



**UK Trade
& Investment**

Overseas Market Introduction Service on the Irish Seafood Market

**Sea Fish Industry Authority
Order Reference: 4525/15**

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Contents

1. Executive Summary	- 3 -
2. Key Findings & Recommendations.....	- 3 -
3. Trade Environment.....	- 4 -
4. Fish and Seafood Industry in Ireland	- 5 -
5. The Sea Fisheries Sector	- 5 -
6. Key Ports.....	- 9 -
7. Aquaculture Production	- 10 -
8. Consumer Trends.....	- 10 -
9. Route to Market.....	- 12 -
10. Labelling of fish and fishery products.....	-14-
11. Seafood Legislation.....	-15-
12. Further Infrmation	-16-
13. UKTI Contacts	-17-



1. Executive Summary

Summary of the enquiry

Seafish, the industry authority on seafood, is a non-departmental public body which supports a profitable, sustainable and socially responsible future for the seafood industry. Seafish commissioned UKTI Ireland to deliver a report on the seafood industry in Ireland.

Methodology

A variety of sources were used when preparing this report including:

- Commercial databases and resources
- Trade associations and other relevant organisations
- Internet research
- Newspaper articles
- Reports

2. Key Findings & Recommendations

1. The consumption of seafood in Ireland is increasing, however not as quickly as other proteins. Seafood has a market share of 2% of total grocery in Ireland. In comparison, Beef has a 4.8% of the market share; Poultry 3.2%; Pork 1.4%; and Lamb 1.1%.¹
2. Most popular fish is salmon (total fish sales valued at €64m for the year ending 4th January 2015), followed by cod (worth €40.2m for same period)²
3. Prepacked fish has increased in growth significantly in Ireland in 2014, which represents huge opportunity for companies. Growth was 6.1%. See Section 8 for more information.
4. The Irish business culture places great importance on face-to-face contact. Irish people are usually generous with information and their time. If you are considering selling into the Irish market, we would suggest that you organise a visit in-market and set up meetings.

¹ Bord Iascaigh Mhara, 2015, Irish Retail Seafood Market Performance

² Bord Iascaigh Mhara, 2015, Irish Retail Seafood Market Performance



3. Trade Environment

Geography

Land Area	70,273 km ²
Coastline	1,448 km
Capital	Dublin
Other main cities	Cork, Galway, Limerick and Waterford

Population, Language & Culture

Population (2011 est.)	4.62m
Number of households (2011)	1.66m
Languages	English

Economy

Total GDP (2014 est.)	\$226.8 billion (in Purchasing Power Parity terms)
Real GDP Growth Rate (Q2 2015)	6%
GDP per capita (2014 est)	\$49,200 (in Purchasing Power Parity terms)
Inflation Rate (2014 est)	0.3%
Unemployment Rate (August 2015)	9.4%
Currency	EUR (€)
Exchange rate	€:£ = 1:0.74

Trade

Total food imports (2014 est.)	€6,152m; of which seafood €235m (Source: CSO)
Total food exports (2014 est.)	€9,322m; of which seafood €530m (Source: CSO)
Top 3 import partners (2014)	UK (30%), the US (11%) and Germany (8%)

Source: CIA Factfile, Irish Central Statistics Office



4. Fish and Seafood Industry in Ireland

The seafood industry trade in Ireland is estimated to be worth €850m, with €330m in domestic sales and €520m in exports.³ The production of seafood is delivered through sea fisheries and aquaculture operations.

Irish waters offer huge opportunities to fishermen, due to its strategic position on the western coast of Europe. The Atlantic Ocean lies to the west, Irish Sea to the east, the North Atlantic to the north and Celtic Sea to the south. Each sea is influenced by the warm waters of the Gulf Stream which has ensured a marine environment with a wide variety of fish.

Exports:

Ireland exported €530m worth of seafood in 2014, which amounted to 259,120 tonnes.⁴ Its most popular seafood exports in terms of value were mackerel; other fish, frozen (excluding livers and roes); other crustaceans (frozen); other fish, fresh (excluding livers and roes) and salmon.⁵ The top export markets for Irish seafood in terms of value are France (€124m), Spain (€60m), UK (€56m), Nigeria (€53m) and Italy (€30m).

