



IRELAND IN THE WORLD AND IN THE EU

(2015, source: FAO and Eurostat)

Ireland is the EU's 7th largest producer for fisheries and 7th largest for aquaculture products.

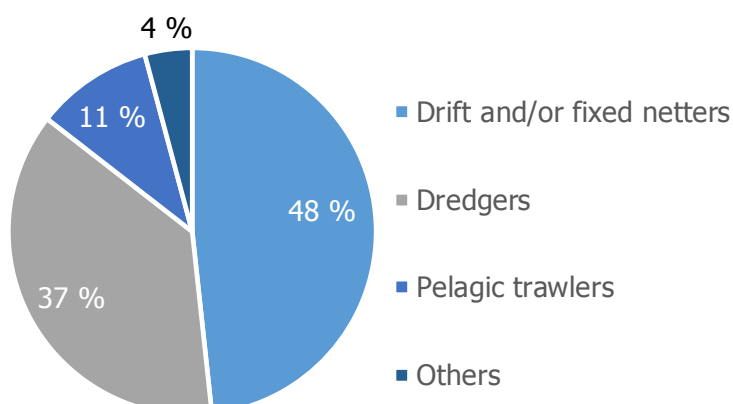
| (1000 tonnes) | World | EU-28 | Ireland | % World | % EU-28 |
|---------------|---------|-------|---------|---------|---------|
| Catches | 104 635 | 5 144 | 235 | 0,2% | 4,6% |
| Aquaculture | 106 094 | 1 307 | 38 | 0,0% | 2,9% |
| Total | 211 511 | 6 451 | 273 | 0,1% | 4,2% |

FISHING FLEET

(2015, source: [JRC and Annual Economic Report](#))

| Vessels | Capacity | Power |
|---|------------------------|-----------------------|
| Number: 2.048 (including 681 inactive) | GT: 58.9 | KW: 179.2 |
| TOTAL FTE: 2.522 | | |
| Small scale | Large scale | Distant fleet |
| Jobs (FTE): 38% | Jobs (FTE): 62% | Jobs (FTE): 0% |

The Irish gear composition:



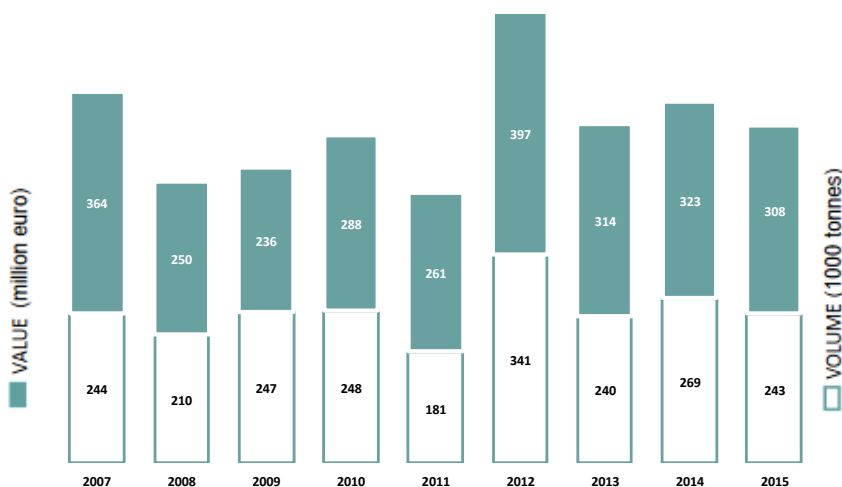


LANDINGS

Landings comprise the initial unloading of any fisheries products, including aquatic plants, from on board a fishing vessel to land in a given country, regardless of the nationality of the vessel making the landings. Landings are recorded in net weight.

In 2015, 98% of the landings in Ireland were from EU vessels. All landings were fresh and for human consumption.

