

# Research for PECH Committee - Fisheries in Ireland

This overview of the fisheries sector in the Republic of Ireland (henceforth: Ireland) provides information for the delegation of the PECH committee to the country (Cork, 17-19 September 2018).

## 1. Introduction

Ireland is part of an island in the North Atlantic, which belongs geographically to Western Europe. The island is governed by Ireland and Northern Ireland. The land area of the island covers 70 280 km<sup>2</sup> with a coastline of 1 448 km. The western coastline borders with the Atlantic Ocean, whereas the south and east coastline borders with the Celtic Sea. Ireland has claimed its territorial seas (12 nm) and EEZ (200 nm). Approximately 4 801,727 people lived in Ireland in 2018.<sup>1</sup>

Ireland is a parliamentary, representative democratic republic. The country is divided into 26 counties with Dublin as its capital. The President of the Republic of Ireland, M.D. Higgins, together with Prime Minister L.E. Varadkar, governs the state. The legislative branch consists of the parliament (Oireachtas) which is formed by the Senate (Seanad Éireann) and the House of Representatives (Dáil Éireann). Judges in the Supreme Court are appointed either by the President or on the advice of the Prime Minister and his Cabinet. Ireland joined the European Community in 1973 and became one of the first countries to adopt the euro in 1999. The country is not part of the Schengen area.

### Seafood Industry

Fishing is predominantly concentrated on the western part of Ireland, since the main fishing grounds are in the Atlantic Ocean.<sup>2</sup> The seafood industry contributed €1.15 billion to the Irish gross domestic product

**Figure 1: Ireland (island)**



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<sup>1</sup> Worldmeters - Ireland population - <http://www.worldometers.info/world-population/ireland-population/>

<sup>2</sup> European Commission - FARNET - [https://webgate.ec.europa.eu/fpfis/cms/farnet2/on-the-ground/country-factsheets/irish-clld-programme\\_en#group-factsheet-areas](https://webgate.ec.europa.eu/fpfis/cms/farnet2/on-the-ground/country-factsheets/irish-clld-programme_en#group-factsheet-areas) (the Irish CLLD Programme)



(GDP) in 2017, a 6,4% growth from 2016.<sup>3</sup> Overall, the Irish seafood industry is performing well. The Irish seafood industry is developing to meet the increasing demand for seafood. The growth of the industry is mainly export-led. France was the most important market for exports in 2017, accounting for over one quarter of the total value. Spain and the UK both accounted for over 10% of total export value.<sup>4</sup>

A number of potential serious challenges to the Irish seafood sector derive from the Brexit process with the issues of access to waters and quota share being the most important. Other issues include the implementation of the landing obligation and the transposition of the Community control system into Irish law.

## 2. Key characteristics of the Irish seafood sector

The main Irish fishing grounds are located in the North Atlantic, the Irish Sea and the Celtic Sea. The total volume of landings at Irish ports in 2017 amounted 314,000 tonnes of fish. The total volume of landings has increased by 12% compared to 2016. The most important Irish fishing ports of 2017 were Killybegs and Castletownbere. That year Killybegs accounted for 149,800 tonnes of Irish and 42,400 tonnes of non-Irish landings, whereas 9,000 tonnes of Irish and 21,500 of non-Irish landings landed in Castletownbere.<sup>5</sup> The three most profitable species landed in Ireland in 2017 were mackerel, Dublin Bay prawn and horse mackerel.<sup>6</sup>

### *Catches and landings*

The total volume of seafood landed and cultivated in Ireland amounted 361,000 tonnes in 2017, an 11% increase from the previous year. 87% of these landings consisted of wild-caught fish (314,000 tonnes). The rest consisted of farmed finfish and farmed shellfish (6% and 7% respectively). These figures include landings from both Irish and non-Irish vessels at Irish ports.<sup>7</sup> 63% of all fish landed in Ireland were pelagic species, whereas demersal species accounted for 24% of the landings in 2017.

The total value of seafood landed and cultivated in Ireland amounted to € 609 million in 2017, a 12% increase from the previous year. The value of wild-caught fish amounted to €401 million in 2017, of which Irish vessels landed €283 million. The rest came from non-Irish vessels. The top five most valuable species landed in 2017 were mackerel, Dublin Bay prawn, horse mackerel, monkfish and brown crab. The most valuable non-Irish landings comprised of hake, monkfish and megrim.