Imports:

Ireland imported €235m worth of seafood in 2014, which amounted to 68,151 tonnes.⁶ Its most popular seafood imports in terms of value were tunas, skipjacks and Atlantic bonito, whole or in pieces; other fish, fresh or chilled; salmon; Herrings, sardines, sardinella, brislings or sprats, fresh or chilled (excluding livers and roes); crustaceans, prepared or preserved.⁷ The top import markets for the Irish market in terms of value are the UK (€145.1m), France (€18.2m), Germany (€16.7m), Denmark (€9.52m) and Netherlands (€5.5m).

According to BIM, the domestic sales came to €330m in 2014.

5. The Sea Fisheries Sector

Landings have been largely increasing in Irish ports since 2010, with one fluctuation in 2013. In 2014, there were 294,383 tonnes of Deepwater, Demersal, Pelagic and Shellfish species landed in Ireland with an overall value of €345.8m.⁸

In terms of value, the most important species in 2014 landed in Ireland was the demersal, valued at €132.1m; pelagic landings were valued at €121.2m; shellfish at €91.2m and deepwater at €898,000.⁹

³ The Irish Seafood Development Agency, Bord Iascaigh Mhara, 2015

⁴ CSO, 2015

⁵ CSO, 2015

⁶ CSO, 2015

⁷ CSO, 2015

⁸ The Sea Fisheries Protection Agency, 2015

⁹ The Sea Fisheries Protection Agency, 2015

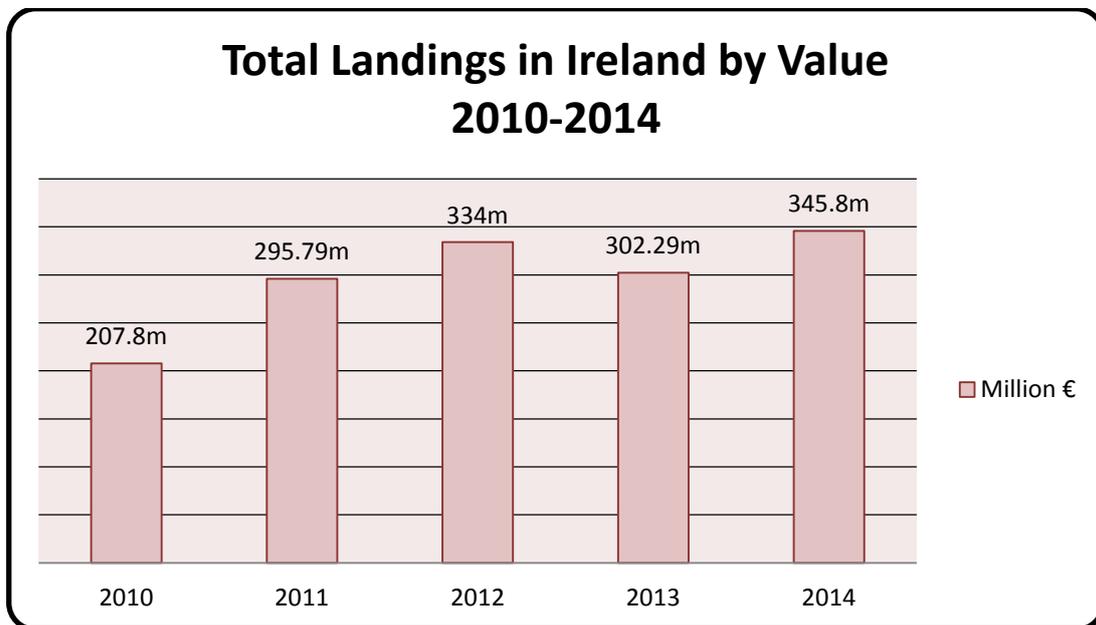


Figure 1: Source Sea Fisheries Protection Agency ("SFPA", 2015)

