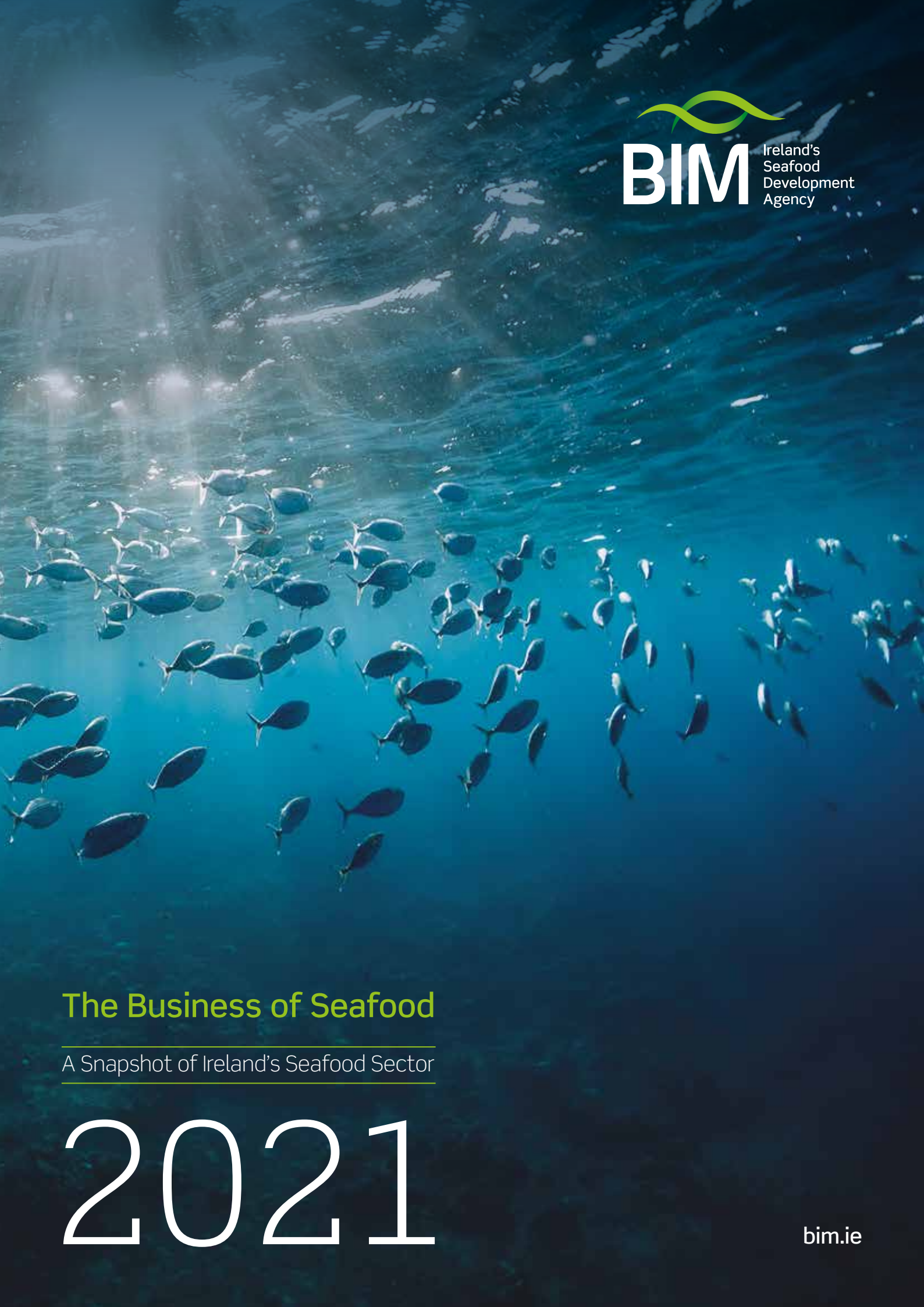


BIM
Ireland's Seafood Development Agency

The Business of Seafood

A Snapshot of Ireland's Seafood Sector

2021

bim.ie

€1.26 BILLION

THE IRISH SEAFOOD ECONOMY 2021

Value of Aquaculture

€175M

-2% Growth

Value of Irish Seafood

€619M

+1% Growth

Our Biggest Fishing Ports
(Value of Landings)

Killybegs
€121M

Castletownbere
€112M

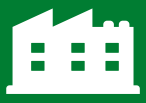
€444M **+2%**

of seafood was landed by Irish and non-Irish vessels into our ports in 2021:

IRISH LANDINGS: €293M
NON-IRISH LANDINGS: €151M

1,993

Number of Registered Fishing Vessels



160

Number of Seafood Processors

319

Number of Aquaculture Sites

16,647

Total number of people employed

DOMESTIC SALES VALUE

€418M

€318m Retail Value

€100m Foodservice Value

TOP SELLING SPECIES

SALMON (Up 2%) **€122M**

COD (Down 8%) **€42M**

GDP Growth +15%

€281M worth of seafood was imported into Ireland in 2021

-57% €83M worth of seafood was imported from the UK in 2021

UK IMPORT SHARE 2021 30%

UK IMPORT SHARE 2020 58%

€674M Export Value

+11% Value Growth

IRELAND'S MAIN EXPORT MARKETS

+17% **EU €397M**

+48% **ASIA €80M**

-13% **UK €79M**

Chartering New Territory

Despite the ongoing challenges presented by the Covid-19 pandemic and the additional impacts of the Trade and Cooperation Agreement agreed between the EU and the UK, 2021 saw the Irish seafood industry recover from the trading difficulties experienced in 2020. Overall, the value of the sector to the economy rose to €1.26 billion, up from €1.09 billion in 2020. This is the highest value on record and represents a growth in GDP of 15.3% compared to 2020.

The main driver of growth was from exports with an increase in value of 11% to €674 million in 2021. Purchases of seafood within the hospitality sector increased by 14% in 2021, following from a decline of 53% in 2020. Domestic consumption grew by 3% to €418 million, while the seafood balance of trade (exports – imports) grew by 45% following strong export growth, particularly in EU markets. Overall investment in the sector increased during 2021 to €454 million (+8%), showing a renewed confidence in the sector.

While overall volumes of seafood production reduced by 10%, largely as a result of the quota transfers to the UK TCA agreement, higher prices for wild caught seafood and significant growth in the farmed shellfish
sector saw the value of production increase to €619 million.

Employment in the sector also remained stable in 2021 despite the challenges. A total of 16,647 people were employed directly and indirectly within the sector, an increase in overall employment of 1%.

This comprised 8,705 employed directly in fisheries, aquaculture and processing and a further 7,942 in downstream employment in ancillary and support sectors. Employment remains high in coastal regions, reaching 16% in Donegal, 7% on the southern and eastern coasts and 6% in Galway-Clare, generating significant socioeconomic value in these areas.

Employment in the burgeoning seafood-tech sector comprising companies involved in high value-adding techniques and processes using seafood has continued to increase. In 2020, the latest figures available, 741 people were employed in the sector in 52 companies, an increase of 71% since 2015. Turnover has increased by 126% in the same period and the opportunities for further expansion are significant.

An increase in the value of the Seafood economy to

€1.26 BILLION

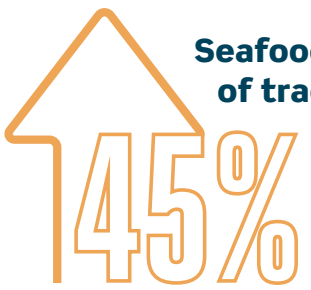
Led mainly by growth in exports

Seafood Consumption remains steady

Demand for Irish seafood increased in 2021 although growth was modest, with consumption of seafood in increasing by 3% to €418 million. The hospitality sector was the main contributor to this growth, with increased sales of 12% (€100 million), despite the continued uncertainty in seafood consumption worldwide due to Covid-19. Sales of seafood into the retail sector declined by 3% in volume but grew by 1% in value to €318 million in 2021, reflecting the challenging market situation at the start of the year.

Overall, the volume of exports increased by 10%, with value increasing by 11% to €674 million mainly driven by a resurgence in the main EU markets in Spain, Italy and France in the latter half of the year. The value of exports of salmon to France, UK, Germany and Belgium continued to increase in 2021, with total growth to all markets of 13% with a total value of €129 million. Exports of Dublin Bay prawns also increased in value by 26% in 2021, reflecting the re-opening of the markets in Italy and France for frozen at sea prawns. The shellfish sector likewise saw increased value in exports of oysters (+40%) and mussels (+10%) mainly into the EU market. For the pelagic species, there was an increase in both the volume and value of exports of mackerel (16% in volume and 10% in value) and blue whiting (82% in volume and 62% in value).

Imports of seafood increased by 7% in volume terms but fell in value by 16%. Salmon, shrimps and prawns, cod and tuna continued as the main imported species in 2021. **There was a marked reduction in the UK import share which almost halved, down from 58% to 30%. The dramatic decline was almost certainly associated with the impacts of Brexit and the new costs associated with trading with the UK.**



Seafood balance of trade

(exports imports) grew by 45%

In 2021, Government investment in the seafood sector continued to grow, amounting to €233 million

AN INCREASE OF 11%

Seafood Production recovers

The value of seafood production rose in 2021 by 1% to €619 million, an increase of €7 million compared to 2020. Overall volume fell by 10% to 356,600 tonnes mainly due to reduced quotas as a result of the TCA deal with the UK, which saw quotas transferred from the EU to the UK. Prices, that had fallen in 2020 due to the lack of market demand and the closure of the food service sector, picked up in 2021, increasing for most species. This resulted in a 2% increase in the value of wild-caught fish to €444 million, an increase of €11 million. By volume, both Irish and non-Irish landings fell 7% and 20% respectively, due largely to Covid-19 and new rules regarding UK vessels landing into Ireland following from Brexit. Killybegs and Castletownbere continued to be the top two Irish ports in volume and value terms. Non-Irish landings were important to these two ports as well as to Dingle in the south-west, where non-Irish landings made up 36% of the total volume of landings into the port.

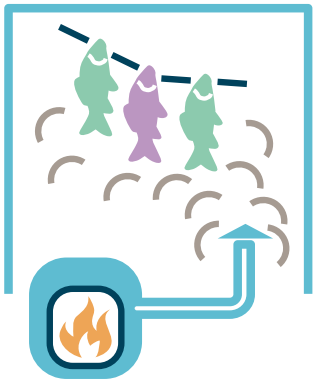
Among the most important species for Irish vessels, mackerel and Dublin Bay prawns continued as the most valuable species landed. However, following from the quota transfers under the TCA between the EU and the UK, the volume and value of landings of mackerel decreased by 18% and 23% respectively. Prices for mackerel also fell for the first time in several years. Conversely, despite the quota transfers, the volume and value of Dublin Bay prawns' landings increased 11% and 16% respectively, reflecting the re-opening of the EU food service sector in the second half of the year. Prices for Dublin Bay prawns overall increased by 4% in 2021 compared to 2020. Whitefish species such as haddock, hake, whiting and megrim showed a similar pattern with increases in volume and value in 2021 as the market situation improved during the year and prices increased.

In contrast to wild caught production, the value of the farmed finfish sector decreased by 14%, mainly due to lower prices for farmed salmon. The farmed shellfish sector fared much better with production of oysters, rope and seabed cultured mussels increasing significantly in value and volume. The oyster sector saw a 22% increase in value and 13% increase in volume as EU foodservice outlets opened during the year. Both mussel sectors – rope and seabed cultured – also saw increases in value of 24% and 31% compared to 2021.

Renewed confidence in the sector as investment grows

In 2021, Government investment in the seafood sector continued to grow, amounting to €232 million, an increase of 11%. Support from the European Maritime and Fisheries Fund (EMFF) along with a national investment programme contributed to a wide range of projects including the improvement of infrastructure in fishing ports and harbours, grant aid for fishers, fish farmers and fish processors, R&D and innovation projects, as well as direct supports to the sector to offset the impacts of Covid-19.

Private investment, after falling quite significantly in 2020, increased by €10 million (+5%), totalling €221 million, reflecting renewed confidence of the sector as it emerged from the Covid-19 pandemic and the effects of Brexit. This confidence in the seafood sector was shared by financial lending institutions and helped to encourage private investment to continue to invest where in a position to do so. However, private investment remains well below pre-Covid-19 levels in 2018 and 2019, when this figure was at a level of €250 million.



The value of seafood production rose in 2021 by 1% to €619 million, an increase of €7 million compared to 2020.

PRODUCTION ROSE IN 2021 BY 1%

Private investment, after falling quite significantly in 2020, increased by €10 million (+5%),
TOTALLING €221 MILLION

Private investment was also aided by the continued availability of grant aid through the EMFF and government grants. These financial injections were critical to sustaining the industry and ensuring businesses remained viable, given the many obstacles they needed to overcome during the period.

The fallout from Brexit

While the overall outlook for 2021 is positive, the EU/UK Trade & Cooperation Agreement (TCA) deal agreed at the end of 2020 brought a sudden and dramatic shift in the landscape for the entire Irish seafood sector. The deal saw quota transfers across EU member states to the UK, totalling almost €200 million. The main impact on the Irish fleet is for Ireland's two biggest fisheries - mackerel and Dublin Bay prawns - which saw quota reductions of 26% and 14% respectively. The impact on the fishing fleet of reduced quotas and for the processing sector as a result of less raw material being available is evident and will continue to be a factor for the foreseeable future. Vital seafood trade routes, primarily through the 'land-bridge' via the UK, have been curtailed, particularly since the beginning of 2021. By the end of 2021, a new trading pattern for seafood has emerged with altogether less reliance on the UK markets and a shift to European and further afield market opportunities.

The potential impacts of the wider Brexit deal on the Irish seafood industry prompted the establishment of a Seafood Task Force to consider measures to mitigate these impacts. The Task Force recommended some 16 funding schemes, with a proposed overall funding requirement of €423 million. Amongst the recommendations were longer-term fleet re-structuring measures, including voluntary decommissioning that aim to restore balance between fishing capacity and available fishing opportunities.

Short-term supports for the catching and processing sectors to mitigate the immediate impacts of the TCA were also proposed, in the form of temporary cessation and liquidity aid schemes. While longer-term initiatives in the areas of processing, aquaculture, public marine infrastructure, and Blue Growth that will help to strengthen and enhance coastal communities especially dependent on the seafood industry were further recommended, at a projected cost of €280 million.

Rising costs - the new challenge

There is no doubt that the initiatives recommended by the Seafood Task Force represent a significant level of investment that will help to rebalance and reshape the industry. However, the developments in the Ukraine in early 2022 have created a whole new set of challenges, which are immediate and threaten the viability of the whole sector. The price of marine diesel has increased exponentially since the start of the Ukrainian crisis, while the price and availability of materials and equipment has also risen sharply. **Coming so soon after the economic shocks of Covid-19 and Brexit, the resilience of the sector is going to be tested to the full during 2022 and beyond. It will require a collective effort from the industry backed with financial and technical support from BIM and Government to withstand this new challenge and remain profitable.**

Breakdown of Seafood - Gross Domestic Product

GDP Components	2017	2018	2019	2020	2021	Growth Rate 2021	% of Seafood Economy
Domestic Consumption	470	486	494	406	418	+3%	33%
Private Investment	220	267	257	211	221	+5%	18%
Government Investment	170	170	185	209	233	+11%	18%
Exports - Imports	345	316	291	271	393	+45%	31%
GDP	**1,205**	**1,239**	**1,227**	**1,097**	**1,265**	**+15%**	**100%**

The Irish Seafood Economy 2021

Direct Employment in the Irish Seafood Sector

2,848
Fisheries

1,984
Aquaculture

3,873
Processing

8,705
Direct Total Employees

Total Employment in the Irish Seafood Sector

8,705
Direct Total Employees

7,942
Indirect Total Employees

16,647
Direct and Indirect Total Employees

Breakdown of Employment by Region

Region	Total Population	Coastal Population	Coastal Employed	Direct Seafood Employment	Downstream Seafood Employment	Share of Coastal Employment
North	159,192	74,989	27,488	1,938	4,327	16%
North West	292,630	64,059	25,328	602	1,065	4%
West	376,875	64,704	27,034	1,017	1,751	6%
South West	342,606	90,323	36,718	922	1,523	4%
South	542,868	115,533	49,815	1,823	3,526	7%
South East	808,737	91,681	36,467	1,108	1,845	5%
North East	2,238,957	83,775	36,139	1,295	2,609	7%
Republic of Ireland	**4,761,865**	**585,064**	**238,989**	**8,705**	**16,647**	**7%**

Source

Where does Irish seafood come from?

In 2021 the volume of seafood produced by the Irish seafood sector fell by 10% to 357,000 tonnes. However strong growth in wild-caught fish prices lead to an overall increase in the total value of seafood by 1% to €619m. This is the highest value of seafood produced recorded in the Business of Seafood series.

The volume of landings into Irish ports fell by 12% in 2021, to 315,000 tonnes, with this decline being driven by the non-Irish fleets which decreased by 20%. Landings from the Irish fleet decreased by 7%, largely due to the quota transfers under the TCA (Trade & Co-Operation Agreement) with the UK.

In terms of value, however, both Irish and non-Irish fleets increased the value of their landings. This was achieved by increased average fish prices. Most ports suffered decreased landing volumes, but the value of landings increased into most ports.

Killybegs and Clogherhead were the only ports to see declines in value, both volume-driven. Castletownbere saw reduced volumes by non-Irish fleets of -20%. However, the value of these landings were equal to 2020, due to price inflation. The value of landings increased significantly in Dunmore East, Howth and Ros an Mhíl -mainly from the Irish fleet - while high-value landings from non-Irish and Irish fleets led to strong growth in Dingle.

Mackerel was the most valuable species landed by the Irish fleet in 2021, with over 60,000 tonnes worth €73m. This was a decrease in value of 23% on 2020 due to combined decreases in volume and price of -18% and -5% respectively. Landings of Dublin Bay prawn increased by 16% to €53m following good volume and value growth throughout the year. Strong price increases were seen in shellfish species particularly crab, lobster shrimps and razor clams (+20%).

Aquaculture production increased volumes by 11%. However, the value of the sector fell by 2% to €175m. The salmon sector saw the biggest decline in value with volumes produced stable at 13,400 tonnes. Difficult market conditions led to price falls and the value declining by 14% to €109m. Strong performances were seen in the other aquaculture sectors with increased volumes and value generated. The oyster sector increased volumes by 13% to nearly 10,000 tonnes, with the value increasing by 22% to €45m. Rope mussels increased volumes by 14% with a similar price increase leading to value growth of 31% to over €8m, while seabed cultured mussels increased in value by 24% to €9m.

