



Bord Iascaigh Mhara
Irish Sea Fisheries Board

BIM STRATEGY

2013
2017

**CAPTURING IRELAND'S SHARE OF
THE GLOBAL SEAFOOD OPPORTUNITY**

SEAFOOD SALES **€1 billion**

JOBS +1200

An action plan to deliver **1200 jobs** and **€1 billion seafood sales** by building scale and enhancing competitiveness in the **Irish seafood sector**.

BIM's Vision and Mission Statements	02
Minister's Foreword	
Simon Coveney TD, Minister for Agriculture, Food and the Marine	04
Chairman's Acknowledgement	
Kieran Calnan, Chairman of BIM	05
Chief Executive's Introduction	
Jason Whooley, CEO of BIM	06
Key Targets for end 2017	08
Current Industry Situation	10
The BIM Strategy 2013 – 2017	12
Five Strategic Priorities	
01 Expand the raw material supply from fisheries and aquaculture to Irish processors	12
02 Maximise additional value from the raw material base	14
03 Create scale within industry structures	16
04 Develop industry skills that will help to grow the sector	18
05 Enhance the environmental sustainability of Irish seafood	20
Glossary	23



Our Vision

A scaled Irish seafood industry capitalising on the growing opportunities for seafood in global markets and providing sustainable employment in our coastal communities.

Our Mission

BIM's mission is to grow a thriving Irish seafood industry; expand the raw material base, add value and develop efficient supply chains that together deliver on the Government's Food Harvest 2020 targets for seafood and create sustainable jobs.





Minister's Foreword

It is my firm belief that the Irish seafood industry is and will continue to be, an important, robust and resilient component of the overall Irish economy. My confidence in the Irish fishing sector, the Irish fish farming sector and in Irish seafood generally has been re-enforced over the past two years, since my appointment as Minister with responsibility for the Marine.

I am, therefore, particularly pleased to welcome this new five year strategy from BIM, an agency with a long and distinguished record of developing Irish seafood and supporting Ireland's coastal communities. This new strategy will build on the great work previously undertaken by BIM on behalf of the industry and add a new focus and impetus to the growth of the seafood sector in future years.

I have been impressed with the transformation of BIM as a development agency since the formation of the current Government in 2011. I am satisfied that BIM is now a focussed, lean and relevant agency and I congratulate the Board and management of BIM for bringing about the modernization and changes necessary to streamline the organisation.

Given the challenge of rebuilding our national economy, I welcome the fact that BIM's strategy is geared to generating value growth from an important indigenous industry which will create much needed jobs in our coastal regions. I am very encouraged to note the strong commercial focus which BIM has placed at the centre of this business friendly strategy. Its emphasis on growing the value of the seafood sector and creating jobs and exports is most relevant at this critical time in our national recovery.

In particular, I am pleased to see the way in which this strategy 'Capturing Ireland's Share of the Global Seafood Opportunity' has been designed to dovetail with the targets and objectives set out in the overarching Food Harvest 2020 national food production plan, and with Harnessing Our Ocean Wealth 2020. These strategies set out ambitious targets for growth in output, job creation and increased exports from the seafood sector and the actions set out in BIM's strategy will facilitate the achievement of these targets.

As the Irish Presidency, we have concluded a far reaching, ambitious reform of the Common Fisheries Policy. We have now secured the agreement which has the support of almost all EU countries and Members of the European Parliament. We need now to focus on effective delivery of all aspects of the new CFP, including ending the unacceptable practice of discarding fish at sea.

BIM will be centrally involved in identifying and promoting measures such as reducing catches of juvenile fish and other vulnerable stocks so that fishermen are supported in the transition to new sustainable fishing practices. In that context, I am pleased to note that BIM has included actions in their strategy to assist the Irish industry in coming into compliance with these new measures that will deliver environmental sustainability.

I strongly believe that the reformed CFP, once implemented and embedded, will provide the basis for a significant period of growth for the Irish fishing industry and the wider seafood sector.

I am conscious of BIM's long heritage in developing Irish seafood and sustaining coastal communities. Based on the contents of this strategy, I have every confidence that they will continue to fulfil this role into the future.

Simon Coveney TD
Minister for Agriculture,
Food and the Marine



Chairman's Acknowledgement

Since taking up the post of Chairman of BIM in June 2012 and having worked in the rural economy for many years, I have a great appreciation of the importance of job creation and economic activity in rural and coastal areas. In that context, I have been greatly impressed with the opportunity presented by the seafood industry.

Throughout the process of preparing this strategic plan and the setting of objectives and targets, we have engaged in a broad consultative approach. This included discussions with Irish/international leaders in the food industry and key members of the Irish seafood industry. We reviewed material from within our own resources in BIM including trends and opportunities in the national and international food industry as well as information and data from key international organisations concerned with seafood.

