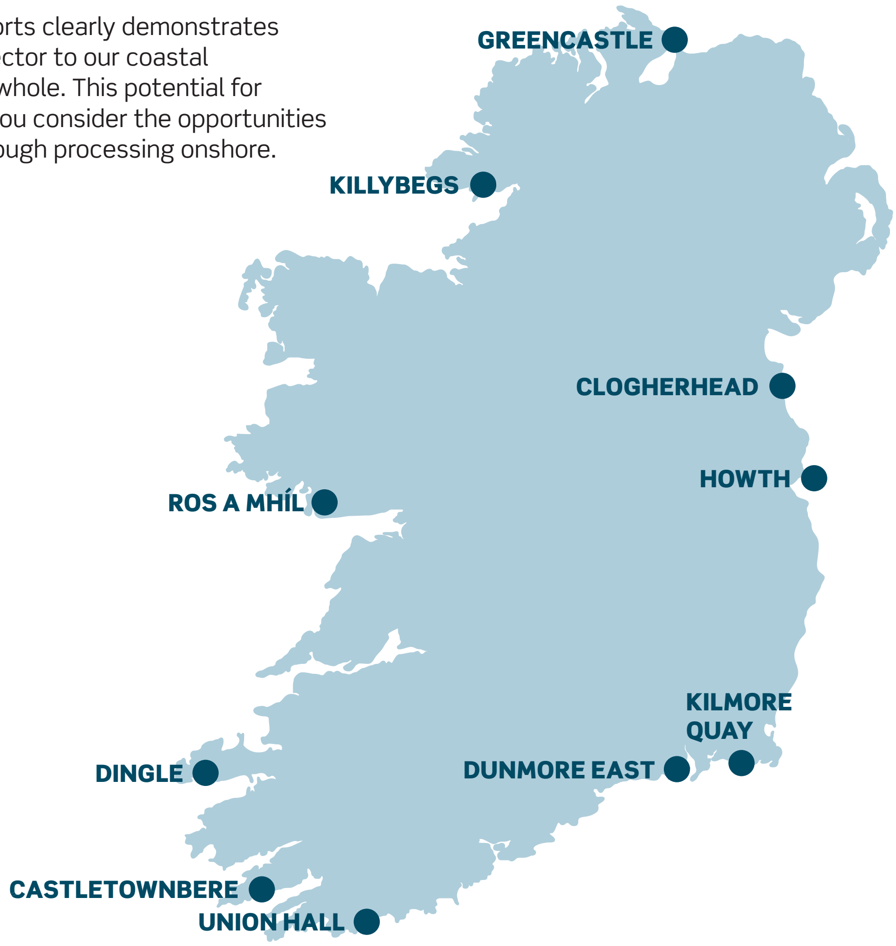
The value of fish landings into key ports clearly demonstrates the importance of the Irish fishing sector to our coastal communities and the economy as a whole. This potential for further revenue is significant when you consider the opportunities to add value to this raw material through processing onshore.

€71M

Out of the €111M worth of landings into Castletownbere, 65% are foreign landings worth over €71M

over
121,000 tonnes

of pelagic fish worth over €59 million are landed into Killybegs



Top Ten Ports

CASTLETOWNBERE	**KILLYBEGS**	**DINGLE**	**DUNMORE EAST**	**HOWTH**
€111M	**€85M**	**€23M**	**€19M**	**€16M**
39,700 tonnes	155,500 tonnes	10,500 tonnes	10,400 tonnes	6,000 tonnes
ROS A MHÍL	**KILMORE QUAY**	**GREENCASTLE**	**CLOGHERHEAD**	**UNION HALL**
€14M	**€13M**	**€9M**	**€9M**	**€9M**
3,300 tonnes	5,500 tonnes	3,600 tonnes	1,900 tonnes	2,400 tonnes

OTHER PORTS
€68M
42,300 tonnes

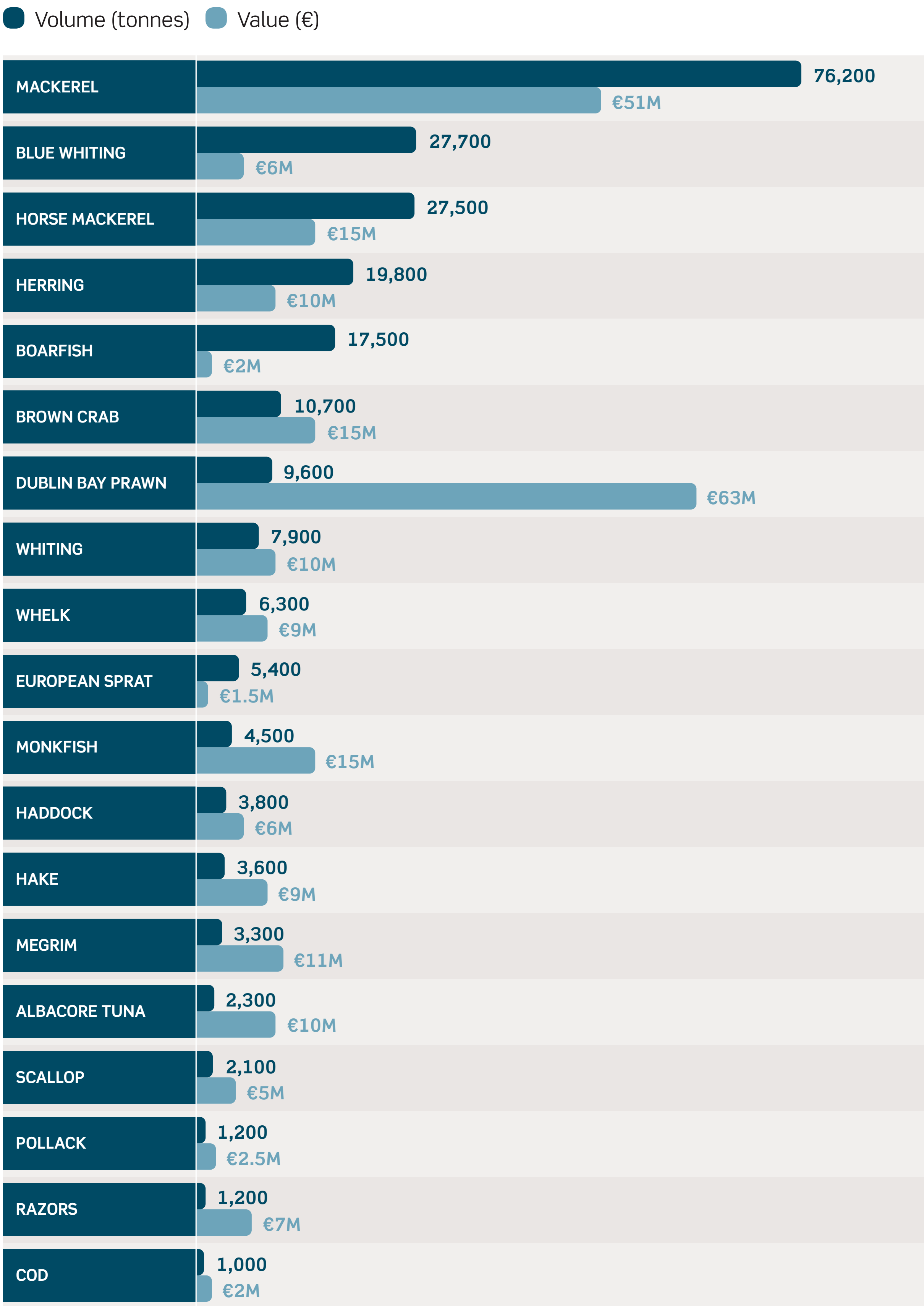
TOTAL IRISH LANDINGS (DOMESTIC AND FOREIGN) INTO OUR MAIN PORTS IN 2016

281,000 tonnes **= €376M**

Note: figures for the top ports listed include foreign landings into Irish ports.