The oyster sector increased value by 22%

€45M

value increase

+22%

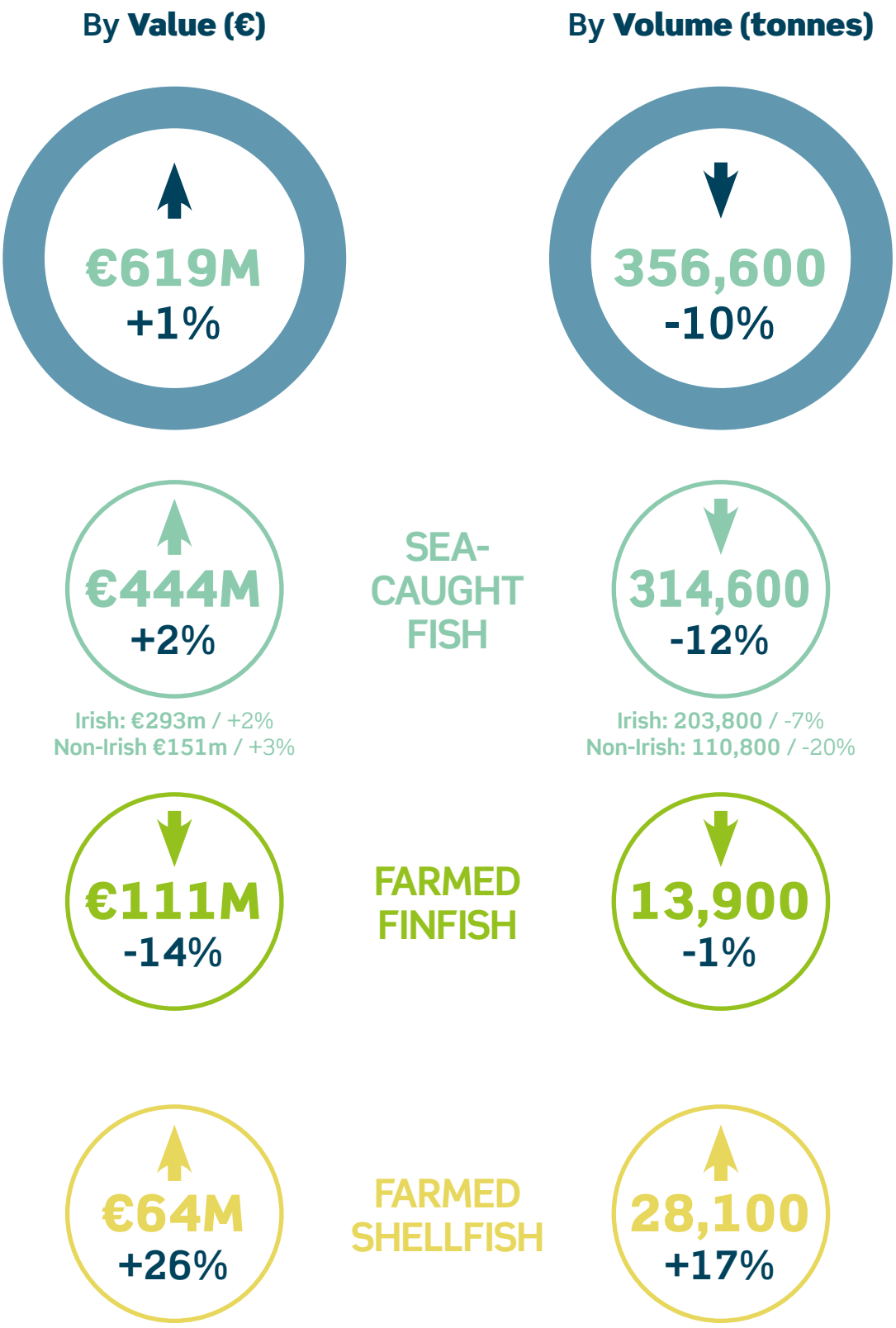
Rope Mussels increased value growth of 31%

€8M

value increase

+31%

THE SOURCE OF IRISH SEAFOOD

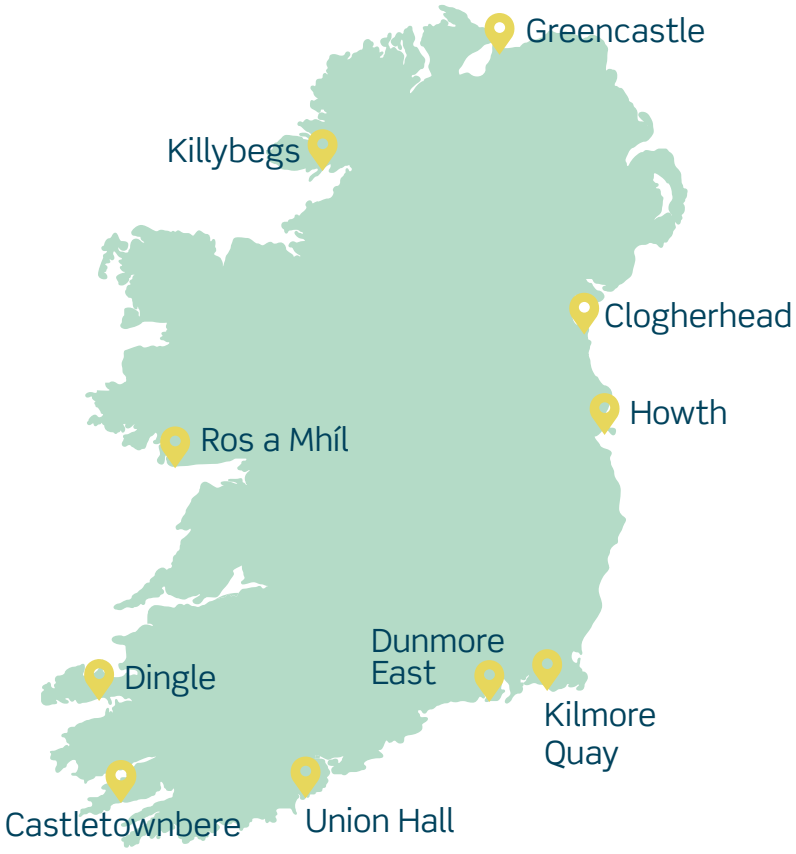


REGIONAL VALUE / VOLUME
DOMESTIC FISH LANDINGS

€444M IN 2021

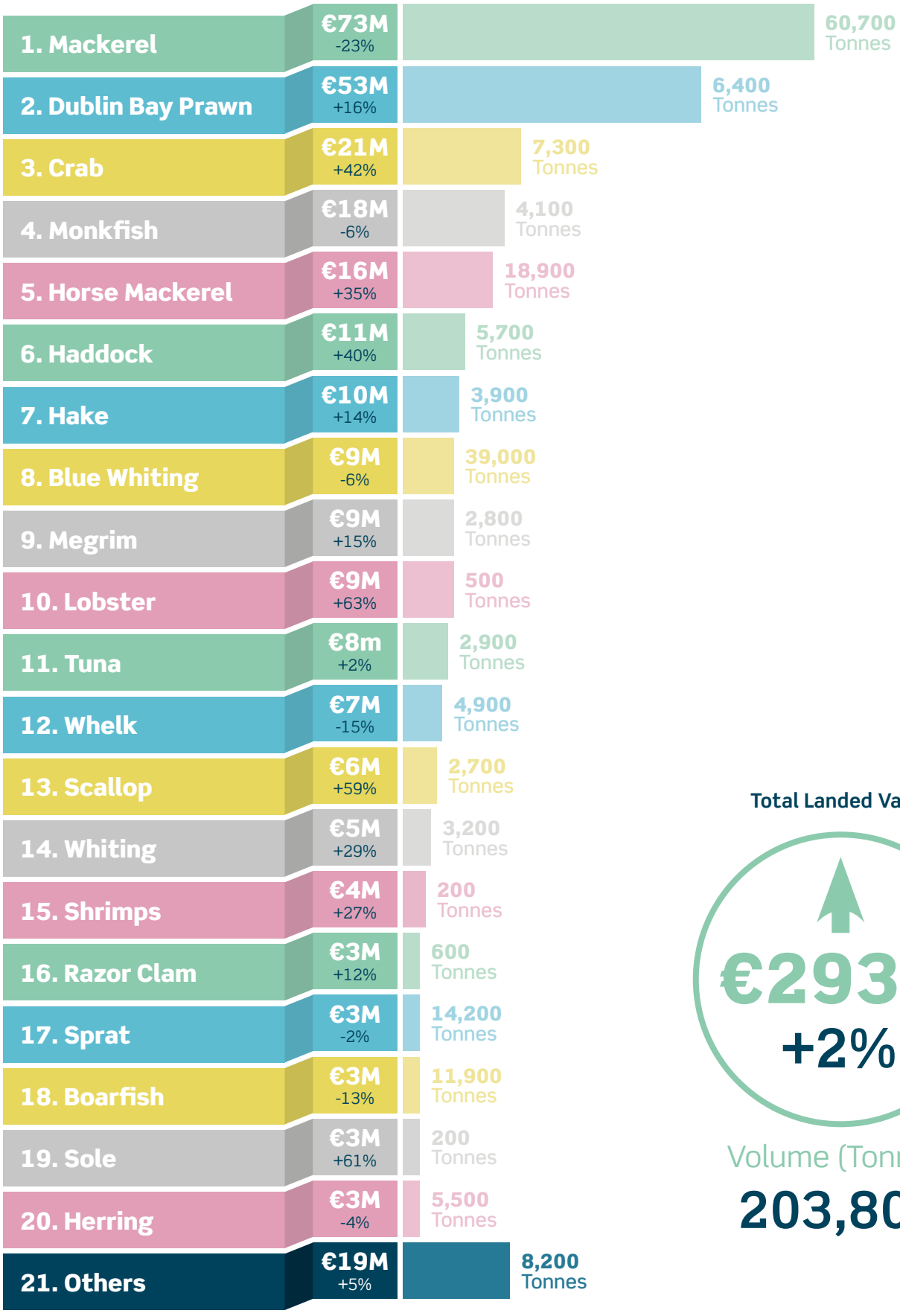
314,600 TONNES

+2%
VALUE GROWTH



Value of Landings - €M					Volume of Landings - Tonnes			
Port	**Irish**	**Non-Irish**	**Total**	**Share of Non-Irish**	**Irish**	**Non-Irish**	**Total**	**Share of Non-Irish**
Killybegs	85	36	121	30%	114,000	83,300	197,300	42%
Castletownbere	27	85	112	76%	11,200	20,000	31,200	64%
Dingle	9	13	22	59%	6,500	3,600	10,100	36%
Dunmore East	16	3	19	16%	10,700	500	11,200	4%
Kilmore Quay	13	0	13	0%	4,100	-	4,100	0%
Ros A Mhil	13	0	13	0%	2,200	-	2,200	0%
Clogherhead	11	0	11	0%	1,600	-	1,600	0%
Howth	10	1	11	9%	2,800	200	3,000	7%
Greencastle	8	1	9	11%	3,200	300	3,500	9%
Union Hall	8	1	9	11%	1,900	200	2,100	10%
Other Ports	93	11	104	11%	45,600	2,700	48,300	6%
Total	**293**	**151**	**444**	**34%**	**203,800**	**110,800**	**314,600**	**35%**

BREAKDOWN OF TOP 20 LANDED SPECIES BY IRISH FLEET



Total Landed Value

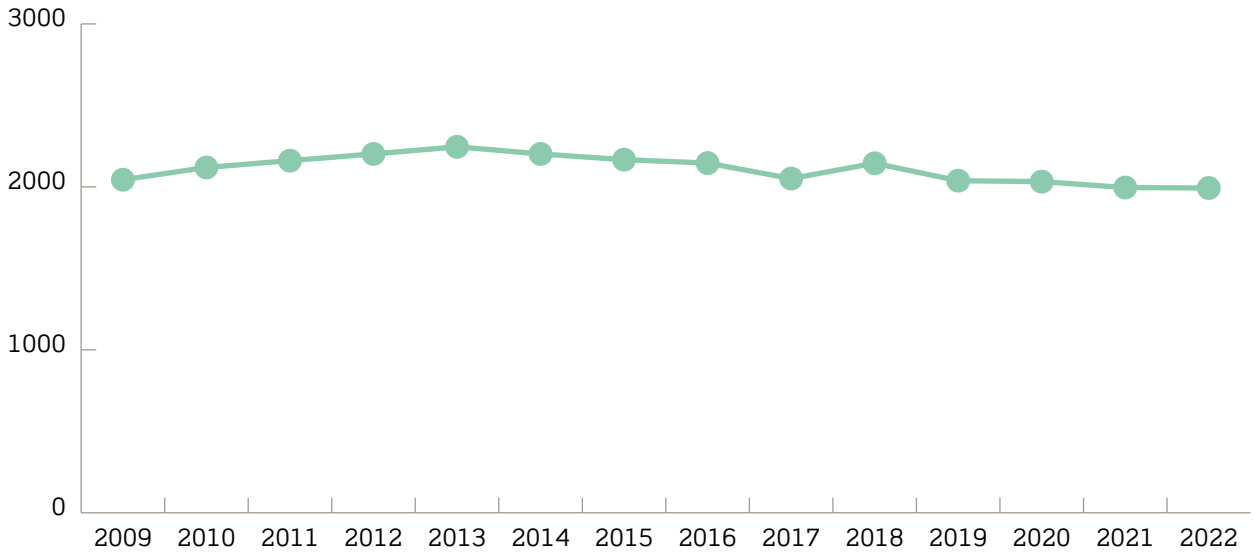
€293M

+2%

Volume (Tonnes)

203,800

THE IRISH FISHING FLEET



Polyvalent Segment:
This segment contains the vast majority of the fleet. These vessels are multi-purpose and include small inshore vessels (netters and potters), and medium and large offshore vessels targeting whitefish, pelagic fish and bivalve molluscs.

Specific Segment:
Vessels which are permitted to fish for bivalve molluscs and aquaculture species.

Refrigerated Seawater (RSW) Pelagic Segment:
Vessels engaged predominantly in fishing for pelagic species (herring, mackerel, horse mackerel and blue whiting, mainly).

Beam Trawler Segment:
Vessels dedicated to beam trawling, a simple trawling method used predominantly in Irish inshore waters except in the southeast, where it is used to catch flatfish such as sole and plaice.

Aquaculture Segment:
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.

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Aquaculture	67	81	87	96	106	107	109	102	97	100	91	92	97	97
Beamer	11	11	12	12	13	13	13	14	13	14	14	13	10	10
Pelagic	23	23	24	23	23	23	23	23	23	23	23	23	23	23
Polyvalent General	1,305	1,356	1,401	1,434	1,466	1,431	1,411	1,421	1,381	1,420	1,417	1,417	1,391	1,386
Polyvalent Potting	491	492	488	487	490	489	477	440	395	435	359	358	329	331
Specific	147	156	149	150	148	139	134	146	142	153	134	129	146	146
Grand Total	**2,044**	**2,119**	**2,161**	**2,202**	**2,246**	**2,202**	**2,167**	**2,146**	**2,051**	**2,145**	**2,038**	**2,032**	**1,996**	**1,993**

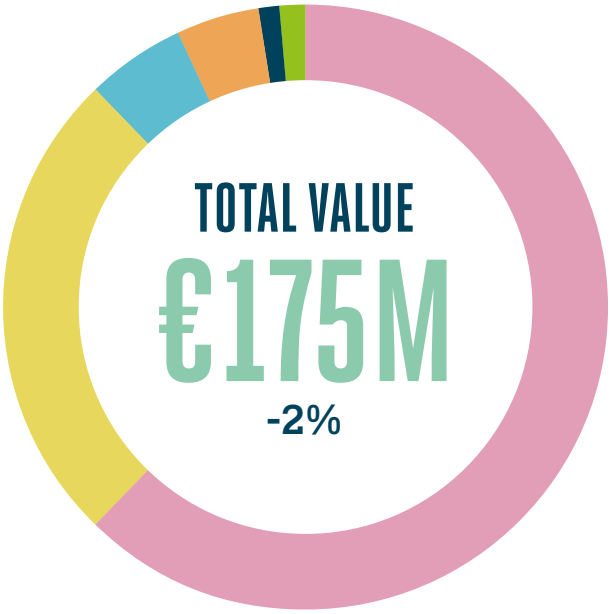
AQUACULTURE PRODUCTION
BY VALUE / VOLUME

Aquaculture production by value (€M)

Salmon
€109M
-14%

Irish Rock Oysters
€45M
+22%

Seabed Cultured Mussels
€9M
+24%



Ropes Mussels
€8M
+31%

Other Finfish
€2M
-9%

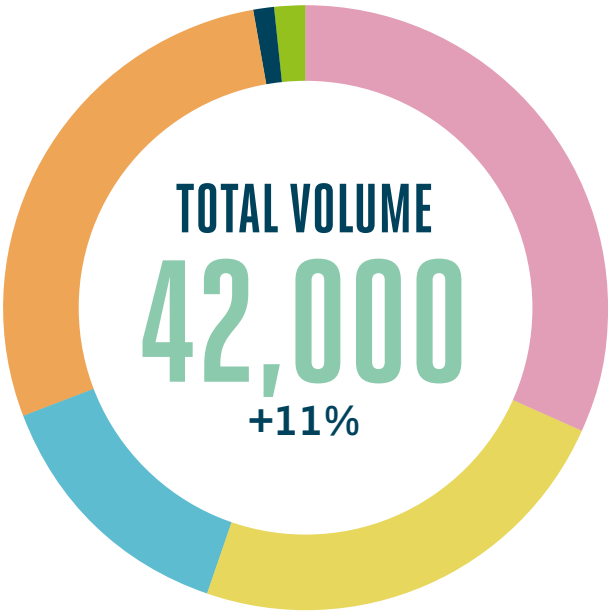
Other Shellfish
€2M
+123%

Aquaculture production by volume (Tonnes)

Salmon
13,400
0%

Irish Rock Oysters
9,900
+13%

Seabed Cultured Mussels
5,800
+33%



Ropes Mussels
11,800
+14%

Other Finfish
500
-11%

Other Shellfish
600
+80%

Processing

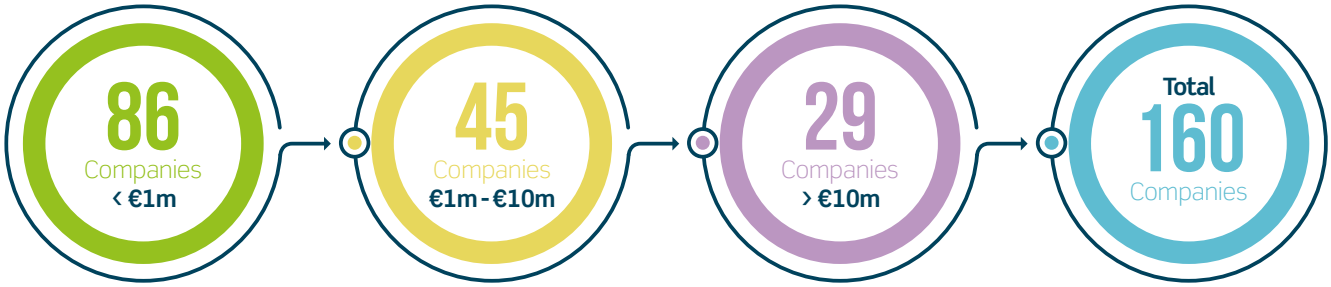
Irish Seafood Processing

As Covid-19 restrictions eased from April 2021 onwards, the consequent opening up of food service channels was a welcome boom, particularly for shellfish processors.

This resulted in buoyant exports to well-established European markets. In terms of Asia, impressive sales of mackerel and shellfish were achieved in China, and likewise there was strong export growth for pelagics to Japan. In contrast, the dominance in demand from west Africa in 2020 waned, as pelagic processors diverted from Nigeria and pursued higher value options in Asia and Europe. Whitefish processors struggled to regain their position in key markets in the early part of 2021, as many European customers opted for national supply options fostered during the pandemic.