In terms of tonnes, the pelagic species were the most landed at 210,504 tonnes representing 71.5% of all fish landed in Irish ports; 56,263 tonnes of the demersal species were landed which represented 19.1% of all fish landed; 27,157 tonnes of shellfish were landed (9.2% of total) and 459 tonnes of deepwater species (0.2%)¹⁰

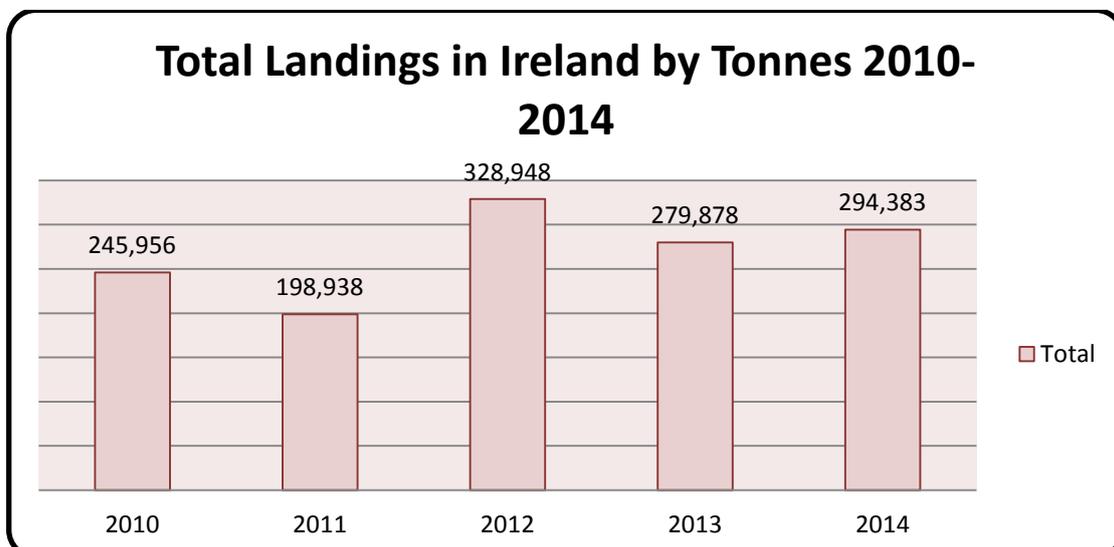


Figure 2: Source SFPA (2015)

¹⁰ The Sea Fisheries Protection Agency, 2015



With 1,914 fishing vessels registered in Ireland¹¹, Irish vessels accounted for 70% of the total value landed in Irish ports and 75% of the weight. Vessels from France, UK, Spain, Norway, Belgium and Germany landed in Irish ports in 2014, accounting for 74,038 tonnes of fish with a combined value of €104.6m.¹²

