



AN t-ÚDARÁS UM
CHOSAINT
IASCAIGH MHARA

SEA-FISHERIES
PROTECTION
AUTHORITY

Protecting Seafood Trade 2022



BIA MARA SÁBHÁILTE INBHUNAITHE
SAFE SUSTAINABLE SEAFOOD

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Ireland as a food exporting nation places significant emphasis on our position as a supplier of safe, traceable, sustainably produced high-quality food. Seafood is a valuable part of this offering.



Chair's Welcome

I am pleased to welcome you to the first Sea-Fisheries Protection Authority (SFPA) 'Protecting Seafood Trade 2022'. This publication aims to highlight the important work the SFPA carries out on behalf of the State and our Seafood sector in protecting and enabling the import and export of seafood.

Ireland as a food exporting nation places significant emphasis on our position as a supplier of safe, traceable, sustainably produced high-quality food. Seafood is a valuable part of this offering. The SFPA as a regulator is conscious of our role in ensuring the integrity of our seafood and strategically in terms of how Ireland's reputation as a food exporter of choice is dependent on all links in the chain.

The SFPA's Trade Compliance unit, supported by our Sea-Fisheries Protection Officers (SFPOs) across the country, work tirelessly to support our seafood producers to enable export internationally and the functioning of our seafood production supply chains. Brexit and the emergence of the UK as a Third Country has led to increased demands on the SFPA. I am encouraged in how the organisation has risen to this challenge and helped to maintain the movement of seafood products without significant disruption.

2022 was a challenging year for Ireland's Seafood Sector with the continuing repercussions from Brexit, the fallout from the Russian invasion of Ukraine, the continued impact of Covid-19 in export markets, the energy crisis and the cost-of-living crisis creating a challenging trading environment. This was reflected in the decrease in third country exports from Ireland to 78,171 tonnes and 26 species from 47 Food Businesses to 48 countries outside the EU in 2022 from 121,395 tonnes in 2021.

The purpose of this report is not to provide an economic insight into seafood trade, rather to lay out the raw data in terms of imports and exports as managed by the SFPA. Nonetheless, the information provided in the Protecting Seafood Trade Report 2022 offers useful analysis in terms of the key trends facing the sector at this present time and highlights an important element of our activity as a regulator. I trust you will find this new report a valuable resource.

Paschal Hayes

EXECUTIVE CHAIRPERSON



Introduction



€530 million

**Irish seafood exports in 2022.
Representing a €17 million value
growth since the previous year.¹**

As Ireland's competent Authority for seafood trade compliance, the SFPA undertakes a range of activities critical to enabling our seafood economy. Irish seafood exports in 2022 was valued at €530 million, representing a €17 million value growth in exports since the previous year¹. Protecting seafood trade via ensuring highly functioning levels of regulatory assurance is a critical element of our mission as the Authority responsible for ensuring the international integrity of Ireland's seafood offering.

In 2022, the SFPA continued to develop and strengthen diplomatic and technical links with international seafood trade contacts. In addition to routine engagement with multi-agency and industry stakeholders, the Authority actively assisted industry in preparing for and dealing with the regulatory and supply chain impact on Irish seafood companies in trading with the UK and vessels fishing in UK waters as the regulatory landscape with the UK began to settle following its exit from the EU and transition to a Third Country.

Active management by the Authority of new associated risks arising from the UK's status as a stand-alone contracting party to the North-East Atlantic Fishing Commission (NEAFC) and as a third country with respect to Illegal, Unreported and Unregulated (IUU) fishing, continued to be necessary.

These control and enforcement requirements were manifest in managing consignment trade and vessel direct landings between Ireland and the UK. The Authority continued to maintain its certification and control regimes in response to the ongoing challenges brought by Covid-19 and its impact on retaining regulatory oversight and on the changed trading patterns, risks and opportunities for Irish seafood companies. The SFPA continued to liaise with overseas control agencies and the Department of Foreign Affairs and Trade officials on a wide range of seafood market access and technical support issues. Export markets on which access and support work was actively conducted during the year included: South Korea; Japan; China; United Arab Emirates; Vietnam; USA, Canada, and the Gulf States.

¹ Figures taken from Bord Bia's "Export Performance and Prospects Report 2022 - 2023".

KEY ENGAGEMENTS DURING 2022 INCLUDED:



Regulatory vigilance following the departure of the UK from the EU and the future trading relationship. This included national and EU co-operation and cross-agency collaboration with regulatory partner organisations and agencies to examine and prepare for food safety and fishery control implications.