Total fishing ports reported in Ireland are 179 of which 157 are covered by EUMOFA. The remaining 22 fishing ports are not landing ports, but one of them has one registered fishing vessel.



Main commercial species landed and % over total (2015, million euro and 1.000 tonnes)



| | | | | | |
|----------------|----|-----|----|-----|----------------|
| HAKE | 61 | 20% | 76 | 31% | MACKEREL |
| NORWAY LOBSTER | 50 | 16% | 29 | 12% | BLUE WHITING |
| MACKEREL | 44 | 14% | 21 | 9% | HERRING |
| MONK | 31 | 10% | 21 | 9% | HORSE MACKEREL |
| MEGRIM | 17 | 5% | 17 | 7% | HAKE |
| BLUE WHITING | 14 | 4% | 10 | 4% | SPRAT |
| OTHERS | 92 | 30% | 69 | 29% | OTHERS |

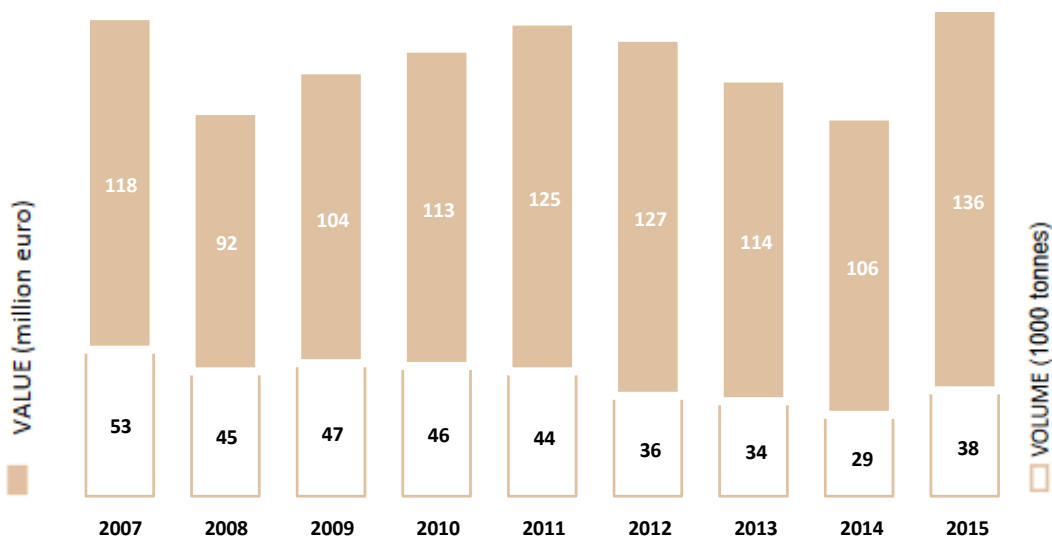
(source: Eurostat)



AQUACULTURE

Aquaculture refers to the farming of aquatic (freshwater or saltwater) organisms, such as fish, molluscs, crustaceans and aquatic plants. Aquaculture data are reported in live weight equivalent and value. Aquaculture products are generally not sold at auctions but directly from producers to processors, wholesalers or retailers.

In 2015 all aquaculture was in sea and brackish water. All of the finfish (salmonids) was produced in cages, while 74% of the molluscs (mussels and oysters) was off-bottom production and 26% on-bottom production.



Main commercial species farmed and % over total (2015, million euro and 1.000 tonnes)



| Species | Value (million euro) | % of Total Value | Volume (1000 tonnes) | % of Total Volume |
|--------------------|----------------------|------------------|----------------------|-------------------|
| MUSSEL MYTILUS SPP | 90 | 66% | 16 | 43% |
| SALMON | 31 | 23% | 13 | 35% |
| OYSTER | 13 | 9% | 7 | 20% |
| OTHERS | 3 | 2% | 1 | 3% |

(source: Eurostat)



Ireland



PRODUCER ORGANISATIONS (2016, source: DG MARE, [link](#))

5 producers organisations (POs) are recognised for the management of fishery activities of their associated members.