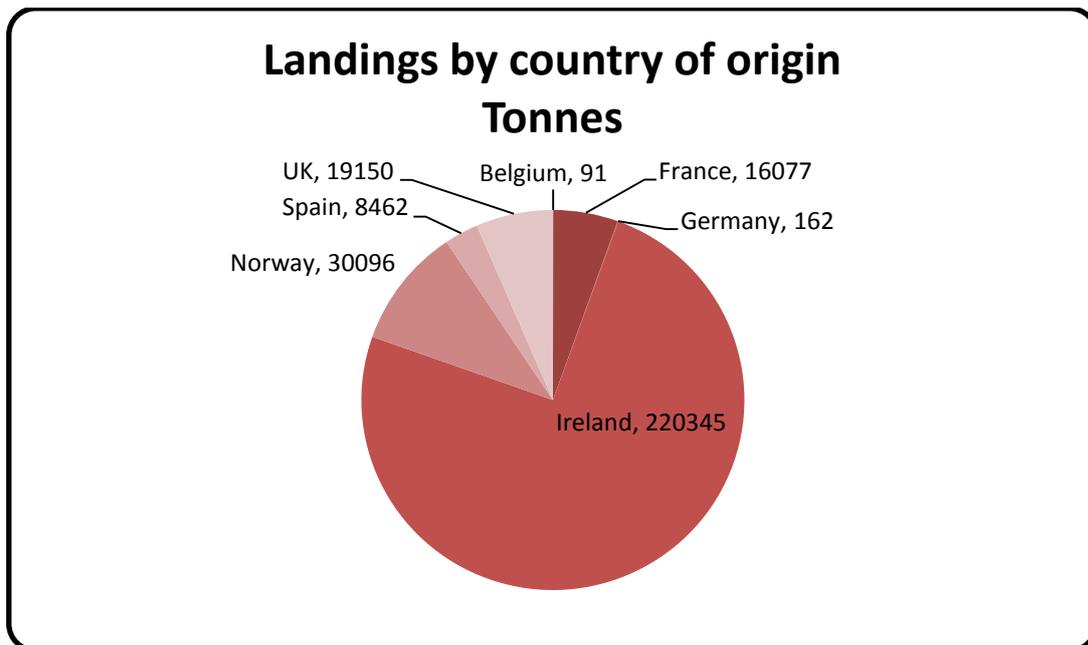


Figure 3: Source SFPA (2015)

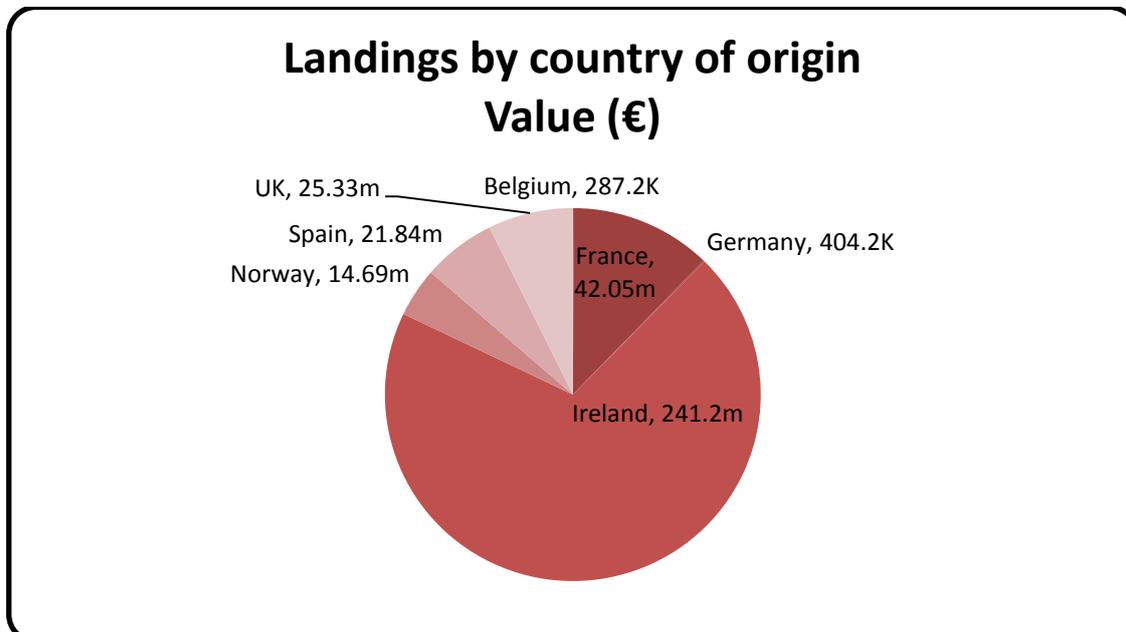


Figure 4: Source SFPA (2015)

¹¹ The Irish Seafood Development Agency, Bord Iascaigh Mhara, 2015

¹² The Sea Fisheries Protection Agency, 2015



In Table 1, below, you can see the top 10 species landed in Irish ports. Atlantic Mackerel is the most landed, at 83,072 tonnes with a value of €61.1m.¹³ The top 10 species account for 78% of the amount of fish landed in Irish ports and 81% of the total value.