In view of the importance of the seafood sector to Irish food exports and to the national economy, it is imperative that a roadmap for the sector is set out in a clear and concise manner and this is best achieved by proper debate and discussion within the industry. The primary producers, whether they be fishermen or fish farmers, are central to this strategy.

Through the actions set out in this strategy, BIM will seek to deliver on a number of high level targets. Given the acceptance that the seafood sector has the potential to grow, add value, expand sales and exports, and most importantly to create new jobs, it is our intention to deliver 1200 jobs and €1 billion in sales by the end of 2017.

The objectives and targets set out in our strategic plan are both realistic and achievable yet have the potential to take the industry to a new level. The key areas of focus through which BIM will seek to achieve the targets are:

- › Expand the raw material base,
- › Optimise added value to our product,
- › Enhance the industry's structures,
- › Seek new sources of finance and strategic partners,
- › Continue to pro-actively improve the skills of our fishermen, fish farmers and processors, and
- › Enhance the sustainability of Irish seafood.

I am enormously impressed with the high calibre of staff and the level of expertise within BIM. Our new five year strategy offers an exciting opportunity for us to drive a change agenda for our industry. BIM will take the leadership role required to steer the seafood industry forward so that it will capitalise on the market opportunities, create new jobs and achieve its full economic potential in the years ahead.

To conclude, the Government's Food Harvest 2020 report acknowledges the potential of the seafood sector to increase output, value and jobs. There is now a growing awareness of the need to develop our natural resource based industries. Therefore I believe that the current economic landscape offers new options in global food markets and presents a real opportunity to achieve a transformation in the Irish seafood industry. I look forward to BIM playing a key role in that transformation.

Kieran Calnan
Chairman of BIM



Introduction by Chief Executive

First of all I would like to thank Minister Coveney for his on-going support for BIM and for his leadership to the wider seafood sector. Like the Minister, I believe that the Irish seafood sector represents a tremendous opportunity to create sustainable employment in our remote, coastal communities as well as adding more export value to the Irish economy.

In the last three years we, in BIM, have made enormous efforts to become more effective, and maximise the use of our more constrained resources both from a financial and a human perspective. I am pleased to report that today we are a leaner and fitter organisation, ready to take on new opportunities for the seafood sector.

Context for developing the new Strategy – the Opportunity

There are a number of significant macro trends which are determining the future of our seafood business. With world population set to reach eight billion by 2025, it is clear that a huge expansion in food production, including seafood, will be required to meet the demand that will be created by this population surge.

In tandem with the forecast population growth, is the fact that the world's centre of economic gravity is moving towards the east. Last year, 28% of the world's middle class lived in the Asia Pacific region. By 2020 this level will increase to 54% and by 2030 it will reach two thirds. I am confident that this rate of income growth in Asia Pacific will have far reaching implications for consumption and trade in seafood. There is a strong preference for seafood in this region and growing incomes will drive demand for a wider range of seafood products. This is evidenced by the growth in consumption of seafood in China, where in 1995 per capita consumption was just 7kgs and by 2020 it is expected to reach 36kgs per capita. With a population of 1.3 billion, the implications for seafood consumption are very clear.

Opportunities in the market will not be restricted to Asia. In the short term, the continuing recessionary situation in key seafood markets such as Spain, Italy and to a lesser extent France, will make trading conditions in these markets challenging. In the longer term however, the shifting of global seafood supply to the east in the absence of increased production will inevitably create supply constraints and thereby will present opportunities for Irish producers in these important traditional markets also. Thus, either through developing new markets in the Far East or by finding niches in the traditional markets there will be opportunities for Irish seafood to expand.

While we are excited by the positive global macro trends for seafood, our strategy must also consider the more challenging economic situation which Ireland faces. The constraints on public expenditure means we must redouble our efforts to ensure that public funding, whether national or from the EU, must be invested in the most effective manner possible so that the targets set out in this strategy can be realised. It is timely at this point to summarise the current status of our sector.

Current state of the Irish seafood sector

At primary production level, seafish landings* to Irish ports in 2011 were 198,937 tonnes valued at €269 million. Provisional data for 2012 shows that output from the aquaculture sector amounted to 36,700 tonnes valued at €133 million. The seafood export sector has been performing well over the last few years and in 2012, exports of Irish seafood increased 20% in value to €516 million on an increased volume of 350,032 tonnes. The leading export markets are France (€115 million), Great Britain (€78 million), Spain (€54 million), Germany (€28 million) and Italy (€27 million). Outside of the EU, the key export destinations are West Africa, Egypt, Russia and Asia (combined value €155 million). Sales on the domestic market reached €329 million and while the retail sector has seen reasonable stability, the food service business continues to be adversely impacted by the economic climate.

Estimated growth in per capita consumption of seafood

1995
2020

EUROPE

CHINA

Overall, the total sales of seafood both export and on the home market amounted to some €845 million.