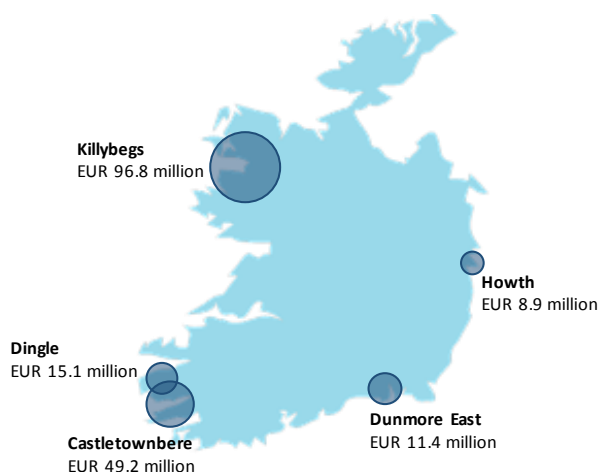
All the POs are involved in fisheries (2 in local small-scale fishing, 2 in coastal fishing and 1 in other types of fishing).

- Irish fish producers organisation
- Killybegs Fishermens Organisation Ltd
- Irish south and west fish producers organisation Ltd
- Irish south and east fish producers organisation limited
- Irish Seafood Producers' group

FIRST SALES (2016, source: EUMOFA)

First sale concerns the fish that is sold or registered at an auction center or to registered buyers or to producer organizations (PO). First sales may differ from landings since the former do not cover fish that is landed by vessels owned by processing companies or direct sales to processors.

In Ireland, first sale is generally done by contract rather than by auction. In 2016, 134 of the 157 places of sale (ports) were operating. Killybegs, Castletownbere, Dingle, Dunmore East and Howth covered together 69% of the total value and 90% of the total volume. The average volume of each place of sale was 19.400 tonnes and the average value was EUR 1.9 million.



134 places of sale were operating in 2016, all of which in the Celtic Sea.

In 2016, the main 3 places of sale covered 89% in terms of volume and 62% in terms of value.

| Top-3 places of sale | Volume (tonnes) | Value (million EUR) | Top-3 main commercial species (value) |
|----------------------|-----------------|---------------------|---|
| Killybegs | 2.299.610 | 97 | Mackerel, Horse mackerel and misc. small pelagics |
| Castletownbere | 16.550 | 49 | Hake, Norway lobster and Monk |
| Dingle | 4.797 | 15 | Hake, Monk and Norway lobster |



WHOLESALE

(sources: BIM)

Wholesale is an intermediary stage in the distribution channel that buys in bulk and sells to resellers (e.g. retailers) rather than to consumers.

There are no structured wholesale markets in Ireland, but a number of companies operate as wholesale distributors. Due to consolidation during the last few years, approximately 80% of the market is now controlled by six wholesalers. The wholesale distributors buy products, both from fisheries and aquaculture, but the vast bulk of their products are imports.

PROCESSING (source: Eurostat-SBS)

In 2015, 2.284 persons were employed in Ireland in the fish processing industry.

In Ireland, the fish processing industry recorded a value added of EUR 130.1 million, covering 1.6% of the value added of total manufacture of food products.

The main products were prepared dishes, fresh fillets, crustaceans and molluscs and fish fillets in batter or breadcrumbs (including fish fingers).