2014 Top 10 species landed in Irish ports			
Species	Tonnes	Value (000's €)	€/tonne
Atlantic Mackerel	83,072	61,133,000	735.9
Lobster Norway	9,132	49,700,000	5,442.4
Hake European	19,149	46,365,000	2,421.3
Monkfish Angler nei	10,157	32,892,000	3,238.4
Blue Whiting	50,184	24,489,000	487.98
Horse Mackerel nei	35,058	2,2057,000	629.2
Megrim nei	5,904	17,498,000	2,963.8
Crab Edible	7,105	9,086,000	1,278.8
Whiting	7,371	8,390,000	1,138.2
Scallop Great Atlantic	3,004	7,972,000	2,653.8

Table 1: Source SFPA 2015

¹³ The Sea Fisheries Protection Agency, 2015



6. Key Ports

Killibegs is by far the most strategic port, accounting for 32.6% of total value of fish landed in Irish ports and 62.2% of total volume. This is followed by Castletownbere (23.7% of value and 11.9% of volume), Dingle (7.5% of value and 4.2% of volume) and Dunmore East (4.8% of value and 3.9% of volume)¹⁴

2014 Top 20 Ports by Value		
Port name	Tonnes	Value (000's €)
Killybegs	183053	112882
Castletownbere	35004	82103
Dingle	12221	25845
Dunmore East	11535	16569
Ros A Mhil	4770	13869
Kilmore Quay	4705	13415
Howth	4481	10753
Clogherhead	1741	7974
Greencastle	3708	6998
Union Hall	2528	6892
Cobh	4631	5907
Rosslare	1413	3282
Ballycotton	1158	3218
Kinsale	2063	2703
Baltimore	2294	2422
Duncannon/St.Helens	1666	2041
Skerries	427	1500
Wicklow	1323	1480
Malin Head	1368	1448
Balbriggan	395	1407

Table 2: Source SFPA 2015

¹⁴ The Sea Fisheries Protection Agency, 2015



7. Aquaculture Production

According to the Irish Seafood Development Agency, Bord Iascaigh Mhara, the first sale value of the aquaculture industry was worth €115m in 2014. There are approximately 250 aquaculture operations in Ireland, employing 1,833 people. The main species that are produced are salmon, oysters and mussels (rope and seabed). Ireland is a world leader in the production of organic salmon and mussels, according to the European Commission, producing 20,000 tonnes every year.

8. Consumer Trends

According to the latest figures from the FAO, Ireland consumed 22.3kg of fish per capita in 2011. This is on the lower end of the scale in Europe, with Portugal consuming 56.8kg/capita, Spain 42.4kg, France 34kg, UK 19kg and Germany 14.2kg. There are three main trends that are having an effect on the consumption of fish in Ireland – health consciousness, environmental impact and the convenience of the products.

Health Conscious

The Irish consumer is becoming more and more health conscious. Irish consumers are beginning to recognise that fish should be part of a healthy diet. According to Kantar Worldpanel, for the year ending on 4th January 2015, this is reflected in Total Fish Retail Sales which increased by 3.2% to reach €196m.

Awareness of Environmental Impact

As well as being more health conscious, consumers are becoming more aware of how their food was produced. They would prefer to buy fish that they know has been sustainably produced.

Convenience

As you will see in Figure 5, chilled fish products have been increasing in 2014, with an increase of 4.8%. There has been a particular interest by Irish consumers in prepacked fish, with options available to microwave or bake-in-the-bag.