Main species by value and volume

Landed weight (tonnes) >10 metre vessels (domestic landings)

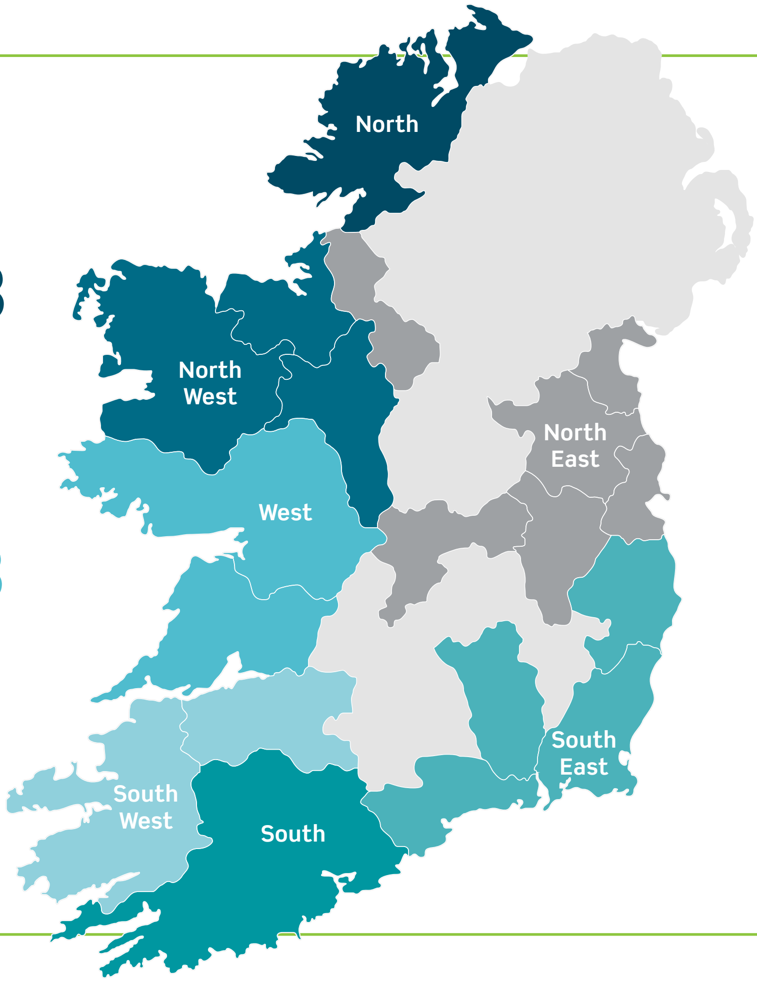


FOR MORE INFORMATION ON
FARMED FISH AND SHELLFISH
See Page 10

Employment in the Seafood Sector

9,257
jobs in 2016 – 4.5% increase on 2015

11,000
including ancillary employment



NORTH
2,133

NORTH WEST
650

WEST
1,093

SOUTH WEST
956

SOUTH
1,824

SOUTH EAST
1,299

NORTH EAST
1,302

AQUACULTURE

1,950
Total employed

1,030
Total FTE*

CAPTURE FISHERIES

3,358
Total employed

2,536
Total FTE*

PROCESSING

3,949
Total Employed

3,029
Total FTE*

* Full time equivalent

Irish Fishing Fleet

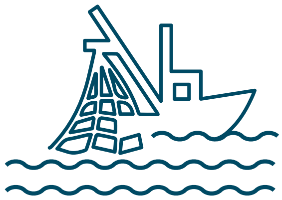
Segment	2008	2009	2010	2011	2012	2013	2014	2015	2016
Aquaculture	33	67	81	87	96	106	107	109	102
Beamer	15	11	11	12	12	13	13	13	14
Pelagic	23	23	23	24	23	23	23	23	23
Polyvalent General	1,272	1,301	1,352	1,397	1,430	1,462	1,427	1,399	1,412
Polyvalent Potting	493	491	492	488	487	490	489	477	440
Polyvalent Tank	4	4	4	4	4	4	4	4	4
Specific	132	147	156	149	150	148	139	132	146
Grand Total	**1,972**	**2,044**	**2,119**	**2,161**	**2,202**	**2,246**	**2,202**	**2,157**	**2,141**
Total Fishery minus Aquaculture	**1,939**	**1,977**	**2,038**	**2,074**	**2,106**	**2,140**	**2,095**	**2,048**	**2,039**

SOURCE: EU Fleet Register

2,039

Total fishing vessels in 2016

1,436



Total active fishing vessels in 2016

Refrigerated Seawater (RSW) Pelagic Fleet

Vessels engaged predominantly in fishing for pelagic species (herring, mackerel, horse mackerel and blue whiting).

Beam Trawler Fleet

Vessels dedicated to beam trawling, a simple trawling method used in some Irish Inshore waters where it is used to catch flatfish such as sole and plaice.

Polyvalent Fleet

This segments represents the vast majority of the fleet. They are multi-purpose and include small inshore vessels (netters and potters) and medium to large offshore vessels targeting whitefish, pelagic fish and bivalve molluscs.

Specific Fleet

Vessels that are permitted to fish for bivalve molluscs and aquaculture species.

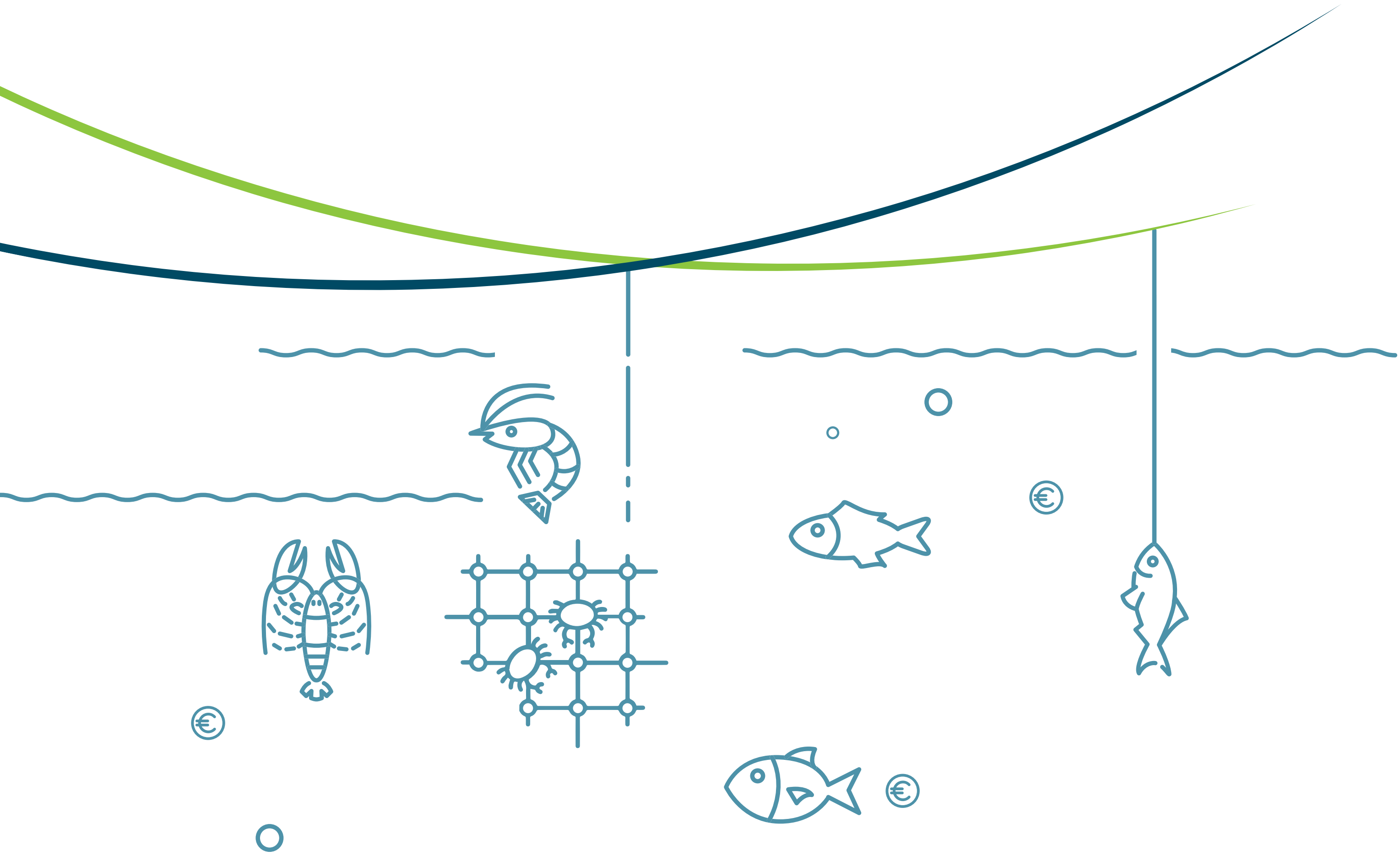
Aquaculture Fleet

These vessels must be exclusively used in the management, development and servicing of aquaculture areas and can collect spat from wild mussel stocks as part of a service to aquaculture installations.

SECTION 3

Aquaculture Production

Data from the BIM Annual Aquaculture Survey showed that aquaculture (fish and shellfish farming) production increased by 9% in volume to reach 43,900 tonnes and increased in value by 13% to €167 million. The primary driver of this growth is the continued development of the gigas oyster and salmon industries. Production of gigas oysters increased to almost 10,000 tonnes to a value of €41 million. Salmon production also had an extremely successful year with production reaching 16,300 tonnes valued at €105 million.