Although the seafood processing sector is characterised by a large number of companies, at least 80% of sales is accounted for by 40 companies in which the turnover ranges from a high of €50 million to €5 million. A significant number of smaller companies have sales of less than €1 million. It is noteworthy that turnover for a typical EU competitor company is approximately €50 million. Small and medium sized seafood companies, many of which are family owned, are and will continue to be an essential component of the Irish seafood landscape. However, when we look at the scale of the market opportunity as outlined above and we consider the high level of fragmentation in our sector, it is clear that changes are needed in how our sector approaches the global seafood market. Thus, the main theme of this strategy is the need to realise scale in the seafood sector, to engender greater competitiveness and take advantage of the global market opportunities for seafood.

Our Approach in the new Strategy

The mega trends referred to earlier call for a new approach in developing this strategy for 2013-2017. Where the last BIM Strategy for 2010-2012, 'Delivering on the Potential for Irish Seafood' focused down to an itemised list of actions, the new approach is to present a strategic direction centred around five key priority areas which will be supported by a number of specific high level projects. These projects will be undertaken by BIM in partnership with industry and will prioritise expanding the raw material supply, increasing added value, aquaculture growth, scaling the sector, developing skills and enhancing sustainability.

The projects will be BIM's means of leading the growth of the industry from its current status to reach a new potential and €1 billion sales and will be informed by the vision our strategy sets for the seafood sector.

This strategy, together with our annual work programmes which will seek to action it, have all been constructed in line with the targets and objectives set out in the key government policies relating directly or indirectly to the seafood sector over the next five years to 2017. We firmly believe that our new strategy and series of high level actions will serve to lead the Irish seafood sector to new levels of output, employment, sophistication and prosperity.

Of course, BIM will continue to administer financial assistance via the new European Maritime and Fisheries Fund (EMFF) Operational Programme to our client base. We will also continue to work closely and synergistically with our parent department DAFM and partner agencies – Bord Bia, Marine Institute, Enterprise Ireland, Údarás na Gaeltachta and The Sea-Fisheries Protection Authority – in pursuit of common objectives and to support existing programmes and develop exciting new initiatives on behalf of the sector.

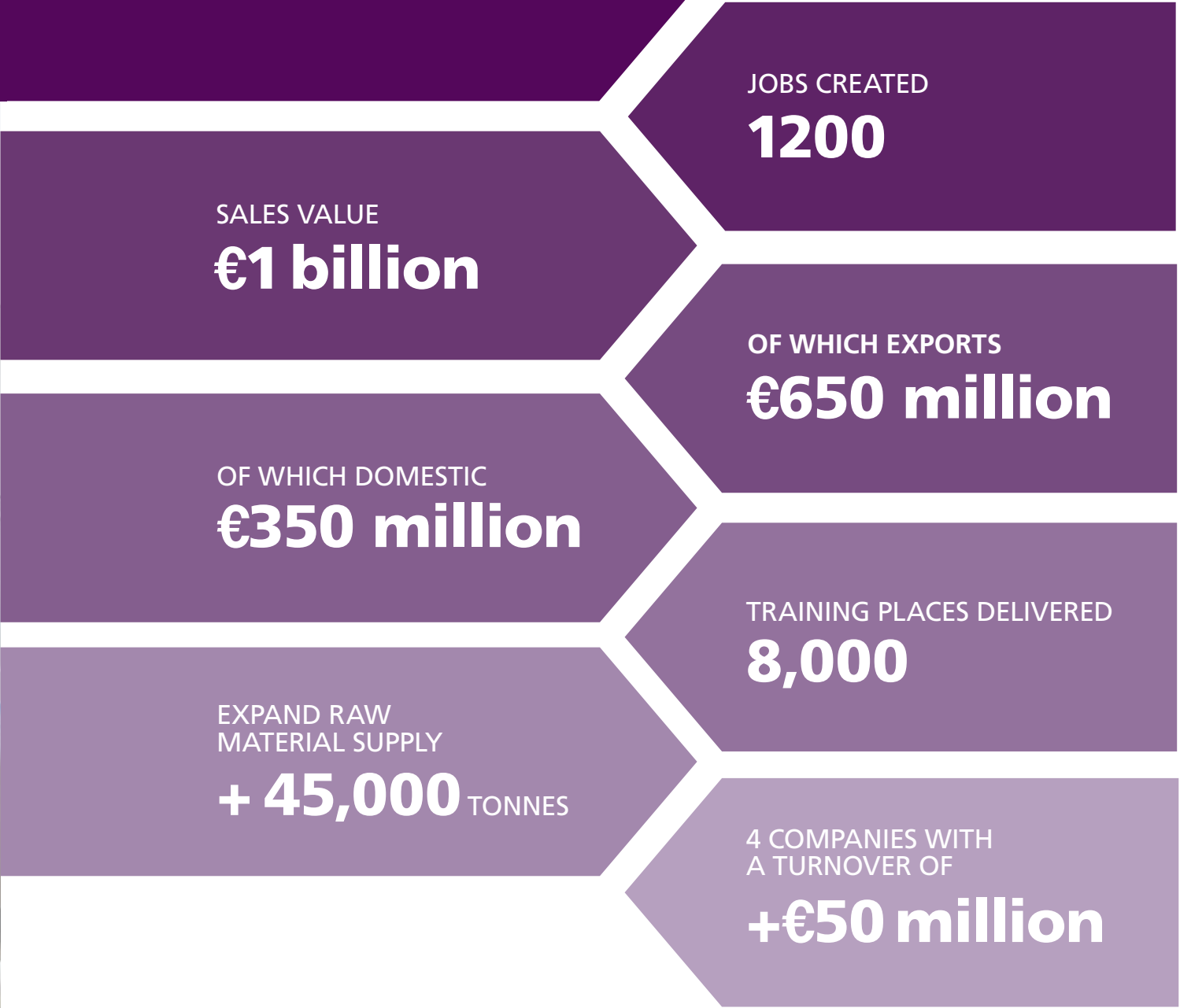
In conclusion, my message in this strategy to all our stakeholders is simple, the Irish industry's ability to really capitalise on the undoubted market opportunities are dependent on increasing scale. Appropriate scale will enable the sector to invest in marketing, new product development and human resources, all of which are essential to secure new higher value markets and critically, improve prices being returned to our primary producers. In turn, this will result in the sector delivering much needed jobs and exports to the national economy over the next five years.