Year-on-year Total Fish Sales in the Irish Retail Market to 4th January 2015

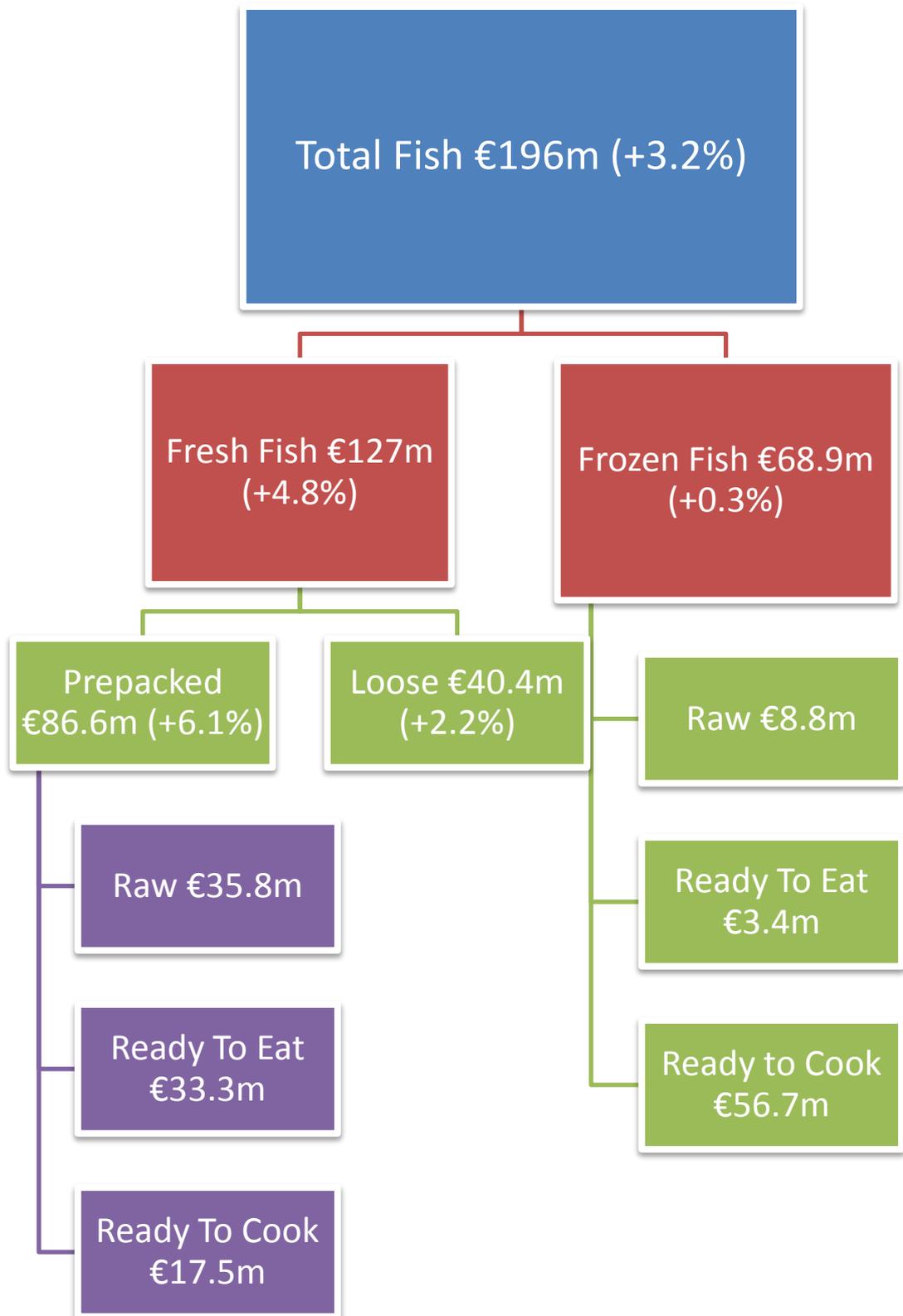


Figure 5: Source Bord Iascaigh Mhara ("BIM")



9. Route to Market

Direct to Retailer

Please see information on all multiples operating in the Republic of Ireland below. It gives detailed contact information as well as market share for fresh and frozen fish. The majority of consumer purchasing of fish occurs in retailers (59%).

