



Irish seafood exports totalled
€577 million
in 2019.



195,000 tonnes
or **€275 million**
worth of Total Allowable
Catch was secured for
Ireland for 2020.



Over
16,150 people
are directly and indirectly
employed in the Irish
seafood sector.

5.1 Overview

The seas around Ireland are among the most productive and biologically sensitive areas in EU waters. As an island nation fishing has always been economically and socially important to Ireland. The natural, clean water around Ireland's 7,500km of coastline has provided exceptionally good seafood for thousands of years and it is important to protect this resource for future generations. Most of the fisheries resources within the area come under the remit of the Common Fisheries Policy (CFP).

The Common Fisheries Policy (CFP) that is currently in place came into force on the 1st January 2014. This policy is reviewed every 10 years with the next review scheduled for completion by the end of 2022. The overarching goal of this policy is to ensure that fishing and aquaculture are environmentally, economically and socially sustainable, thus resulting in a competitive and viable seafood sector for all.

Over 16,150 people are directly and indirectly employed in the Irish seafood sector, many of them based in Ireland's remote coastal communities where alternative employment options are limited. The success of the Irish seafood industry is vital to the economies of these regions, where it provides employment on fishing vessels, fish farms, in processing operations and in the distribution of seafood.

5.2 General Fisheries Situation in Ireland and the EU in 2019

Ireland:

According to the CSO the value of Irish seafood exports in 2019 was estimated to be in the region of €577 million, a slight increase on the value attained in 2018. The value of exports of salmon and mackerel, Ireland's most valuable seafood exports, both increased in 2019 after challenging conditions in 2018. Salmon increased by 28% in value with a volume increase of 22%, while mackerel exports increased in value by 7% despite an 8% drop in volume.

EU:

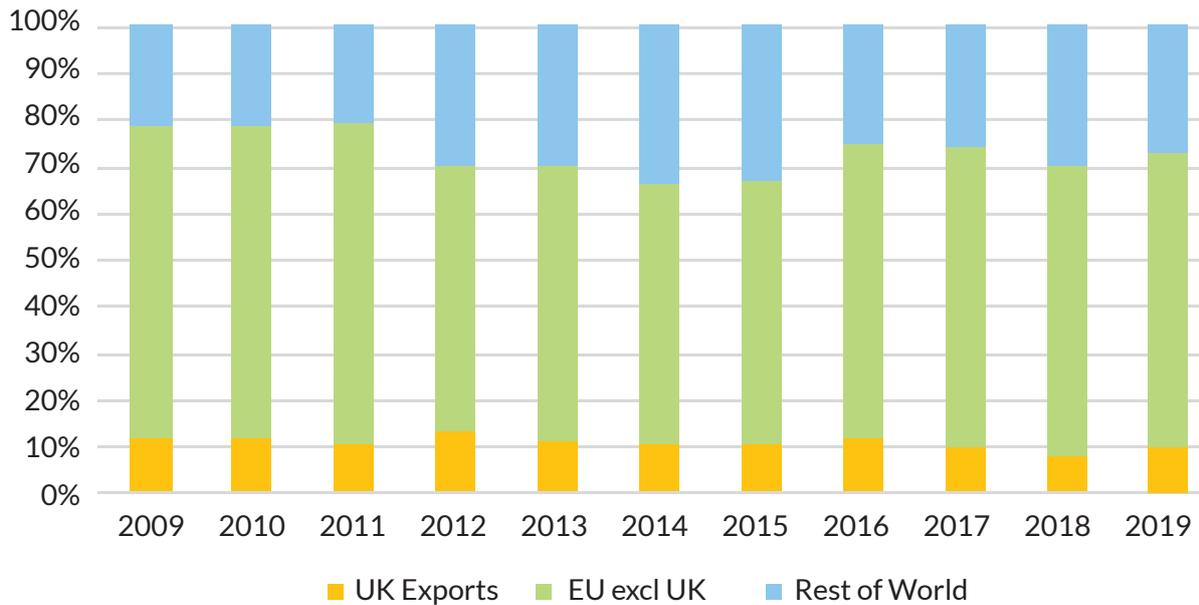
The main EU markets, France, Spain, Italy, Poland and Germany account for approximately 55% (€315m) of total exports by value.

International:

The International market accounted for approximately 36% (€206 million) of total exports in 2019. Exports to the three main Asian markets (China, Republic of Korea and Japan) were stable in value terms in 2019 compared to 2018. These markets accounted for 14% (€81 million) of total seafood export values. The wider South East Asian markets (China, Republic of Korea, Japan, Taiwan, Vietnam, Singapore, Malaysia and Thailand) accounted for over 15% (€86m) of total export values in 2019. Nigeria is also an important market for Irish fish with exports of 33,660 tonnes in 2019, mostly of frozen mackerel and frozen blue whiting. While 17% of our fish exports by weight went to Nigeria the value was closer to 5%. In contrast almost 15% of our fish exports by weight went to France with the value representing 25% of total fish exports.



Figure 5.1 Worldwide Fish exports by value, 2009-2019



Source: Central Statistics Office, Trade Statistics 2019

5.3 Seafood Exports

Trade:

In the pelagic sector, where the main commercial pelagic species caught by Irish vessels include mackerel, herring, horse mackerel and blue whiting, a reduction of 20% in Ireland's total allowable catch for mackerel had a direct impact on the volumes exported in 2019. However, prices and demand for Irish mackerel were strong particularly in Asia, where there was a shortage of stocks. The best performing pelagic markets in 2019 were in Asia and in Europe, while significant growth was seen in the UK and Middle East. Demand for Irish mackerel in China increased by around 61% in value during 2019.