Ireland is subject to the landing obligation from the 1st of January 2019. The obligation will apply to all species subject to total allowable catches (TACs) in the North Western Waters. Bord Lascaigh Mhara, Irelands Seafood Development Agency, (BIM) and the Marine Institute point out that the implementation of this landing obligation poses difficulties for Ireland, which fisheries industry is characterised by multiple fishing gears and mixed fisheries types. In particular, preliminary studies of the above institutes show that maintaining the current FMSY indicators for 2020 in combination with the landing obligation will create serious choke species problems, in particular for the cod and whiting species. In addition, different discard bans rules in the North Western Waters after Brexit add further uncertainty, confusion and disruption to fishing.<sup>8</sup>

<sup>3</sup> Bord Lascaigh Mhara (Ireland's Seafood Development Agency) - The business of seafood 2017. A snapshot of Ireland's Seafood Sector - <http://www.bim.ie/media/bim/content/7097-BIM-Business-of-Seafood-2017.pdf> (p0).

<sup>4</sup> Bord Lascaigh Mhara (Ireland's Seafood Development Agency) - The business of seafood 2017. A snapshot of Ireland's Seafood Sector - <http://www.bim.ie/media/bim/content/7097-BIM-Business-of-Seafood-2017.pdf> (p4).

<sup>5</sup> Bord Lascaigh Mhara (Ireland's Seafood Development Agency) - The business of seafood 2017. A snapshot of Ireland's Seafood Sector - <http://www.bim.ie/media/bim/content/7097-BIM-Business-of-Seafood-2017.pdf> (p11).

<sup>6</sup> Bord Lascaigh Mhara (Ireland's Seafood Development Agency) - The business of seafood 2017. A snapshot of Ireland's Seafood Sector - <http://www.bim.ie/media/bim/content/7097-BIM-Business-of-Seafood-2017.pdf> (p11 and 12).

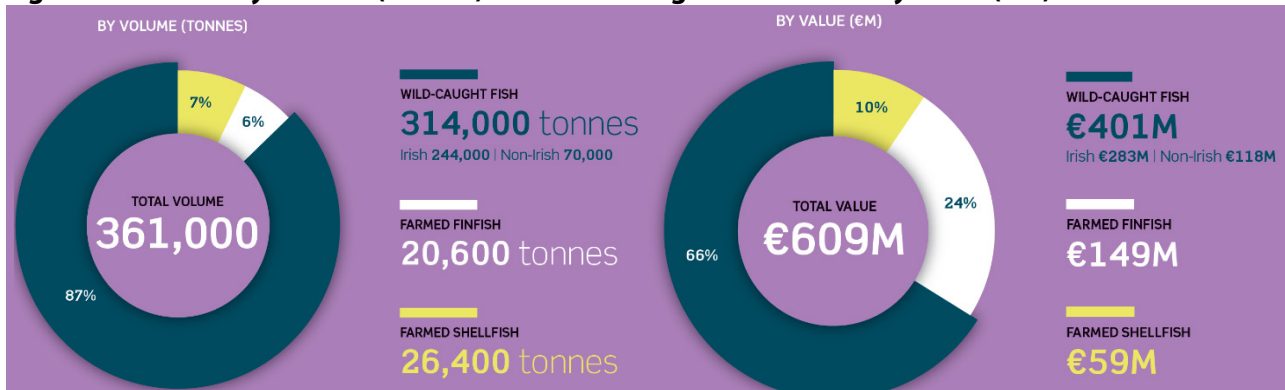
<sup>7</sup> Bord Lascaigh Mhara (Ireland's Seafood Development Agency) - The business of seafood 2017. A snapshot of Ireland's Seafood Sector - <http://www.bim.ie/media/bim/content/7097-BIM-Business-of-Seafood-2017.pdf> (p10).

<sup>8</sup> Bord Lascaigh Mhara (Ireland's Seafood Development Agency) and Marine Institute - Assessment of the impacts of the Landing Obligation on Irish Vessels - [http://www.bim.ie/media/bim/content/publications/Lo,report,2016\\_final.pdf](http://www.bim.ie/media/bim/content/publications/Lo,report,2016_final.pdf); Bord Lascaigh Mhara (Ireland's Seafood Development Agency) - Landing Obligation and Choke Species in Multispecies and Mixed fisheries, the North Western Waters - [http://www.europarl.europa.eu/cmsdata/147263/Rihan%20Presentation\\_ep\\_nww\\_revised.pdf](http://www.europarl.europa.eu/cmsdata/147263/Rihan%20Presentation_ep_nww_revised.pdf)

There are a number of flexibility measures available in tackling choke species, including de minimis discarding; discarding species with a high survivability rate; inter-species flexibility and year-to-year flexibility. Quota swaps between Member States with regard to potential choke scenarios have been assessed as a tool with limited scope. It is likely that a number of species will still pose serious choke problems even after all the above-mentioned solutions have been explored. Separately from the solutions that can be adopted in a discards plan, other legal instruments (such as in the end of year TAC and Quota Regulation) may also be required to alleviate the risk of choke situations. Member States will need to work with the Commission to address residual choke issues.