The scale and projected growth of seafood consumption in China presents a very significant market opportunity for seafood over the next decade, while Europe's high dependency on imports will inevitably result in supply shortages for some species.

Given our access to raw material supply, Ireland is uniquely placed to be a central figure in the development and expansion of the global market.

*latest available data from SFPA

Key Targets for end 2017



Current Industry Situation

Capture Fisheries – Landings to Irish Ports in 2011

	Tonnes	€000
Pelagic Fish	127,605	86,900
Demersal Fish	45,547	94,195
Shellfish	25,785	88,004
Total	198,937	269,099

Note: Latest available data from SFPA

Aquaculture Production in 2012

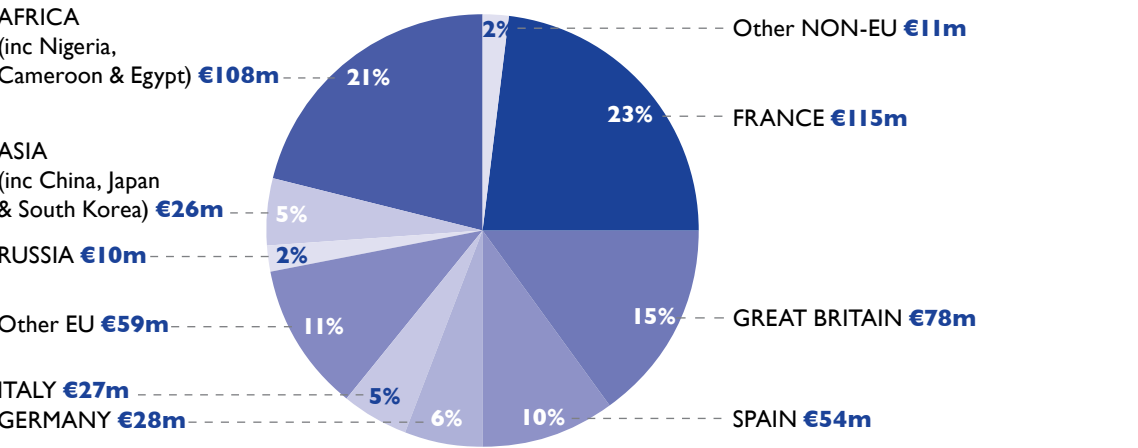
	Tonnes	€000
Finfish	13,880	83,830
Shellfish	22,820	48,940
Total	36,700	132,770

Industry Employment

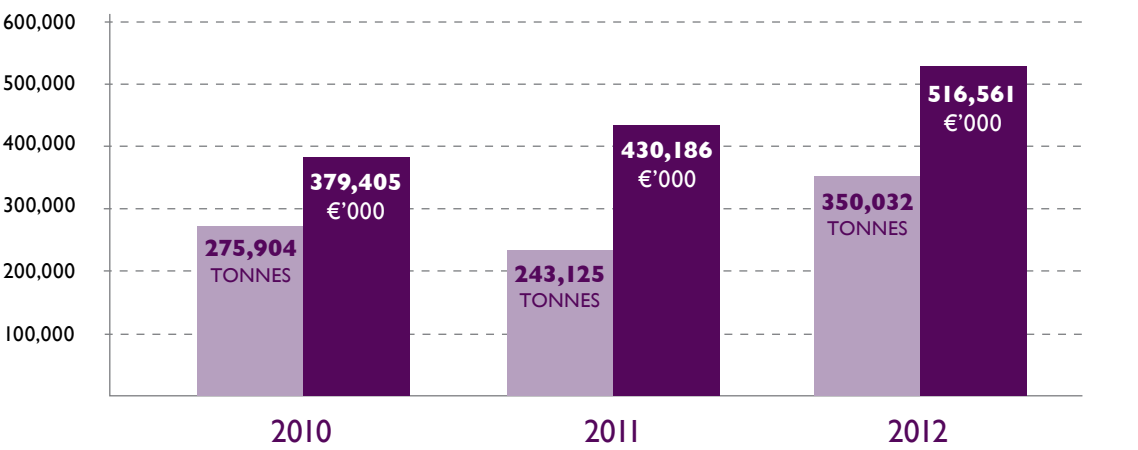
The seafood industry supports the economic viability of many coastal communities, directly generating or supporting approximately 11,000 jobs. This includes full and part time/casual employment in the fisheries, aquaculture, seafood processing and ancillary services sectors as shown below.