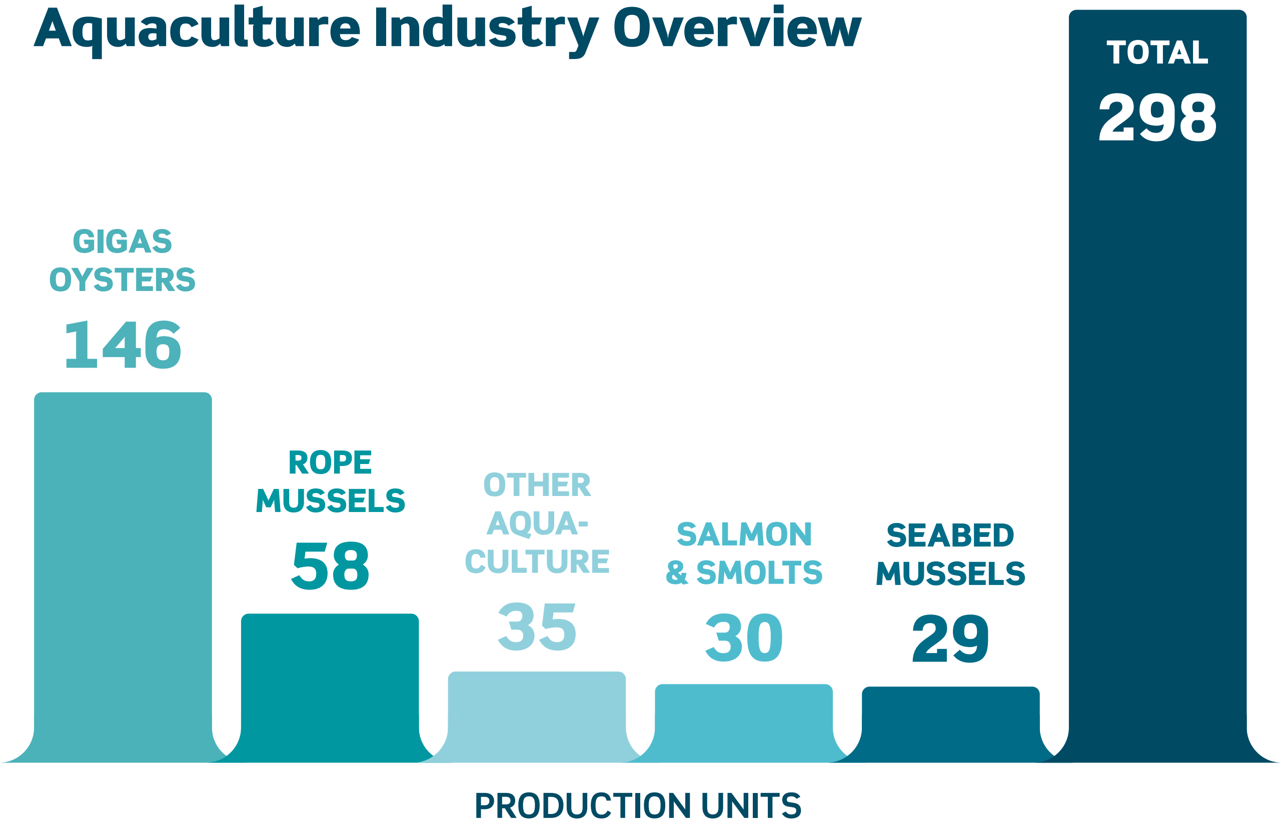
Trends in aquaculture production

	2008	2009	2010	2011	2012	2013	2014	2015	2016
Volume (tonnes)	45,000	48,700	47,000	44,800	36,600	34,600	31,600	40,100	43,900
Value (€)	€94M	€107M	€123M	€128M	€131M	€117M	€116M	€149M	€167M

SOURCE: BIM Annual Aquaculture Survey

Aquaculture production increased by
9% in 2016 to
44,000 tonnes worth €167M

Aquaculture Industry Overview

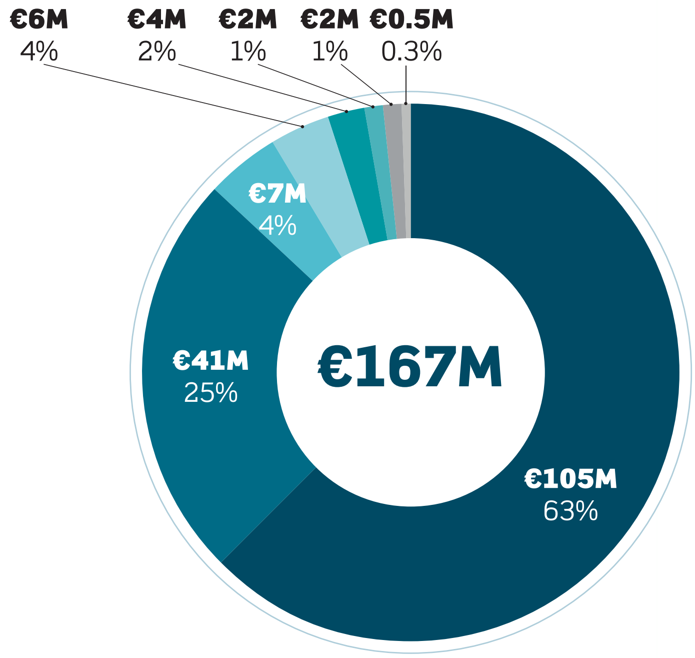


FOR MORE INFORMATION ON
IRISH SEAFOOD RETAIL SALES
See Page 17

Aquaculture Production

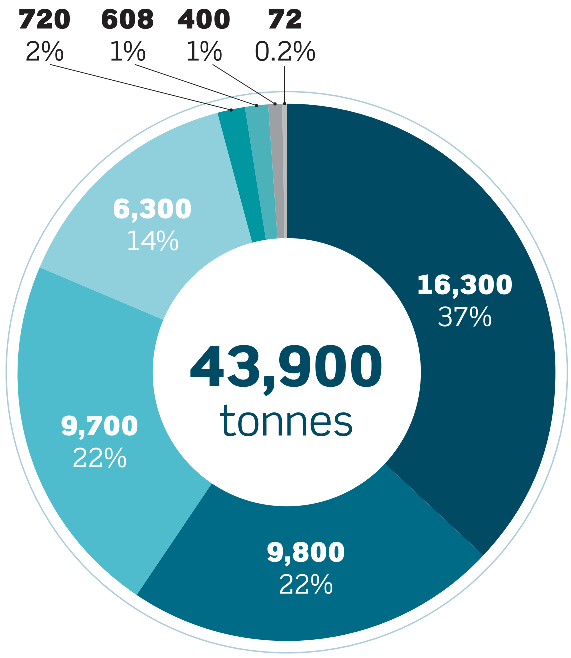
By Value (€)

- Salmon **€105M**
  63% of total value
- Gigas Oyster **€41M**
  25% of total value
- Rope Mussels **€7M**
  4% of total value
- Seabed Cultured Mussels **€6M**
  4% of total value
- Salmon Smolt **€4M**
  2% of total value
- Freshwater Perch & Trout **€2M**
  1% of total value
- Native Oyster **€2M**
  1% of total value
- Other Sectors **€0.5M**
  0.3% of total value



By Volume (tonnes)

- Salmon **16,300 tonnes**
  37% of total volume
- Rope Mussels **9,800 tonnes**
  22% of total volume
- Gigas Oyster **9,700 tonnes**
  22% of total volume
- Seabed Cultured Mussels **6,300 tonnes**
  15% of total volume
- Freshwater Perch & trout **720 tonnes**
  2% of total volume
- Salmon Smolt **608 tonnes**
  1% of total volume
- Native Oyster **400 tonnes**
  1% of total volume
- Other Sectors **72 tonnes**
  0.2% of total volume