**Figure 2: Catches by volume (tonnes)**

**Figure 3: Catches by value (€M)**



Source: Ireland’s Seafood Development Agency

*Trade volumes and values*

Ireland imported €335 million worth of seafood in 2017, of which 68% came from the UK. 143,800 tonnes of fish was imported by Ireland in 2017. The top five most valuable imported species were salmon, cod, shrimp and prawn, tuna, and marine animal feed ingredients. The growth of the Irish seafood market in 2017 was predominantly export-led. In total, 313,600 tonnes of fish was exported from Ireland in 2017. Ireland exported €666 million worth of seafood in 2017, a 10% export increase from 2016. The main export markets for Ireland are the EU27, followed by the UK, Asia and Africa. The top five most valuable species exported are salmon, mackerel, crab, Dublin Bay prawn, and seaweeds and other algae.<sup>9</sup>

*Fishing fleet*

In 2017, the Irish fishing fleet registered 2050 vessels.<sup>10</sup> The fleet is characterised by six types of fishing vessels (see figure 4). The majority of the Irish fishing fleet consists of polyvalent general and potting vessels. This type of boats include small inshore vessels, that fish up to 10 miles from the Irish coast, as well as medium to large offshore vessels, which mainly target whitefish, pelagic fish and bivalve molluscs. The specific fleet also targets bivalve molluscs, as well as aquaculture species. There is also the aquaculture fleet, which is used for the management, development and/or servicing of aquaculture areas. The refrigerated seawater pelagic fleet targets pelagic species such as herring, mackerel, horse mackerel, and blue whiting. Lastly, the beam trawler fleet operates mainly in inshore waters (the area up to 10 miles from the Irish coast) to catch flatfish.

<sup>9</sup> Bord Lascaigh Mhara (Ireland’s Seafood Development Agency) - The business of seafood 2017. A snapshot of Ireland’s Seafood Sector - <http://www.bim.ie/media/bim/content/7097-BIM-Business-of-Seafood-2017.pdf> (p26 t/m 29).

<sup>10</sup> Bord Lascaigh Mhara (Ireland’s Seafood Development Agency) - The business of seafood 2017. A snapshot of Ireland’s Seafood Sector - <http://www.bim.ie/media/bim/content/7097-BIM-Business-of-Seafood-2017.pdf> (p13).

**Figure 4: The Irish Fishing Fleet**

| IRISH FISHING FLEET |              |              |              |              |              |              |              |              |              |              |
|---------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Segment             | 2008         | 2009         | 2010         | 2011         | 2012         | 2013         | 2014         | 2015         | 2016         | 2017         |
| Polyvalent General  | 1,276        | 1,305        | 1,356        | 1,401        | 1,434        | 1,466        | 1,431        | 1,411        | 1,421        | 1,380        |
| Polyvalent Potting  | 493          | 491          | 492          | 488          | 487          | 490          | 489          | 477          | 440          | 395          |
| Specific            | 132          | 147          | 156          | 149          | 150          | 148          | 139          | 134          | 146          | 142          |
| Aquaculture         | 33           | 67           | 81           | 87           | 96           | 106          | 107          | 109          | 102          | 97           |
| Pelagic             | 23           | 23           | 23           | 24           | 23           | 23           | 23           | 23           | 23           | 23           |
| Beamer              | 15           | 11           | 11           | 12           | 12           | 13           | 13           | 13           | 14           | 13           |
| <b>Grand Total</b>  | <b>1,972</b> | <b>2,044</b> | <b>2,119</b> | <b>2,161</b> | <b>2,202</b> | <b>2,246</b> | <b>2,202</b> | <b>2,167</b> | <b>2,146</b> | <b>2,050</b> |

Source: Ireland's Seafood Development Agency

### Employment

9271 people were directly employed in the Irish seafood sector in 2017. A breakdown of this number indicates that 3361 people were employed in fisheries, 1912 in the aquaculture sector, and 3998 in the processing branch.<sup>11</sup> Employment in the Irish seafood sector is largely concentrated around its coastal communities. The dependency of these coastal communities on seafood employment differs per region (see figure 5).<sup>12</sup>