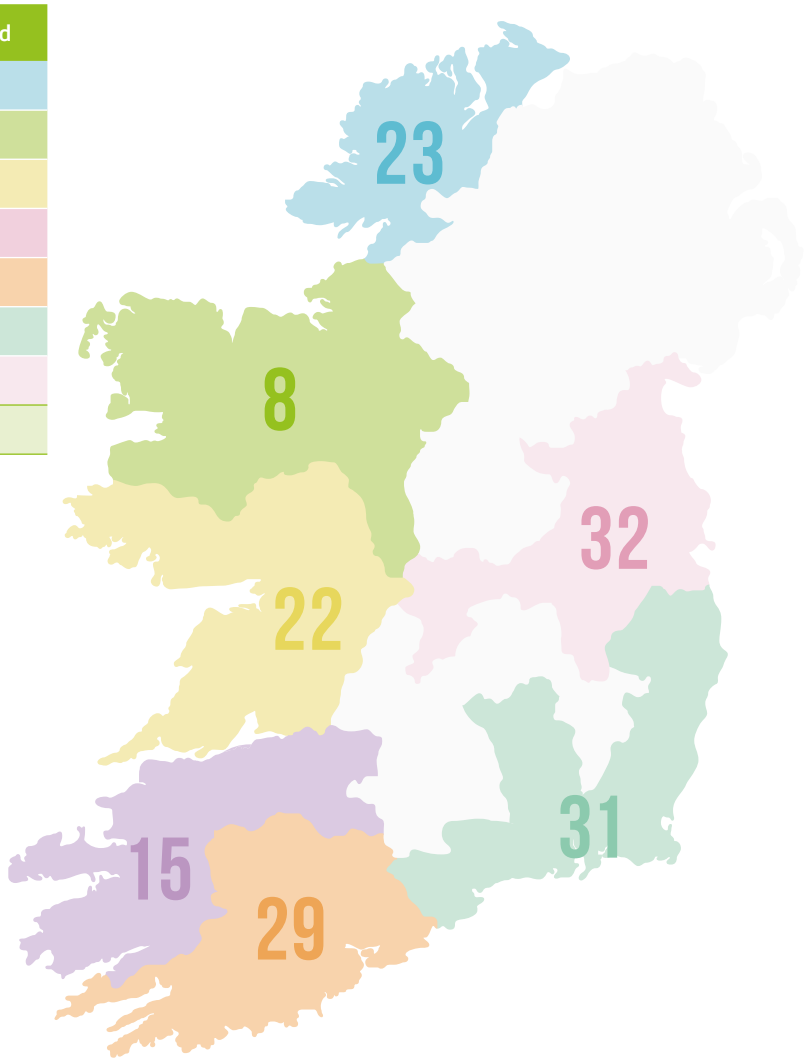
The impact of the UK's departure from the EU was evident in the drop in exports, but was even more marked in the fall in imports. This meant the UK was no longer the dominant import source for Irish processors. The resumption of meaningful processing activity and trade was a major relief for processors. However, logistics constraints, escalating fuel, energy, and other supply-chain costs coupled with labour sourcing issues continued to present real challenges for the processing sector.

Number of Seafood Processing Companies by Revenue



Irish Seafood Processing Companies by Region

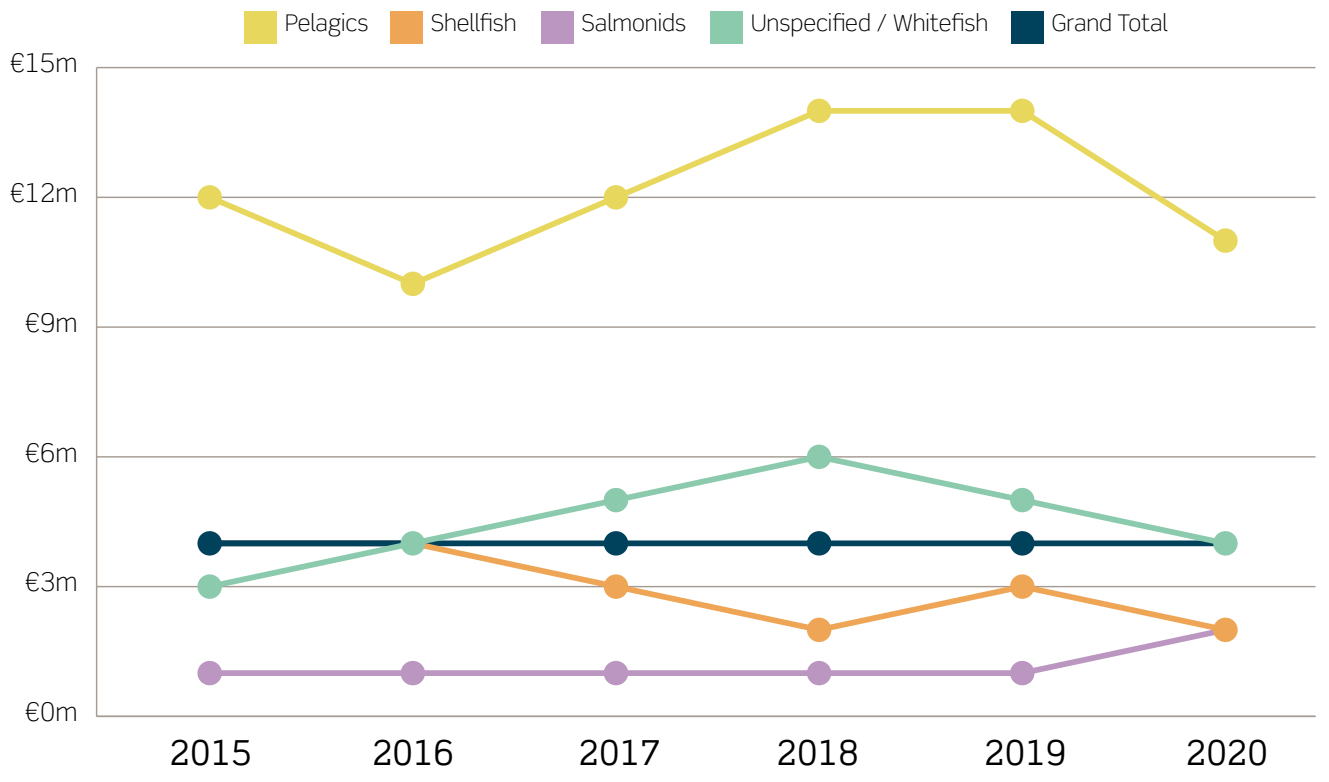
Region	No. of Companies	Total Employed
North	23	853
North West	8	205
West	22	303
South West	15	395
South	29	899
South East	31	374
North East	32	844
Total	**160**	**3,873**



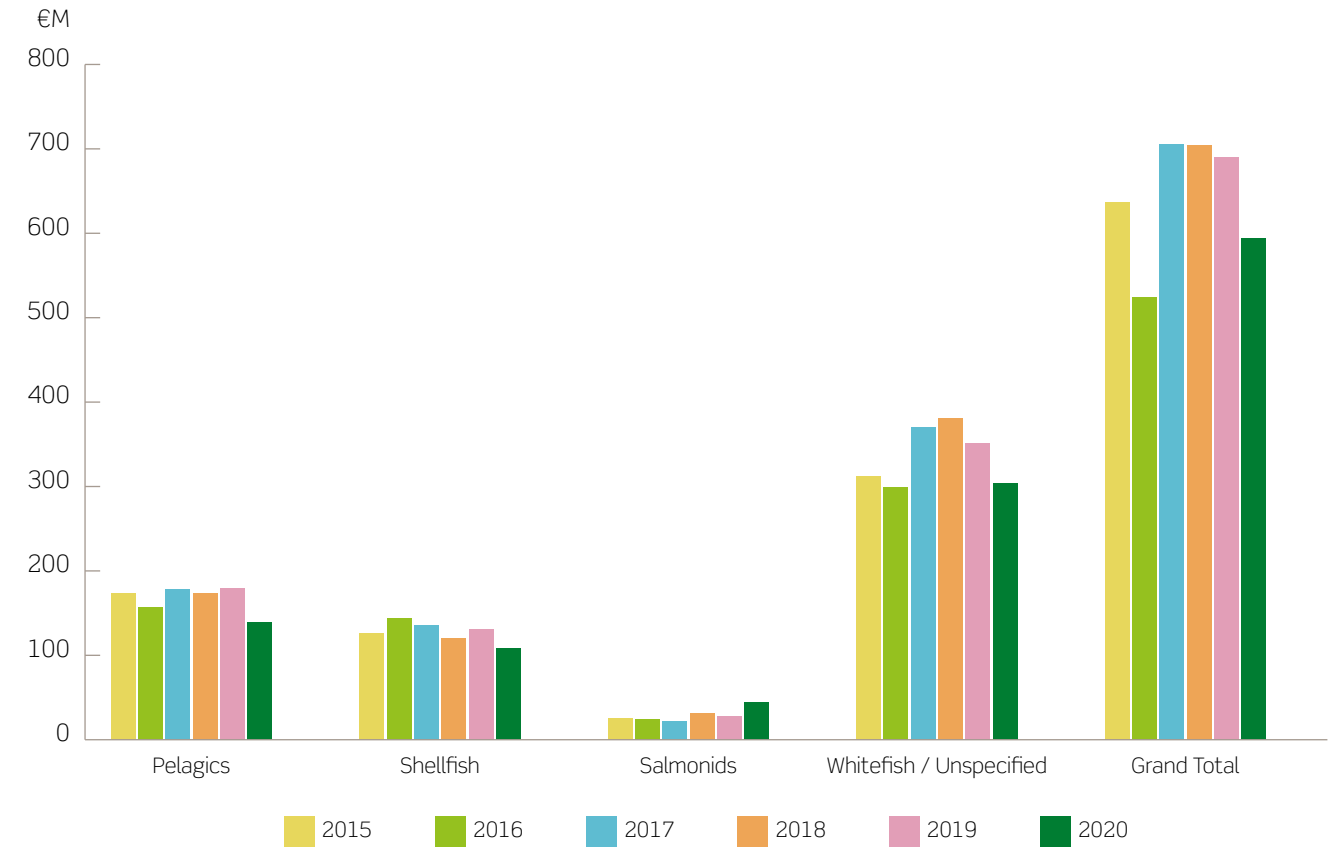
Breakdown by Revenue and by Main Seafood Category

Category	‹ €1M	€1M - €10M	› €10M	Total	Growth 2019
Whitefish	40	20	15	75	+4%
Shellfish	31	12	4	47	+3%
Salmonids	13	10	2	25	-15%
Pelagic	2	3	8	13	+2%
Total	**86**	**45**	**29**	**160**	**0%**
Breakdown of Industry	54%	28%	18%	100%	

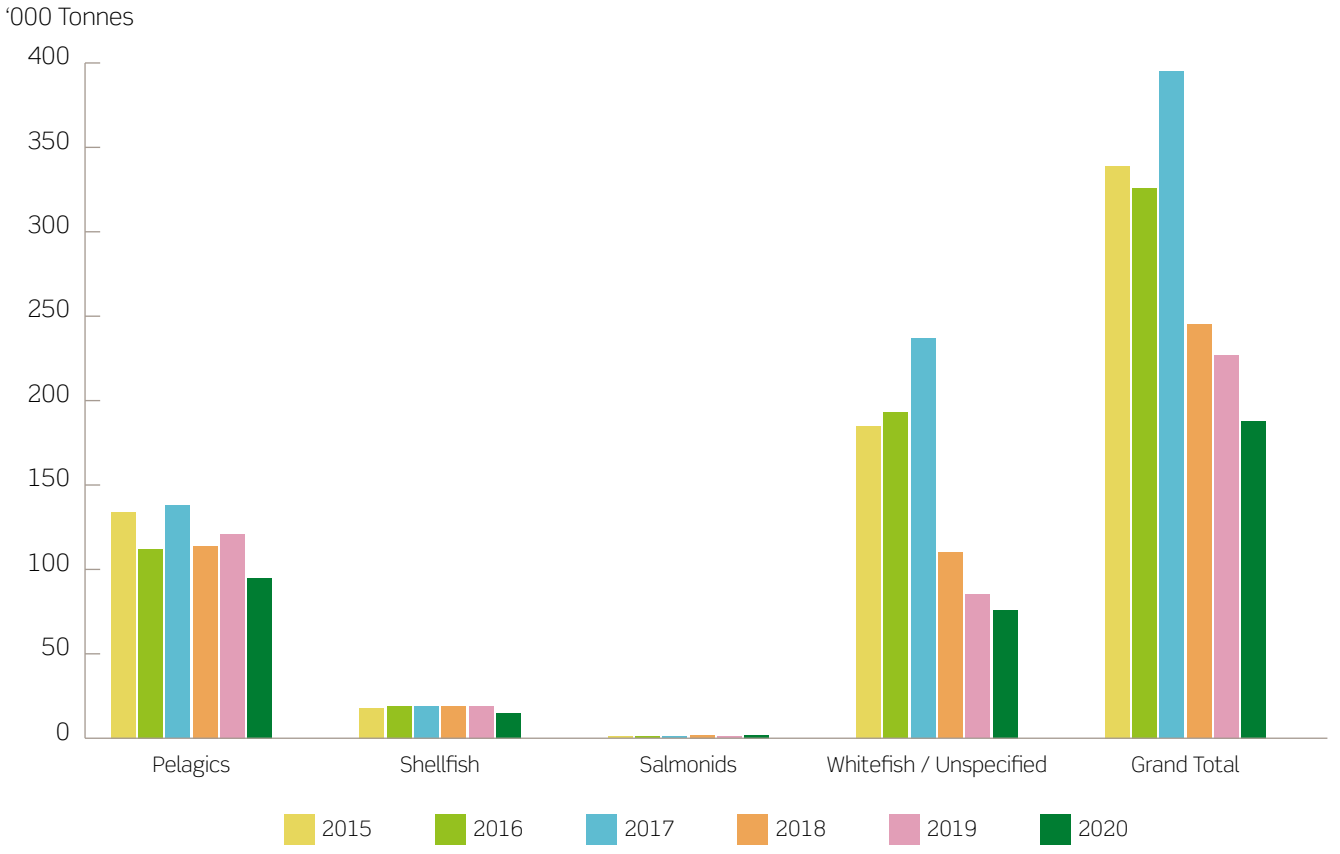
Average Turnover per Processing Sector



Total Value of Irish Processing Sector **2015 - 2020**



Total Volume of Irish Processing Sector **2015 - 2020**



Seafood Consumption

In 2021 the consumption of seafood in Ireland grew modestly by 3% to €418m with the hospitality sector being the main contributor. After a collapse in hospitality spending in 2020 of 54%, the sector grew in 2021 by 12%.

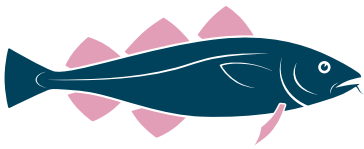
Food Consumption – Retail

Sales of seafood in the retail sector declined by 3% in volume, but grew by 1% in value to €318m in 2021, crystalising the significant gains made in the sector in the previous year. Fresh sales increased by 2%, while frozen sales increased by 1%. Tinned seafood products saw a significant decline of 8% having increased strongly in 2020.

Sales of salmon increased by 6% in volume, with lower prices leading to a decrease in value of 2%. Cod sales were also down 9% in volume and 8% in value. Higher volumes led to an 11% increase in the value of prawns sales, despite prices only increasing marginally. Strong growth was seen in sales of domestically caught haddock, crab and farmed mussels (+20%, +49% and +15% respectively).

Food Consumption – Hospitality

The foodservice sector was again impacted severely in 2021, being one of the most affected sectors in Ireland, due to the continued lockdowns in the early part of the year. The most severe restrictions were in place for the first five months, with only take-away and delivery food available. From May onwards, restrictions were eased until December when following a further surge in Covid infections, restrictions on the hospitality sector were re-introduced. Overall, purchases of seafood in the hospitality sector increased by 14% after the decline of 53% in 2020. In the medium term, the share of seafood in overall hospitality purchases is showing a consistent decline, falling by over 15% since 2016.