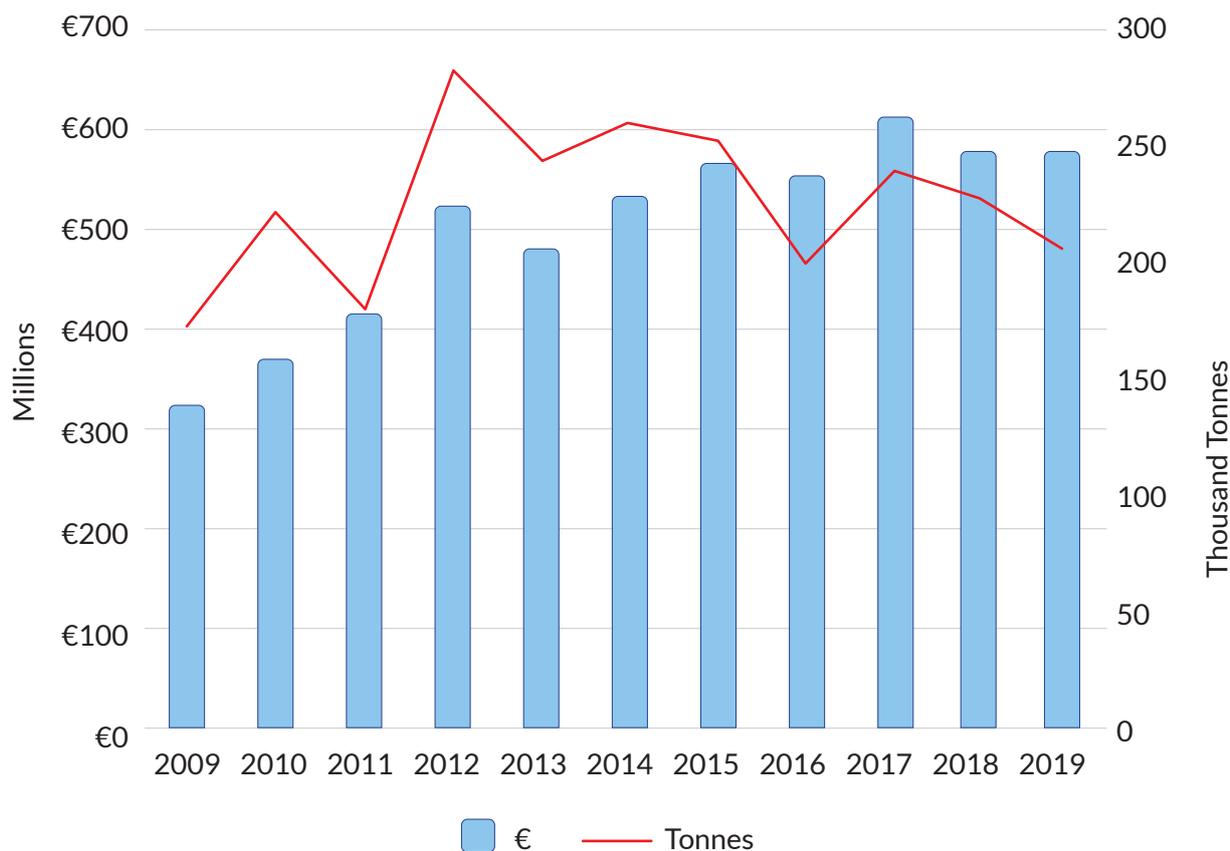
The African markets performed well earlier in the year but struggled to match the new price levels resulting in an annual reduction in both value and volume of about 26%. Core markets in Europe saw an increase in export values of 4% yet volumes declined 5%. Spain remains our main market for whitefish followed by the UK and France. The Irish whitefish total allowable catch remained relatively stable in 2019 compared to 2018.

Export values and volumes of Irish shellfish fell in 2019 after a number of challenges affected production throughout the year.

The Irish oyster sector had a bad year with export values and volumes decreasing by 14%. Exports of oysters to France and China declined significantly in 2019 with growth only seen in exports to the Netherlands and the United Kingdom; however these markets are relatively small.

In 2019, salmon export values increased by 28% driven by a 22% increase in volume and further price increases. The volume of fresh or chilled Atlantic salmon exported in 2019 increased by 33%. The French market continued to dominate Irish salmon exports, accounting for 40% of the total value in 2019. Exports to Poland doubled in 2019 from 1,000 tonnes to over 2,000 with value increasing from €9m to €21m year on year.

Figure 5.2 Value of Seafood exports, 2009-2019



Source: Central Statistics Office, Trade Statistics 2019

5.4 Brexit

Fisheries is one of the areas which will be most impacted by Brexit. For Ireland and the EU27 the position on fisheries is agreed and set down in the EU negotiating mandate, which states at paragraph 89 that:

- 'The provisions on fisheries should uphold existing reciprocal access conditions, quota shares and the traditional activity of the Union fleet, and therefore:
- uphold continued reciprocal access, for all relevant species, by Union and United Kingdom vessels to the waters of the Union and the United Kingdom;
- uphold stable quota shares, which can only be adjusted with the consent of both Parties'

The EU negotiating mandate commits that any fisheries agreement can only be agreed in the overall context of the future relationship in paragraphs 17, 86 and 90. It is also provided for in paragraph 73 of the Political Declaration.

The Programme for Government 2020 commits to 'defending the interests of Irish agriculture, fisheries, export businesses and the wider economy' and prioritises 'achieving the best possible deal for the Irish fishing industry in relation to access conditions, quota shares and the traditional activity of the EU fleet, while insisting that fisheries issues are dealt with as part of an overall trade deal.' By working closely with stakeholders and other concerned EU Member States, Ireland has ensured that Irish and EU fisheries interests and concerns remain high on the EU agenda and that fisheries have not been isolated in the overall Brexit negotiations.

Ireland has been working intensively in the European preparations for the UK's exit from the EU. All impacted Member States, in particular the Group of 8 Member States whose fishing industries would be most impacted by Brexit, including Ireland, France, Germany, Spain, Denmark, Sweden, the Netherlands and Belgium, are striving to mitigate the potential impacts of Brexit on fisheries. There have been intense interactions including with the Chief Negotiator Mr Michael Barnier and the EU Commissioner for Environment, Oceans and Fisheries, Virginijus Sinkevičius. The Group of 8 continue to reiterate their full commitment to the EU negotiating mandate and delivering an outcome that upholds our existing access and quota shares.