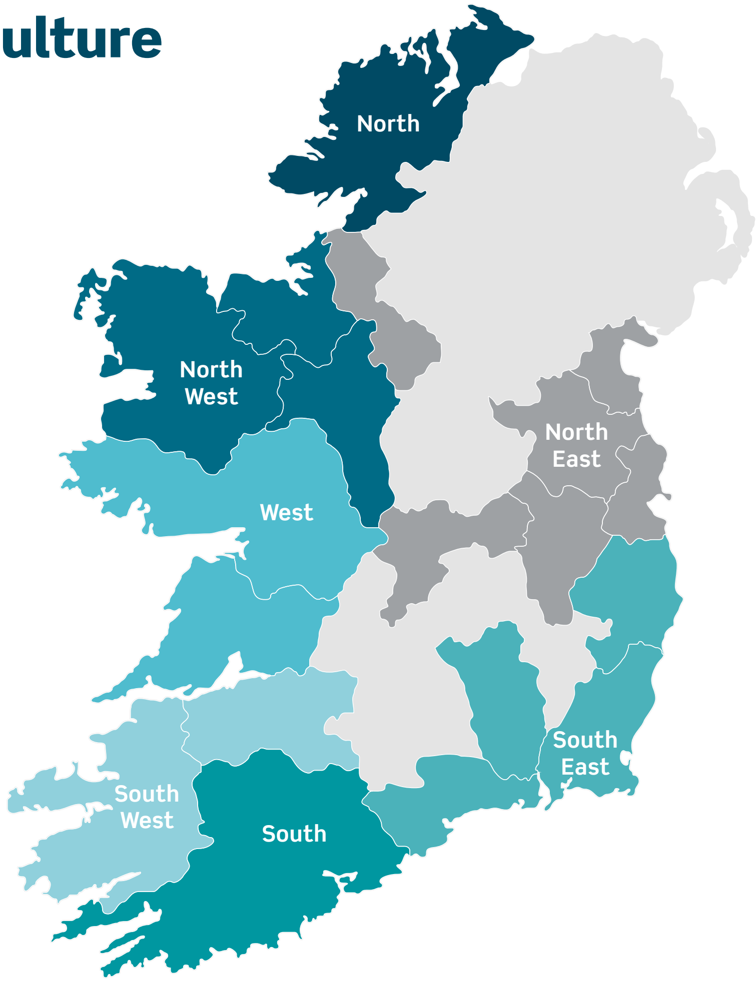
Regional Value of Aquaculture

NORTH
€29M

NORTH WEST
€21M

WEST
€39M

SOUTH WEST
€22M



SOUTH
€34M

SOUTH EAST
€19M

NORTH EAST
€4M

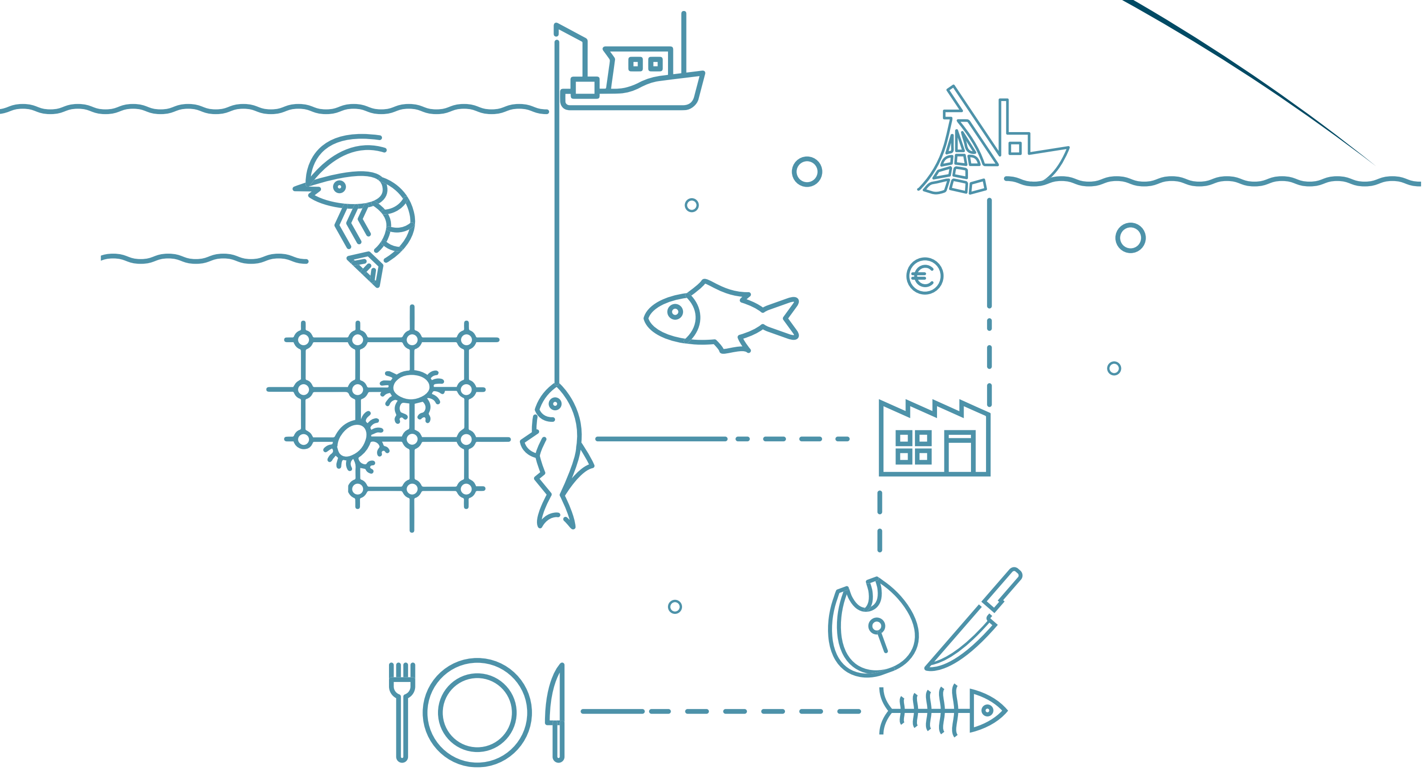
SECTION 3
Aquaculture Production

Region	Mussel value €'000	Oyster value €'000	Salmon €'000	Freshwater Trout, Smolts & Perch Value €'000	Other value €'000	Total value €'000
North	608	11,926	14,739	1,519	208	29,000
North West	558	4,361	16,229	0	0	21,148
West	665	3,004	34,040	986	66	38,761
South West	1,863	5,708	14,269	0	47	21,887
South	4,097	3,236	25,200	1,237	82	33,852
South East	2,620	13,934	0	2,462	0	19,016
North East	1,819	1,763	0	0	0	3,582
Total	**12,230** **7%**	**43,932** **26%**	**104,477** **62%**	**6,204** **4%**	**403** **2%**	**167,246**

FOR MORE INFORMATION ON **SEAFOOD IMPORTS**
See Page 20

Irish Seafood Processing & Retail

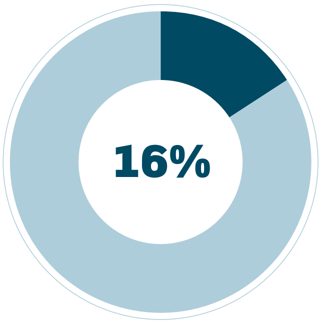
In 2016, there were 156 seafood processing companies providing 3,949 jobs including full time, part time and casual employment. Within this sector, 16% of the companies had revenues over €10 million. Of the remainder, 33% had revenues between €1 and €10 million and 51% of less than €1 million.



Irish Seafood Industry
- Companies Revenue Breakdown

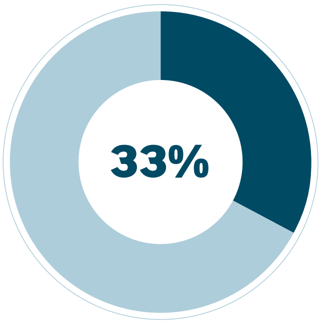
>€10 million

24
companies



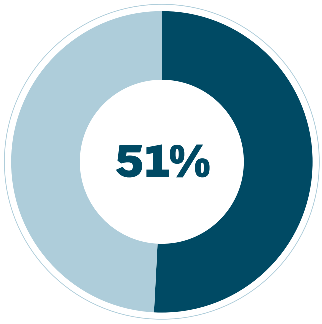
€1 to €10 million

52
companies



<€1 million

80
companies



Processing Companies
by Main Seafood Category

Category	> €10M	€1M to €10M	<€1M	Total
Shellfish	5	10	24	**39**
Whitefish/Multi Species	9	24	36	**69**
Pelagic	7	4	4	**15**
Salmonids*	3	14	16	**33**
Total	**24**	**52**	**80**	**156**
Breakdown of Industry	**16%**	**33%**	**51%**	