**Figure 5: Employment in the Irish seafood sector per region (2017)**

| REGION                     | Total Population | Coastal Population | Coastal Employed | Direct Seafood Employment | Direct and Indirect Seafood Employment | Share of Coastal Employment |
|----------------------------|------------------|--------------------|------------------|---------------------------|--|-----------------------------|
| North                      | 159,192          | 74,989             | 27,488           | 2,089                     | 3,318                                  | 12%                         |
| North West                 | 292,630          | 64,059             | 25,328           | 660                       | 1,068                                  | 4%                          |
| West                       | 376,875          | 64,704             | 27,034           | 1,111                     | 1,760                                  | 7%                          |
| South West                 | 342,606          | 90,323             | 36,718           | 999                       | 1,606                                  | 4%                          |
| South                      | 542,868          | 115,533            | 49,815           | 1,893                     | 2,976                                  | 6%                          |
| South East                 | 808,737          | 91,681             | 36,467           | 1,274                     | 1,968                                  | 5%                          |
| North East                 | 2,238,957        | 83,775             | 36,139           | 1,244                     | 1,941                                  | 5%                          |
| <b>Republic of Ireland</b> | <b>4,761,865</b> | <b>585,064</b>     | <b>238,989</b>   | <b>9,271</b>              | <b>14,638</b>                          | <b>6%</b>                   |

Source: Ireland's Seafood Development Agency

## 3. Aquaculture sector

Finfish (salmon and trout) and shellfish (mussels and oysters) dominate the Irish aquaculture production. In 2017, Ireland was the largest producer of organic farmed salmon in the EU. The sector counted more than 1900 full and part-time jobs and 284 productions units that same year.<sup>13</sup>

Ireland published its latest multi-annual national strategic plan for sustainable aquaculture, in line with the strategic guidelines for the sustainable development of EU aquaculture, on 23 October 2015. According to this document, the Irish aquaculture sector currently struggles, amongst other things, with complex environmental requirements leading to delays in licencing process, insufficient product availability to meet

<sup>11</sup> Bord Lascaigh Mhara (Ireland's Seafood Development Agency) - The business of seafood 2017. A snapshot of Ireland's Seafood Sector - <http://www.bim.ie/media/bim/content/7097-BIM-Business-of-Seafood-2017.pdf> (p7).

<sup>12</sup> Bord Lascaigh Mhara (Ireland's Seafood Development Agency) - The business of seafood 2017. A snapshot of Ireland's Seafood Sector - <http://www.bim.ie/media/bim/content/7097-BIM-Business-of-Seafood-2017.pdf> (p7).

<sup>13</sup> Bord Lascaigh Mhara (Ireland's Seafood Development Agency) - The business of seafood 2017. A snapshot of Ireland's Seafood Sector - <http://www.bim.ie/media/bim/content/7097-BIM-Business-of-Seafood-2017.pdf> (p1 and p7).

market demand, limited business planning from smaller operations, and with a lack of private investment and entrepreneurship.<sup>14</sup> This multi-annual plan proposed 24 actions, implemented until 2020, to improve the Irish aquaculture. The four key focus points underpinning these actions are:

1. The simplification of administrative procedures
2. Spatial planning
3. Enhancing the competitiveness of Irish and EU aquaculture
4. Promoting a level playing field for EU operators by exploiting their competitive advantages

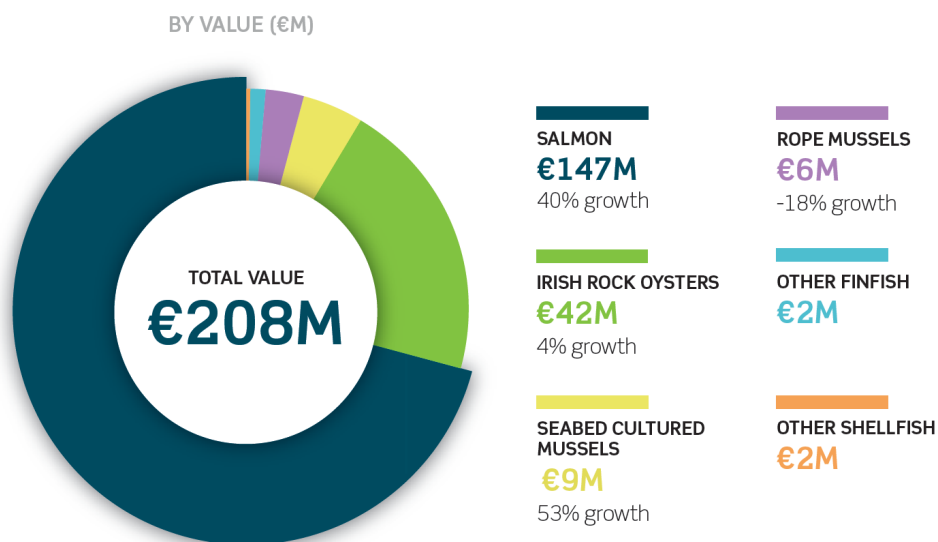
The Irish aquaculture industry has the following management bodies:

- BIM (aquaculture development)
- Marine Institute (Toxicology)
- The Department of Communications, Marine and Natural Resources (planning and licensing)

In addition, best practices in Irish aquaculture sector includes co-ordinated local aquaculture management systems (CLAMS), special unified marketing schemes (SUMS), and ECOPACT, an initiative to introduce environmental management systems (EMS) throughout the industry.<sup>15</sup>

In 2017, the industry produced approximately 47,000 tonnes of seafood. Value reached a level of €208 million that same year. The strongest growth in the sector, both in terms of volume and value, came from the oyster and salmon farmers. Low prices on the global market negatively affected the farmed rope mussel industry, resulting in a 13% loss of tonnes in 2017 and an 18% decrease in value compared to 2016. Apart from the farmed rope mussel sector, all sectors increased their output from 2015 onwards.<sup>16</sup> Notably the salmon farming sector experienced an increase in output: the national production reached 16,300 tonnes (value: €105 million) in 2016. The volume of farmed salmon experiences another 25% growth in 2017, with 200,000 tonnes being cultivated. As a result, the value also increased to €147 million.

**Figure 6: Aquaculture production by value**

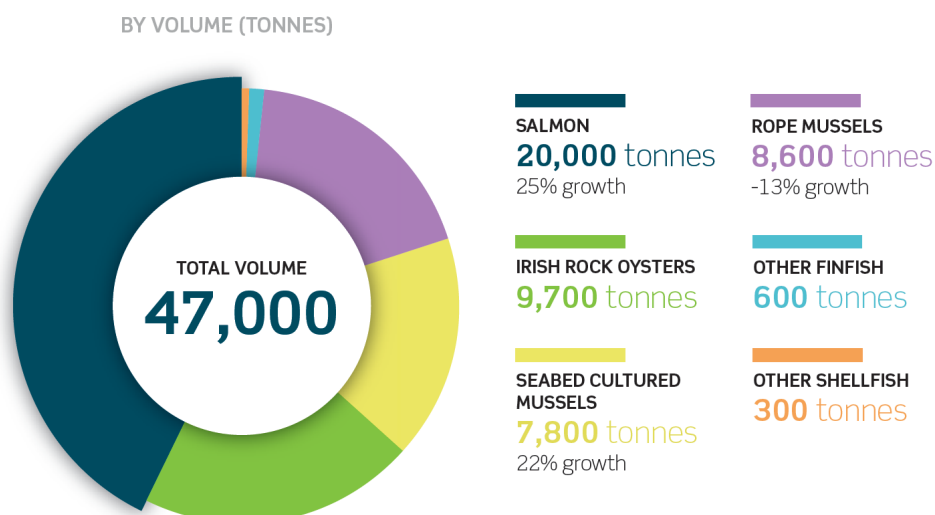


Source: Ireland's Seafood Development Agency

<sup>14</sup> Department of Agriculture, Food and the Marine - National Strategic Plan for Sustainable Aquaculture Development - <https://www.agriculture.gov.ie/media/migration/seafood/marineagenciesandprogrammes/nspa/NationalStrategicPlanSusAquaDevel181215.pdf> (p23).

<sup>15</sup> Department of Agriculture, Food and the Marine - National Strategic Plan for Sustainable Aquaculture Development - <https://www.agriculture.gov.ie/media/migration/seafood/marineagenciesandprogrammes/nspa/NationalStrategicPlanSusAquaDevel181215.pdf> (p63 and 104 t/m 110).

<sup>16</sup> Bord Lascaigh Mhara (Ireland's Seafood Development Agency) - The business of seafood 2017. A snapshot of Ireland's Seafood Sector <http://www.bim.ie/media/bim/content/7097-BIM-Business-of-Seafood-2017.pdf> (p14).