More than 70% of the total Irish fishing fleet, greater than 12 metres in length, operating in both whitefish and pelagic fisheries, would be impacted by loss of access to UK waters. Six fisheries including the high value prawn and mackerel fisheries, involving 173 of the largest Irish fishing trawlers would be most reliant on UK waters. Over a third of Irish landings come from the UK waters and for our most important stocks (mackerel and prawns) the figures are higher. Our fishing fleet is strongly dependent on access to fishing grounds in the Irish Sea, Celtic Sea and West of Scotland, which are wholly or partly within UK waters. The EU Member States most dependent upon landings from the UK zone are Belgium (50%), Ireland (34%), Denmark (30%), Netherlands (28%), France (19%) and Germany (18%). In absolute financial terms, France would be the biggest loser.

The UK demand is that quota shares are established on the basis of 'zonal attachment' and each year access to the UK fishing grounds are 'purchased' using the transfer of EU quota to the UK as recompense for this access. If the UK zonal attachment demand was applied, it would have huge negative consequences on Irish fisheries because the UK could claim a much higher proportion of the available fishing quotas for each stock each year. The UK 'zonal attachment' claim is based on the level of catches taken from UK waters. If this criterion was used, it would result in Irish fish quotas being cut by 35% in value. The displacement of the EU fleet from the Irish exclusive economic zone (EEZ) and/or the reduction in EU quota shares, if remedial measures are not taken, is likely to:

- lead to serious over-exploitation of stocks in our own EEZ;
- deliver substantial cuts to many of our quotas;
- cause a substantial control challenge for the Irish navy, and potentially conflict at sea.





The value of exports of salmon and mackerel, Ireland's most valuable seafood exports, both increased in 2019 after challenging conditions in 2018.

The Programme for Government provides that it will:

- Ensure protection of the interests of the Irish Fishing industry, by insisting that a Fisheries Agreement with the UK is concluded as an integral part of an overall EU Free Trade Agreement with the UK.
- Recognise that the critical issue in these negotiations for the Irish industry is continued access to UK waters and quota share and the danger of displacement of the EU fleet into Irish territorial waters.

The UK Landbridge is a commonly used trade route for the transport of fishery products landed to Irish ports by vessels of various EU Flag States. The Programme for Government 2020 assures to 'continue to underline the importance of the UK Landbridge with the European Commission negotiating team and engage with our partners in France, the Netherlands, Belgium and Germany, to ensure the UK Landbridge remains a viable and efficient route to market.' DAFM continues to work closely with the Department of Foreign Affairs and Trade, and our European colleagues on this important issue.

The implementation of the Northern Ireland Protocol is also highlighted as a key priority in the Programme for Government 2020. The practical application of the withdrawal arrangements under the Northern Ireland Protocol in respect of a fisheries is under consideration. The Voisinage arrangement, which gives access to fish in Irish waters from the baselines to six nautical miles for Northern Ireland owned and operated vessels, and gives Irish fishing vessels access to Northern Ireland waters from the baselines to six nautical miles, may also need to be provided for in a new Fisheries agreement.

The Programme for Government 2020 commits that the new Government 'will work to ensure that Ireland is Brexit-ready for all possible outcomes.' The focus now will be to continue to work to ensure the best possible outcome for the seafood sector.

5.5 Common Fisheries Policy

One of the main objectives of the Common Fisheries Policy (CFP) is to allow for the rebuilding of fish stocks in European waters over time, which will support the viability of the European fishing industry through long term management of stocks, reducing and eliminating discards and rebuilding stocks to Maximum Sustainable Yield (MSY).

Implementation of the key elements of the CFP continued throughout 2019 at both EU and national level. Some of the key features are:

Maximum Sustainable Yield - Maximum Sustainable Yield (MSY) is the level which allows the highest catch of fish while keeping stocks sustainable in the long term. 2019 marked the deadline under the Common Fisheries Policy (CFP) to end overfishing by setting Total Allowable Catches (TAC) in accordance with the scientific advice. This means that for most stocks, where sufficient advice is available, quotas have been set at levels that ensure long-term sustainability, in line with the MSY principle.

At the December 2019 Agriculture and Fisheries Council, fishing opportunities or TACs were negotiated and fixed in line with the MSY objective. 195,000 tonnes of quotas worth €275 million was secured for Irish fishermen for 2020.

Phased ending of discards – The discard ban or landing obligation, which is a key element of the Common Fisheries Policy (CFP), was phased in over a number of years and was fully implemented in 2019. The ending of the wasteful practice of discarding fish is a key tool for the long-term conservation and sustainability of fish stocks around our shores and the long term sustainability of fishing in Ireland and throughout EU waters. The phased implementation period allowed the fishing industry to adjust and implement changes to avoid non-target species.

Multi-annual fisheries plans - The aim of multi-annual fisheries plans is to restore and maintain fish stocks at sustainable levels while ensuring the social and economic viability for fishermen operating in certain regions. In March 2019, the European Council adopted the multiannual plan for management of fisheries in Western Waters, which is extremely important from an Irish perspective. The regulation sets out a comprehensive management plan including all relevant fish stocks and sets fishing objectives for the key target species. It ensures these stocks are fished in line with the MSY principle while by-catches are managed accordingly to the precautionary approach.

Regionalisation - The last reform of the CFP changed the way in which the Common Fisheries Policy is managed, giving EU Countries with mutual interests greater control at national and regional level. The North West Waters Regional Group of Member States (Ireland, Belgium, France, Netherlands, Spain and, formerly, the UK) meet regularly, to agree discard plans and other fisheries measures in consultation with the relevant stakeholders. The North Western Waters (NWW) Group consults the relevant Advisory Councils on a regular basis. The Advisory Councils comprise stakeholders from the fishing industry, environmental NGOs, consumers representatives, recreational anglers and civil society. The NWW Group met throughout 2019 to discuss various implementation issues and to work on additional measures following the full implementation of the landing obligation.

5.6 Fish Quota Management

In 2019, DAFM was responsible for managing over 193,606 tonnes of fish quotas. The management arrangements for quotas differ from species to species and are determined by the Minister for Agriculture, Food and the Marine following regular formal consultation with Industry representatives. A key objective of whitefish quota management is the avoidance of very early closure of fisheries through rapid exhaustion of the quota. This is important because our whitefish fisheries are mixed and an early closure may lead to discarding of fish and would undermine the effective implementation of the landing obligation which prohibits discarding of fish at sea.