	Full Time	Part Time	Total
Total Fisheries	3,924	1,060	4,984
Aquaculture	693	1,023	1,716
Processing	2,200	660	2,860
Ancillary	1,440		1,440
Total	11,000		11,000

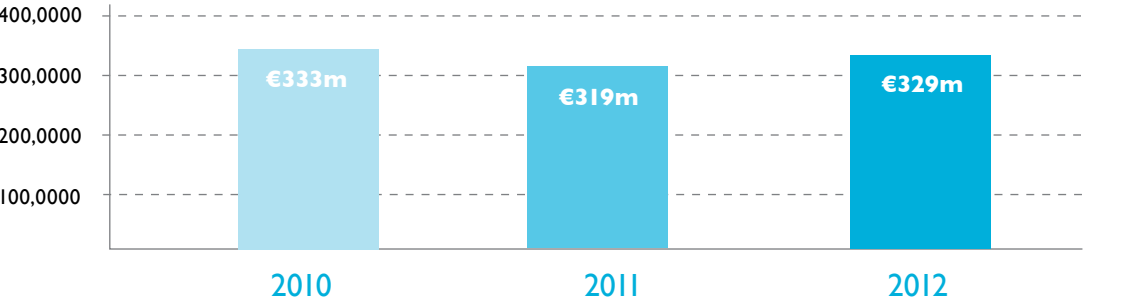
Irish Seafood Exports by Market and % Share in 2012



Irish Seafood Exports by Volume and Value in 2010 – 2012



Value of Sales on the Domestic Market in 2010 – 2012



EXPAND THE RAW MATERIAL SUPPLY FROM FISHERIES AND AQUACULTURE TO IRISH PROCESSORS

Why is this important?

The demand for seafood is growing and over the next decade is projected to grow by 42 million tonnes per annum according to the Food and Agricultural Organisation (FAO). The major factors contributing to this growth are the increasing world population, the growth in spending power in Asia and the preference in that region for seafood. The growing demand for seafood in Asia may be expected to have a knock-on effect in traditional markets in Europe which are now almost 65% dependant on imports.

BIM is confident that the combination of these factors will create new business opportunities for Irish seafood. If the Irish seafood industry is to gain advantage from this prospective growth in demand then it is imperative that it expands output if it is to compete on the global marketplace. Therefore, it is essential that additional sources of raw material are sought to generate the expanded levels of new and innovative value added seafood products that will be needed to capitalise on the emerging market opportunities.



Key actions BIM will undertake to ensure that this objective is delivered

- › BIM working in conjunction with Údarás na Gaeltachta will evaluate, and where necessary reconfigure, potential and existing aquaculture licence locations (including an investigation of further deep sea salmon farm locations) to accelerate development, bring redundant licensed capacity back into production and improve and standardise environmental performance and overall compliance with conservation needs and regulatory requirements.
- › Significantly develop the aquaculture sector, within the context of clearly defined national policies, output targets and environmental targets. This will be derived from the new Strategy for Aquaculture to be produced in tandem with the Seafood Operational Programme 2014–2020 which will give effect to the new European Maritime and Fisheries Fund (EMFF).
- › Investigate an e-trading seafood platform that will increase the volume of fish caught off the Irish coast being processed by Irish processors.
- › Work in conjunction with the Marine Institute and directly with the catching sector to ensure optimal utilisation of existing resources including blue whiting and boarfish. In addition, investigate possibilities for under-utilised species that may provide commercial opportunities.
- › Promote the development and expansion of traditional aquaculture species with particular emphasis on those species with real commercial potential.
- › Promote the diversification of new species and new technologies in the sector. In certain high-risk areas, undertake pilot or prototype projects in conjunction with industry players to assess the feasibility of innovative technology.
- › Expand the farming of edible seaweed and other seaweeds for use in areas such as functional foods, animal feed supplements, nutraceuticals and horticulture.

If the Irish seafood industry is to gain advantage from this prospective growth in demand then it is imperative that it expands output if it is to compete on the global marketplace.