Total Fish sales have increased by 3.2%, with a marked increase in sales of prepacked fish, with an increase of 6.1%.¹⁵ There are over 40 commercial species sold in Ireland, but the most popular being salmon with salmon accounting for €64m of sales (€57.2m Fresh and €6.7m frozen). Other popular fish in Ireland include cod which is worth €40.2m (fresh €15.5m and frozen €24.7m), coley worth €5.2m (fresh €5.1m and frozen €0.1m), haddock worth €8.8m (€4.7m fresh and €4.1m frozen), prawns worth €16.2m (€9.6m fresh and €6.6m frozen) and hake is worth €6.8m (€6.5m fresh and €0.3m frozen).¹⁶

Although the retail sales of fish are growing, it is not growing as fast as other proteins in the market and currently accounts for 2% of the grocery share. (Bord Bia)

Foodservice

Bord Bia estimates that value of fish purchased by foodservice was €79m in 2014.¹⁷ This accounts for 24% of total domestic sales.

Distributor

There are many distributors operating in Ireland that are specialised in seafood. Please see [here](#) for a directory of distributors operating in Ireland, which you can filter by category.

¹⁵ The Irish Seafood Development Agency, Bord Iascaigh Mhara, 2015

¹⁶ The Irish Seafood Development Agency, Bord Iascaigh Mhara, 2015

¹⁷ Bord Bia, Foodservice Channel 2014



Supermarket Retailers in Ireland, market share on for year on 4th January 2015¹⁸

	Tesco		Supervalu		Dunnes Stores		Aldi		Lidl	
Overall Market Share	25.6%		24.8%		22.2%		8.2%		7.9%	
Address	Gresham House, Marine Road, Dun Laoghaire, County Dublin.		('Musgrave Goup'), Musgrave House, Ballycurreen, Airport Road, County Cork.		46-50 South Great George's Street, Dublin 2.		Newbridge Road, Naas, County Kildare.		Great Connell Road, Newbridge, County Kildare.	
Phone	00353 (0)1 280 8441		00353 (0)21 452 2100		00353 (0)1 475 1111		00353 (0)45 846 300		00353 (0)45 440 400	
Website	www.tesco.ie		www.supervalu.ie		www.dunnesstores.com		www.aldi.ie		www.lidl.ie	
Share of Overall Market of...	Fresh Fish	Frozen	Fresh Fish	Frozen	Fresh Fish	Frozen	Fresh Fish	Frozen	Fresh Fish	Frozen
	20.8%	24.9%	27%	21.5%	21.7%	21.5%	4.4%	13.3%	10.1%	10.6%
Buying Practices	Buy direct		Buy direct		Buy direct		Buy direct		Buy direct	
Other Information	Fresh seafood counters in some larger stores. Mainly frozen and / or prepacked seafood sales.		Fresh seafood counters in some larger stores. Mainly frozen and / or prepacked seafood sales.		Fresh seafood counters in some larger stores. Mainly frozen and / or prepacked seafood sales.		Frozen and / or prepacked seafood sales only.		Frozen and / or prepacked seafood sales only.	

Table 3: Source Bord Iascaigh Mhara, Irish Seafood Retail Sales, January 2015

¹⁸ The Irish Seafood Development Agency, Bord Iascaigh Mhara, 2015



10. Labelling of fish and fishery products

The Irish market follows the European regulation No. 1169/2011 on labelling fish and fish products. For more information, please visit the Food Safety Authority of Ireland's ("FSAI") website [here](#). The FSAI outlines the following information on labelling fish and fish products in Ireland.

Mandatory Information

Article 35 of the Regulation sets out the mandatory information that must be provided for prepacked and non-prepacked products and specifies the following indications:

- Commercial and scientific name of the species
- Production method ("...caught..." or "...caught in freshwater..." or "...farmed...")
- Area where the product was caught or farmed
- Category of fishing gear used
- Whether the product has been defrosted (with limited exceptions)
- Date of minimum durability ('best-before' date) – where appropriate

In addition to the above, prepacked products must also display all the relevant information specified in European Regulation No. 1169/2011 Articles 9 and 10 of on the provision of food information to consumers.