There are 9 principal managed pelagic stocks (Mackerel, Irish Sea Herring, Celtic Sea Herring, North West Herring, Atlanto-Scandian Herring, Horse Mackerel, Blue Whiting, Boarfish and Albacore Tuna) and the particular management of each is further subdivided between various sectors of the fleet. The fishing of pelagic species is generally confined to the spring and the autumn. Since 1 January 2015 pelagic stocks have been subject to the landing obligation.

To align the principles of the landing obligation to Ireland's quota management system, in December 2017 a conservation measure (a Pilot Quota Balancing Policy for Pelagic Stocks) was put in place at the request of and in cooperation with Industry representatives. This was expanded to cover 5 key Demersal (whitefish) stocks in policy set down in April 2019.

The Quota Balancing system is a management conservation and rational exploitation measure to aid matching catch limit to actual catch to support landing obligation requirements. The landing obligation as provided for under Article 15 of Regulation (EC) No.1380/2013 (CFP) relates to conservation. Quota balancing means that when a catch allocation to a vessel is exceeded, a balancing adjustment will be made from future allocations of fishing opportunities and will operate independently of any action being considered or taken by the control authorities.

Quota Balancing is being implemented on a phased basis. Pelagic stocks were quota balanced for the years 2018 and 2019. Quota Balancing for the five key Demersal (Whitefish) Stocks will be implemented in 2020.

5.7 The Irish Fishing Fleet

The Irish fishing fleet can be broken down into five categories:

Specific

This category covers vessels permitted to fish for bivalve mollusc and aquaculture species. There were 151 vessels registered under this category at year end 2019.

Polyvalent

Polyvalent vessels totalling 1,723 made up the majority of the Irish fishing fleet in 2019. These vessels are multi-purpose and include both smaller inshore vessels and medium or large offshore vessels used to land whitefish, pelagic fish and bivalve molluscs.

Beam Trawler Segment

This category contained 10 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.

Refrigerated Seawater (RSW) Pelagic Segment

This segment contained 23 vessels engaged predominantly in fishing for pelagic species (primarily herring, mackerel, horse mackerel and blue whiting).

Aquaculture Segment

The 97 vessels in this category must be exclusively used in the management; development and servicing of aquaculture areas and can collect mussel seed subject to an authorisation for that purpose under section 13 of the Sea-Fisheries and Maritime Jurisdiction Act 2006, as part of a service to aquaculture installations.

Table 5.1 *The Irish Fishing Fleet 31 December 2019*

Irish Fishing Fleet 31 December 2019			
Segment	Number of vessels	Gross Tonnes	Kilowatts (KW)
Polyvalent	1,723	32,918	117,177
Pelagic	23	24,876	47,109
Beam Trawl	10	1,139	2,818
Specific	151	2,267	12,240
Total	1,907	61,200	179,344
Aquaculture	97	4,280	11,673

Source: Licensing Authority for Sea Fishing Board

5.8 Employment

With over 16,000 direct and indirect jobs across fisheries, aquaculture, processing and ancillary sectors, the seafood industry plays a vital role in the sustainable economic viability of many coastal communities across Ireland.

Table 5.2 *Employment in the Seafood Industry, 2018 and 2019*

	2018			2019		
	Full Time	Part Time	Total	Full Time	Part Time	Total
Fisheries	2,603	628	3,231	2,390	643	3,033
Aquaculture	1,064	861	1,925	1,061	887	1,948
Processing	2,904	988	3,892	3,229	977	4,206
Ancillary			5,311			6,962
Total			14,359			16,149

Source: Bord Iascaigh Mhara

5.9 Aquaculture

In December 2016, an independent Aquaculture Licensing Review Group was appointed by the Minister to review the process of licensing for aquaculture and its associated legal framework. The report of the Licensing Review Group was submitted to the Minister in May 2017.

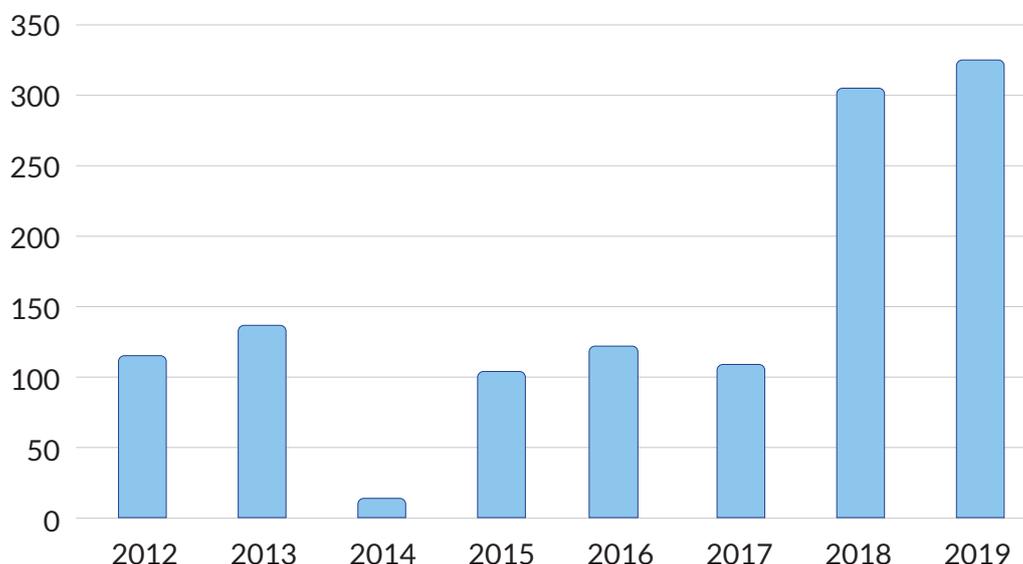
The Review Group carried out a detailed investigation of the existing aquaculture licensing process, undertook comprehensive stakeholder consultation and examined comparative national and international consent systems to determine best practice for managing a complex licensing process in a transparent, environmentally appropriate and legally robust manner.