MAXIMISE ADDITIONAL VALUE FROM THE RAW MATERIAL BASE

Why is this important?

When one looks at the global market, it is clear that Ireland is a small player in the world seafood scene. As a consequence, Irish seafood cannot and should not try to compete on a cost basis against cheaper third country products such as pangasius or tilapia which are heavily imported into the EU. If we are to maximise the return from our precious seafood resource, we need to differentiate Irish seafood products from those of lower cost producers.

The need to move from commodity trading – with the exception of some pelagic species – is of paramount importance for Irish seafood. In addition, the need for added value products is driven by younger generations of consumers that are demanding more convenience in product presentation and meal preparation. This is a feature of newly emerging markets in Asia and elsewhere as well as in traditional European markets.

A strong focus on maximising additional value will ensure that the industry will be able to keep abreast of this trend and ultimately, protect market share and ensure long term financial sustainability. The facilities at the Seafood Development Centre (SDC) will critically support this priority objective.

A strong focus on maximising additional value will ensure that the industry will be able to protect market share and ensure long term financial sustainability.



Key actions BIM will undertake to ensure that this objective is delivered

- › Using commercially relevant market research and intelligence, we will work to develop 'ready to launch' new product concepts within the SDC that could be made available to industry through various commercial options.
- › Work with fishermen, sales organisations and processors to develop more integrated industry structures to enable the industry to compete more effectively in the international marketplace.
- › Proactively work with Bord Bia to develop a marketing strategy for seafood.
- › Facilitated by the Seafood Processing Investment Scheme which is under the aegis of our parent department DAFM, BIM will continue to work with seafood companies to build scale in their businesses in conjunction with Enterprise Ireland and Údarás na Gaeltachta.
- › Assess the potential for branding using appropriate quality assurance standards together with certification such as Organic or Eco-labelling.
- › Promote the widespread use of BIM's product certification and assurance schemes, including the PGI (Protected Geographic Indicator) status for salmon and other products.
- › Support job creation and greater economic activity of small-scale operators, in particular through the establishment and active promotion of Fisheries Local Action Groups (FLAGs) in coastal communities.
- › Work with Enterprise Ireland to provide a Green Business Programme to the processing sector that will focus on achieving cost reductions in energy, water and utilities as well as supporting a positive environmental profile with Bord Bia's Origin Green initiative.
- › Place a specific focus on developing product options from species such as blue whiting and boarfish including the evaluation of marine proteins.
- › Provide a business planning service to the seafood sector.
- › To ensure a ready availability of sound, comprehensive statistical and economic analysis on the seafood industry that will help inform policy and support for the sector, BIM will produce and circulate regular economic reports with an initial focus on the main harbours and hinterland areas.
- › Collaborate with Teagasc to explore R&D potential opportunities for the seafood sector.
- › Establish formal strategic alliances with University College Cork and Letterkenny Institute of Technology to create stronger industry links to the third level sector including access to relevant graduates and the development of innovation clusters around the seafood sector.
- › Develop the domestic retail and food service sectors, covering the areas of quality, food safety, knowledge transfer and skills development.
- › Provide expert support to assist seafood businesses achieve adherence to necessary hygiene and food safety standards required by Irish and EU legislation.
- › Ensure that top quality seafood product is being produced by the sector by encouraging investment in the improvement of safety, working and hygiene conditions of the fishing fleet.

CREATE SCALE WITHIN INDUSTRY STRUCTURES

Why is this important?

The Irish seafood industry employs up to 11,000 people in fishing, fish farming and fish processing and these jobs are located in peripheral coastal regions. The companies in the sector are dominated by family owned firms and there are 180 registered seafood companies with processing facilities in Ireland. A large proportion of this number are small scale firms with a turnover ranging from €3 million to €10 million. In addition there is a significant number of artisanal scale operations supplying dispersed local markets such as shops and restaurants. This contrasts with a typical European competitor with a turnover in the order of €50 million. Compounding the lack of scale is our geographic position on the periphery of mainland Europe.

In reality, this means that it can be very difficult for Irish seafood companies supplying perishable product to compete with their much larger European counterparts in the market place. This is particularly relevant when dealing with buyers from large continental companies that require daily delivery arrangements.

Over the next five years, BIM will lead the sector in its effort to build scale and to create the necessary level of competitiveness to compete in the long term and realise the sector's capacity to grow revenue and generate jobs.

Appropriate scale, particularly in defined product categories will enable a company or a group of companies working collaboratively to invest in marketing, research, advanced business and monitoring systems, all of which open access to new markets and improve company profitability.

BIM commenced this work in 2012 with the Route to Market Programme and over the next five years through the implementation of this strategy, we will continue to work with industry on an ambitious business development strategy.

Over the next five years through the implementation of this strategy, BIM will continue to work with industry on an ambitious business development strategy.