156 Companies
provide 3,949 jobs

including full time, part time
and casual employment

* Salmon, Trout

Seafood Processing Companies by Region

NORTH
25

Shellfish: 7
Whitefish/Multi Species: 4
Pelagic: 11
Salmonids: 3

NORTH WEST/WEST
31

Shellfish: 8
Whitefish/Multi Species: 15
Pelagic: 1
Salmonids: 7

SOUTH WEST
15

Shellfish: 3
Whitefish/Multi Species: 6
Pelagic: 2
Salmonids: 4

SOUTH
26

Shellfish: 5
Whitefish/Multi Species: 12
Pelagic: 1
Salmonids: 8

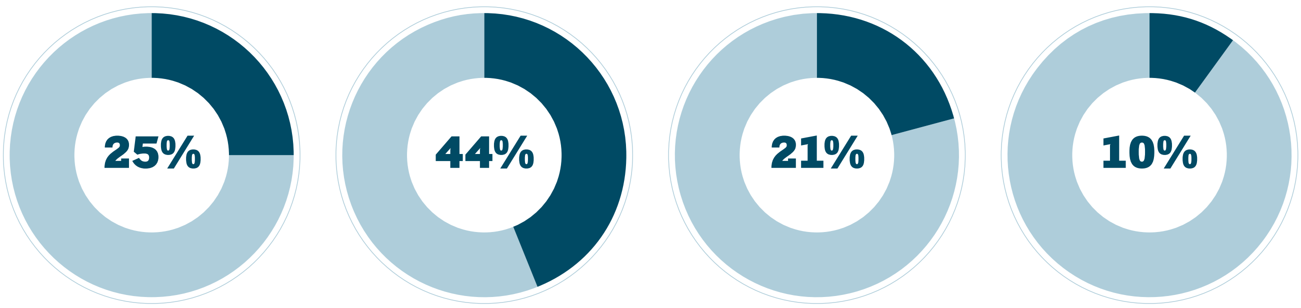
SOUTH EAST
29

Shellfish: 10
Whitefish/Multi Species: 16
Salmonids: 3

NORTH EAST
30

Shellfish: 6
Whitefish/Multi Species: 16
Salmonids: 8

Production by Seafood Category

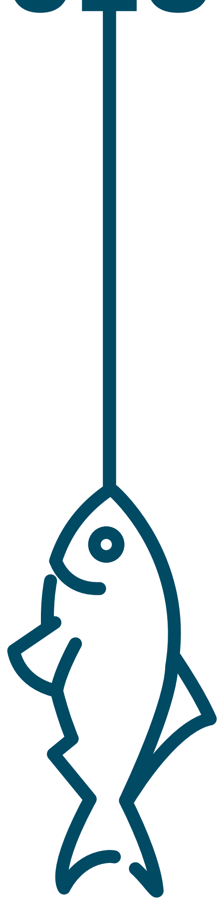


Shellfish | **Whitefish/ Multi Species** | **Salmonids*** | **Pelagic**

* Salmon, Trout

Irish Retail Seafood Sales were valued at

€239 million in 2016



TOP SPECIES	VALUE	YOY GROWTH %
Salmon	€94.5M	+11.5%
Cod	€47.5M	+0.7%
All Prawns	€17.4M	-2.0%
Pollack	€13.0M	-1.6%
Hake	€9.4M	+32.9%
Haddock	€9.2M	+15.8%
Mackerel	€6.0M	-10.9%
Trout	€5.5M	+18.0%
Coley	€5.4m	-9.9%
Whiting	€4.8m	-9.0%
Mussels	€1.0M	+21.4%

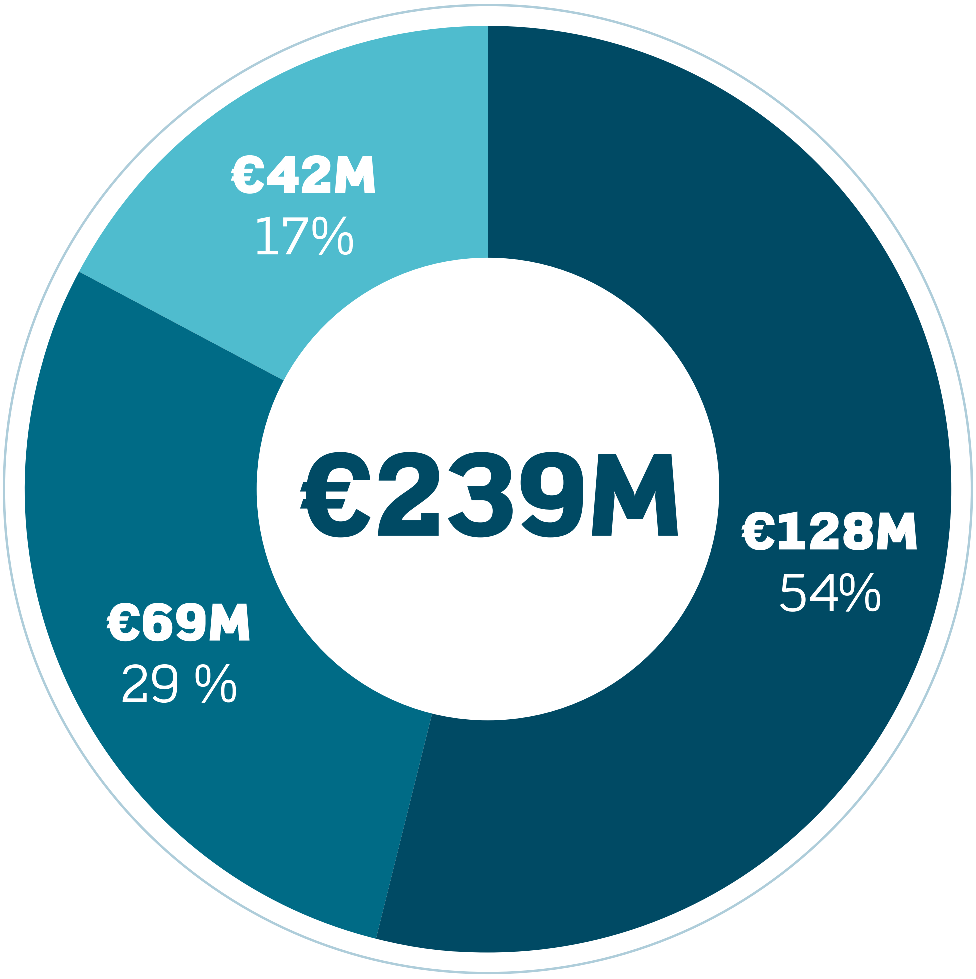
Fresh Fish Species Purchased Most Frequently

(Number of times the average buyer purchased species during 2016)

Salmon	All Prawns	Cod	Hake
13.3	5.5	5.4	4.3
Mackerel	**Coley**	**Trout**	**Whiting**
4.2	4.1	4	4

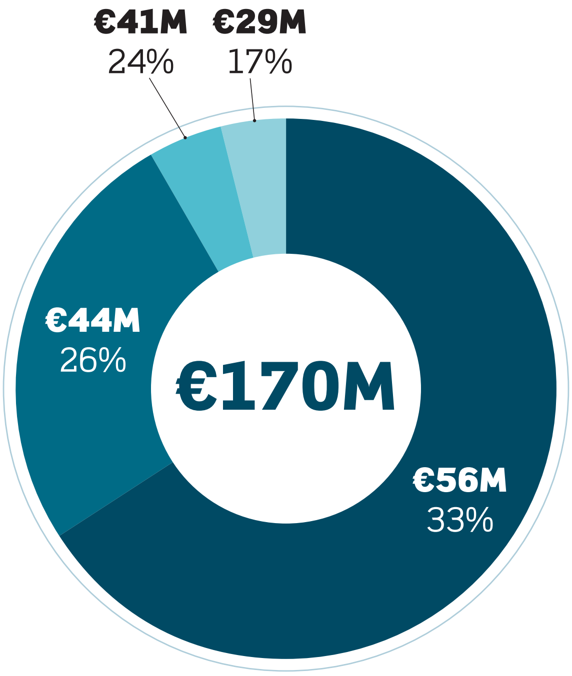
FOR MORE INFORMATION ON
SEAFOOD EXPORTS
See Page 24

Fresh and Frozen Fish Sales



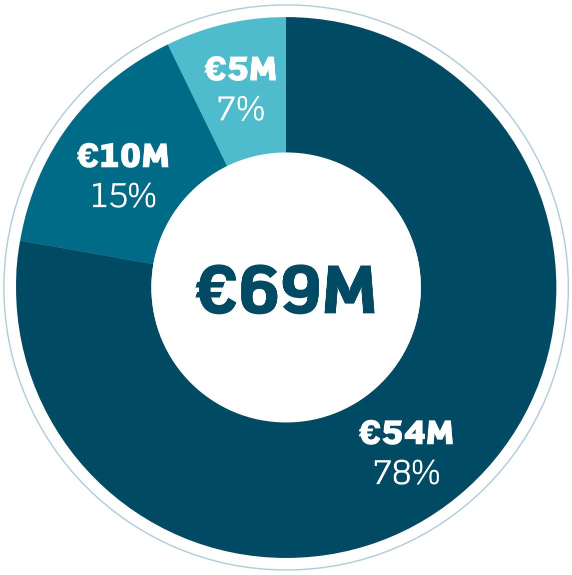
PREPACKED FRESH	PREPACKED FROZEN	LOOSE FRESH
€128M	€69M	€42M
54%	29%	17%
of total seafood sales	of total seafood sales	of total seafood sales

Total Fresh Fish Sales



- Prepacked Raw
  €56M
  33% of total seafood sales
- Prepacked Ready to Eat
  €44M
  26% of fresh fish sales
- Loose Raw
  €41M
  24% of fresh fish sales
- Prepacked & Loose Ready to Cook
  €29M
  17% of fresh fish sales

Total Frozen Fish Sales



- Prepacked Ready to Cook
  €54M
  78% of frozen fish sales
- Prepacked Raw
  €10M
  15% of frozen fish sales
- Prepacked Ready to Eat
  €5M
  7% of frozen fish sales

SECTION 4
Irish Seafood Processing & Retail

NOTE:
- Ready to Eat – Fish which can be unpackaged and consumed without any cooking
- Ready to Cook – Fish which has been prepared to provide final product for the consumer and is ready to cook.

Irish Seafood Imports

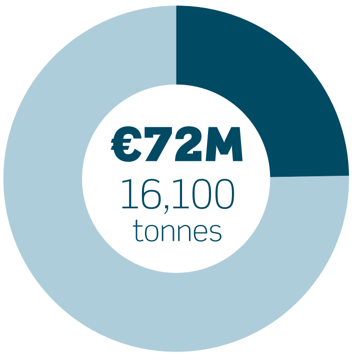
Irish seafood imports were valued at €276 million and amounted to 69,000 tonnes in 2016. This represents less than 1% decrease in value from €277 million in 2015 with a 19% decline in volume from 85,100 tonnes in the same year.