**Figure 7: Aquaculture production by volume**

Source: Ireland's Seafood Development Agency

## 4. Legal and institutional framework

The current minister for Agriculture, Food & the marine is Michael Creed T.D. Within the Department of Agriculture, Food and the Marine (DAFM), there are ten different sections including animal health & welfare, farming sectors, forestry rural environment and sustainability, and seafood. The seafood sector is divided into the following sub-divisions:

1. Aquaculture & foreshore Management: to ensure the efficient and effective management of aquaculture licensing and foreshore licensing in respect of aquaculture and sea fishery related activities.<sup>17</sup>
2. Sea-Fisheries Policy & Management Division: responsible for the strategic, economic and sustainable development of the seafood sector, as well as the broad regulation of it, within the framework of the Common Fisheries Policy (CFP), the Sea-fisheries and Maritime Jurisdiction Act 2006 and the Fisheries (Amendment) Act 2003.<sup>18</sup>
3. Sea Fisheries Administration: The principal functions of the division are in the areas of sea fishing boat licensing and registration, management and development of fishery harbours and coast protection.<sup>19</sup>
4. Marine Agencies & Programmes: The mission of the Marine Agencies & Programmes Division is to support the development of the Irish seafood sector through delivery of the Seafood development Operational Programmes and collaborating with the marine state agencies.<sup>20</sup>
5. Fisheries Management Notices.<sup>21</sup>
6. Fishing Harbours.<sup>22</sup>

<sup>17</sup> Department of Agriculture, Food and the Marine - Aquaculture & Foreshore Management - <https://www.agriculture.gov.ie/seafood/aquacultureforeshoremanagement/>

<sup>18</sup> Department of Agriculture, Food and the Marine - Sea-Fisheries Policy & Management Division - <https://www.agriculture.gov.ie/seafood/sea-fisheriespolicymanagementdivision/>

<sup>19</sup> Department of Agriculture, Food and the Marine - Sea Fisheries Administration - <https://www.agriculture.gov.ie/seafood/sea fisheriesadministration/>

<sup>20</sup> Department of Agriculture, Food and the Marine - Marine Agencies & Programmes Division - <https://www.agriculture.gov.ie/seafood/marineagenciesprogrammesdivision/>

<sup>21</sup> Department of Agriculture, Food and the Marine - Fisheries Management Notices - <https://www.agriculture.gov.ie/seafood/fisheriesmanagementnotices/>

<sup>22</sup> Department of Agriculture, Food and the Marine - Fishery Harbours - <https://www.agriculture.gov.ie/seafood/fisheryharbours/>

7. The Marine Engineering Division provides an advisory, inspectorial, design and construction service to DAFM.<sup>23</sup>
8. Fisheries Research.<sup>24</sup>
9. Our Ocean Wealth: the Irish Government published [an Integrated Marine Plan for Ireland](#) in 2012. The plan was an initiative of the Inter-Departmental Marine Coordination Group, chaired by Mr. Michael Creed TD. The Our Ocean Wealth website has been set up to provide information and updates on Ireland's Integrated Marine Plan, marine news from across a range of Government Departments and agencies, and details of the annual conference and associated events.<sup>25</sup>

The Department of Communications, Energy and Natural Resources has the responsibility for Ireland inland fisheries. The Minister, Mr. Denis Naughten T.D., has overall responsibility for the regulatory and policy framework to ensure the conservation, protection and management of the inland fisheries resource, including sea angling.<sup>26</sup> Regulation is required to comply with both EU and national Legislation. The Inland Fisheries Act 2010 established Inland Fisheries Ireland (IFI) as the agency responsible for the protection, management and conservation of Ireland's inland fisheries and sea angling resources. The agency develops and advises the Minister on policy and national strategies relating to inland fisheries, including sea angling.<sup>27</sup>

The fisheries management bodies in Ireland are:

- BIM
- DAFM
- IFI
- The Marine Institute
- Sea-Fisheries Protection Authority (SFPA)

#### *The European Maritime and Fisheries Fund (EMFF) 2014-2020*

Ireland's EMFF Programme provides for investment in the seafood industry of €240 million. The Programme supports the implementation of the CFP, the Integrated Maritime Policy, the EU Nature Directives and the EU 2020 Strategy.<sup>28</sup> It is implemented through 21 schemes and involves five state agencies and two departments with the DAFM as the lead department and managing authority for the programme. Some 18% of programme funds are allocated to control and enforcement, with 17% devoted to data collection, 54% devoted to fisheries, aquaculture and processing, 5% to Fisheries Local Action Groups (FLAGs) and 4% to the Integrated Maritime Policy. Ireland's EMFF Programme got off to a slow start, similar to other Member States, but now has one of the highest spend and commitment rates in the Union. Data Collection funds are fully committed, while control and enforcement funds are almost fully committed. Commitment rates are growing across other schemes, with an average commitment rate above 50%.