Internal capacity building within the organisation including clarification of technical requirements, contingency planning, communication, and liaison with other key stakeholders on fisheries regulatory preparedness for the UK exit from the EU regulatory regime and common market.



Design and delivery of trade information seminars for industry trading with UK in addition to leading individualised regulatory engagement and preparation conversations with diverse external stakeholder groupings.



Continued organisational involvement with seafood relevant areas of the work of the Codex Alimentarius Commission.



Updating organisational certification and oversight regimes in response to the introduction of revised foundational EU food safety official controls regulation.

Implementation and enforcement by the Authority of EU official control regulation and fisheries conservation legislation continue to act as the regulatory baselines upon which Ireland's robust seafood certification system is built.

The SFPA developed its work in seafood trade regulation, provision of technical market access support, performing official controls in disciplines including company and product registration and certification, seafood safety and sea-fisheries conservation. Implementation and enforcement by the Authority of EU official control regulation and fisheries conservation legislation continue to act as the regulatory baselines upon which Ireland's robust seafood certification system is built.

Inspection and health certification of export consignments continued during another year of specific Covid-19 related challenges in order to continue to provide public health and customer assurance regarding seafood safety and quality standards that are expected in international food markets and underpinned by EU regulations.

Bernard O'Donovan

NATIONAL DIRECTOR TRADE COMPLIANCE

Trade Flows of Fish and Fishery Products Certified

Exports of Irish seafood to international destinations outside the EU encompassed the processing of 3,670 health certificates for 78,171 tonnes of produce in 2022. This represented respective decreases over 2020 data of 17% and 33% in the amount of export health certificates issued and export tonnage certified, reflecting a re-alignment back towards 2020 levels of trade following a similar percentage increase in 2021 over 2020. The main export markets certified by volume of produce were Nigeria, Egypt, China, Congo and Japan, primarily covering exports of high volume frozen pelagic fish.

Official controls in the deterrence of Illegal, Unreported and Unregulated (IUU) fishing continued to be conducted. This included the verification of 2,831 catch certificates relating to the import of 11,747 tonnes of produce from all third countries, including the UK. This represented respective decreases over 2021 data of 6% and 23% in the amount of import certificates and import tonnage verified, reflecting reduced trade volumes of imports returning closer to 2020 levels. The main countries from which import consignments originated were UK, Iceland, Ecuador, China, and Vietnam. Imports from UK accounted for 58% and 28% in the respective overall amounts of certificates issued and tonnage imported from all third countries.



Landings by UK-registered vessels accounted for 93% of the overall total number of landings by non-EU fishing vessels into Ireland.

10,800 tonnes

of Irish seafood export-certified in line with illegal, unregulated and unreported fishing regulations.

688 catch certificates were issued for the export of 10,800 tonnes of Irish seafood produce to third countries, including the UK. The main species exported by volume were Atlantic Mackerel, Sprat, Haddock and Atlantic Herring. This represented respective decreases over 2021 data of 21% and 55% in the amount of export catch certificates and related export tonnage catch certified. Exports to UK accounted for 74% of the total number of certificates issued.

75,457 tonnes

of produce imported from non-EU fishing vessels into Ireland.

A total of 700 direct landings of fishery products by non-EU fishing vessels into Ireland resulted in the import of 75,457 tonnes of produce. This represented respective increases over 2021 data of 8% and 16%. Landings by UK-registered vessels accounted for 93% of the overall total number of landings by non-EU fishing vessels into Ireland. Irish vessels landed 284 times into third country ports, accounting for exports of 12,085 tonnes of produce, with 93% of landings taking place in UK ports.

Export Health Certificates

* Please note all the weights in this section refer to the product as exported and may not reflect the species live weight.