108 companies

Sales: EUR 0.56 billion

(2015, source Eurostat - SBS)



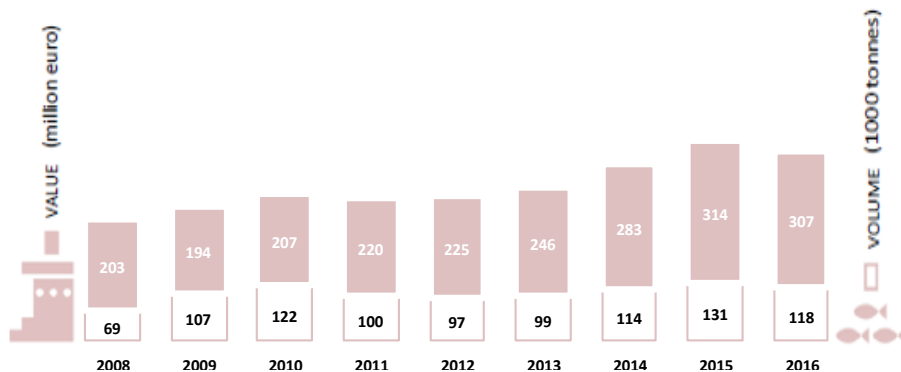
TRADE (source: Eurostat)

Import

MAIN COMMERCIAL SPECIES IMPORTED AND % OVER TOTAL IMPORTS (2016, million euro)



| | | |
|-------------------|-----|-----|
| SALMON | 46 | 15% |
| COD | 25 | 8% |
| OTHER MARINE FISH | 22 | 7% |
| SKIPJACK TUNA | 21 | 7% |
| OTHER SALMONIDS | 19 | 6% |
| MISC. SHRIMPS | 18 | 6% |
| OTHERS | 155 | 51% |

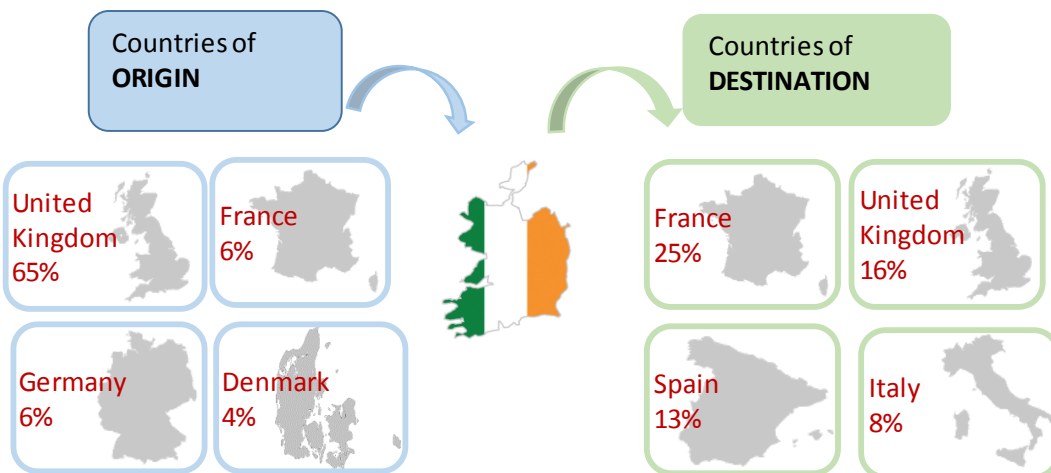
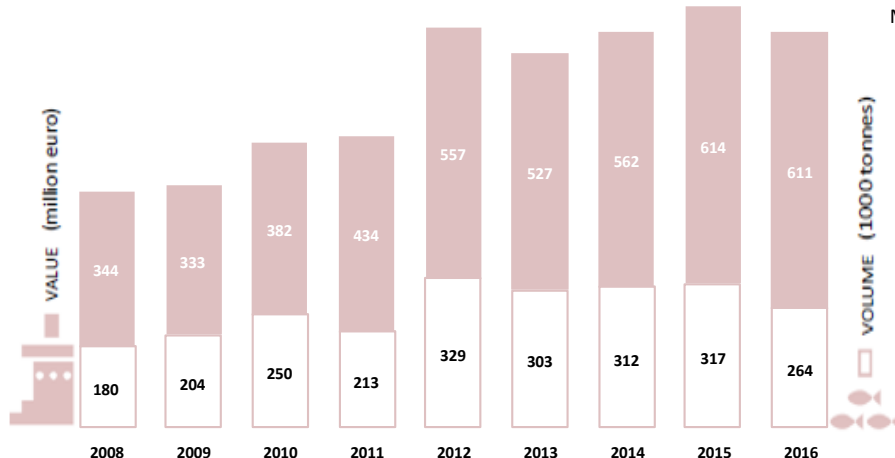