<sup>23</sup> Department of Agriculture, Food and the Marine - Engineering - <https://www.agriculture.gov.ie/seafood/engineering/>

<sup>24</sup> Department of Agriculture, Food and the Marine - Fisheries research - <https://www.agriculture.gov.ie/seafood/fisheriesresearch/>

<sup>25</sup> Department of Agriculture, Food and the Marine - Our Ocean Wealth - <https://www.agriculture.gov.ie/seafood/ouroceanwealth/>; Our Ocean Wealth - About us - <https://www.ouroceanwealth.ie/about-us>

<sup>26</sup> Department of Communications, Energy and Natural Resources - Inland Fisheries. Management and Conservation Measures - <https://www.dccae.gov.ie/en-ie/natural-resources/topics/Inland-Fisheries/Pages/home.aspx>

<sup>27</sup> Department of Communications, Energy and Natural Resources - Inland Fisheries Ireland - <https://www.dccae.gov.ie/en-ie/natural-resources/topics/Inland-Fisheries/Pages/Inland-Fisheries-Ireland.aspx>

<sup>28</sup> Department of Agriculture, Food and the Marine - European Maritime and Fisheries Fund 2014-2020 - <https://www.agriculture.gov.ie/emff/>

## 5. Fisheries resource management, control and enforcement

Irish fishing grounds centre on the North Atlantic, the Irish Sea and the Celtic Sea. Ireland fished on 61 stocks in 2017, of which 59 stocks are shared stocks with the UK.<sup>29</sup> For certain species and fishing grounds, Ireland and the UK agreed on benefits from a limited special protection under the Hague Preferences which provides additional quota once the TAC has gone below a certain level.

Ireland has an overall share above 60% of EU TACs for herring, boarfish, plaice, sole, and cod. Regarding the status of the stocks, the biomass<sup>30</sup> is low for cod, haddock, and whiting west of Scotland, cod and sole in the Irish Sea, and for herring. The cod and haddock stocks are showing positive recovery results due to successful conservation measures.

The Irish naval service, the air corps and the SFPA have joint competence to monitor and enforce EU conservation law in Ireland.<sup>31</sup> The Irish management of fisheries control and enforcement is laid down in the Sea-Fisheries and Marine Jurisdiction Act 2006, which sets down the sanctions for fisheries offences. These sanctions are complemented by a points system for licence holders and for masters under the EU Control Regulation of 2009. The control authorities (SFPA and Naval Service) continue to implement the sanctions provisions of the Sea Fisheries and Maritime Jurisdiction Act 2006 in respect of infringements of the CFP.

However, concrete attempts to transpose the penalty point system into Irish law have been successfully challenged before the Irish High Court and the penalty points system is therefore currently not transposed into Irish law.<sup>32</sup> This has triggered an infringement proceeding by the EU Commission. Ireland received a letter of formal notice under the infringement proceeding from the EU Commission on 17 May 2018 in relation to the non-implementation of the required EU points system.<sup>33</sup> Shortly after, the EU Commission advised on 12 June 2018, that the implementing decision on the suspension of interim payments under the EMFF have now been adopted. The EU contribution to Ireland's EMFF Programme is pending on the fulfilment of certain conditions, including the compliance with the requirements of the Control Regulation to legislate for and implement a points system for fishing vessel owners and masters of fishing vessels.

## 6. Possible impact of Brexit

It is understandable that, until there is a concrete outcome of the EU-UK negotiations, it is hard to make any precise assessment of the macro-economic impacts on the sector. The main factors affecting the Irish seafood sector will be regulatory divergence, access to UK fishing grounds, customs procedures and tariffs. The following section elaborates briefly on these points of importance:

- Regulatory divergence: The legal framework relating to fisheries will be set by EU CFP until 2021. After this transition period, the UK will leave the CFP and new fisheries agreements between the EU and the UK have to be concluded. Any such new fisheries agreement will be conditional upon the type of agreement between the EU and the UK regarding the internal market. The issue here is that legal uncertainty may inhibit investment in the Irish and European seafood sector provided there is no new fisheries agreement reached before 2021.<sup>34</sup>

<sup>29</sup> Marine Institute's Fisheries Ecosystems Advisory Services - The Stock Book 2017: Annual Review of Fish Stocks in 2017 and with Management Advice for 2018 - <https://oar.marine.ie/handle/10793/1337> (front page).