Since receiving the Report of the Review Group, DAFM has engaged in detailed consideration of the recommendations set out in the Report with a view to their implementation, having regard to the legislative, environmental, technical and public interest issues that arise. DAFM has also engaged closely with industry representatives and relevant State Agencies.

5.10 Aquaculture Licensing

In 2017 DFAM put in place a two-year programme to eliminate the backlog of shellfish licensing applications. This resulted in 305 and 324 licence determinations achieved in 2018 and 2019 respectively.

Figure 5.3: Aquaculture Licence Determinations 2012-2019



Source: Department of Agriculture, Food and the Marine

Approximately 1200 licence determinations have been made since 2012, with 305 and 324 licence determinations achieved in 2018 and 2019 respectively. This eliminates the shellfish licensing backlog as an issue affecting the aquaculture industry. The elimination of the shellfish licensing backlog is a significant development for the industry and provides the solid footing for the future.

The processing of applications for finfish licences in the marine environment is significantly more complex than the situation in relation to shellfish aquaculture, due to the requirement for operators to produce Environmental Impact Statements/ Environmental Impact Assessment Reports and for DAFM and relevant Agencies to analyse these reports in detail. DAFM must then produce an Environmental Impact Assessment in relation to each application.

DAFM currently has seven new/renewal applications for finfish licences on hand for which recent Environmental Impact Statements/Environmental Impact Assessment Reports were submitted. These applications and environmental reports are being examined with a view to progressing to the public and statutory consultation phases of the licensing process.

DAFM has formally requested finfish operators to submit Environmental Impact Statements for the remainder of the licence renewal applications held. This request issued to all operators in December 2018 and it specified the deadline for submission of the necessary documentation to be 30th September 2019. The deadline for submission of the Environmental Impact Statements has been extended the on two occasions, the most recent to 31st December 2020 in response to indications from industry that meeting such deadlines has proven and continues to be challenging. As of now, the initiative lies with the finfish operators to respond to the DAFM's request. The current COVID-19 crisis may have an impact on this.

Currently the operators in question continue to operate their salmon farms under the provisions of Section 19A (4) of the 1997 Fisheries (Amendment) Act. This effectively allows them to continue to operate (after the expiry of their aquaculture licences) subject to the terms and conditions of their original aquaculture licences pending the determination of their renewal applications.

5.11 Inshore Fisheries and Natura 2000 Management

Developing Sustainable Inshore Fisheries

The National Inshore Fisheries Forum (NIFF) met on four occasions during 2019 to discuss and develop proposals concerning inshore fisheries and their interactions with Natura 2000 sites. The NIFF and the supporting network of six Regional Inshore Fisheries Forums (RIFFs) were established to facilitate development and implementation of policies and initiatives relating to the sustainable management of inshore fisheries. Since their inception, the Forums have developed initiatives seeking to protect the future of a sector which is extremely important for Irish coastal communities. The Irish inshore sector comprises fishing boats of less than 12 metres in overall length, which are predominately active within six nautical miles of the Irish shore. The RIFFs cover six regions around the coast: North East, South East, South West, West, North West and North. The Forums involve representation from inshore fishermen, environmental interests, marine leisure, marine tourism and other marine stakeholders. A dedicated website provides information on the work of the Forums: www.inshoreforums.ie.

In January 2019, the NIFF finalised a strategy for the Irish inshore fisheries sector. The [Strategy for the Irish Inshore Fisheries Sector 2019-2023](#), which was launched in February, is the first industry-led blueprint for the sector. The NIFF first identified the development of a strategy for the sector as a priority in 2017. The strategy was developed through an extensive process involving the NIFF and the RIFFs, and an inclusive approach was taken to identifying key issues and priorities for the sector, including a steering group with industry and State partners, a dedicated workshop and public consultation. The development process was co-funded by the Government of Ireland and the European Union under Ireland's European Maritime and Fisheries Fund Operational Programme. The strategy identifies objectives and actions that will shape the work of the Forums over the next few years. Bord Iascaigh Mhara (BIM) is leading implementation of the strategy, which will seek to target funding support available under the European Maritime and Fisheries Fund to where it can be most effectively used. A strategy implementation group, which includes DAFM, BIM, the Marine Institute, the Sea-Fisheries Protection Authority and industry representatives, has identified priority actions under the strategy and is monitoring and driving implementation progress.

An industry proposal recommended by the NIFF to increase the Minimum Conservation Reference Size (MCRS) for landings of brown crab was approved in January 2019. This conservation measure raised the MCRS to 140mm for brown crab taken by Irish sea-fishing boats in waters around Ireland (ICES areas VI and VII), an increase on the 130mm MCRS set out in EU legislation. The proposal was initiated by members of the fishing industry in the South East, and brought forward by the South East RIFF, to support the sustainability of the brown crab fishery by allowing brown crab more time to reproduce. The introduction of the measure followed an extensive consultation process involving the NIFF and RIFFs. Also, a three-week public consultation on the proposal was held in 2018, with 27 of the 28 submissions received supporting the increase. The measure was given legal effect through a statutory instrument ([S.I. No. 26 of 2019](#)).

Another industry initiative, to provide legal protection for v-notched crawfish, was approved in May. This conservation measure prohibits v-notched crawfish from being landed by or retained onboard Irish sea-fishing boats or being offered for sale. Such crawfish need to be returned alive to the sea. The measure stemmed from a proposal developed by members of the fishing industry in the southwest in consultation with the Marine Institute. Industry members sought legal protection for crawfish v-notched under a Marine Institute research project in that region. The protection should enable the multiple recapture and release of v-notched crawfish that will provide information on migration, growth and reproduction and promote an increase in the spawning potential of crawfish. The proposal was brought forward through the South West RIFF and, with unanimous support from the RIFFs, was recommended by the NIFF and this conservation measure was given legal effect through a statutory instrument ([S.I. No. 289 of 2019](#)).



In January 2019, the NIFF finalised a strategy for the Irish inshore fisheries sector.

The Strategy for the Irish Inshore Fisheries Sector 2019-2023, which was launched in February, is the first industry-led blueprint for the sector.