Export

MAIN COMMERCIAL SPECIES EXPORTED AND % OVER TOTAL EXPORTS (2016, million euro)



| | | |
|----------------|-----|-----|
| MACKEREL | 87 | 14% |
| SALMON | 66 | 11% |
| NORWAY LOBSTER | 63 | 10% |
| CRAB | 42 | 7% |
| OYSTER | 34 | 5% |
| HORSE MACKEREL | 33 | 5% |
| OTHERS | 286 | 47% |

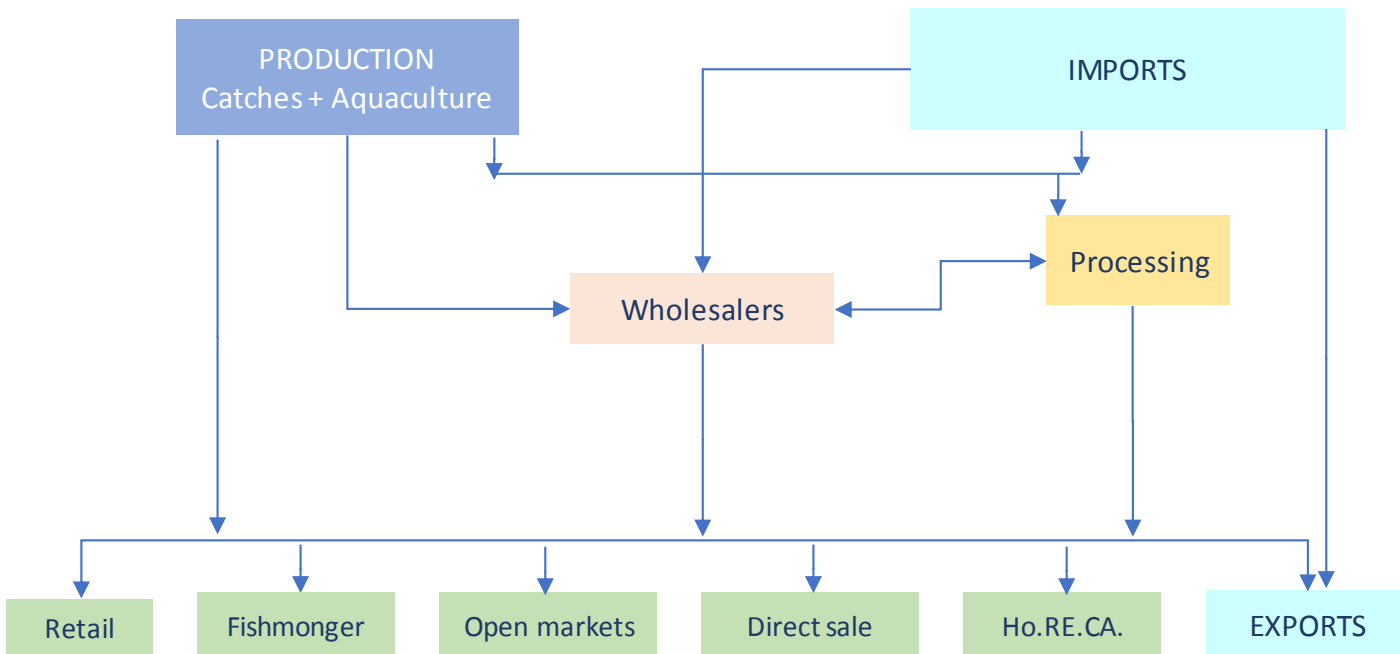




DISTRIBUTION

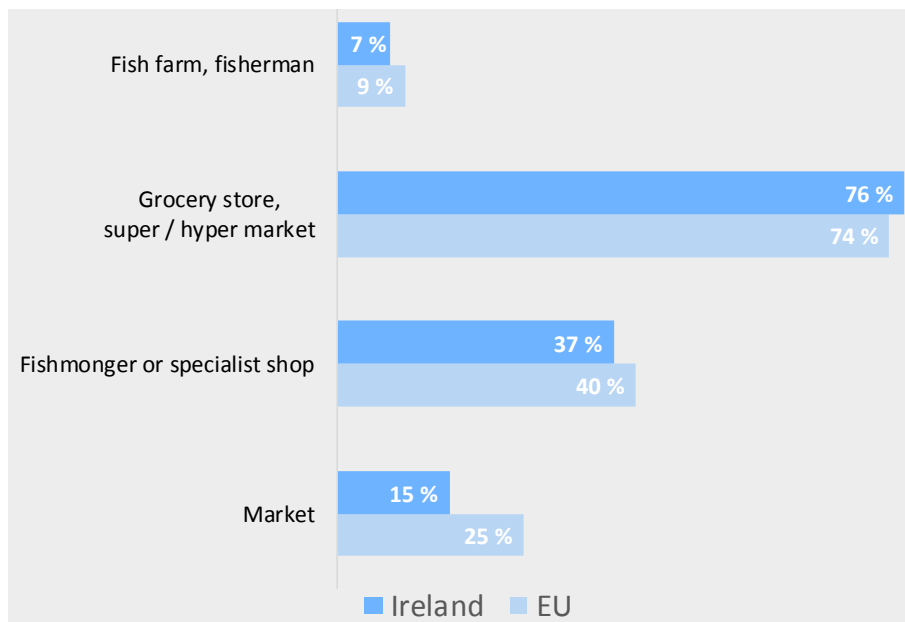
The supply chain of fishery and aquaculture products in Ireland

(sources: BIM)



Consumers preferences on purchasing channels

(source: EUROBAROMETER)





CONSUMPTION

Apparent consumption of fishery and aquaculture products in Ireland amounted to **22,2 kg/per capita in 2015**, slightly lower (-0,43%) than the previous year. The main consumed species are **cod, haddock, hake and salmon**.