+12% growth

€418M

estimated value of seafood consumed in Ireland

Prawn sales increased in value despite prices only increasing marginally

11% VALUE INCREASE

€418M

estimated value of seafood consumed in Ireland

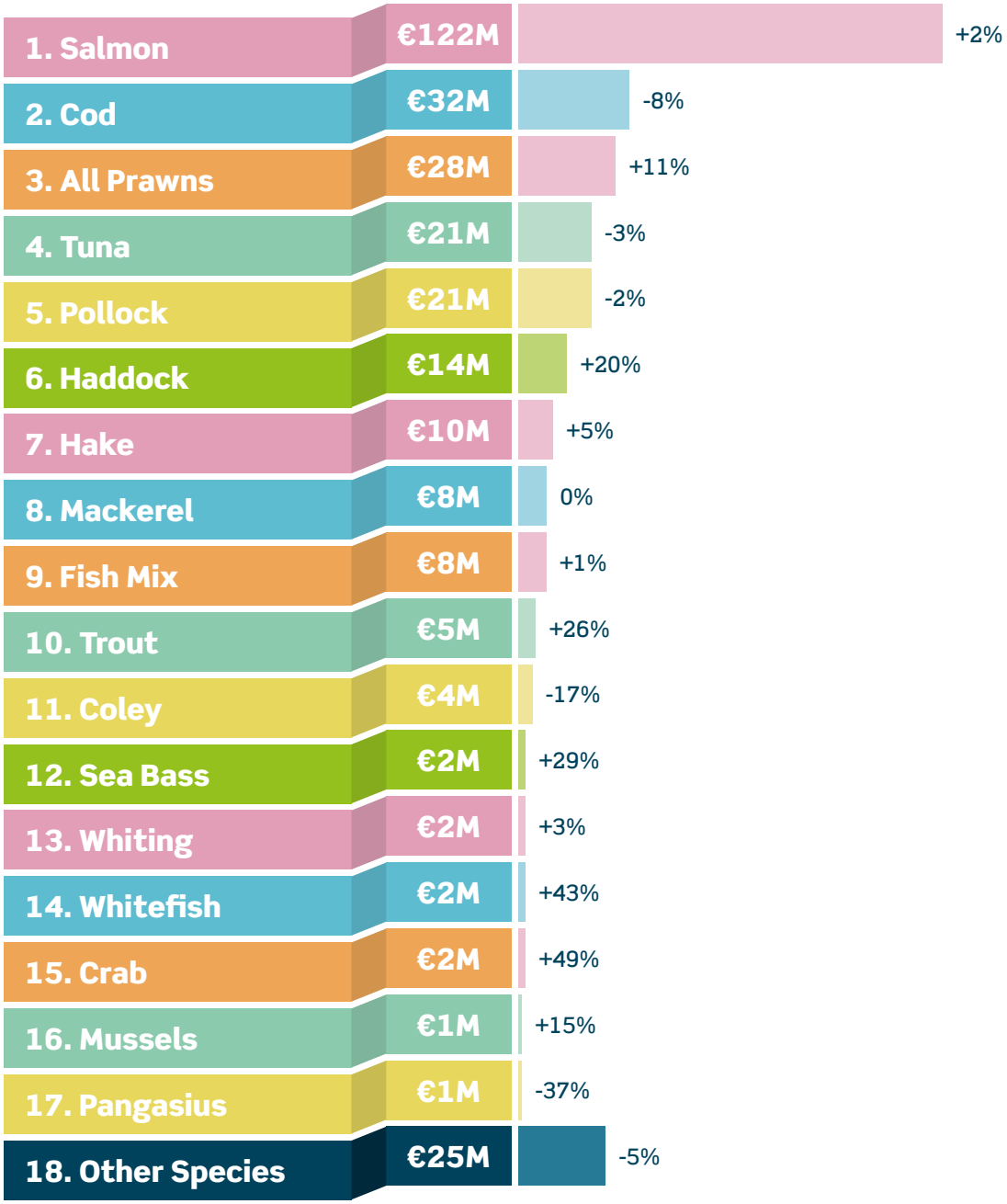
€318m

the value of seafood retailed in Ireland

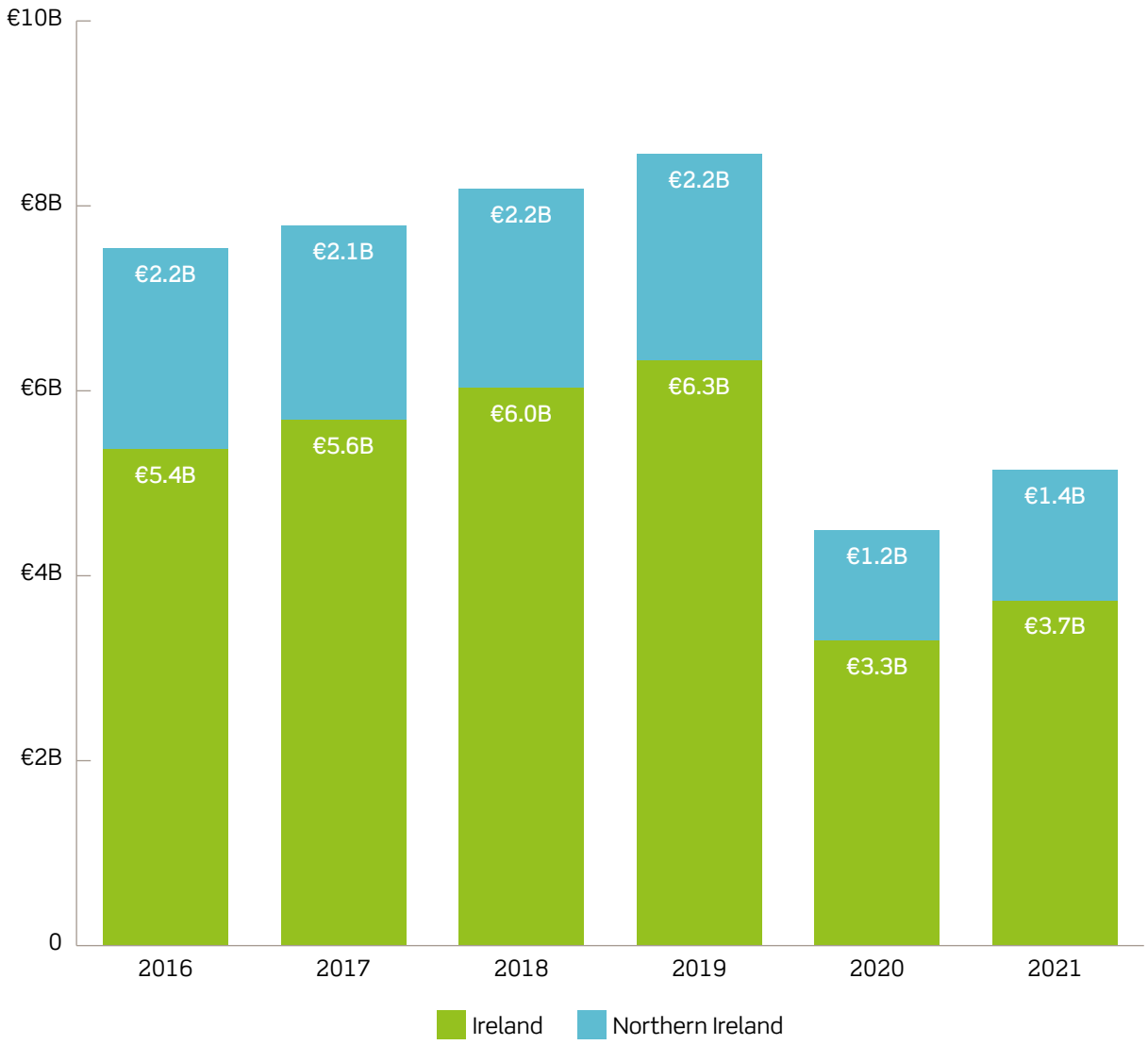
€100m

estimated value of seafood consumed in the foodservice sector

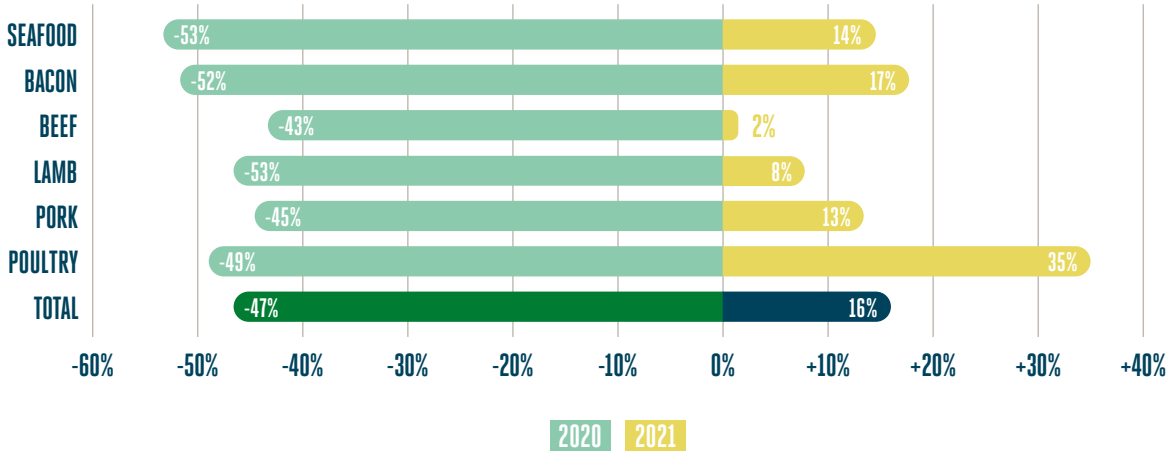
Top Retail Species by Value 2021



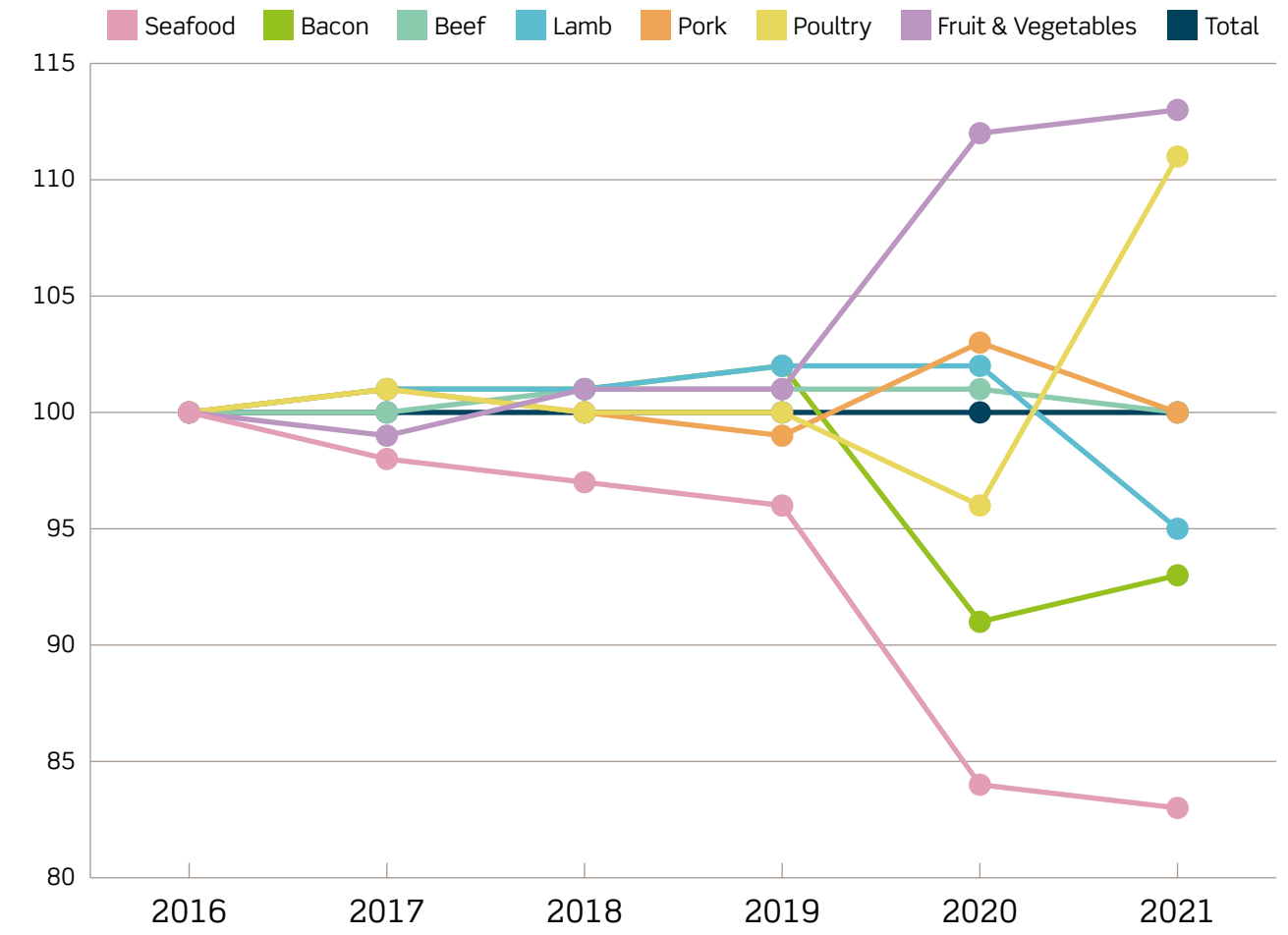
All Ireland Foodservice Turnover (€B)



Foodservice Purchase Growth (Seafood) **2020 - 2021**



Food-service Operator Purchase Share **2016-2021**



Trade

Imports and Exports of Seafood

In 2021 exports grew by 10% in volume and 11% in value, led by increased volumes of Irish organic salmon, mackerel and Dublin Bay prawns.

Throughout 2021, prices fluctuated significantly between species with salmon and mackerel facing difficult market conditions with prices decreasing by 3% and 6% respectively. International demand for shellfish species led to strong price growth for species such as Dublin Bay prawn, crab, lobsters and mussels which can be seen in the landings of the Irish fleet in the previous chapter. Exports of pelagic species increased by 25% in volume, but only 8% in value. Exports to Asia grew by 48% in value terms, recovering strongly after a difficult 2020. Exports to the EU grew in volume and price terms leading to strong value growth of 17%. Lower prices for pelagic species led to a reduction of 13% in the value of exports to Africa, despite increased volumes. Exports to the UK fell by 13% in volume and value terms. Generally, there was a shift away from exporting to the UK with increased export volumes to Europe, Africa and Asia.

Imports of seafood increased by 7% in volume terms although value fell by 16% due to a significant increase in imports of low-value blue whiting. These imports are due to non-Irish landings of this low value species into Killybegs. Imports of salmon and other freshwater species fell by 23% in volume and 13% in value terms, with increased salmon prices offsetting to some extent the reduction in volume. Whitefish imports fell by 4% in volume and value terms, while shellfish volumes fell by 20%. However, the value of these rose by 5% due to the strong price increases in this category in 2021. The major declines in these categories could be associated with the impacts of Brexit and the new costs relating to trading with the UK. The value of imports from the UK fell from €194m in 2020 to €83m in 2021, a reduction of 57%. In terms of volume, imports from the UK only fell by 11%. Imports doubled in value terms from Africa and Asia, while they increased over 75% from the Nordic countries and the rest of the world. The EU has now become our main import partner for the first time after value growth of 17% in 2021.

Imports doubled in value terms from **Africa** and **Asia** while they increased over 75% from the **Nordic countries** and the Rest of the World. The **EU** has now become our main import partner for the first time after value growth of 17% in 2021.

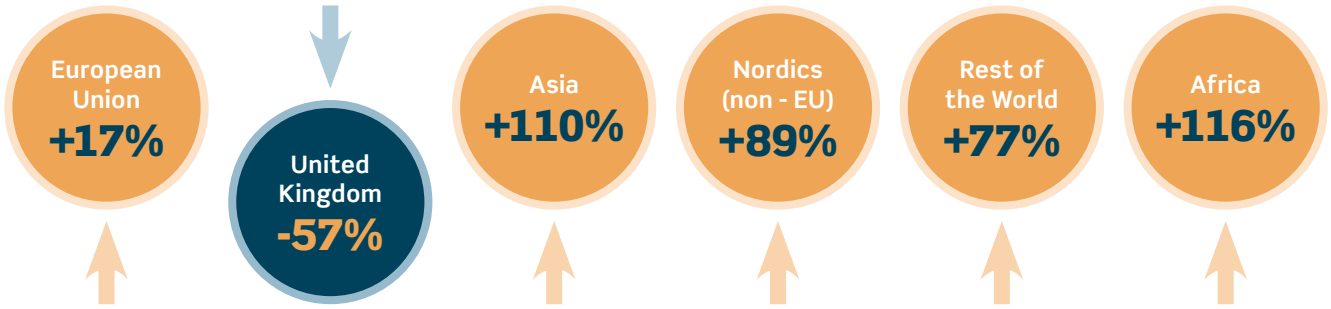
TRADE - IMPORTS

TOTAL CHANGE OF IMPORTS

-16%
Total Value Change
Imports

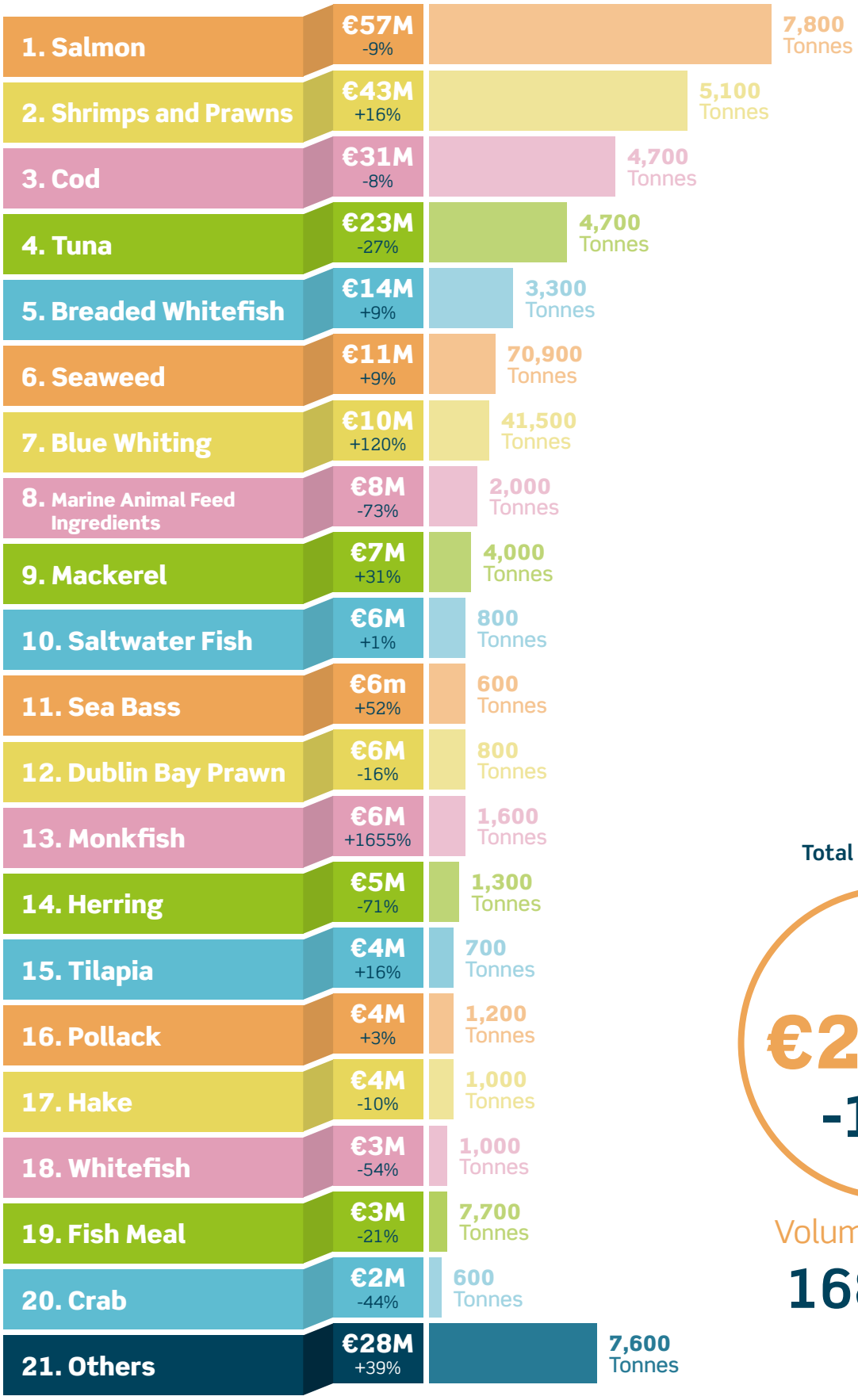
+7%
Total Volume Change
Imports

Main Import Markets Value Growth



Main Markets	Value €M 2020	Value €M 2021	Volume Tonnes 2020	Volume Tonnes 2021
European Union	99	116	33,800	29,900
United Kingdom	194	83	54,800	48,500
Asia	15	32	2,700	4,900
Nordics (Non-Eu)	12	23	64,000	79,600
Rest Of The World	10	18	2,100	3,700
Africa	4	9	1,100	2,300
Grand Total	**334**	**281**	**158,500**	**168,900**

BREAKDOWN OF TOP 20 IMPORTED SPECIES 2021



Total Import Value

€281M

-16%

Volume (Tonnes)