Irish Seafood Imports were valued at

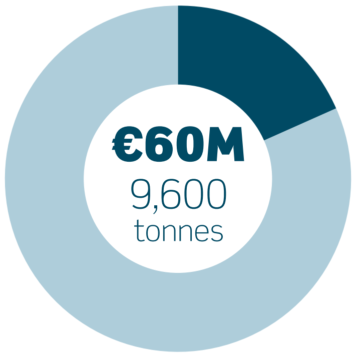
€276 million in 2016

Top species by Value

What Seafood Products do we Import?

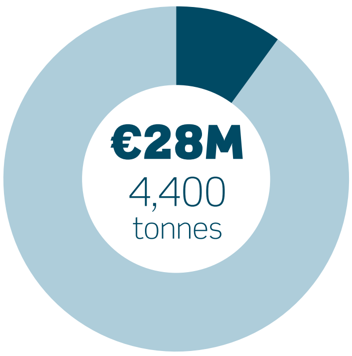


Prepared Fish Products
(smoked, canned, pre-prepared etc.)

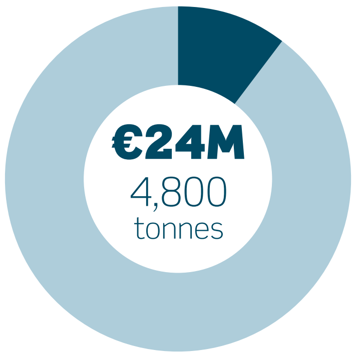


Fresh Whole Fish
(mainly cod, seabass, salmon)

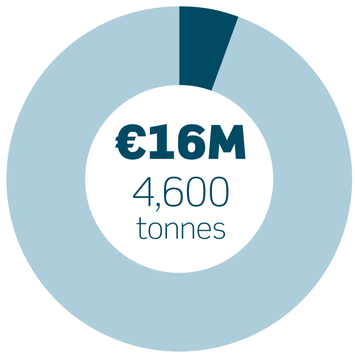
Fish Meal and Oil
(mainly mussels, shrimp & prawns)



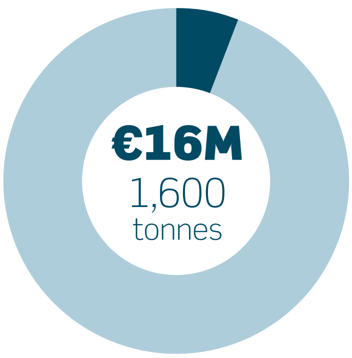
Frozen Shellfish
(mainly shrimp & prawns and crab)



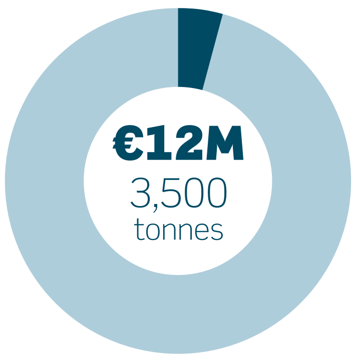
Fish Fillets, Fresh and Frozen
(mainly cod, salmon, hake)



Live or Fresh Shellfish
(mainly mussels, shrimp & prawns)



Prepared Shellfish Products
(mainly shrimp & prawns, crab)



Frozen Whole Fish
(mainly mackerel)

Fish Livers and Roes

Total: 69,000 tonnes **= €276M**

Main Import Countries in 2016

GREAT BRITAIN AND N. IRELAND

€186M

47,400
tonnes

FRANCE

€21M

3,400
tonnes

GERMANY

€17M

2,500
tonnes

DENMARK

€9M

3,100
tonnes

NORWAY

€5M

5,100
tonnes

NETHERLANDS

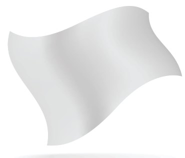
€5M

1,100
tonnes

ICELAND

€4M

400
tonnes



OTHER COUNTRIES

€29M

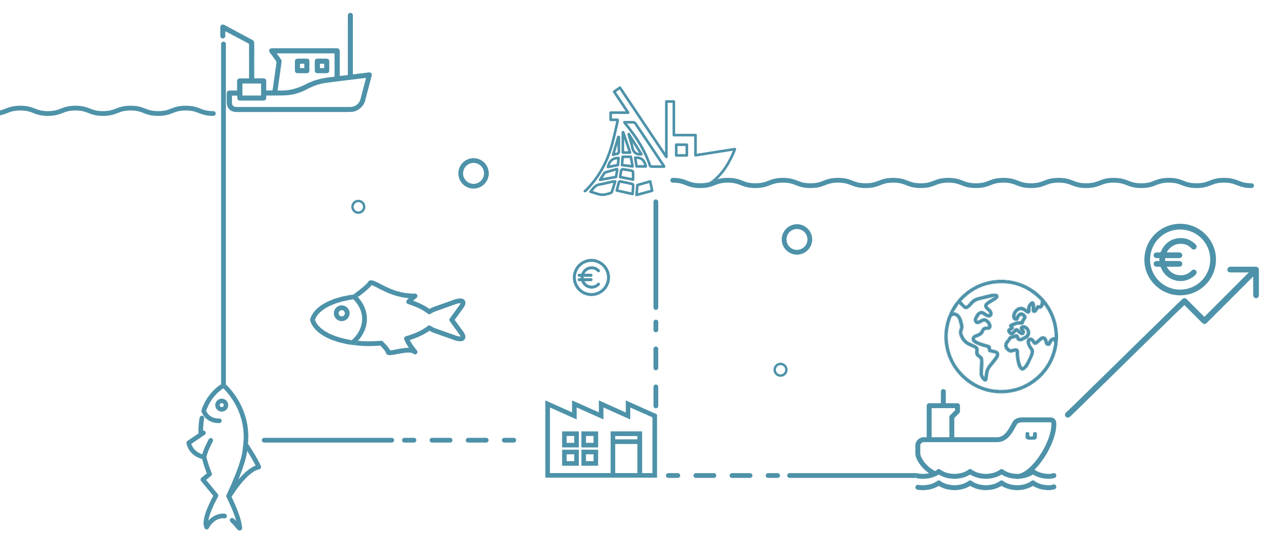
6,000
tonnes

Total: 69,000 tonnes **= €276M**

Irish Seafood Exports

Irish seafood exports were valued at €559 million in 2016; this represents a 1% decrease on €564 million in 2015. Salmon valued at €71 million decreased by 5% on €75 million in 2015 however the unit price of fresh whole Irish salmon at €7.8 per Kg is on a par with 2015 and well above the average EU market price in this period.

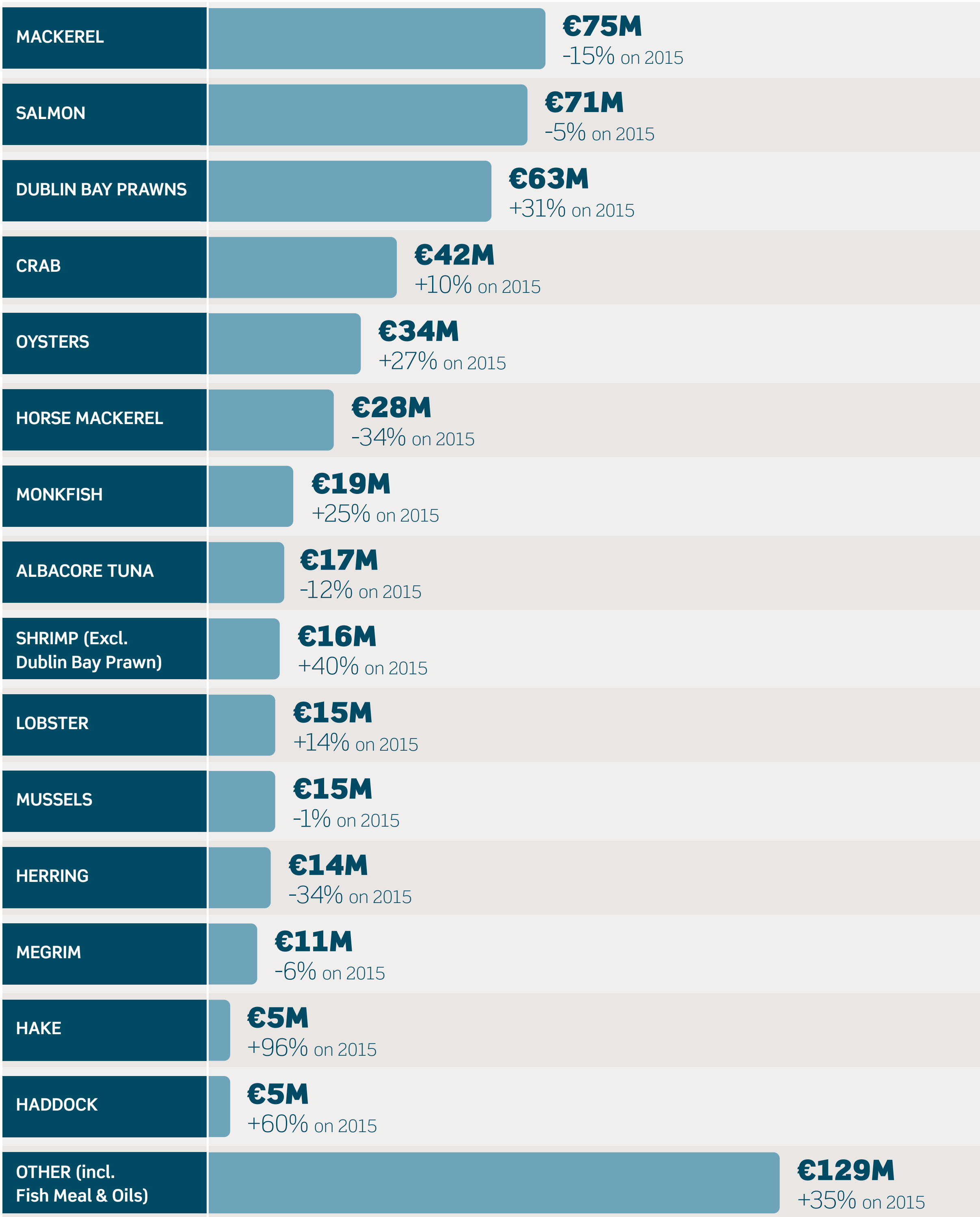
Pelagic exports were valued at €150 million; this represents a 27% decrease in value from €205 million due to reduced quotas in 2016. Shellfish exports increased by 21% to €237 million in 2016 from €196 million in 2015. This increase is evident in all the main shellfish categories including Dublin Bay Prawn valued at €63 million with Irish oysters at €34 million.