<sup>30</sup> Marine Institute's Fisheries Ecosystems Advisory Services - The Stock Book 2017: Annual Review of Fish Stocks in 2017 and with Management Advice for 2018 - <https://oar.marine.ie/handle/10793/1337> (p8, 14 and 18).

<sup>31</sup> Sea-Fisheries Protection Authority - Sea-Fisheries Conservation - <http://www.sfpa.ie/Sea-Fisheries-Conservation>

<sup>32</sup> *O'Sullivan v. The Sea-Fisheries Protection Authority; Crayden Fishing Company Limited v. The Sea-Fisheries Protection Authority.*

<sup>33</sup> European Commission - May infringements package: key decisions - [http://europa.eu/rapid/press-release MEMO-18-3446\\_en.htm](http://europa.eu/rapid/press-release_MEMO-18-3446_en.htm) (8. Maritime Affairs and Fisheries).

<sup>34</sup> Bord Lascaigh Mhara (Ireland's Seafood Development Agency) - The business of seafood 2017. A snapshot of Ireland's Seafood Sector - <http://www.bim.ie/media/bim/content/7097-BIM-Business-of-Seafood-2017.pdf> (p4); Irish Fish Processors and Exporters Association - Seafood sectoral civic dialogue on brexit (Seafood Sectoral dialogue - <https://www.agriculture.gov.ie/media/migration/seafood/sea-fisheriespolicymanagementdivision/brexit/SeafoodSectoralDialogueBrexit1February2017LorcCinnide020217.pdf> (Brexit 1 February 2017)).



- Access to UK fishing grounds:
  - The government did announce its withdrawal from the London Fisheries Convention, which established fishing rights in coastal waters for countries of Western Europe, including Ireland. Ireland is one of the eight Member States fishing in British waters. On average (2011-2015), 34% of Irish landings originated from UK waters. The percentage for specific stocks is even higher. For example, on average, 64% of Irish mackerel landings originate from the UK zone.<sup>35</sup>
  - Change in access waters may lead to the displacement of fishing patterns by Irish fishers, which may result in more fishing pressure in the western waters and the remainder of the North Sea. This in turn might put pressure on the sustainability of fish stocks if Ireland wants to maintain its amount of catches from a geographically smaller area.
  - It is not clear whether the UK will withdraw from the Hague Preferences.
- Customs procedures and tariffs: Seafood products in the EU are currently traded without any taxes within the common market, but such products might be subject to tariff and/or non-tariff barriers from the UK to the EU and vice versa, when the UK leaves the internal market. Ireland would be affected by such protective measures since export of Irish seafood to the UK constitutes 12% of their seafood exports. Notably mussel and whitefish exporters are at risk.<sup>36</sup>

To alleviate the potential costs of Brexit to the fishers, DAFM has established a specific support scheme under the Irish state budget for 2018, such as a provision of €25 million to facilitate the development of new Brexit response loan schemes for farmers, fishermen and food businesses.<sup>37</sup>

## Further information

This briefing is available in summary, with option to download the full text, at: <http://bit.ly/2Odpn2l>

More information on Policy Department research for PECH: <https://research4committees.blog/pech/>

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<sup>35</sup> Belfast Telegraph Digital - Brexit impact on fishing to be probed by MPS - <https://www.belfasttelegraph.co.uk/news/northern-ireland/brexit-impact-on-fishing-to-be-probed-by-mps-36472849.html>; The Belfast Telegraph - View from Dublin: Irish fishermen have a lot to lose from Brexit - <https://www.belfasttelegraph.co.uk/business/uk-world/view-from-dublin-irish-fishermen-have-a-lot-to-lose-from-brexit-36745201.html>

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<sup>37</sup> Irish Government News Service - Budget 2018: Building competitiveness, new opportunities and protecting the Irish agri-food and fisheries sector in the face of Brexit challenge - Creed - [https://merrionstreet.ie/en/News-Room/Releases/Budget\\_2018\\_Building\\_Competitiveness\\_New\\_Opportunities\\_and\\_Protecting\\_the\\_Irish\\_Agri-Food\\_and\\_Fisheries\\_Sector\\_in\\_the\\_face\\_of\\_Brexit\\_Challenge\\_%E2%80%933\\_Creed.html](https://merrionstreet.ie/en/News-Room/Releases/Budget_2018_Building_Competitiveness_New_Opportunities_and_Protecting_the_Irish_Agri-Food_and_Fisheries_Sector_in_the_face_of_Brexit_Challenge_%E2%80%933_Creed.html)

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