168,900

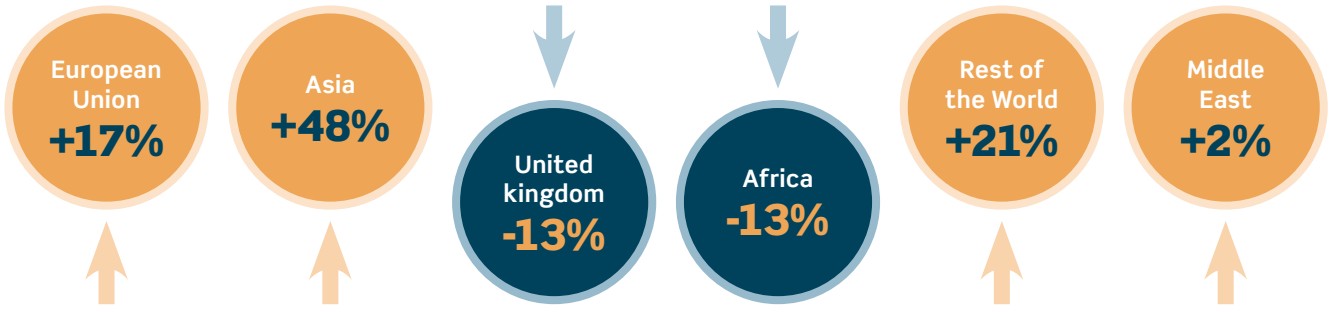
TRADE - EXPORTS

TOTAL CHANGE OF EXPORTS

+11%
Total Value Change
Exports

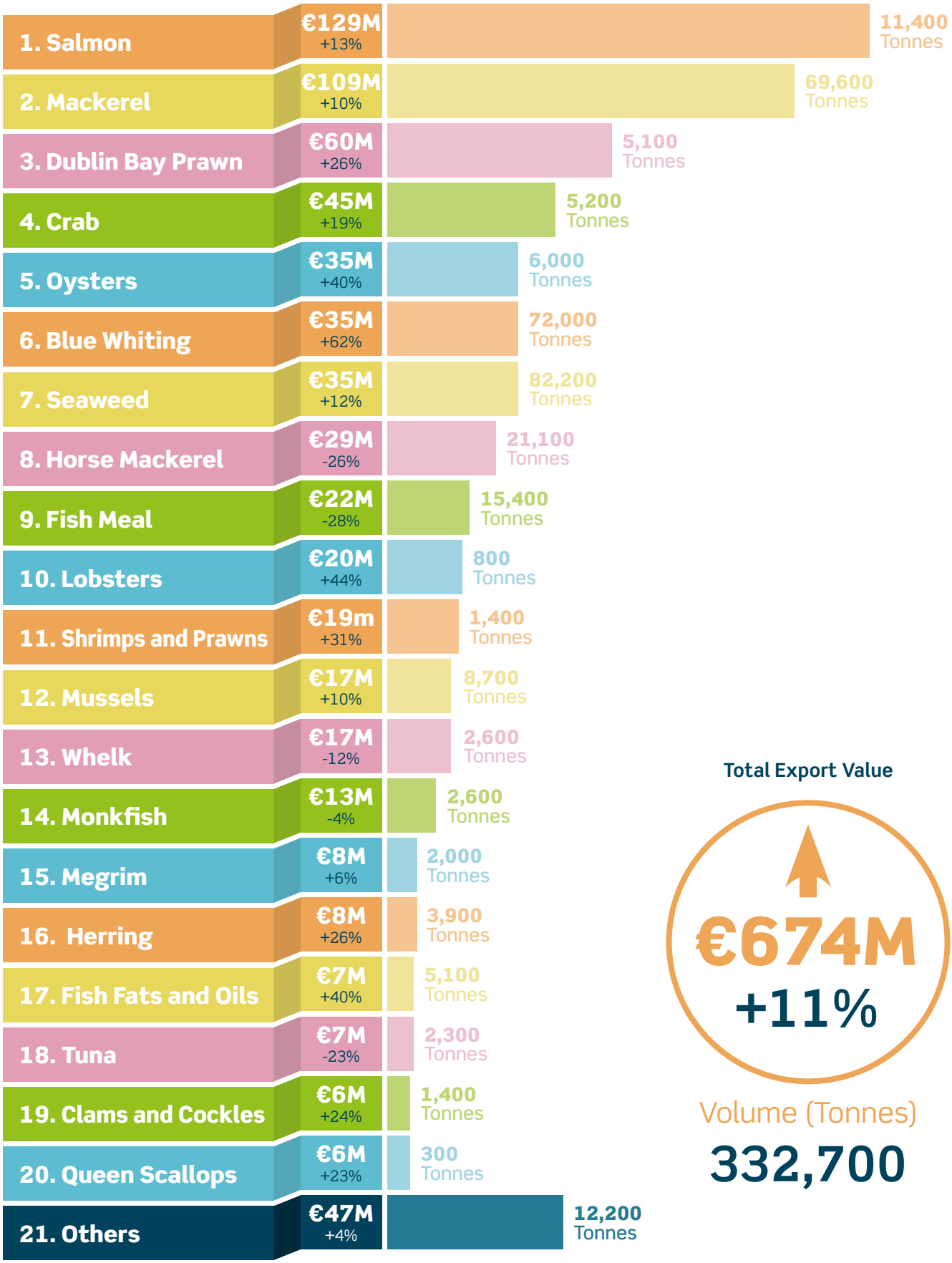
+10%
Total Volume Change
Exports

Main Export Markets Value Growth



Main Markets	Value €M 2020	Value €M 2021	Volume Tonnes 2020	Volume Tonnes 2021
European Union	338	397	95,200	107,900
Asia	54	80	23,500	36,800
United Kingdom	91	79	52,500	45,600
Africa	75	65	76,500	88,500
Rest Of The World	22	27	28,000	28,500
Middle East	25	26	27,400	25,400
Grand Total	**605**	**674**	**303,100**	**332,700**

BREAKDOWN OF TOP 20 EXPORTED SPECIES 2021



Total Export Value

€674M

+11%

Volume (Tonnes)

332,700

Main Export Partners
Top 10 Export Partners

RANK	PARTNER COUNTRY	VALUE 2021	VALUE GROWTH	MAIN EXPORT SPECIES	SHARE OF PARTNER TOTAL
1	FRANCE	€164M	+34%	SALMON	36%
				OYSTERS	15%
				CRAB	13%
2	UNITED KINGDOM	€79M	-13%	FISH MEAL	23%
				SALMON	18%
				FISH FATS AND OILS	8%
3	SPAIN	€65M	+20%	DUBLIN BAY PRAWN	18%
				MONKFISH	16%
				CRAB	13%
4	ITALY	€58M	+32%	DUBLIN BAY PRAWN	71%
				SHRIMPS AND PRAWNS	14%
				MUSSELS	4%
5	NIGERIA	€38M	-23%	BLUE WHITING	63%
				MACKEREL	28%
				HORSE MACKEREL	9%
6	CHINA	€28M	+126%	MACKEREL	50%
				OYSTERS	13%
				CRAB	13%
7	GERMANY	€28M	+10%	SALMON	67%
				MACKEREL	19%
				HERRING	6%
8	POLAND	€26M	-41%	SALMON	61%
				MACKEREL	31%
				HERRING	4%
9	EGYPT	€20M	+4%	MACKEREL	62%
				HORSE MACKEREL	38%
10	JAPAN	€18M	+61%	MACKEREL	55%
				HORSE MACKEREL	26%
				HERRING	10%


2
7
8
1
4
3
10
6
9
5

COVID-19

Once again, during 2021, Covid-19 affected seafood trade globally and in Ireland, albeit to a lesser extent than in 2020. In January 2021, exports to China fell to very low levels, before strengthening significantly in the following months of February, March and April.

While exports to China typically taper off over the summer and the winter months, in 2021, export volumes and values rose strongly from October, signalling a rebound in Chinese domestic demand for seafood.

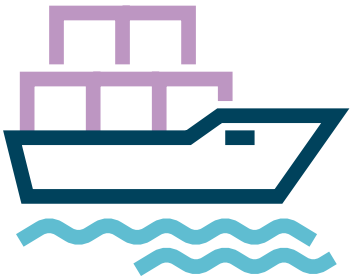
Exports to our most important market, France, recovered strongly throughout the year. Monthly export value surpassed 2019 levels from June and reached €15m in value for each month up until the end of the year.

Exports to Italy recovered completely in 2021, with the Easter period of March to May seeing volumes and values returning to pre-Covid levels. For the rest of the year, exports matched the previous year with strong value growth leading up to Christmas. Exports to Italy were significantly above 2019 levels in 2021.

In 2020, Spain was the main market for Irish exports that was least affected by the Covid-19 pandemic. In 2021, volumes exported increased in March and April, and in July and August, reflecting the re-opening of the hospitality sector in Spain over the Easter and summer holiday period. The monthly value of exports surpassed 2019 levels for each month but one in the second half of the year.

Export volumes and value to the UK increased in January and February of 2021 before falling off into the summer months. Volumes stabilised over the latter half of the year.

Overall, strong growth was evident to France, Spain, Italy and China in 2021, which is unsurprising after the performance in 2020. However, the level of growth led to export values surpassing 2019 levels for France, Italy and Spain. Value to China is still lower than 2019 although strong potential for future growth remains. The decline in trade with the UK is almost certainly reflective of the new trading situation post-Brexit rather than from any Covid-related effect.

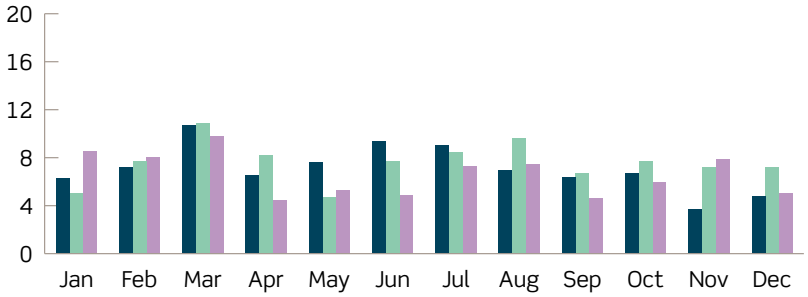


EXPORTS TO FRANCE, OUR MOST IMPORTANT MARKET, RECOVERED STRONGLY THROUGHOUT THE YEAR

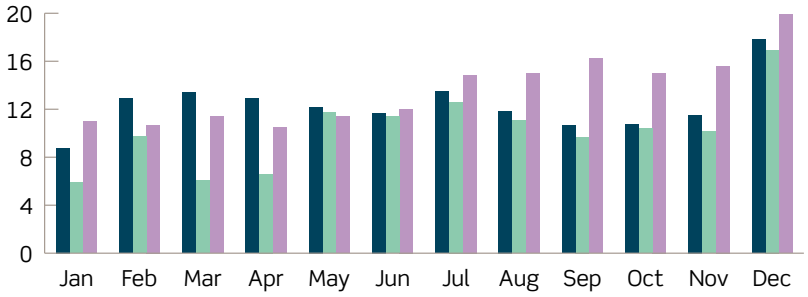
Trade Partner

UNITED KINGDOM

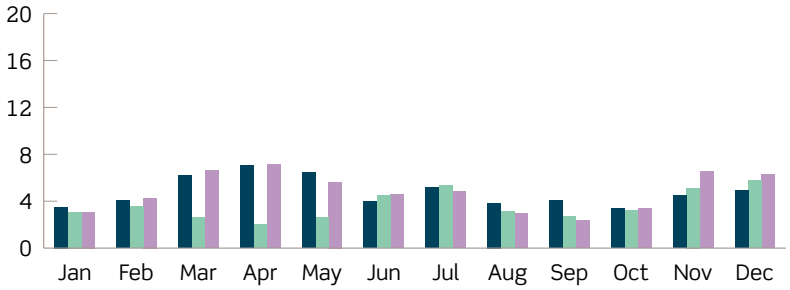
Export Value by Country (€M) 2019 2020 2021



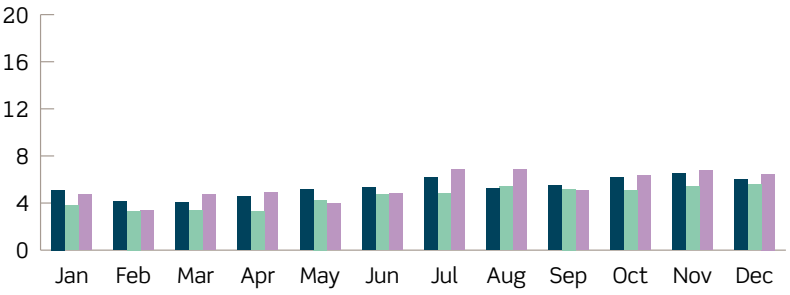
FRANCE



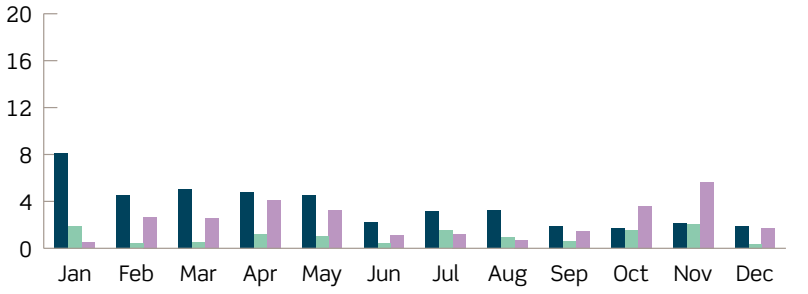
ITALY



SPAIN

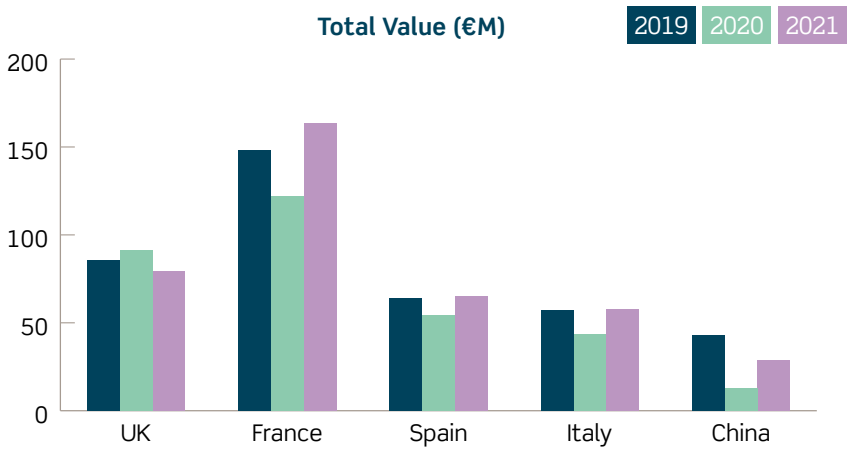


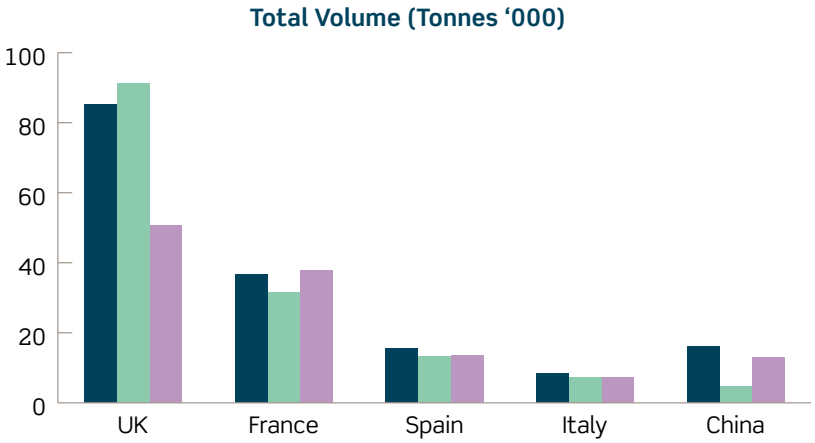
CHINA



Trade Partner

TOTAL





2019-2021 Change € Million

FRANCE

UNITED KINGDOM

SPAIN

ITALY

CHINA

2021 Change € Million

FRANCE

UNITED KINGDOM

SPAIN

ITALY

CHINA


D 349 TEMPO
38
36
34
32
30
28
26

Irish Fleet Performance

Economic Performance of Ireland's offshore fishing fleet

The capacity of the Irish offshore fleet has remained relatively stable over recent years, with around 200 vessels above 18m. However, economic performance has shifted over time. The period of the 2008 financial crisis was a time of economic strain to the fleet, with fuel costs increasing and low profitability exacerbated by overcapacity in the fleet.

A decommissioning programme initiated in 2008 improved the economic performance from 2011 onwards, with relatively consistent levels of gross profit generated by the fleet since then. Over time, the significance of crew costs has increased from 16% of turnover in 2008, to 38% in later years Sourcing crew remains a significant challenge for the sector, which has exacerbated during the Covid pandemic, with this problem now being shared with many other sectors of the economy.

Fuel costs were a major issue to the fleet during the 2008 financial crisis, with these rising to around 20% of turnover. These costs have remained at that level since then, with fluctuations occurring over time. In early 2022, rising fuel costs due to the Russian invasion of Ukraine has made this a major issue again for the Irish fleet, with fuel prices rising to unprecedented levels. Compared to March 2021, data supplied from industry sources showed that by March 2022, fuel has increased by 150% from €0.44/ litre to €1.10/litre, threatening the viability of the Irish and wider European fishing fleet. Given the lack of alternatives available to food production machinery in the agriculture and fishing sectors, extended periods with these elevated fuel costs will have detrimental effects on the industry.