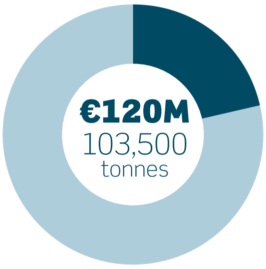
Irish seafood exports were valued at

€559 million in 2016

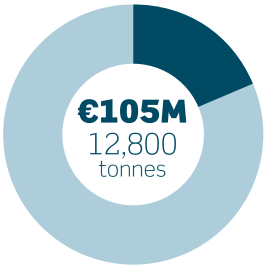
Top species by value in 2016



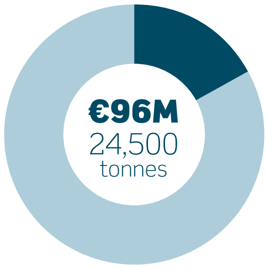
What Seafood Products do we Export?



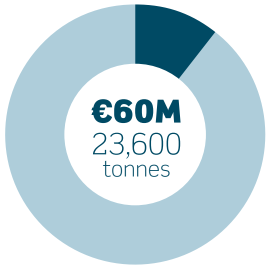
Frozen Sea Caught Fish
(mainly mackerel/ horse mackerel and herring)



Frozen Shellfish

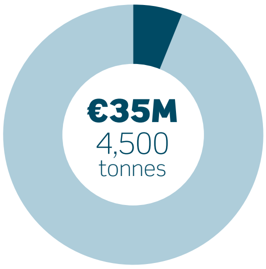


Live or Fresh Chilled Shellfish

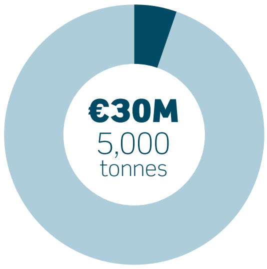


Fresh Sea Caught Fish
(mainly monkfish, megrim, hake, haddock and whiting)

Fresh whole Salmon

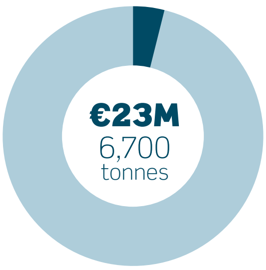


Prepared Shellfish

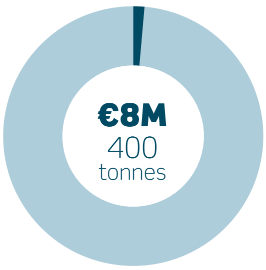


Prepared Fish Products
(mainly tuna, mackerel, herring)

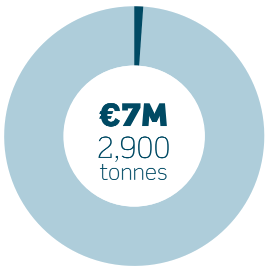
Fish Meal and Oil



Other Freshwater Fish and Fillets (fresh and frozen)
– mainly salmon and trout



Smoked Fish



Sea Caught Fish Fillets (fresh and frozen)
– incl. herring, whiting, monkfish and tuna

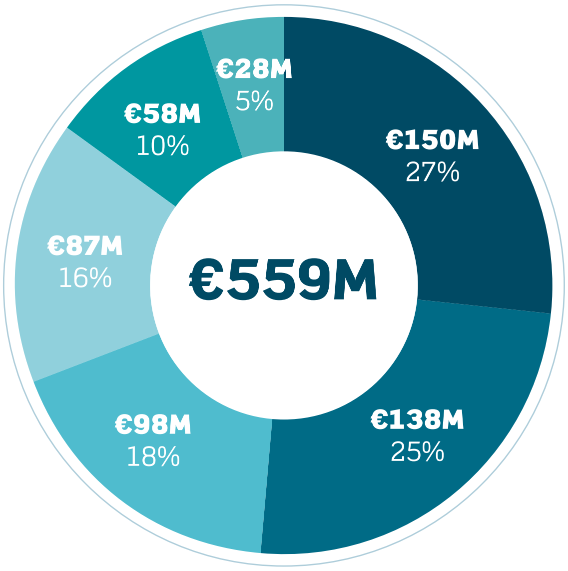
Livers and Roe

Total: 212,300 tonnes **= €559M**

Exports by Category

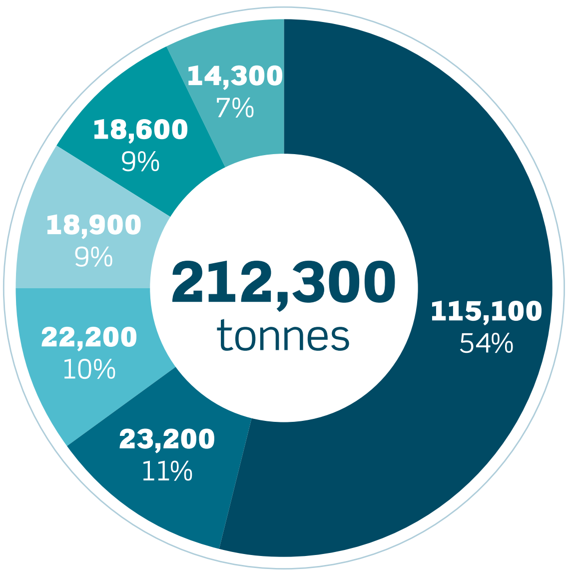
By Value (€)

- Pelagic **€150M**
  27% of total value
- Shellfish (Crustaceans) **€138M**
  25% of total value
- Shellfish (Molluscs) **€98M**
  18% of total value
- Freshwater Fish **€87M**
  16% of total value
- Whitefish **€58M**
  10% of total value
- Fish Meals and Oils **€28M**
  5% of total value



By Volume (tonnes)

- Pelagic **115,100 tonnes**
  54% of total volume
- Shellfish (Molluscs) **23,200 tonnes**
  11% of total volume
- Fish Meals and Oils **22,200 tonnes**
  10% of total volume
- Whitefish **18,900 tonnes**
  9% of total volume
- Shellfish (Crustaceans) **18,600 tonnes**
  9% of total volume
- Freshwater Fish **14,300 tonnes**
  7% of total volume