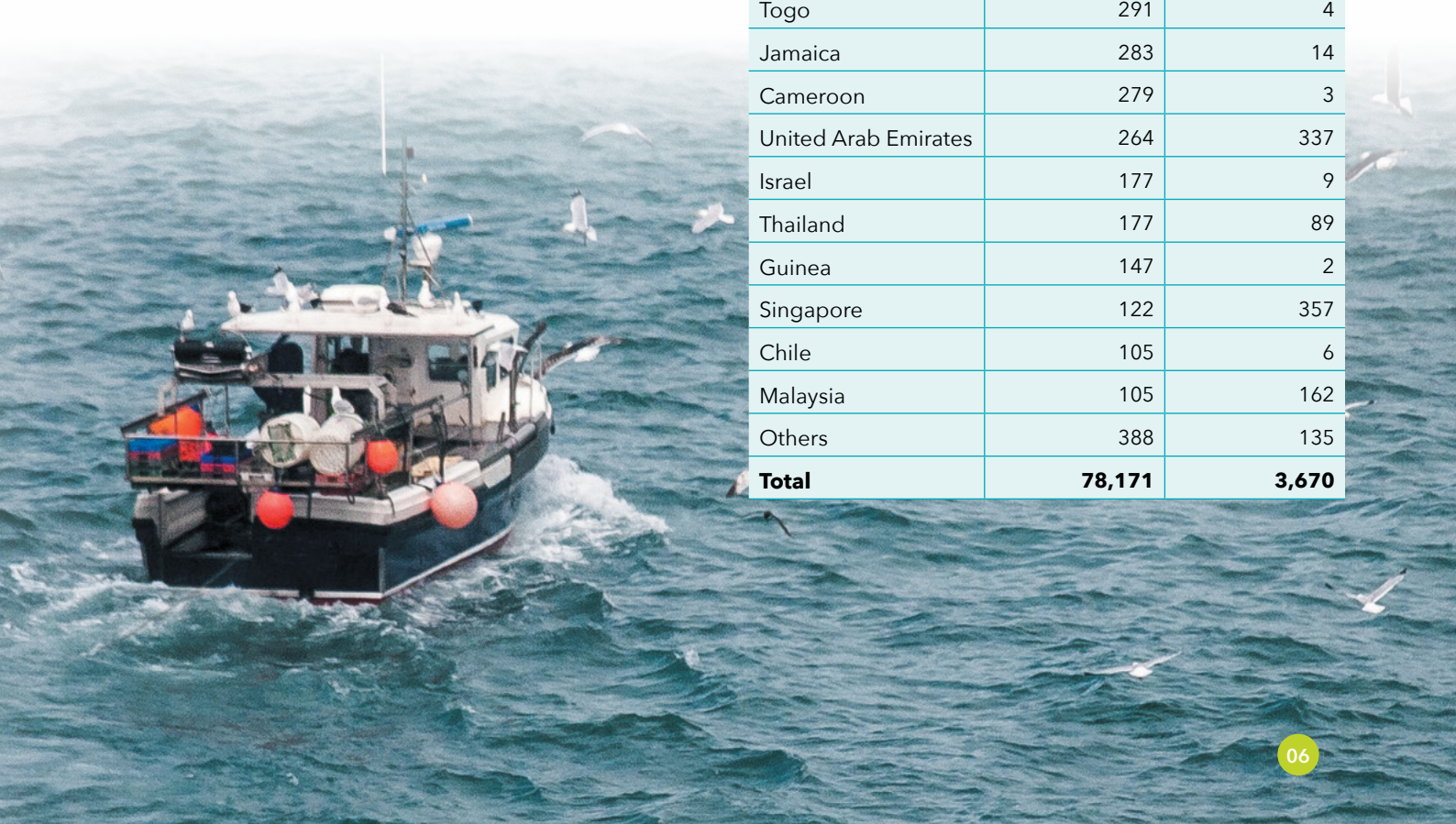
Health certificates are required for the export of fish and fishery products and molluscan shellfish outside the European Union (EU) - they are not necessary for trade within the EU. The SFPA provides health certificates for specific consignments, in order to facilitate trade. Health certificates can only be issued for products that are produced in establishments approved or registered under Regulation EC No. 853/2004, which lays down specific hygiene rules for foods of animal origin.

78,171 tonnes

and 26 species were certified for export from 47 Food Businesses to 48 countries outside the EU in 2022.

A total of 3,670 consignments of seafood totalling 78,171 tonnes and 26 species were certified for export from 47 Food Businesses to 48 countries outside the EU in 2022. This compares with a total of 4,455 consignments of seafood totalling 121,395 tonnes and 25 species which were certified for export from 48 Food Businesses to 42 countries outside the EU in 2021. In 2020, a total of 4,048 consignments of seafood totalling 91,824 tonnes and 25 species which were certified for export from 50 Food Businesses to 37 countries outside the EU.