Management of the all-island mussel seed fishery continued in 2019, with the autumn fishing season commencing in the Irish Sea in late September and starting in Castlemaine Harbour, Co. Kerry, in early October (see Natura 2000 section below). The fishery continues to be certified by the Marine Stewardship Council (MSC). The current certification, which was issued in 2018 and is valid for five years, says the fishery has been found to comply with the MSC requirements and is well-managed and sustainable. This follows a previous conditional certification received in 2013. At the end of 2019, a six-week public consultation took place to seek the views of those with an interest in the Irish Sea mussel seed fishery regarding the management arrangements in place for the fishery. The consultation concluded on 31 December with 86 submissions received. The information received during the public consultation will inform policy decisions on the management arrangements for the fishery. The aim is to examine the current management arrangements for the fishery and consider changes that could better support productivity and sustainability.

CASE STUDY

Strategy for the Irish Inshore Fisheries Sector 2019-2023

The Irish inshore sector comprises fishing boats of less than 12 metres in overall length, makes up approximately 80% of the Irish fishing fleet, operates from communities all around the Irish coast, and supports an estimated 2,500 to 3,000 jobs. In 2017, the National Inshore Fisheries Forum (NIFF) set out to develop the first industry-led strategy for the sector.

A Steering Group was made up of industry members from NIFF and State partners, including DAFM and the marine agencies. An inclusive approach was taken to identify key issues and priorities for the sector, including a dedicated workshop with industry stakeholders, as well as a public consultation. The development process was co-funded by the Government of Ireland and the European Union under Ireland's European Maritime and Fisheries Fund Operational Programme.

The NIFF finalised the Strategy for the Irish Inshore Fisheries Sector 2019-2023 at the start of 2019, and it was launched that February. The strategy identifies a number of objectives linked to specific actions that will shape the work of the Inshore Fisheries Forums over the next few years. Bord Iascaigh Mhara (BIM) is leading implementation of the strategy, in partnership with the NIFF and the inshore sector. The implementation process will seek to target funding support available under the European Maritime and Fisheries Fund to where it can be most effective.

A strategy implementation group, which includes the DAFM, BIM, the Marine Institute, the Sea-Fisheries Protection Authority and industry representatives, is monitoring and driving implementation progress. Priority actions under the strategy have been identified by the implementation group, and it has set up three working groups to address these, focusing initially on the development of an inshore sector profile, building the capacity of the sector to engage with policy development and increasing the sector's understanding of inshore fisheries management.



Implementation of Natura 2000 Directives

Natura 2000 is an EU network of core breeding and resting sites for rare and threatened species, and some rare natural habitat types which are protected in their own right. The Marine Institute (the state agency responsible for marine research, technology development and innovation in Ireland) previously prepared a risk assessment of sea-fisheries interactions with Natura 2000 protected species and habitats along the South and West coasts of Ireland. It expects to complete a similar assessment for protected bird species in 2020. These assessments are being made under Article 6.2 of the European Union's Habitats Directive. A similar risk assessment was completed by the Institute in 2013 for fishing activities in Natura 2000 sites in the Irish Sea (East coast). Working with the National and Regional Inshore Fisheries Forums, the Government has commenced actions to address risks posed by sea-fisheries activities on a priority basis.

A request to amend the fisheries Natura plan for the mussel seed fishery in Castlemaine Harbour, Co. Kerry, was made in September 2019 by Bord Iascaigh Mhara (BIM) on behalf of industry members in the harbour. BIM provides the Secretariat for the Bottom Grown Mussel Consultative Forum. On screening, the requested amendment was not found to be a material change to the plan that would require appropriate assessment, and amendment was approved at the start of October 2019. Also, a fisheries Natura declaration was issued in October to extend the boundaries of an area around Dalkey Island where fishing for mussels is prohibited, accepting a recommendation from the Marine Institute to close the area on a precautionary basis due to the presence of protected reef habitat.

Clean Oceans Initiative

The Clean Oceans Initiative was launched in January 2019 to address the issue of marine plastic pollution. During the first 12 months of the Clean Oceans Initiative, 96% of Irish trawlers signed up to the initiative. BIM and the Harbour Masters of the 6 Fishery Harbour Centres owned and managed by DAFM, have been working with the fishing industry in relation to the pollution in our marine environment and marine litter. DAFM and BIM will continue to work with the fishing industry in 2020 to gain 100% participation to the initiative.

There are two EU Directives that will be a key driver in relation to marine litter in 2020.

Single Use Plastics Directive

Directive (EU) 2019/904, published on 12 June 2019, forms part of the European Commission's plastics strategy which commits the EU to tackling litter, boosting recycling rates and improving the design of plastic products. The directive must be transposed by 3 July 2021. BIM has been working with the fishing industry for a number of years to tackle the pollution in our marine environment and is the lead agency in relation to matters of marine litter.

The objectives of this directive, which apply to fishing gear containing plastic include:

- Reducing the impact of fishing gear containing plastic on the environment and human health;
- Promoting the transition to a circular economy; and
- Fostering innovative business models, products and materials.

DAFM is actively engaged with the Department of Communications, Climate Action and Environment to support the transposition of the Single Use Plastics Legislation into Irish law.

Port Reception Facilities Directive

Directive (EU) 2019/883 of the European Parliament and of the Council of 17 April 2019 on port reception facilities for the delivery of waste from ships, amending Directive 2010/65/EU and repealing Directive 2000/59/EC requires that vessels land waste they produce during voyages to and between EU ports to Port Reception Facilities. It also requires ports to develop waste handling plans and provide Port Reception Facilities to the ships using their ports. It builds on existing international arrangements, principally MARPOL 73/78. These regulations apply to all ships (including fishing vessels and recreational craft) and all ports within the State visited by such ships.

Local competent authorities (in most cases the port in question) must develop and implement an appropriate waste reception and handling plan for their respective ports. The plan should be available for public inspection and also available to all port users at the port. DAFM is working with the Department of Transport, Tourism and Sport to support the transposition of the Port Reception Facilities Legislation into Irish law before the 28 June 2021 deadline.