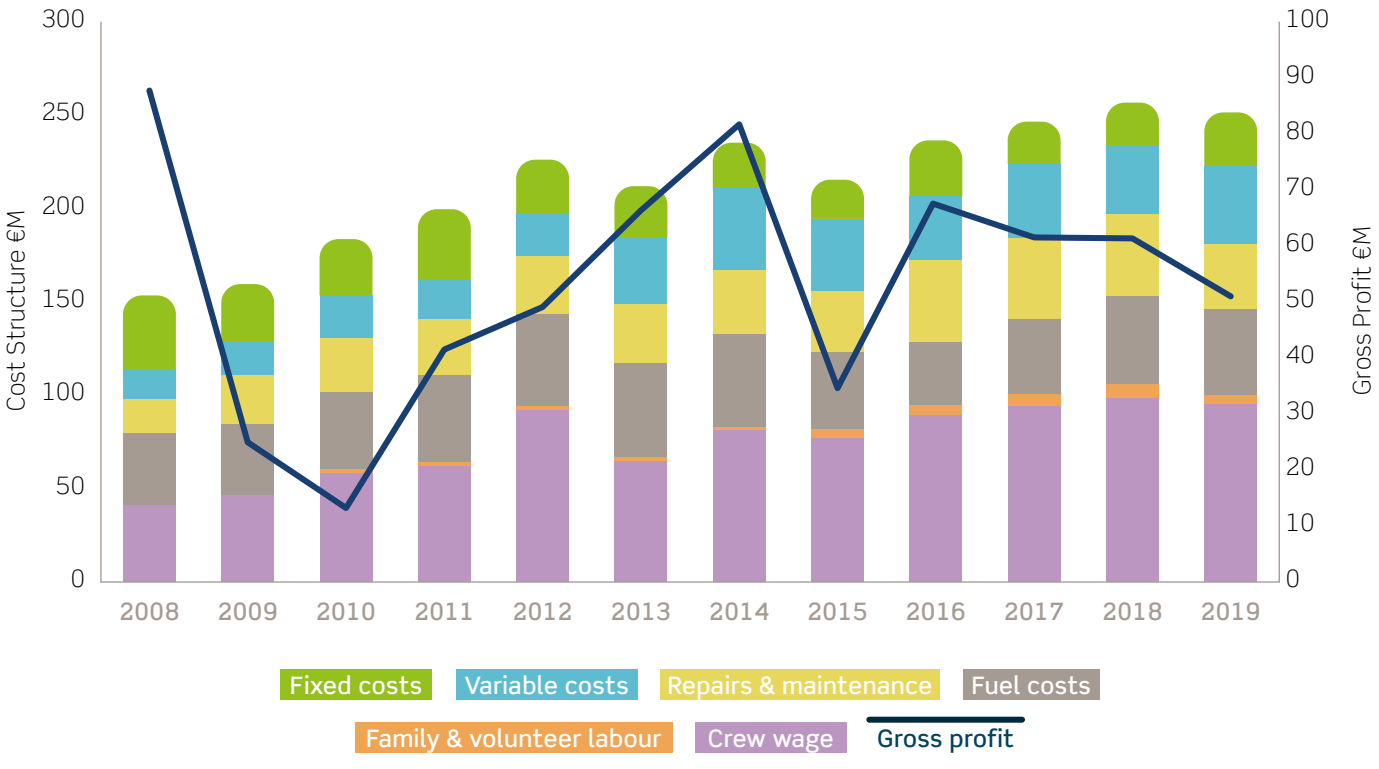
FUEL INCREASED BY
150%
FROM MARCH 2021
TO MARCH 2022

1,301 FTEs
EMPLOYED ON
214 VESSELS

Economic Performance of the Offshore Fleet

Fleet	Length (overall)	National Segment	Number of Active Vessels	Days at Sea
Mid-water Trawlers	≥ 40 metres	Pelagic	20	1,324
	24 - 40 metres	Pelagic & Polyvalent	12	1,184
Demersal Trawlers & Seiners	24 - 40 metres	Polyvalent	48	10,846
	18 - 24 metres	Polyvalent	65	14,825
	12 - 18 metres	Polyvalent	34	4,429
Drift & Fixed Nets	18 - 24 metres	Polyvalent	14	2,181
Beam Trawlers	24 - 40 metres	Beam Trawl	14	3,419
Dredgers	24 - 40 metres	Specific	7	1,625
			214	39,833

Economic Performance of the Irish Fishing Fleet 2008 - 2019



FTE	Landings Live Weight Tonnes	Revenue €'000	Fuel oil used per tonne	Gross Profit Margin %	Net Profit Margin	Profitability
225	107,952	84,817	158	28%	20%	High
83	29,890	22,093	93	27%	7%	Weak
361	20,184	67,781	1,499	42%	35%	High
394	17,080	71,391	1,354	21%	17%	Reasonable
101	3,748	9,542	1,080	7%	1%	Weak
49	1,825	5,303	1,390	17%	11%	Reasonable
51	2,654	9,783	2,661	10%	6%	Weak
38	2,245	5,532	783	7%	-1%	Weak
1,301	185,577	276,241	478	28%	23%	High

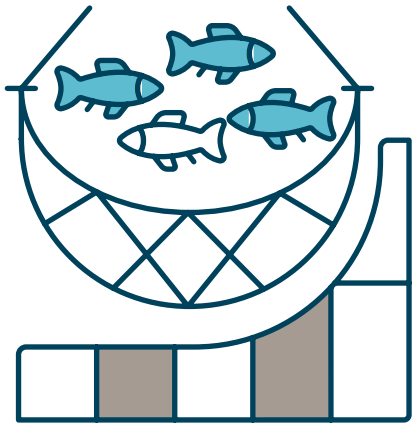

Donna - Jane

Quotas

In 2022, Ireland's quota of the Total Allowable Catch (TAC) amounts to 158,000 tonnes, worth an estimated €214m. This represents a 7% decrease on the volume and value of quota in 2021. In Area VI (west of Donegal), total quota for demersal stocks falls marginally by 2%.

In the Celtic Sea, demersal stock quotas have increased by 2%, while demersal stocks that span both the Celtic Sea and West of Scotland (mainly hake) have fallen by 14%. Pelagic quotas are down by 9% for 2022, with the main reductions for mackerel and blue whiting. In the case of mackerel, this is due largely to reductions under the Trade & Co-Operation Agreement (TCA) the EU agreed with the UK as part of the Brexit process.

THE VALUE OF IRELAND'S QUOTA FOR 2022 IS €214M



TOTAL QUOTA - IRELAND

YEAR	TOTAL QUOTA	VALUE - €M
2021	170,935	230
2022	158,372	214

This is a provisional figure as the final 2022 quotas had not been published in the OJEU at the time of this report.

Area VI Demersal Stocks

Stock	Area	Year	Irish Quota	Change 19-20
Cod	VIa	2021	243	
		2022	220	-9%
Cod	VIb	2021	16	
		2022	14	-13%
Common sole	VI	2021	46	
		2022	46	0%
Haddock	Vb VIa	2021	648	
		2022	684	+6%
Haddock	VIb XII XIV	2021	570	
		2022	386	-32%
Megrims	VI	2021	600	
		2022	627	+4%
Monkfish	VI	2021	562	
		2022	439	-22%
Norway lobster	VI	2021	202	
		2022	160	-21%
Plaice	VI	2021	248	
		2022	248	0%
Pollack	VI	2021	26	
		2022	22	-15%
Saithe	VI	2021	369	
		2022	352	-5%
Whiting	VI	2021	299	
		2022	561	+88%

2021
3,829
TONNES

2022
3,759
TONNES

DIFFERENCE
-2%

Area VI & VII Demersal Stocks

Stock	Area	Year	Irish Quota	
Hake	VI, VII	2021	2,989	
		2022	2,383	-20%
Skates & Rays	VI, VIIa-c, & e-k	2021	1,210	
		2022	1,177	-3%
Small-eyed ray	VIIf	2021	12	
		2022	12	0%
Undulate ray	VIIe	2021	25	
		2022	24	-4%
Tusk	V, VI, VII	2021	238	
		2022	238	0%
Blue Ling	II,IV international waters	2021	2	
		2022	2	0%
Blue Ling	Vb,VI,VII	2021	32	
		2022	30	-6%
Ling	VI, VII, VIII, IX, X, XII, XIV	2021	1,301	
		2022	1,059	-19%
Greenland Halibut	IIa, IV, VI	2021	29	
		2022	29	0%
Spurdog/dogfish	I, II, IIII, IV, V, IV, IVV, VIII, XII, XIV	2021	48	
		2022	48	0%
Cod	I,II	2021	290	
		2022	290	0%

2021
6,176
TONNES

2022
5,292
TONNES

DIFFERENCE
-14%

Area VII Demersal Stocks

Stock	Area	Year	Irish Quota	
Cod	VII b-k	2021	422	
		2022	338	-20%
Cod	VIIa	2021	104	
		2022	104	0%
Megrims	VII	2021	2,844	
		2022	2,827	-1%
Monkfish	VII	2021	2,775	
		2022	2,977	+7%
Haddock	VII b-k	2021	2,959	
		2022	2,920	-1%
Haddock	VIIa	2021	1,322	
		2022	1,171	-11%
Whiting	VIIa	2021	280	
		2022	274	-2%
Whiting	VIIb-k	2021	2,707	
		2022	3,972	+47%
Norway lobster	VII	2021	6,102	
		2022	5,682	-7%
Plaice	VII bc	2021	15	
		2022	15	0%
Plaice	VII fg	2021	240	
		2022	237	-1%
Plaice	VII hjk	2021	28	
		2022	47	+68%
Plaice	VIIa	2021	1,069	
		2022	1,031	-4%
Pollack	VII	2021	680	
		2022	572	-16%
Saithe	VII	2021	1,493	
		2022	1,404	-6%
Common sole	VII bc	2021	28	
		2022	28	0%
Common sole	VII fg	2021	42	
		2022	39	-7%
Common sole	VII hjk	2021	126	
		2022	95	-25%
Common sole	VIIa	2021	104	
		2022	105	+1%

2021
23,340
TONNES

2022
23,838
TONNES

DIFFERENCE
+2%

Deepwater Stocks

Stock	Area	Year	Irish Quota	
Black Scabbardfish	V, VI, VII, XII	2021	55	
		2022	55	0%
Alfonsinos	I, II, III, IV, V, VI, VII, VIII, IX, X, XII, XIV	2021	7	
		2022	7	0%
Roundnose Grenadier	Vb, VI, VII	2021	153	
		2022	153	0%
Roundnose Grenadier	VIII, IX, X, XII, XIV	2021	2	
		2022	2	0%
Red Seabream	VI, VII, VIII	2021	3	
		2022	3	0%

2021 220 TONNES

2022 220 TONNES

DIFFERENCE 0%

Deepwater Stocks

Stock	Area	Year	Irish Quota	
Greater silver smelt	III, IV	2021	5	
		2022	5	0%
Greater silver smelt	V, VI, VII	2021	262	
		2022	821	+213%
Boarfish	VI, VII,VIII	2021	13,234	
		2022	15,749	+19%
Herring	I, II	2021	3,370	
		2022	3,101	-8%
Herring	VIaN	2021	478	
		2022	470	-2%
Herring	VIaS, VIIbc	2021	1,236	
		2022	1,236	0%
Herring	VII ghjk	2021	750	
		2022	750	0%
Herring	VIIa	2021	808	
		2022	719	-11%
Blue whiting	I, II,III, IV,V, VI, VII, VIII a,b,d,e XII,XIV	2021	35,373	
		2022	28,435	-20%
Mackerel	VI, VII	2021	60,847	
		2022	54,922	-10%
Horse mackerel	IIa, IVa, VI, VIIa-c, VIIe-k, VIIIa,b,e	2021	17,561	
		2022	15,737	-10%
Horse mackerel	IVb, IVc, and VIId	2021	330	
		2022	202	-39%
Albacore	north.atl	2021	3,115	
		2022	3,115	0%
Blue Shark	Atlantic Ocean, North of 5 degrees	2021	1	
		2022	1	0%

2021 137,370 TONNES

2022 125,263 TONNES

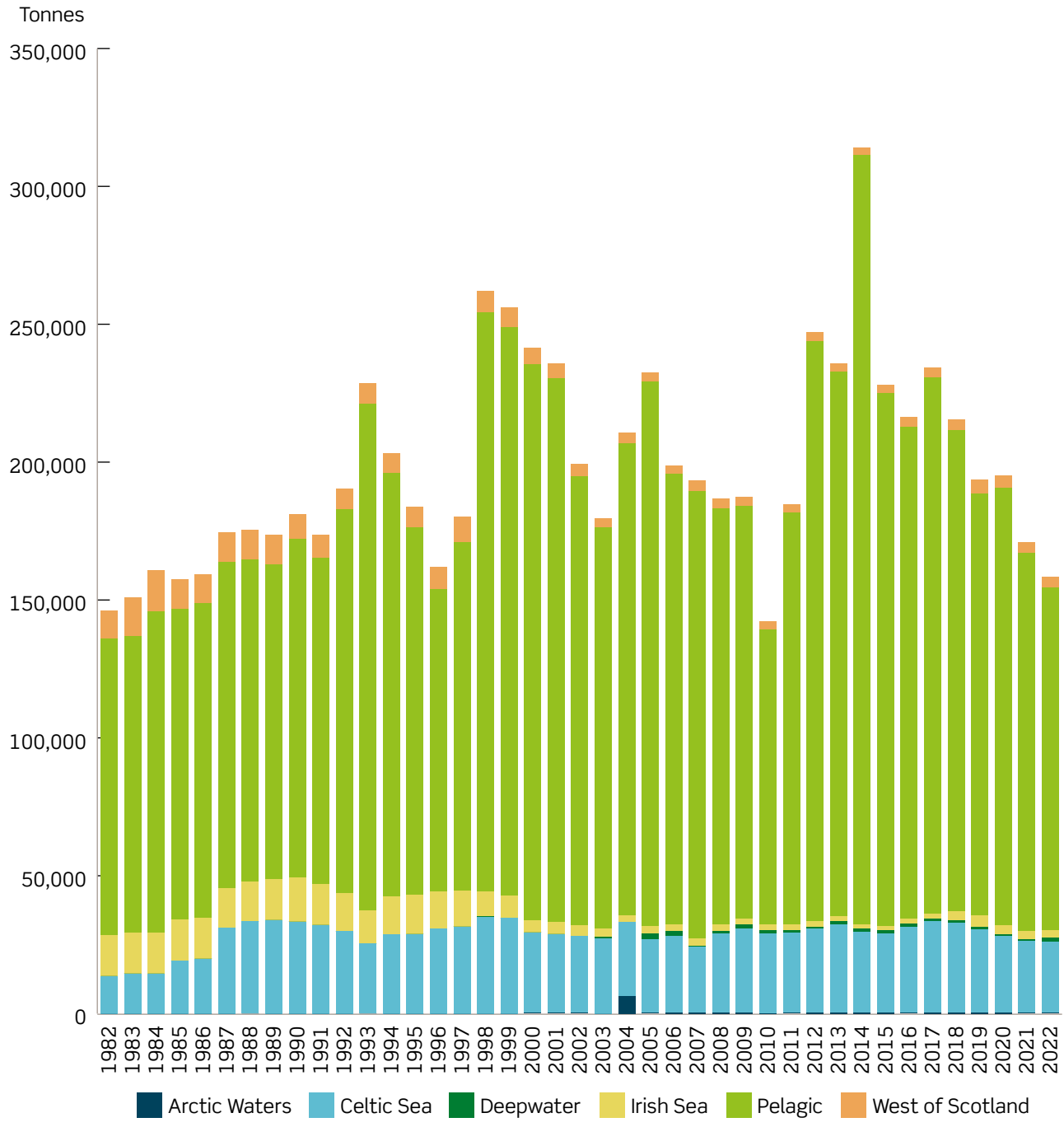
DIFFERENCE -9%

EVOLUTION OF IRISH QUOTA 1982 - 2022

Fishing Opportunities for all stocks by regional sea 1982 - 2022

Quotas were first introduced into European fisheries in 1982. Since their introduction, Ireland's quota has fluctuated quite significantly from lows of 162,000 tonnes in 1996 and 142,000 tonnes in 2010, to highs of 262,000 tonnes in 1997 and 314,000 tonnes in 2014. These peaks and troughs have mainly been driven by variability in pelagic quotas, such as blue whiting, horse mackerel and boarfish.

Quotas for demersal stocks across the sea areas have been remarkably stable since 2000, averaging around 35,000 tonnes. Ireland's 2022 total quota for all stocks represents a decrease on 2021, with the decrease driven mainly by reductions in the quotas for pelagic stocks, as well as whitefish species such as hake, monkfish and Dublin Bay prawns.



BREXIT

The end of the Brexit withdrawal period brought about the biggest change and disruption in EU-UK relations in 50 years, across all aspects of trade and society. The EU/UK Trade & Cooperation Agreement (TCA) deal agreed at the end of 2020 has brought a sudden and dramatic shift in the landscape for the entire Irish seafood sector, in a number of respects.

In 2021, the real impacts of Brexit hit the Irish seafood sector. As part of the Trade and Cooperation Agreement (TCA) between the EU and UK, quota transfers across EU Member States to the UK, valued at €199m based on 2020 quota shares and prices were agreed. These quota transfers were front loaded, with 60% of the total transfers applied in 2021. The main impact on the Irish fleet is for Ireland's two biggest fisheries - mackerel and Dublin Bay prawns - which see quota losses of 26% and 14% respectively. The impact on the fishing fleet of reduced quotas is evident from the previous chapters, where the landings of mackerel fell by 18% in volume and 23% in value.

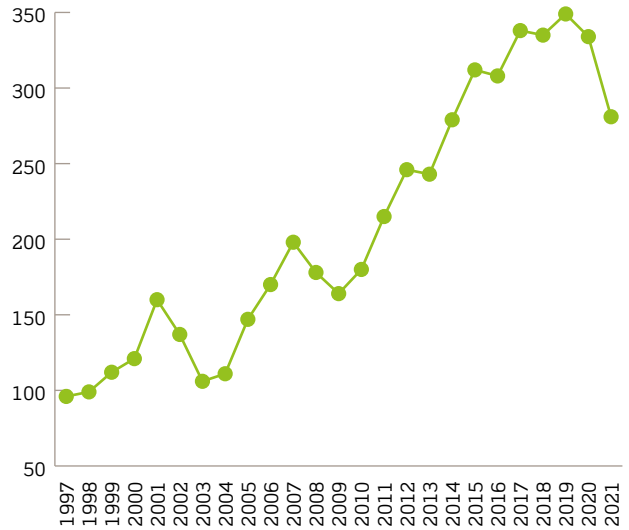
The TCA will continue to affect Ireland's fishing industry up until the end of 2026, when the Agreement is up for re-negotiation. Vital seafood export routes, primarily the land-bridge via the UK, have been curtailed and trade to and from the UK disrupted. Traditionally, Ireland has imported around two-thirds of all its seafood from the UK. In 2021, imports from the UK fell by 57% in value terms, reducing the import share to 30%, which is the lowest level ever recorded. Imports of salmon, cod, tuna and fish meal from the UK all saw significant reductions. An extraordinary level of substitution occurred, with imports of seafood doubling from Asia and Africa, increasing by nearly 90% from Nordic countries, while increasing by 17% in value terms from the EU.

Given that Ireland has been disproportionately impacted by the quota transfers under the TCA compared to other Member States, plans for a Brexit Adjustment Reserve (BAR) have been published by the European Commission to 'mitigate the economic impacts of the withdrawal of the UK and to show solidarity with member states, especially those most affected'.

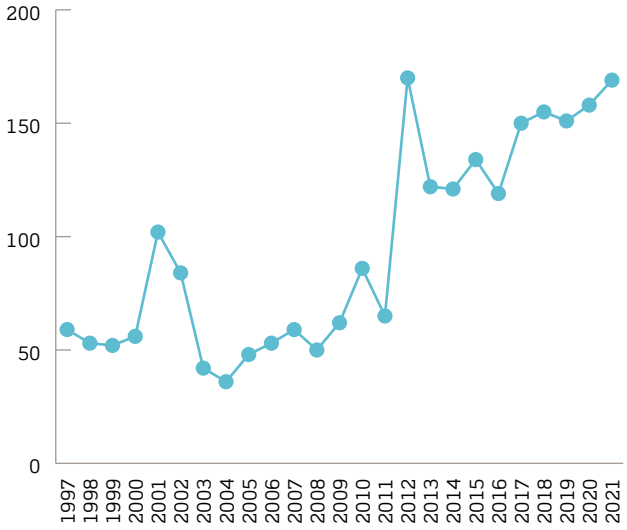
Recognising the impacts of the TCA on the Irish seafood industry, the Minister for Agriculture, Food & the Marine, Charlie McConalogue TD, established a Seafood Task Force to consider measures to mitigate the impacts of the fish quota share reductions. The Task Force made sixteen recommendations, with a proposed overall funding requirement of €423m recognising the ambition of the seafood sector and the local communities where activity is centred. In addressing the Terms of Reference set, the Task Force focused on the burden imposed by the TCA and how to address losses, necessary funding arrangements, and the role of the Common Fisheries Policy Review. The Task Force also recommended longer-term fleet restructuring measures through voluntary decommissioning schemes for the whitefish and inshore sectors that will restore balance between fishing capacity and available fishing opportunities. Short-term supports, including a possible Voluntary Temporary Cessation Scheme, and support schemes for the catching sectors, processors and Fishermen's Co-operatives to mitigate the immediate impacts of the TCA were proposed. While longer-term initiatives in the areas of processing, aquaculture, public marine infrastructure and Community Led Local Development (CLLD) that will help to strengthen and enhance coastal communities particularly dependent on the seafood industry were also recommended.