Countries	Tonnes	Consignments
Nigeria	23,963	83
Egypt	17,064	91
China	8,194	359
Congo	6,534	51
Japan	4,180	71
Ivory Coast	4,076	18
Ghana	2,411	33
Benin	1,797	23
Vietnam	1,795	169
Korea, Republic Of	1,120	78
United States	929	49
Ukraine	759	38
Hong Kong	650	1,242
Haiti	625	8
Liberia	558	4
Canada	426	225
Sierra Leone	400	3
Lithuania	352	7
Togo	291	4
Jamaica	283	14
Cameroon	279	3
United Arab Emirates	264	337
Israel	177	9
Thailand	177	89
Guinea	147	2
Singapore	122	357
Chile	105	6
Malaysia	105	162
Others	388	135
Total	78,171	3,670



Exports

Top Three Export Destinations

Three countries account for 63% of Irish seafood exported to third countries outside the EU in 2022: Nigeria 30.7%, Egypt 21.8%, and China 10.5%.

Exports to the three destinations, Nigeria, Egypt and China were primarily pelagic species, as set out in the tables below.

Table 1: Exports to Nigeria

Species	Tonnes
Blue Whiting	19,119
Mackerel	4,743
Sole	100
Pacific Oysters	1
Total	23,963

Table 2: Exports to Egypt

Species	Tonnes
Horse Mackerel	12,890
Mackerel	4,074
Hake	100
Total	17,064

Table 3: Exports to China

Species	Tonnes
Mackerel	5,646
Horse Mackerel	1,399
Whelk	618
Crab	126
Razor Clams	125
Prawns	114
Blue Whiting	100
Pacific Oysters	65
Salmon	1
Total	8,194

Exports by Species Class

In 2022, the vast majority (93.4%) of seafood exported consisted of pelagic species including Blue Whiting, Mackerel and Horse Mackerel. Shellfish exports amounted to 4.9 % of exports and mostly included Whelk, Pacific Oysters, Razor Clams and Crab exports. Round Fish and Demersal species comprised 1.7% of exports, mostly Salmon.

Table 4: Exports by Class

Species Class	Tonnes	Percentage
Pelagic	73,035	93.4%
Shellfish	3,851	4.9%
Demersal	1,285	1.7%
Total	78,171	100%

Table 5: Pelagic Species

Roundfish	Tonnes
Blue Whiting	32,791
Mackerel	21,617
Horse Mackerel	17,800
Sprat	414
Herring	389
Sardines	24
Total	73,035

Table 6: Shellfish Species

Shellfish	Tonnes
Whelk	2,207
Pacific Oysters	529
Razor Clams	501
Crab	400
Prawns	133
Mussels	38
Scallops	20
Others	23
Total	3,851

Table 7: Round Fish and Demersal

Roundfish	Tonnes
Salmon	1,017
Others	268
Total	1,285

93.4% exported seafood in 2022

consisted of pelagic species including Blue Whiting, Mackerel and Horse Mackerel.

Exports (continued)

32,791 tonnes

of Blue Whiting exports to third countries
in 2022 of which 58.3% went to Nigeria.



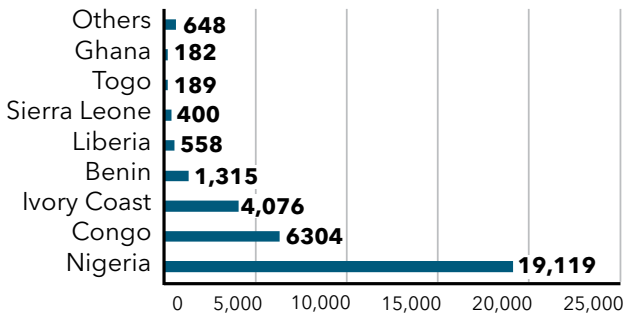
Exports of Blue Whiting

Exports of Blue Whiting to third countries totalled 32,791 tonnes in 2022 of which 58.3% went to Nigeria. All Blue Whiting was exported frozen.

Table 8: Exports of Blue Whiting by Country and Weight

Country	Tonnes
Nigeria	19,119
Congo	6,304
Ivory Coast	4,076
Benin	1,315
Liberia	558
Sierra Leone	400
Togo	189
Ghana	182
Others	648
Total	32,791

Figure 1: Blue Whiting Exports (tonnes)



Exports of Mackerel

A total of 21,617 tonnes of Mackerel was exported to various third countries in 2022. Almost all of this was frozen Mackerel (>99.9%) with small amounts of smoked and canned Mackerel being exported.