BIM will lead the sector in its effort to build scale and to create the necessary level of competitiveness to compete in the long term and realise the sector's capacity to grow revenue and generate jobs.

Key actions BIM will undertake to ensure that this objective is delivered

- › Attract international strategic partners to the sector through the identification of specific species opportunities with associated business plans.
- › Develop skills and competencies to pursue new areas of public funding for the sector from EU Programmes on the structural frameworks.
- › Adopt a more commercial approach for BIM to deal with start-up projects including the use of trial farms and campus companies.
- › Facilitate the establishment of a Seafood Investment Fund with private sector interests to increase the capital available for the Irish seafood industry.
- › Provide support packages and expert advice to generate greater synergies within the seafood sector that will enable it compete more effectively in the international marketplace.
- › Build on existing joint ventures established in 2012 in the Chinese and French markets and further expand this work to focus on Russia and Brazil, working in a proactive partnership with Bord Bia.



DEVELOP INDUSTRY SKILLS THAT WILL HELP TO GROW THE SECTOR

Why is this important?

In common with other business sectors, the seafood industry needs a regular supply of suitably trained and skilled personnel to work on board fishing vessels, on fish farms and in processing plants. BIM already has a long established record of providing the industry with vocational training for appropriate qualifications to work as crew members, skippers and engineers on fishing vessels, and this vital service will continue over the next five years. This strategy marks the introduction of a new era of professionalism in the sector and BIM's skill development programmes will reflect this.

The provision of accredited training services allied with our new approach with third level institutions will secure the seafood sector's place in the modern Irish economy. The new approach will ensure that the skills development work which BIM undertakes for the seafood sector, is placed and accredited to the National and EU Framework Qualifications, so that our actions are fully compatible with the requirements for 'portable qualifications' and life long learning progression.

The National Fisheries College, with locations in Greencastle, Castletownbere and Dun Laoghaire, is equipped to deliver a broad range of Department of Transport and FETAC accredited courses. These include fishing vessel deck officer and engineering Certificates of Competency training and short duration courses on safety, radio, first aid and other nautical skills. BIM's mobile Coastal Training Units provide short courses in safety, radio, engineering and navigation at ports around the coast offering industry practitioners convenient access to necessary training. Courses related to product handling for seafood processors and traders are provided in the Seafood Development Centre (SDC) at Clonakilty.

An integral component of this new strategy will be the promotion and development of business management skills in the sector through leadership programmes and through the introduction of new seafood business management courses with selected third level institutions aimed at attracting potential seafood graduates into the sector. The provision of appropriate skills and training to the sector will underpin the drive towards competitiveness which is the central focus of this strategy.

The provision of accredited training services allied with our new approach with third level institutions will secure the seafood sector's place in the modern Irish economy.



Key actions BIM will undertake to ensure that this objective is delivered

- › Develop a targeted seafood leadership programme for key industry players in conjunction with a third level institution(s) and relevant agencies.
- › Build new strategic partnerships with leading Irish third level institutions that promote structured, career centred, professional development for those working in the seafood sector including skippers, engineers and deckhands.
- › In conjunction with other training providers and through the SDC, facilitate technology know-how in processing, innovation and new product development, supported where appropriate, by mentoring and FETAC accredited training.
- › Provide practical certificate and diploma courses, including essential safety training, leading to recognised qualifications from the Department of Transport and FETAC at the BIM training colleges in Greencastle and Castletownbere.
- › In conjunction with the catching sector and other key stake holders (Maritime Safety Directorate of the Department of Transport, Tourism and Sport; Marine Survey Office; Irish Coast Guard etc) develop and implement a strategic upgrade of the training programme for sea fishermen with particular emphasis on safety and on professional qualifications including the introduction of courses consistent with the requirements of the International Convention on Standards of Training, Certification and Watchkeeping for Fishing Vessel Personnel (STCWf).
- › Continue to provide statutory (Department of Transport), safety and FETAC accredited training places to fishermen, fish farm workers and others working in the sector.
- › Provide relevant courses at various fishing ports through the mobile Coastal Training Units.
- › Work with industry to improve the occupational health and safety environment for crew serving on aquaculture and fishing vessels and staff working in seafood processing operations.



ENHANCE THE ENVIRONMENTAL SUSTAINABILITY OF IRISH SEAFOOD

Why is this important?

BIM's priority to enhance the sustainability of seafood will have regard to the Europe 2020 Strategy which sets the agenda for creating a resource efficient Europe. This has informed the Government's 'Our Sustainable Future - A framework for sustainable development for Ireland' which offers a vision for how Ireland can achieve a resource efficient, low carbon and climate resilient future.

Our programmes will also be informed by the new Common Fisheries Policy (CFP) which is due to take effect in 2014. This will focus on the broader maritime picture as advocated by the Integrated Maritime Policy (IMP) and its environmental pillar, the Marine Strategy Framework Directive. The new policy will be based on exploiting fisheries resources sustainably.