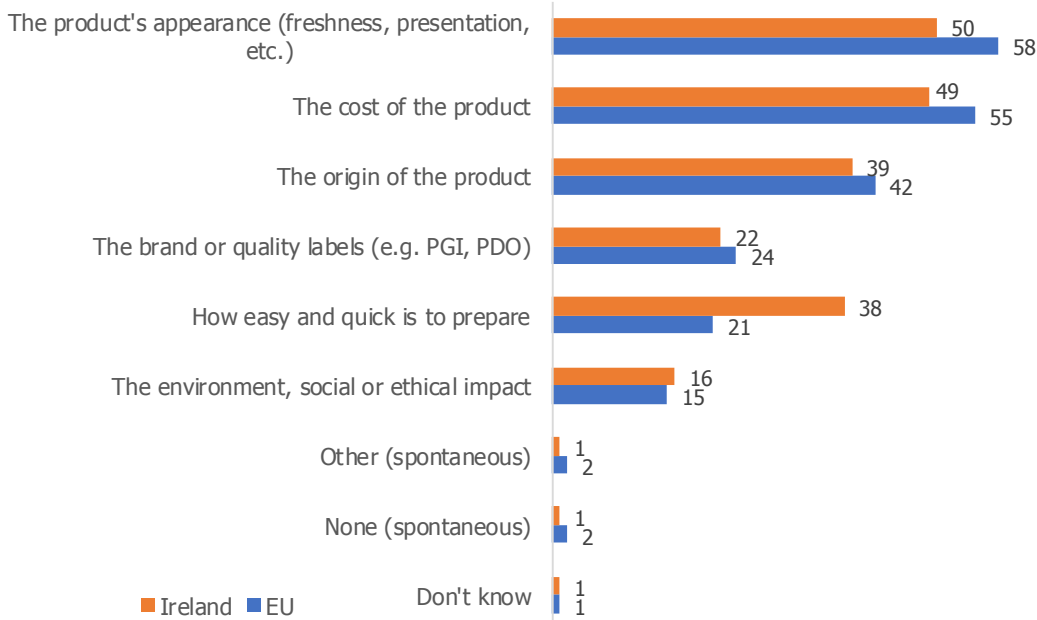
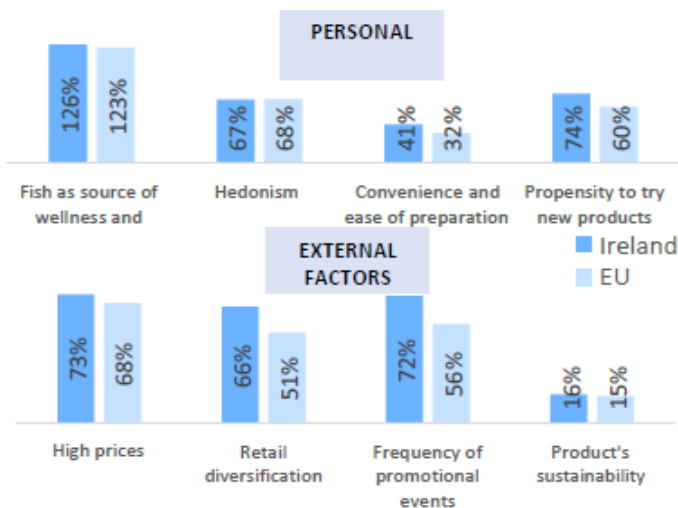
From a socio-demographic point of view, regular fish consumers belong mainly in the age classes 40-54 years and over 55 years. Young people are less inclined to eat fish frequently in Ireland. This age group has the lowest number of regular consumers across the EU. This is also the case in Ireland (source: "EU consumer habits regarding fishery and aquaculture products").

The Irish consume especially fresh and smoked, salted or dried products, while loose fish (73%) is slightly more frequently consumed than the EU average (68%).

22,2 Kg per capita
 (Source: EUMOFA)

Purchasing factors

(source: EUROBAROMETER)



IRELAND IN EUMOFA



LANDINGS

Volumes and values are collected by EUMOFA from **Eurostat – Fishery**. Data concern all species landed in Ireland by vessels of all nationalities. Data are available on a yearly basis, accessible through simple and advanced tables.

FIRST SALES

Volumes and values are collected from **Irish Sea Fisheries Board (BIM)** on a monthly basis. Data is collected by place of sale and includes all marketed species.

For 2016, **Monthly data** were collected and disseminated for 58 species sold in 134 places of sale (ports).

The data are accessible through simple and advanced tables.

AQUACULTURE

Volumes and values are collected by EUMOFA from **Eurostat – Fishery**. Data are available on a yearly basis, accessible through simple and advanced tables.

WHOLESALE

No data for this supply chain are available

PROCESSING

Volumes and values are collected from **Eurostat – PRODCOM**. Data concern 13 processed products as recorded through the PRODCOM nomenclature. Data are available on a yearly basis and are accessible through simple tables.

TRADE

Volumes and values are collected from **Eurostat – COMEXT**. Data concern trade of all fisheries and aquaculture products as recorded by national customs, available on a monthly and yearly basis. Data are accessible through simple and advanced tables.

CONSUMPTION

Household consumption of fresh fishery and aquaculture products is collected from a **private provider** by EUMOFA on a monthly basis for 8 products based on panel reporting. Click [here](#) for the products per each Member State. Data (volumes and values) are accessible through simple queries on a monthly and yearly basis.