Trends in Seafood Exports by Main Market

FRANCE

+10%

2016
€142M

2015
€129M

GREAT BRITAIN

+12%

2016
€78M

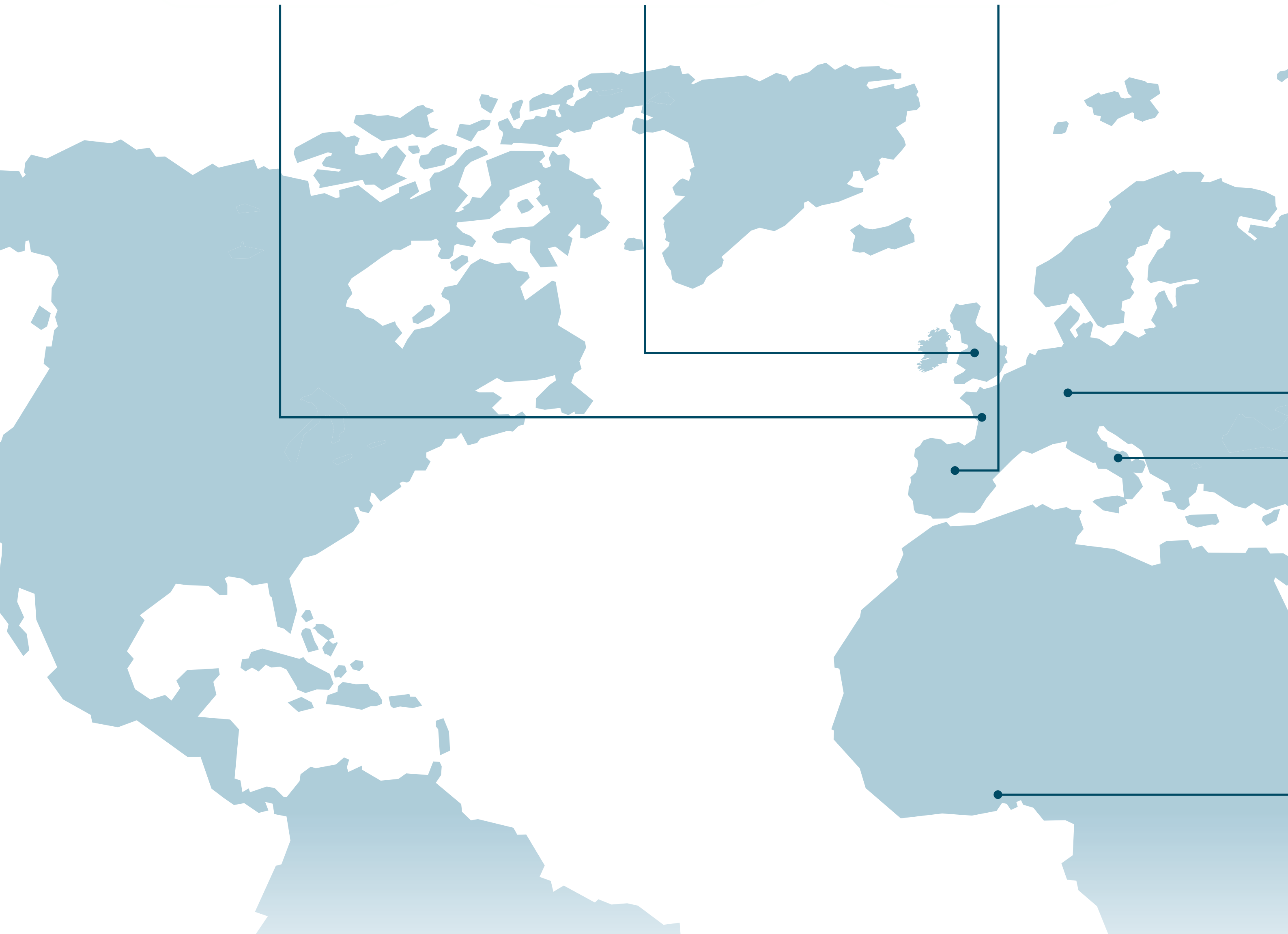
2015
€70M

SPAIN

+13%

2016
€78M

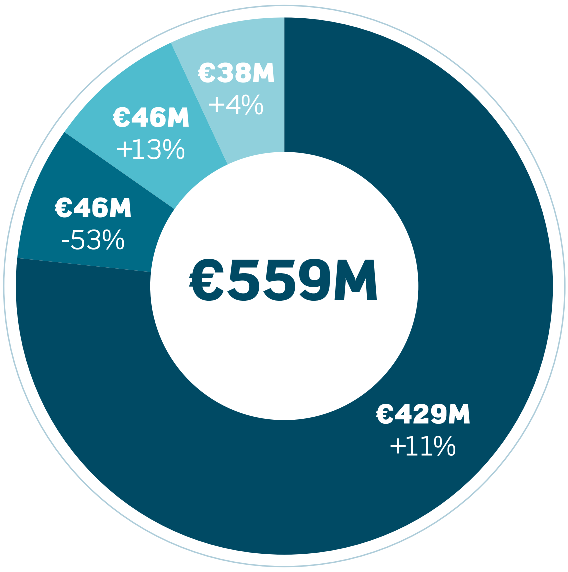
2015
€68M



ITALY	GERMANY	NIGERIA	CHINA (incl. Hong Kong)	SOUTH KOREA	JAPAN
+50%	+2%	-54%	+24%	-4%	+56%
2016 €46M	2016 €23M	2016 €33M	2016 €30M	2016 €16M	2016 €10M
2015 €30M	2015 €22M	2015 €71M	2015 €24M	2015 €17M	2015 €6M

Irish Exports by Region

- European Union **€429M**
  11% increase
- Nigeria and North Africa **€46M**
  -53% decrease
- Asia (China, Hong Kong, South Korea and Japan) **€46M**
  13% increase
- Other Non-EU **€38M**
  4% increase



EUROPEAN UNION

2015	2016	% Change
€388M	**€429M**	**+11%**
131,000 tonnes	**135,300** tonnes	**+3%**

NIGERIA AND NORTH AFRICA

2015	2016	% Change
€98M	**€46M**	**-53%**
94,000 tonnes	**40,300** tonnes	**-57%**

ASIA
(CHINA, HONG KONG, SOUTH KOREA AND JAPAN)

2015	2016	% Change
€41M	**€46M**	**+13%**
9,600 tonnes	**11,200** tonnes	**+16%**

OTHER NON-EU

2015	2016	% Change
€37M	**€38M**	**+4%**
23,600 tonnes	**25,500** tonnes	**+8%**

Terms of Reference

Pelagic fish

Pelagic fish swim in mid-waters or near the surface. Oil rich fish such as mackerel, herring, boarfish and tuna are common examples.

Demersal fish

Demersal fish are those which live on or near the sea bed. Round and flat white fish fall into this category and include cod, hake, haddock and flatfish such as flounder, sole, turbot, plaice and halibut.

Shellfish

Shellfish are broadly divided into two main categories – molluscs and crustaceans. Molluscs are a diverse group that can be divided into three categories of uni-value molluscs (periwinkle, whelk), bi-value molluscs (mussels, oysters, scallops) and cephalaopds (squid, cuttlefish). Crustaceans are more mobile creatures with hard segmented shells and flexible joints and include prawns, shrimp, crab and lobster. Echinoderms are not as frequently harvested for food as molluscs and crustaceans, however, sea urchin is popular on the Asian market.

Regions by county:

North: Donegal

North West: Mayo, Sligo and Leitrim

West: Galway and Clare

South West: Kerry and Limerick

South: Cork

South East: Wicklow, Wexford and Waterford

North East: Louth, Meath and Dublin

Landings data

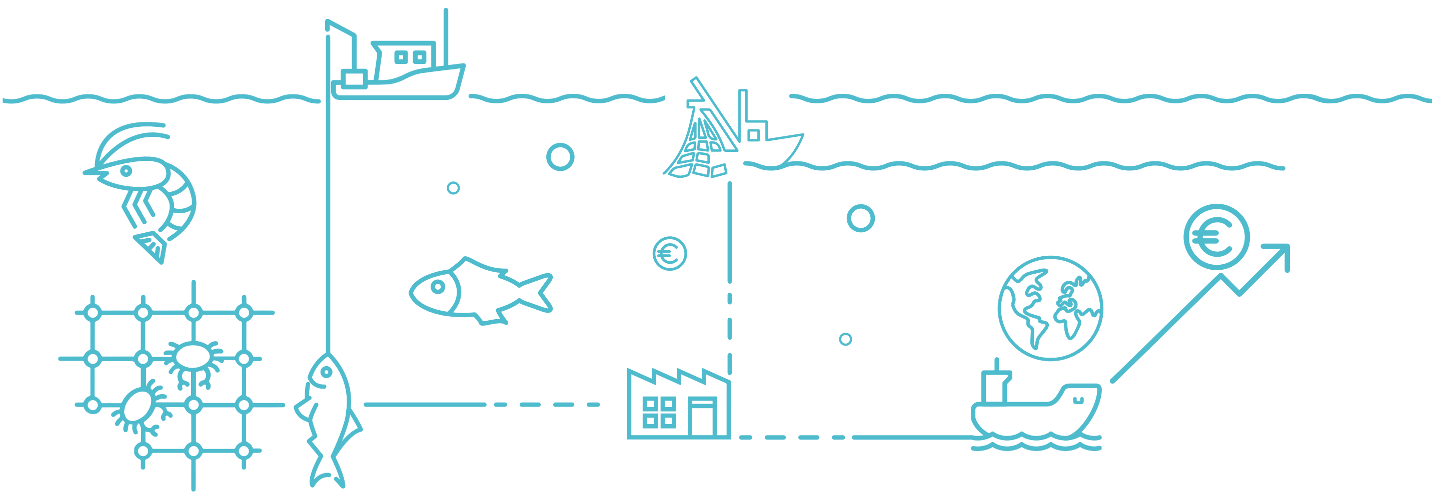
Supplied by the Sea Fisheries Protection Authority (SFPA) www.sfpa.ie

Data sources

Retail data is supplied by Kantar World Panel.

Import and Export data supplied by the Central Statistics Office (CSO).

Please note some figures have been rounded for the purposes of this publication. Please consult data sources above for original data.



Notes

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