Overseas Market Introduction Service on the Irish Seafood Market

Sea Fish Industry Authority
Order Reference: 4525/15

Produced by
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Dublin

Date of Report: 29th September 2015
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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%.  

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)

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.

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1 Bord Iascaigh Mhara, 2015, Irish Retail Seafood Market Performance
2 Bord Iascaigh Mhara, 2015, Irish Retail Seafood Market Performance
## 3. Trade Environment

### Geography

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Land Area</td>
<td>70,273 km²</td>
</tr>
<tr>
<td>Coastline</td>
<td>1,448 km</td>
</tr>
<tr>
<td>Capital</td>
<td>Dublin</td>
</tr>
<tr>
<td>Other main cities</td>
<td>Cork, Galway, Limerick and Waterford</td>
</tr>
</tbody>
</table>

### Population, Language & Culture

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population (2011 est.)</td>
<td>4.62m</td>
</tr>
<tr>
<td>Number of households (2011)</td>
<td>1.66m</td>
</tr>
<tr>
<td>Languages</td>
<td>English</td>
</tr>
</tbody>
</table>

### Economy

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total GDP (2014 est.)</td>
<td>$226.8 billion (in Purchasing Power Parity terms)</td>
</tr>
<tr>
<td>Real GDP Growth Rate (Q2 2015)</td>
<td>6%</td>
</tr>
<tr>
<td>GDP per capita (2014 est)</td>
<td>$49,200 (in Purchasing Power Parity terms)</td>
</tr>
<tr>
<td>Inflation Rate (2014 est)</td>
<td>0.3%</td>
</tr>
<tr>
<td>Unemployment Rate (August 2015)</td>
<td>9.4%</td>
</tr>
<tr>
<td>Currency</td>
<td>EUR (€)</td>
</tr>
<tr>
<td>Exchange rate</td>
<td>€:£ = 1:0.74</td>
</tr>
</tbody>
</table>

### Trade

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total food imports (2014 est.)</td>
<td>€6,152m; of which seafood €235m (Source: CSO)</td>
</tr>
<tr>
<td>Total food exports (2014 est.)</td>
<td>€9,322m; of which seafood €530m (Source: CSO)</td>
</tr>
<tr>
<td>Top 3 import partners (2014)</td>
<td>UK (30%), the US (11%) and Germany (8%)</td>
</tr>
</tbody>
</table>

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. 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. 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. 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. 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. 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.

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.

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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
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%).

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

Figure 2: Source SFPA (2015)

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10 The Sea Fisheries Protection Agency, 2015
With 1,914 fishing vessels registered in Ireland\textsuperscript{11}, 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.\textsuperscript{12}

\begin{figure}
\centering
\includegraphics[width=\textwidth]{landings_by_country_of_origin_tonnes.png}
\caption{Figure 3: Source SFPA (2015)}
\end{figure}

\begin{figure}
\centering
\includegraphics[width=\textwidth]{landings_by_country_of_origin_value_euro.png}
\caption{Figure 4: Source SFPA (2015)}
\end{figure}

\textsuperscript{11} The Irish Seafood Development Agency, Bord Iascaigh Mhara, 2015
\textsuperscript{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. The top 10 species account for 78% of the amount of fish landed in Irish ports and 81% of the total value.

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

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).  

<table>
<thead>
<tr>
<th>Port name</th>
<th>Tonnes</th>
<th>Value (000's €)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Killibegs</td>
<td>183053</td>
<td>112882</td>
</tr>
<tr>
<td>Castletownbere</td>
<td>35004</td>
<td>82103</td>
</tr>
<tr>
<td>Dingle</td>
<td>12221</td>
<td>25845</td>
</tr>
<tr>
<td>Dunmore East</td>
<td>11535</td>
<td>16569</td>
</tr>
<tr>
<td>Ros A Mhíl</td>
<td>4770</td>
<td>13869</td>
</tr>
<tr>
<td>Kilmore Quay</td>
<td>4705</td>
<td>13415</td>
</tr>
<tr>
<td>Howth</td>
<td>4481</td>
<td>10573</td>
</tr>
<tr>
<td>Clogherhead</td>
<td>1741</td>
<td>7974</td>
</tr>
<tr>
<td>Greencastle</td>
<td>3708</td>
<td>6998</td>
</tr>
<tr>
<td>Union Hall</td>
<td>2528</td>
<td>6892</td>
</tr>
<tr>
<td>Cobh</td>
<td>4631</td>
<td>5907</td>
</tr>
<tr>
<td>Rosslare</td>
<td>1413</td>
<td>3282</td>
</tr>
<tr>
<td>Ballycotton</td>
<td>1158</td>
<td>3218</td>
</tr>
<tr>
<td>Kinsale</td>
<td>2063</td>
<td>2703</td>
</tr>
<tr>
<td>Baltimore</td>
<td>2294</td>
<td>2422</td>
</tr>
<tr>
<td>Duncannon/St.Helens</td>
<td>1666</td>
<td>2041</td>
</tr>
<tr>
<td>Skerries</td>
<td>427</td>
<td>1500</td>
</tr>
<tr>
<td>Wicklow</td>
<td>1323</td>
<td>1480</td>
</tr>
<tr>
<td>Malin Head</td>
<td>1368</td>
<td>1448</td>
</tr>
<tr>
<td>Balbriggan</td>
<td>395</td>
<td>1407</td>
</tr>
</tbody>
</table>

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

Total Fish €196m (+3.2%)

Fresh Fish €127m (+4.8%)
  - Prepacked €86.6m (+6.1%)
    - Raw €35.8m
    - Ready To Eat €33.3m
    - Ready To Cook €17.5m
  - Loose €40.4m (+2.2%)

Frozen Fish €68.9m (+0.3%)
  - Raw €8.8m
  - Ready To Eat €3.4m
  - Ready to Cook €56.7m

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 2015

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

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

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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 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

Amended by
- Consolidated version of Regulation (EU) No 1379/2013 (as at 01 January 2014)

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**

- **Name:** Emma Shiel  
- **Job Title:** Team Leader for Trade Services  
- **Location:** UKTI Dublin  
- **Telephone:** 00353 (0)1 205 3757  
- **Email:** emma.shiel@fco.gov.uk

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**UK Trade & Investment (‘UKTI’)**

UKTI works with UK-based businesses to ensure their success in international markets, and encourage the best overseas companies to look to the UK as their global partner of choice.

UKTI has a **customer commitment** to helping its UK and international customers by providing a range of services, to a high standard and improve customer service by listening to customer feedback.

We also have a **co-ordination role across government** to establish a more systematic approach to relationships with companies which are the most economically significant investors and exporters.