IRISH IMPORTS OF ALL SEAFOOD PRODUCTS 1997-2021

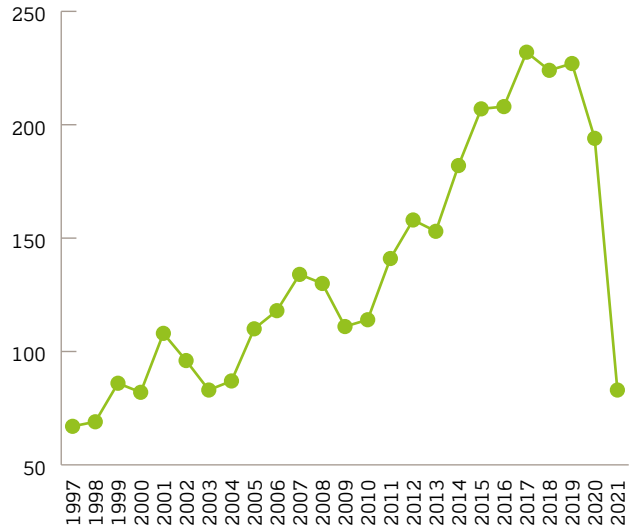
Total Imports - Value (€M)



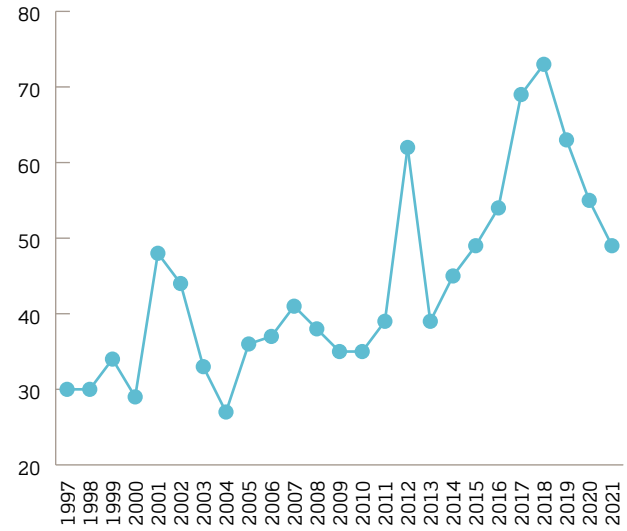
Total Imports - Volume (Tonnes '000)



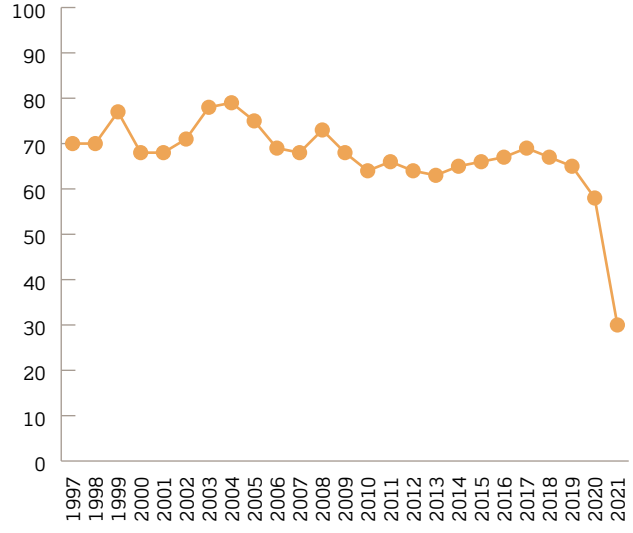
Imports from UK - Value (€M)



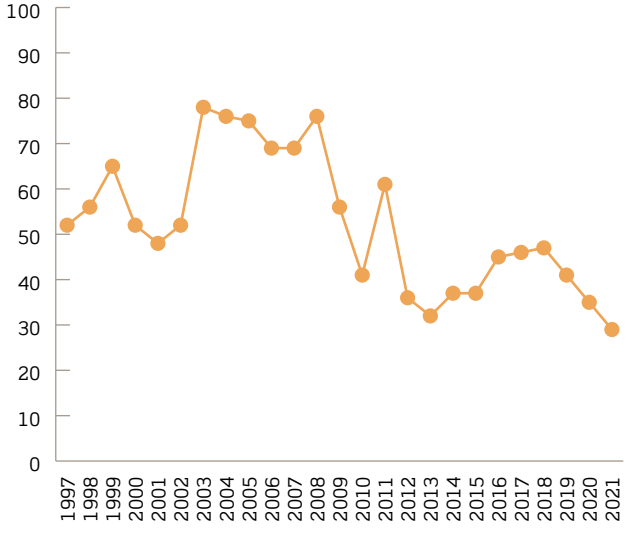
Imports from UK - Volume (Tonnes '000)



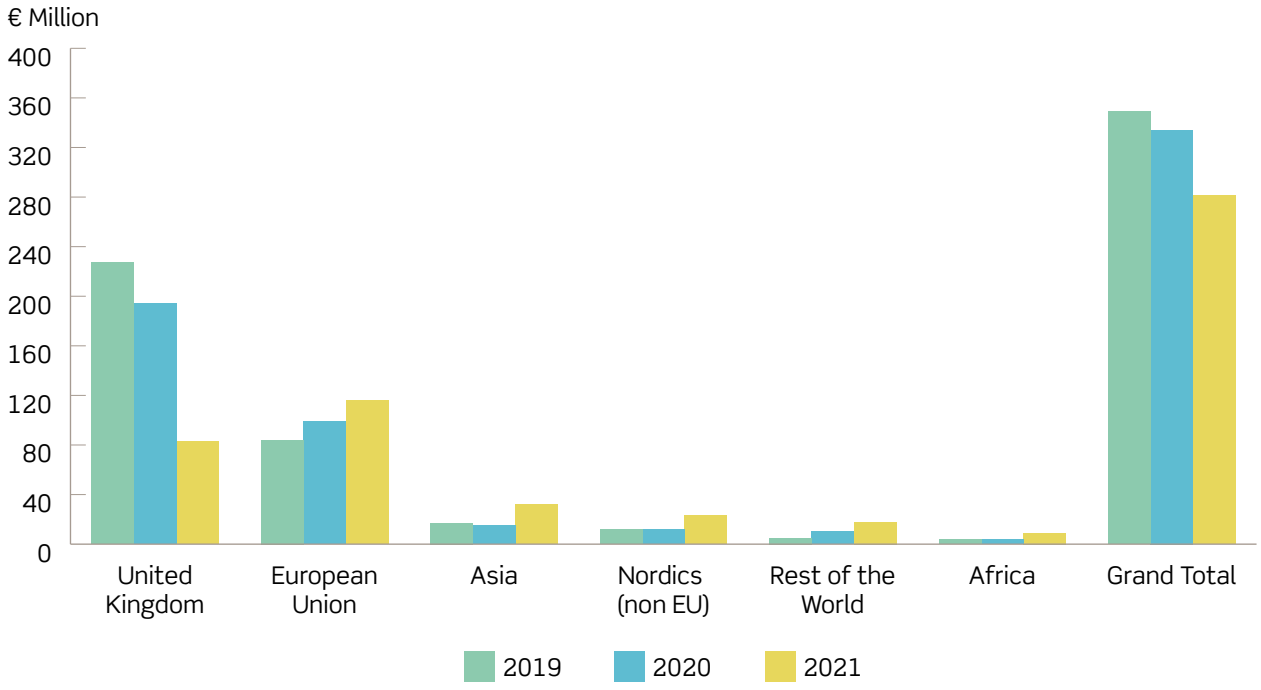
UK Value Share (%)



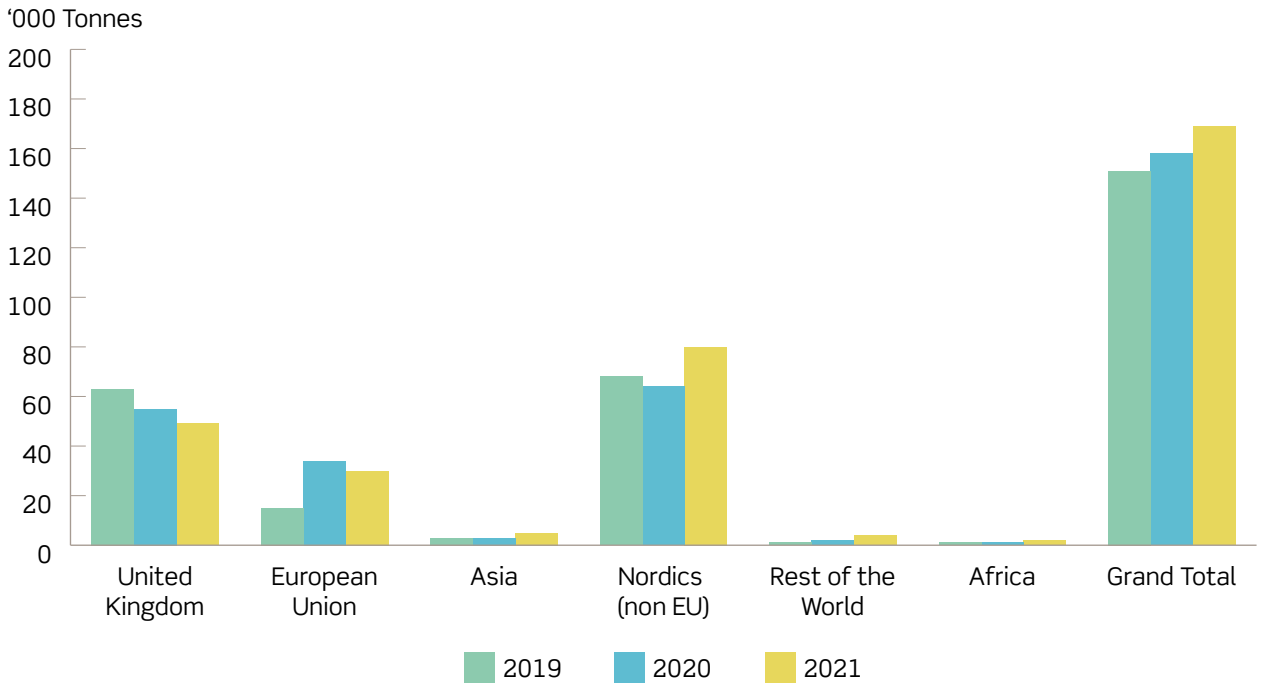
UK Volume Share (%)



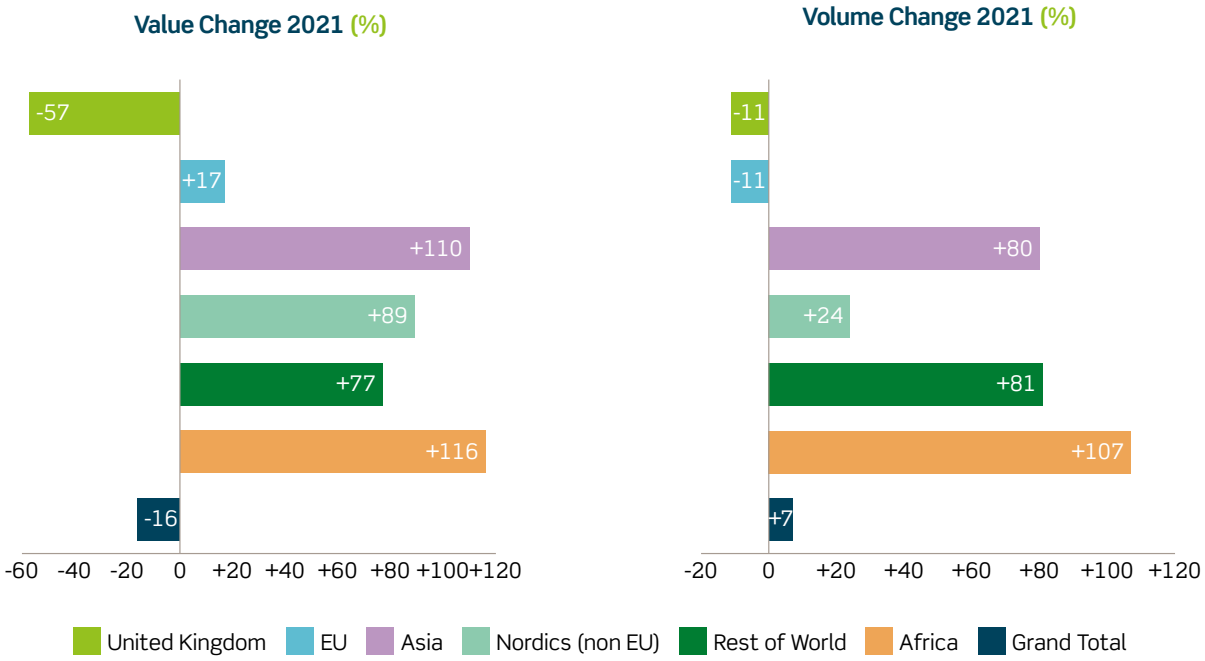
Total Value of All Seafood Imports by Region **2019-2021**



Total Volume of All Seafood Imports by Region **2019-2021**

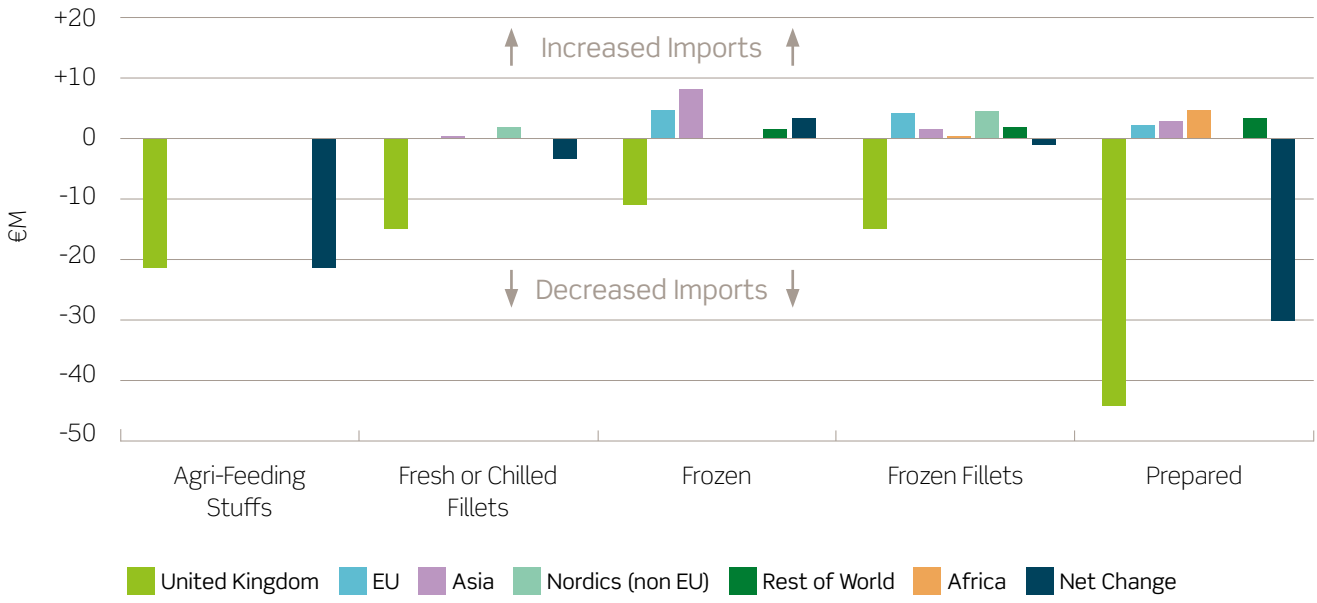


Total Value and Volume Change of All Seafood Imports by Region **2021**



Substitution for Main Imports of Processed Seafood Goods

Substitution Effects of Processed Seafood Imports



BREXIT ADJUSTMENT RESERVE (BAR)

Decommissioning	€ Million
Whitefish	€66.00
Inshore	€6.00
Off Register/Inshore Inactive	€3.70
Total	**€75.70**

Short-term Measures	€ Million
Co-ops	€1.00
Polyvalent tie-up (1 year)	€12.00
Polyvalent tie-up (2022)	€12.00
Inshore Short-term Support	€3.50
Pelagic Liquidity	€8.00
Processing Liquidity	€12.00
Scallop Liquidity	€0.60
Pelagic Tie-up	€21.00
Total	**€70.10**

Onshore/Offshore Initiatives	€ Million
Aquaculture	€60.00
Small Scale Public Marine Infrastructure	€80.00
Community Led Local Development	€35.00
Inshore Longer-term Supports	€10.00
Inshore Marketing	€2.50
Processing Capital (Including Inshore)	€90.00
Total	**€277.50**

Overall Total	**€423.30**

Seafood-Tech Sector

The seafood-tech sector refers to companies that are involved in high value-adding techniques and processes utilising seafood. It is distinct from the direct primary producing sectors of fishing and aquaculture due to its value-adding characteristics. It is also distinct from the processing sector, as it is not providing direct output to the food sector.

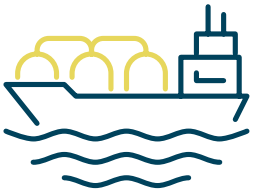
In the Business of Seafood, estimates of activity in the downstream economy are provided whereby the indirect seafood sector that supports the direct seafood sectors of fishing, aquaculture and seafood processing are accounted. The seafood-tech sector as set out here is separate to these ancillary and auxiliary service providers but does share commonalities with the processing and indirect support sectors.

The sector is composed of high technology companies that provide business support, professional and port services and carry out significant research and development into the nutritional and health benefits of seafood. The range of activities include genetics, pharmaceutical industries, aquaculture infrastructure, information technology, financial services and many other associated activities.

BIM has for the last four years been developing start-up companies in this area through its Aquaculture Accelerator Programme.

As can be seen in the figures below the sector is dominated by bioscience companies which account for the majority of the number of companies, in terms of employment and revenue generated. BIM estimates that significant growth has occurred in the seafood-tech sector over the last five years with the number of active companies growing from 34 in 2015 to 52 in 2020 (+53%). Over this period employment in these companies increased from 434 in 2015 to 741 in 2020 (+71%) while turnover has increased from €80m in 2015 to €180m in 2020 (+126%). The growth in Bioscience companies has driven growth in the overall sector with significant growth also occurring in the Professional Services sector.