Voluntary Information

The Regulation also permits the provision of the following information on a voluntary basis, provided that it is clear, unambiguous and verifiable:

- Date of catch of fishery products or the date of harvest of aquaculture products
- Date of landing of fishery products or information on the port at which the products were landed
- More detailed information on the type of fishing gear
- In the case of fishery products caught at sea, details of the flag State of the vessel that caught those products
- Environmental information
- Information of an ethical or social nature
- Information on production techniques and practices
- Information on the nutritional content of the product

Voluntary information must not be displayed to the detriment of the space available for mandatory information on the marking or labelling.

There is a useful guide on labelling fish and aquaculture consumer products produced by the European Commission which you can find [here](#).



11. Seafood Legislation

EU Legislation

According to the FSAI, the following regulations are applicable to fish and aquaculture consumer products, from EU legislation:

- Council Regulation (EC) No 1224/2009 of 20th November 2009 establishing a Community control system for ensuring compliance with the rules of the common fisheries policy
- Commission Implementing Regulation (EU) No 404/2011 of 8th April 2011 laying down detailed rules for the implementation of Council Regulation (EC) No 1224/2009 establishing a Community control system for ensuring compliance with the rules of the Common Fisheries Policy
- Regulation (EU) No 1379/2013 of the European Parliament and of the Council of 11th December 2103 on the common organisation of the markets in fishery and aquaculture products.

Amended by

- Council Regulation (EU) No 1385/2013 (OJ L354, p86, 28/12/2013) of 17 December 2013 amending Council Regulations (EC) No 850/98 and (EC) No 1224/2009, and Regulations (EC) No 1069/2009, (EU) No 1379/2013 and (EU) No 1380/2013 of the European Parliament and of the Council, following the amendment of the status of Mayotte with regard to the European Union
- Consolidated version of Regulation (EU) No 1379/2013 (as at 01 January 2014)
- Commission Implementing Regulation (EU) No 1420/2013 of 17th December 2013 of the European Parliament and of the Council on the common organisation of the markets in fishery and aquaculture products

Seafood – National Legislation

- European Communities (Labelling of Fishery and Aquaculture Products) Regulations, 2003 (S.I. No.320 of 2003)

S.I. No. 320 of 2003 gave effect to the previous rules on fishery and aquaculture products which have been repealed by Regulations EU No 1379/2013 and 1420/2013



12. Further Information

Useful Websites

General

Many Government funded bodies, regularly submit tenders, including for food supply contracts, onto the centralised Government procurement website. This website can be accessed at www.etenders.gov.ie.

A further Government website, www.procurement.ie, also contains tenders, as well as a list of certain upcoming, as of yet unpublished, opportunities.

For general information on Ireland, the publically funded Citizens' Information Agency, www.citizensinformation.ie, together with the Irish Government's gateway website, www.gov.ie, are useful starting points.

Sector Specific

The Sea-Fisheries Protection Authority - www.sfpa.ie

The Sea-Fisheries Protection Authority is an Irish statutory body charged with the effective and fair regulation of the Sea-Fishing and Seafood Sectors.

Bord Iascaigh Mhara - www.bim.ie

An official agency, Bord Iascaigh Mhara helps to develop the Irish Seafood Industry by providing technical expertise, business support, funding and training, together with promoting responsible environmental practice.

The Marine Institute- www.marine.ie

The Marine Institute is the Irish national agency responsible for Marine Research, Technology Development and Innovation (RTDI). It seeks to assess and realise the economic potential of Ireland's 220 million acre marine resource; promote the sustainable development of marine industry through strategic funding programmes and essential scientific services; and safeguard Ireland's marine environment through research and environmental monitoring.

Bord Bia (The Irish Food Board) - www.bordbia.ie

An official agency, Bord Bia exists to market Irish food both in Ireland and overseas. This includes seafood.

The Irish Department of Agriculture, Food and the Marine - www.agriculture.gov.ie

A Government department, it is similar in purpose and scope to the Department for the Environment, Food and Rural Affairs in the UK.



13. UKTI Contacts

UKTI Commercial Officer

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