5.12 Sustainability in the sector

Common Fisheries Policy-Maximum sustainable yield (MSY)

The Common Fisheries Policy stipulates that fishing will be progressively managed at maximum sustainable yield (MSY) levels where possible by 2015 and by 2020 at the latest. In practice this means taking the highest possible amounts of catches from the sea, while keeping fish stocks healthy. In the North-East Atlantic and adjacent waters (North Sea, Baltic Sea, Skagerrak, Kattegat, West of Scotland Sea, Irish Sea and Celtic Sea), EU fisheries ministers set overall catch limits based on scientific advice. These total allowable catches (TACs) are then divided into national quotas, which set limits on the amount of fish that can be caught.

The catch limits set for the species in the waters around Ireland have seen over-exploitation decline significantly over the last number of years. In the northeast Atlantic, the pressure on fish stocks from fishing has decreased steadily since 2003 with biomass (the measure of a quantity – usually weight – of stocks) increasing since 2007.

Marine Strategy Framework Directive (MSFD)

Under the Marine Strategy Framework Directive, Ireland is required to take measures towards achieving and maintaining Good Environmental Status (GES) for its waters by 2020. The criteria for determining GES includes areas such as: integrity of the seabed, the status of commercial fish and shellfish stocks, and by-catch impacts on non-commercial fish and other marine fauna.

From mid-2019 to early-2020, work was undertaken on compiling data for the second cycle of the Marine Strategy Framework Directive (MSFD) and is being led by the Department of Housing, Planning and Local Government. This resulted in a report for the European Commission on whether GES is being achieved for different areas. This process will eventually result in a new Programme of Measures which will take into account any developments in the GES observed since the last cycle of environmental status allocation. The Sea-Fisheries Policy and Management Division (SFPMD) sits on both the working group and the National Steering Group for MSFD.



5.13 Research Projects: Fisheries & Aquaculture

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Funding:
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ToxVib: Genomics to Investigate Risks of Toxin-Producing Vibrio in Irish Shellfish. The marine bacteria *Vibrio* cause gastroenteritis after consumption of infected shellfish. Due to climate change and warmer marine waters, these bacteria have now extended into Europe, leading the EU to classify *Vibrio* as emerging pathogens posing a serious threat to human health. Dr Aoife Boyd (NUIG) and Dr Fiona Walsh (MU) will investigate potential risks to shellfish aquaculture and human health in Ireland from pathogenic *Vibrio*. We will assess environmental effects on presence of toxigenic *Vibrio* in oysters and mussels. Genomic analysis will identify disease-causing genes of Irish *Vibrios*. Genes for TTX, a potentially fatal neurotoxin recently discovered in European shellfish, will be targeted for developing novel DNA detection methods. This project will help sustain and grow Irish shellfish production, by assessing current and forthcoming risks of pathogenic *Vibrio*. This knowledge will minimise contaminated shellfish reaching the market and table, reduce cases of seafood-borne gastroenteritis and increase human wellbeing.

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SarcoBlu: Blue whiting protein hydrolysates for management of sarcopenia. This project focuses on the development of blue whiting protein digestion products (hydrolysates) for application in the management of sarcopenia. Consumption of high quality protein/protein hydrolysates has the potential to reduce the extent of sarcopenia, a condition linked with the loss of muscle mass and strength in the elderly. The specific objectives of this project are: to generate and fully characterise blue whiting protein hydrolysates, to determine the potential of specific hydrolysates to promote cell regeneration and protein synthesis in muscle cells, and to perform a human trial to assess the ability the protein hydrolysates to beneficially alter parameters associated with the risk of developing sarcopenia. In developing scientific evidence of the ability of hydrolysates to protect against the development of sarcopenia, the project will impact public health by improving the quality of life for elderly populations resulting in reduced healthcare costs while adding value to the marine processing sector.

5.14 Highlights

Inshore Fisheries and Natura 2000 Management

The National Inshore Fisheries Forum (NIFF) finalised the first industry-led strategy for the Irish inshore fisheries sector in January 2019. The Strategy for the Irish Inshore Fisheries Sector 2019-2023 was launched at the end of February 2019. It identifies objectives and actions that will shape the work of the Inshore Fisheries Forums over the next few years. Bord Iascaigh Mhara is leading the strategy's implementation, and a strategy implementation group (which includes representatives from DAFM, State agencies and industry) is monitoring and driving implementation progress.

Total Allowable Catches (TACs)

The 2020 fishing opportunities or TACs (Total Allowable Catches) secured for Ireland at the December 2019 Agriculture and Fisheries Council amounts to 195,000 tonnes of quotas worth €275million for the Irish Fishing Industry for 2020. This was a balanced outcome, delivering on sustainability objectives and ensuring a strong result against the challenging backdrop of Brexit.

Quotas were first introduced into European fisheries in 1982. Since their introduction Ireland's has fluctuated quite significantly. These peaks and troughs have largely been driven by variability in pelagic quotas such as blue whiting, horse mackerel and boarfish. Ireland's 2020 share of the total allowable catch (TAC) for all stocks represents a marginal increase on 2019 but in overall terms is well above the average allocation received over the 1982-2019 period.

Seafest 2019

SeaFest 2019 attracted over 90,000 visitors to Cork City Docklands during the three-day event from 7-9 June 2019. As Ireland's national maritime festival, SeaFest aims to strengthen our maritime identity, increasing participation and engagement with the sea in accordance with Goal 3 of Harnessing Our Ocean Wealth, Ireland's Integrated Marine Plan. Working together with Cork City Council and a wide range of partner agencies and organisations, the Marine Institute co-ordinated SeaFest on behalf of the cross-government Marine Coordination Group, which is chaired by the Minister for Agriculture, Food and the Marine. DAFM's marine agencies, BIM, SFPA and Bord Bia were central to the event.

The associated sixth 'Our Ocean Wealth Summit' also took place as part of Seafest. The 750 delegates attending the event on the 10th June at Cork's City Hall heard from leading national and international speakers including former US Secretary of State John Kerry. The principal discussions focussed on climate change impacts on the health of our shared oceans resources. Minister Michael Creed TD addressed delegates at the Summit, welcoming continuing positive growth trends in Ireland's Blue Economy and sharing Ireland's recent experiences with sustainable blue growth initiatives. The Minister also launched, on behalf of Government, the annual Harnessing Our Ocean Wealth Review of Progress.