Ecological sustainability is therefore a basic premise for the economic and social future of European fisheries, and the development of the wider seafood sector. The CFP will provide critical support for the long-term sustainable future of Ireland's seafood sector and for ensuring that it can retain access to and grow the resource base on which the industry is dependent.

Through our development initiatives, we will seek to grow the seafood sector by applying green economy principles that align the preferences of environmentally conscious consumers while maximising renewable resources to reduce waste and input costs, and to embrace assured food production systems.

Consumers worldwide now want to know where their seafood is coming from and are concerned that the seafood they consume is responsibly sourced. In this context, specific projects for the strategy will include the potential for branding using appropriate quality assurance standards together with certification such as MSC, Organic or Eco-labelling. BIM's schemes are geared towards assuring that all products covered by them are sustainable, safe and traceable.

BIM will seek to ensure that's our assurance schemes align with the Bord Bia Origin Green project. The sustainability positioning provided by this Origin Green brand initiative will permit participant companies to engage directly with the challenges of sustainability, reducing energy inputs, minimising carbon footprint and lessening environmental impact. In turn, this will secure better prices to the food and seafood sectors.

Key actions BIM will undertake to ensure that this objective is delivered

- › Co-operate with Bord Bia to leverage added value from BIM's unique suite of product certification and assurance schemes through alignment with their promotional campaigns and, in particular, the Origin Green initiative.
- › Promote the widespread use of BIM's certified Eco labels through the implementation of operator based Environmental Code of Practice for Irish Aquaculture Companies and Traders (ECOPACT) and wild fisheries (Seafood EMS/ Stewardship Standard) sectors.
- › Facilitate the adoption by industry sectors of sustainability standards such as MSC or the FAO based approach.
- › Cognisant of the new Common Fisheries Policy and specifically the issue of the obligation to land all catches, BIM will work with the industry to develop new approaches to implement the obligation such as measures to reduce and eliminate discarding of commercial fish species.
- › Develop technical conservation measures that reduce the bycatch of protected species (including marine mammals and seabirds) and the impact of fishing gears on the seabed and on the wider marine environment. This work will focus on modified and alternative fishing gear and the development of environmentally friendly fishing methods.
- › Actively assist DAFM and the MI – including the provision of survey and GIS based expert services – in the preparation of Appropriate Assessments. BIM will work with industry to produce fishery Natura plans to provide compliance with the requirements of the Birds and Habitats Directives with regard to aquaculture licensing and fisheries management and control.
- › Via the Co-ordinated Local Aquaculture Management Systems (CLAMS) process BIM will assist operators and DAFM to take collective actions to reduce the environmental footprint of aquaculture operations and improve levels of public safety by enhanced marking of aquaculture sites and interpretation.

This initiative will allow participant companies to engage directly with the challenges of sustainability, reducing energy inputs, minimising carbon footprint and lessening environmental impact.



Glossary

BIM	Bord Iascaigh Mhara
CFP	Common Fisheries Policy
CLAMS	Co-ordinated Local Aquaculture Management System
CTUs	Coastal Training Units
DAFM	Department of Agriculture, Food and Marine
DoT	Department of Transport
ECOPACT	Environmental Code of Practice for Irish Aquaculture Companies and Traders
EI	Enterprise Ireland
EMS	Environmental Management Systems
EFF	European Fisheries Fund
EMFF	European Maritime and Fisheries Fund
EU	European Union
FAO	Food and Agriculture Organization of the United Nations
FETAC	Further Education and Training Awards Council
FLAGs	Fisheries Local Action Groups
GIS	Geographic Information System
ICZM	Integrated Coastal Zone Management
MI	Marine Institute
MSC	Marine Stewardship Council
MSFD	Marine Strategy Framework Directive
NFC	National Fisheries College
NPD	New Product Development
SDC	Seafood Development Centre
SFPA	Sea Fisheries Protection Agency
SPIS	Seafood Processing Investment Scheme
SAC	Special Area of Conservation
UnaG	Údarás Na Gaeltachta



EAT MORE IRISH FISH



BIM CLONAKILTY

Clogheen Road
Clonakilty
Co. Cork
T +353 1 2144100
E info@bim.ie

BIM DUN LAOGHAIRE

Crofton Road
Dun Laoghaire
Co. Dublin
T +353 1 2144100
E info@bim.ie

BIM KILLYBEGS

The New Pier
Killybegs
Co. Donegal
T +353 74 9732600
E killybegsoffice@bim.ie

BIM GALWAY

New Docks
Galway
Co. Galway
T +353 91 564 318/19
E galwayoffice@bim.ie

NATIONAL FISHERIES COLLEGE

Greencastle
Co. Donegal
T +353 74 938 1068
E nfcgreencastle@bim.ie

Castletownbere Co. Cork

T +353 27 71230
E rfccastletownbere@bim.ie

www.bim.ie

JOBS +1200

SEAFOOD SALES €1 billion