Number of active companies growing from 34 in 2015 to 52 in 2020 (+53%)



34 in 2015 » 52 in 2020

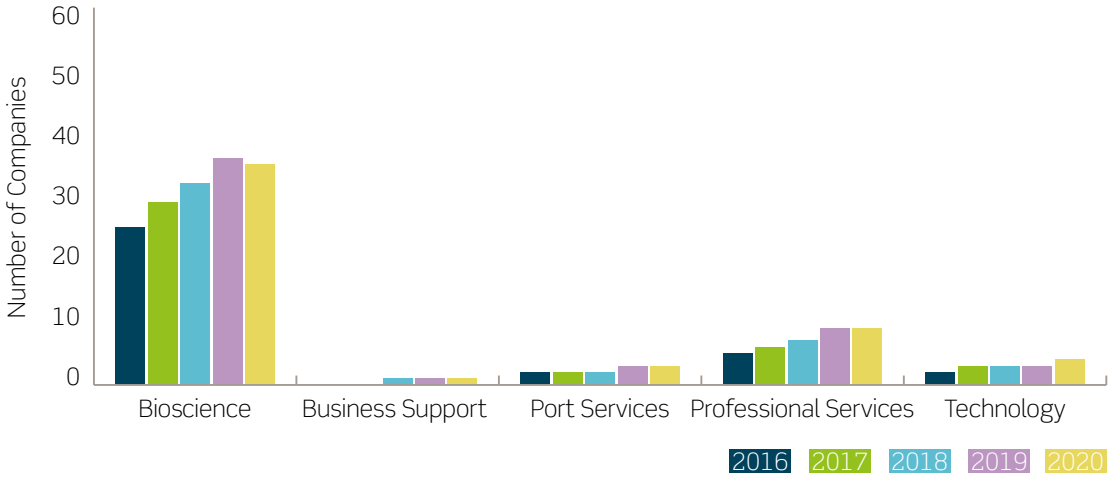
Employment increased from 434 in 2015 to 741 in 2020 (+71%)

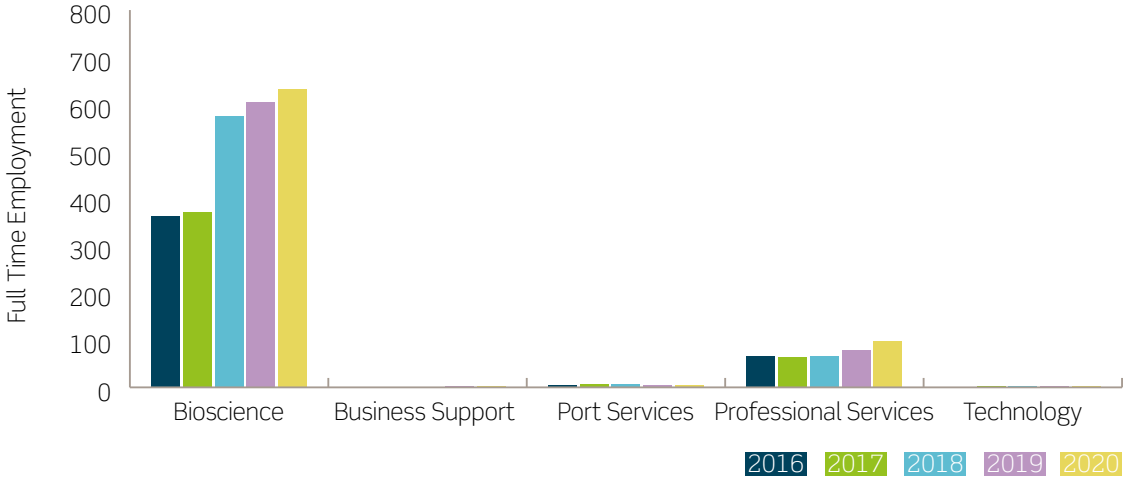
434 in 2015
741 in 2020

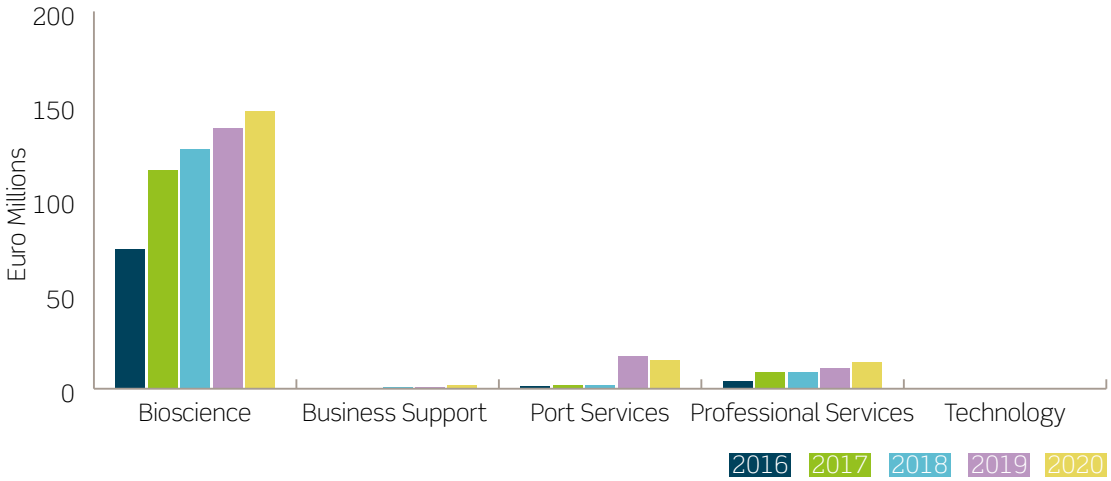
Turnover increased from €80m in 2015 to €180m in 2020 (+126%)

€80m - 2015
€180m - 2020

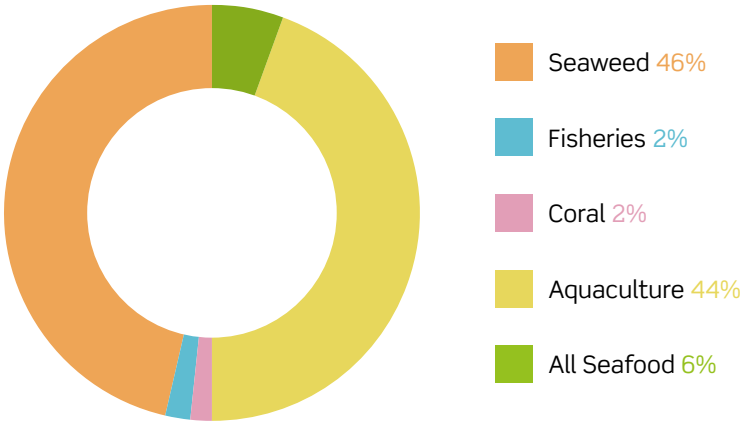
SEAFOOD TECH SECTOR



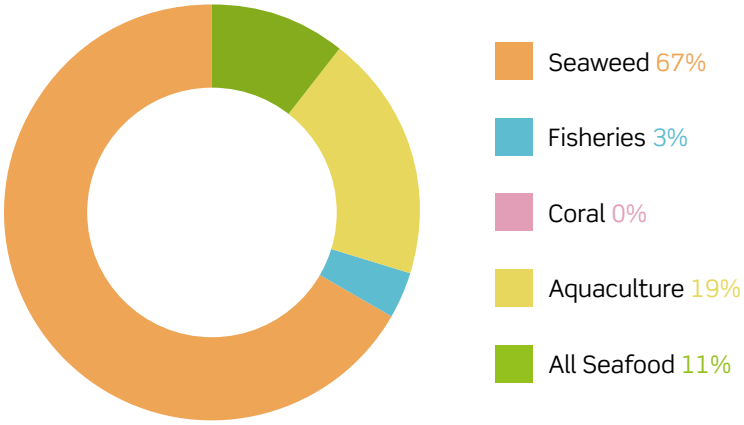




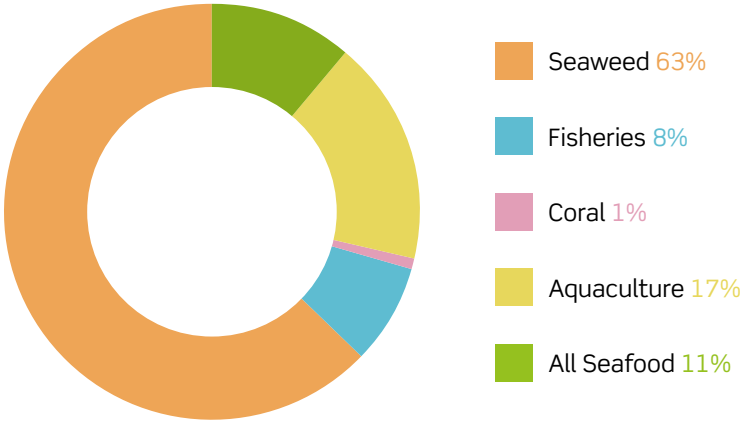
No. of Active Seafood-Tech Companies by Seafood Subsector - 2020



Seafood-Tech Employment by Seafood Subsector - 2020



Seafood-Tech Turnover by Seafood Subsector - 2020



Aquaculture Bay Study

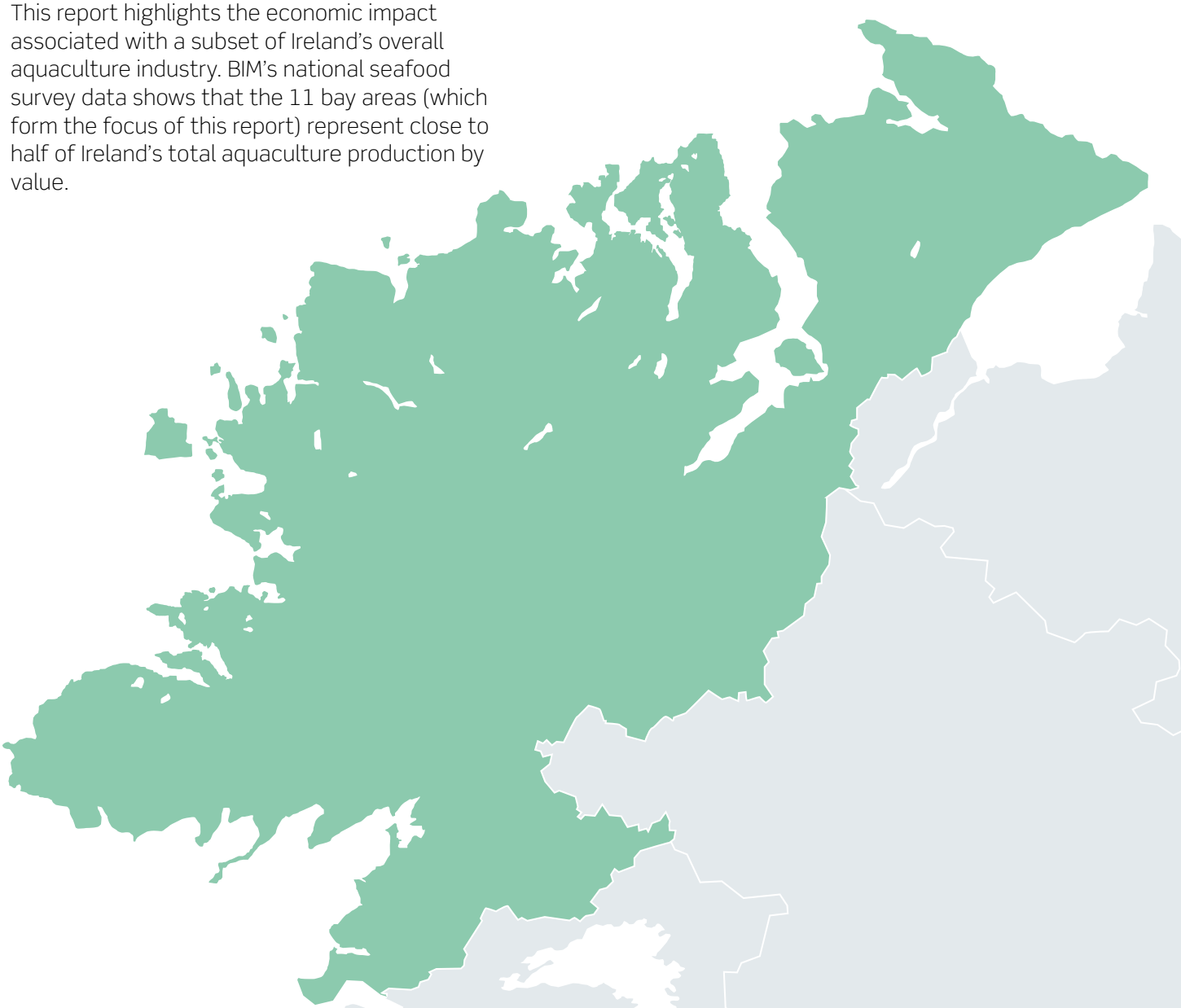
Summary

The Irish aquaculture sector is an important component of the Irish seafood economy. This is particularly the case in some of the country's more peripheral coastal economies (e.g., rural Donegal).

To shed new light on the economic contribution of Irish aquaculture at both the local and national level, Bord Iascaigh Mhara (BIM) commissioned Oxford Economics and Perceptive Insight to assess the economic impact of the aquaculture sector at 11 of Ireland's most representative bay areas. These ranged from Dingle in Co. Kerry - the largest of these bay economies - to Mulroy Bay in Co. Donegal, the smallest and most northerly of the bays assessed.

This report highlights the economic impact associated with a subset of Ireland's overall aquaculture industry. BIM's national seafood survey data shows that the 11 bay areas (which form the focus of this report) represent close to half of Ireland's total aquaculture production by value.

COUNTY DONEGAL IS AN IMPORTANT AREA FOR IRELAND'S AQUACULTURE SECTOR



AQUABAY STUDY IRELAND

Bantry Bay, Co. Cork

The aquaculture sector **employs 130 FTEs, 90 directly** and **40 downstream**.

Finfish cultivation is main driver of aquaculture economy.

Highest multiplier for wages; **every €1,000 wages generates €871 in wages downstream**.

Carlingford Lough, Co. Louth

The aquaculture sector employs **98 FTEs, 81 directly** and **17 downstream**.

Mussel cultivation is main driver of aquaculture economy.

Highest multiplier for wages; **every €1,000 wages generates €504 in wages downstream**.

Clew Bay, Co. Mayo

The aquaculture sector employs **128 FTEs, 103 directly** and **25 downstream**.

Finfish cultivation is main driver of aquaculture economy.

Highest multiplier for wages; **every €1,000 wages generates €654 in wages downstream**.

Dingle Bay, Co. Kerry

The aquaculture sector employs **204 FTEs, 170 directly** and **34 downstream**.

Oyster cultivation is main driver of aquaculture economy.

Highest multiplier for wages; **every €1,000 wages generates €600 in wages downstream**.

Donegal Bay, Co. Donegal

The aquaculture sector employs **167 FTEs, 112 directly** and **55 downstream**.

Finfish cultivation is main driver of aquaculture economy.

Highest multiplier for wages; **every €1,000 wages generates €759 in wages downstream**.

Dungarvan Bay, Co. Waterford

The aquaculture sector employs **81 FTEs, 63 directly** and **18 downstream**.

Oyster cultivation is main driver of aquaculture economy.

Highest multiplier for wages; **every €1,000 wages generates €538 in wages downstream**.

Kenmare Bay, Co. Kerry

The aquaculture sector **employs 94 FTEs, 71 directly** and **23 downstream**.

Finfish cultivation is main driver of aquaculture economy.

Highest multiplier for wages; **every €1,000 wages generates €1,171 in wages downstream**.

Kilkieran Bay, Co. Galway

The aquaculture sector employs **69 FTEs, 30 directly** and **39 downstream**.

Finfish cultivation is main driver of aquaculture economy.

Highest multiplier for employment; **every 100 jobs generates 130 jobs downstream**.

Mulroy Bay, Co. Donegal

The aquaculture sector employs **46 FTEs, 32 directly** and **14 downstream**.

Finfish cultivation is main driver of aquaculture economy.

Highest multiplier for wages; **every €1,000 wages generates €878 in wages downstream**.

Roaringwater Bay, Co. Cork

The aquaculture sector employs **109 FTEs, 98 directly** and **11 downstream**.

Mussel cultivation is main driver of aquaculture economy.

Highest multiplier for wages; **every €1,000 wages generates €566 in wages downstream**.

Trawenagh Bay, Co. Donegal

The aquaculture sector employs **78 FTEs, 64 directly** and **14 downstream**.

Oyster cultivation is main driver of aquaculture economy.

Highest multiplier for wages; **every €1,000 wages generates €537 in wages downstream**.

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, whiting and flatfish such as sole, turbot, plaice and megrim.

Regions by County

North: Donegal

North West: Mayo, Sligo and Leitrim

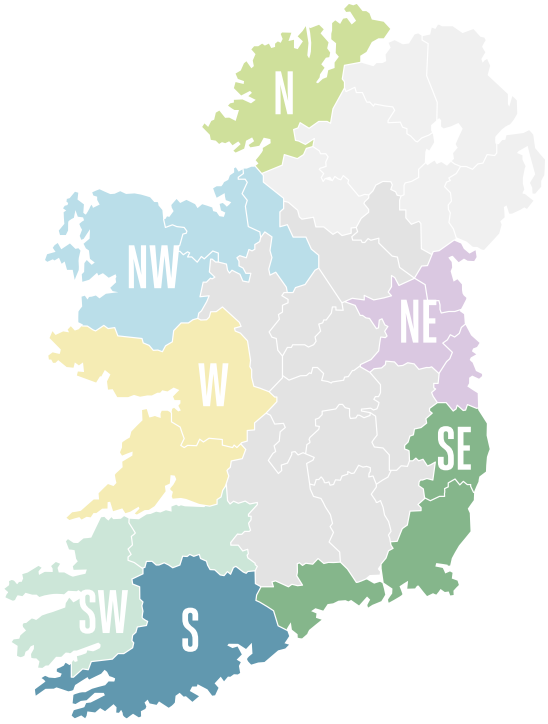
West: Galway and Clare

South West: Kerry and Limerick

South: Cork

South East: Wicklow, Wexford and Waterford

North East: Louth, Meath and Dublin



Data Sources

Landings data are supplied by the Sea Fisheries Protection Agency (SFPA), www.sfpa.ie.
Value of landings are estimated by BIM.

Aquaculture data is collected through the BIM Annual Aquaculture Survey. Processing data is collected through the Data Collection Framework and economic data is provided by the Central Statistics Office (CSO). Seafood-Tech sector employment and estimated turnover based on data sourced from Bureau van Dijk Orbis.

Population data is sourced from the CSO Census 2016, www.cso.ie. Seafood population and employment statistics estimated by BIM using Census 2016 data.

Employment data in seafood sector collected through the Data Collection Framework by BIM. Retail data is supplied by KANTAR World Panel.

Foodservice consumption estimated by BIM using Bord Bia 'Irish Foodservice Channel Insights' data. The total processing employment includes wild seaweed harvesters. Import and Export data supplied by EUROSTAT via IHS Markit.

Government investment is sourced from the Revised Estimates for Public Services of the Government of Ireland. Economic performance of the fishing fleet is sourced from BIM's Data Collection Framework Data.

Data on quotas is sourced from the Official Journal of the European Union. Please note, at the time of publication these quotas were provisional, as they had not been published in the OJEU. Some figures have been rounded for the purposes of this publication.

The data used in this publication includes provisional data, which may be subject to updates throughout the year. Please consult the data sources cited above for original and updated data.

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