At a local level in the host city of Cork, it is estimated that SeaFest and associated events in 2019 generated €4.1 million in direct income for the city's tourism industry. SeaFest also received a national award for 'Best Cultural Event' at the 2019 Event Industry Awards and was described by judges as "a great celebration of Ireland's maritime heritage that serves an important cultural purpose".



5.15 Ireland and EU Outlook 2021-2022

The EU faces an unprecedented challenge over the next number of years as it adapts to managing fish stocks shared with the UK. At this point, it is not clear how the UK's withdrawal from the EU will be effectively managed from a fisheries perspective. It is likely that the UK, in the short term at least, will follow the same policy as the EU in terms of setting TACs in line with MSY. However, there is no clarity on how the UK will address issues such as the discards ban, technical measures and by-catch only stocks.

A review of the current Common Fisheries Policy (CFP) is expected to be completed by the end of 2022. The European Commission has indicated that it will commence the review process when there is clarity on the future relationship of the EU and the UK. The review of the CFP is a detailed process involving extensive consultation with stakeholders across the EU.

The fishing industry, like all sectors of the economy, has been impacted by the COVID-19 Pandemic. Nonetheless, in spite of the difficulties, the fishing industry has continued to keep food in our shops and on our tables during this extraordinary time. This has highlighted the vital role that the fishing industry plays in the food chain. This, in turn, underscores the importance of ensuring the sustainability of our fish stocks. Due to the closure of the food service sector around the world during the pandemic and transportation issues, exports of fish from Ireland were down around 20% in value during the first four months of 2020.

The need for a sustainable and resilient food chain to ensure food security is central to the EU's Farm to Fork Strategy published in May 2020. This aim of this strategy is to accelerate the EU's transition to a sustainable food system.

These strategies will help us to continue to build on the progress that has been made to date – build and maintain healthy fish stocks, protect vulnerable species and protect the marine ecosystem upon which our fishing industry, and the communities it supports, depends.

5.16 Fisheries & Aquaculture decade review

The Common Fisheries Policy

The Common Fisheries Policy (CFP) which is currently in place came into force on the 1st January 2014. This was one of the key achievements of the Irish Presidency in 2013 and was secured after many months of complex negotiations with the European Parliament. This policy is reviewed every 10 years with the next review scheduled for completion by the end of 2022. This radical reform placed the concept of long-term sustainability at the core of fisheries policy with the aim of ushering in a new era of more sustainable fishing.

Some of the key features of the CFP which have been delivered over the period from 2014 include:-

- **Fishing at Maximum Sustainable Yield by 2020:** At the December 2019 Agriculture and Fisheries Council, fishing opportunities or TACs (Total Allowable Catches) were negotiated and fixed in line with the MSY objective. For 32 of the 47 stocks of particular interest to Ireland, the quotas for 2020 were set at or below the scientific advice where available, meeting MSY criteria. For other stocks, the Council agreed restrictive or precautionary quotas to allow for unavoidable by-catches or the collection of scientific data.
- **Landing Obligation implemented by 1 January 2019:** The objective of the Landing Obligation (also referred to as the 'discards ban') is to eliminate the wasteful and unsustainable practice of discarding. Since October 2014 the European Commission has adopted several discard plans, within the parameters laid down in Article 15 of the Common Fisheries Policy, in the waters of interest to Irish fishermen in preparation for the full implementation of the landing obligation in 2019.
- **Regionalisation:** This was one of the most significant changes introduced by the revised CFP in 2014. Regionalisation gives EU countries greater control at national and regional level on issues such as implementation of the Landing Obligation and technical and conservation measures to protect juvenile fish and vulnerable fish species. Ireland is part of the North Western Waters (NWW) Regional Group of Member States along with France, Spain, Belgium and the Netherlands. The UK was also a member of the NWW group before its withdrawal from the EU. Stakeholders, through Advisory Councils, including the fishing industry, are fully consulted on all options and input into the regular meetings of the North West Waters Group. The EU Commission implements such agreed policies at EU level applicable to the region.

Harnessing Our Ocean Wealth – Developing Ireland's Blue Economy

Ireland's Integrated Marine Plan (IMP), Harnessing Our Ocean Wealth was published in 2012 and set out the Government's Vision, High-Level Goals, and Key 'Enabling' Actions to put in place the appropriate policy, governance and business climate to enable our marine potential to be realised.

The cross Departmental Marine Coordination Group (MCG) chaired by the Minister for Agriculture Food and the Marine, continues to review and report on progress in implementing Ireland's Integrated Marine Plan. This is carried out on an ongoing basis through:

- regular meetings of the MCG and other inter-departmental/agency forums,
- publishing an annual Review of Progress,
- holding an annual Our Ocean Wealth Conference/SeaFest Events, and
- publishing Status Reports/news items on specifications.

The sixth Annual Review of Progress published in June 2019 provides an overview of the main activities across a range of actions undertaken by Government Departments and their State bodies in 2018 in relation to the Marine. A copy of the annual review is available at the following link; <https://www.ouroceanwealth.ie/publications>.

A review of the first IMP is currently underway and will help to inform future policy in relation to the marine economy.

The Marine Strategy Framework Directive (MSFD)

The first Cycle of the MSFD ran from 2012 to 2018. This involved the setting of initial objectives and indicators as well as the initial assessments. Following this, Monitoring Programmes were put in place and a Programme of Measures (PoMs) was written. The current MSFD PoMs was submitted to the European Commission in July 2016. The main purpose of the PoMs is to put in place actions and measures which will support the meeting of the environmental targets set out under Article 10 of the Directive (Establishment of Environmental Targets), leading to the achievement and maintenance of GES.

Measures DAFM have been involved in implementing include:-

- the inside 6 nautical mile trawling ban from 2020 for vessels over 18m in length overall,
- implementation of the Landing Obligation and Multi-Annual Plans (Sea-Fisheries Policy and Management Division), and
- the Clean Ocean Initiative to remove plastics from the waters (BIM and Marine Programme Agencies Division).

The process for MSFD is cyclical and the second cycle began in 2018.