Table 9: Exports of Mackerel by Country and Weight

Country	Tonnes
China	5,645
Nigeria	4,743
Egypt	4,074
Japan	3,152
Ghana	1,783
Ukraine	519
Vietnam	373
Canada	354
Others	974
Total	21,617

Figure 2: Mackerel Exports (tonnes)

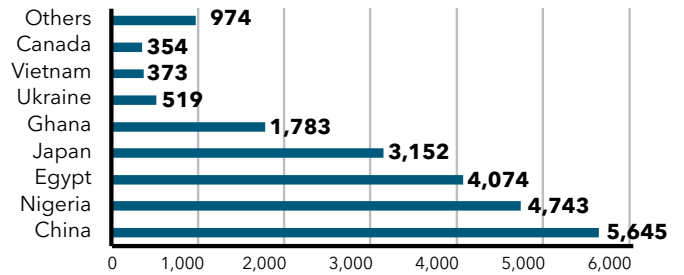


Table 10: Presentation Type Mackerel

Presentation	Tonnes
Whole Frozen	15,491
Frozen	6,105
Smoked	16
Canned	5
Total	21,617

Exports (continued)

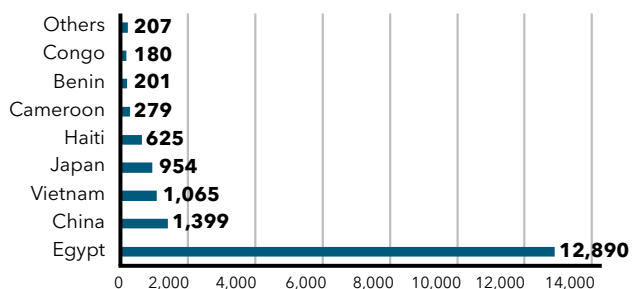
Exports of Horse Mackerel

A total of 17,800 tonnes of Horse Mackerel was exported to third countries in 2022 with 72.4% of this exported to Egypt. All Horse Mackerel was exported frozen.

Table 11: Exports of Horse Mackerel by Country and Weight

Country	Tonnes
Egypt	12,890
China	1,399
Vietnam	1,065
Japan	954
Haiti	625
Cameroon	279
Benin	201
Congo	180
Others	207
Total	17,800

Figure 3: Horse Mackerel Exports (tonnes)



Exports of Whelk

Whelk is regarded as a particular delicacy in some East Asian countries which is where the majority of this product was exported. In 2022, 50.2% of this Whelk was exported to Korea. The majority of consignments of Whelk were exported frozen.

Table 12: Exports of Whelk by Country and Weight

Country	Tonnes
Korea, Republic Of	1,107
China	618
Vietnam	201
Hong Kong	103
United States	96
Others	82
Total	2,207

Figure 4: Whelk Exports (tonnes)

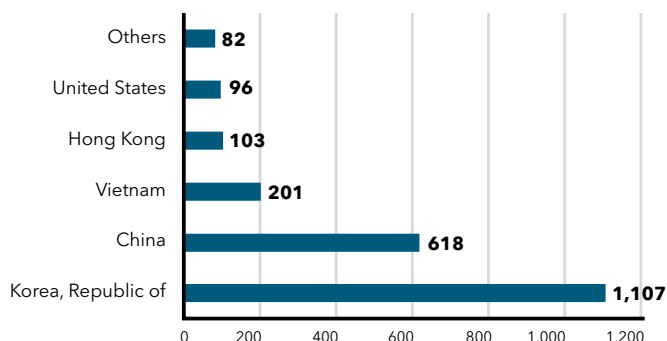


Table 13: Whelk Presentation

Presentation	Tonnes
Frozen	2,160
Cooked	43
Live	4
Total	2,207



Exports (continued)

Exports of Salmon

In 2022, a total of 1,017 tonnes of Salmon was exported to various third countries as set out in the table below. A small proportion of this was gutted or smoked salmon with the rest being frozen.

Table 14: Exports of Salmon by Country and Weight

Country	Tonnes
United States	702
Chile	105
United Arab Emirates	86
Belarus	50
Thailand	24
Others	50
Total	1,017

Figure 5: Salmon Exports (tonnes)

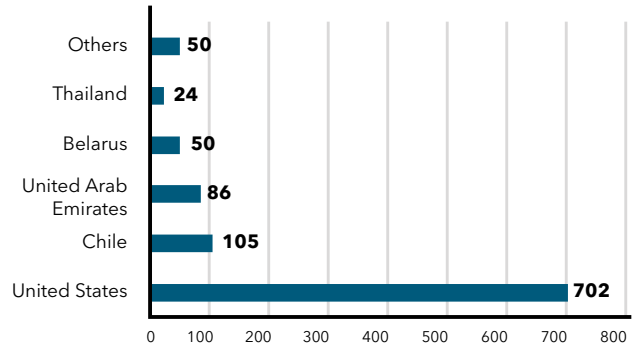


Table 15: Salmon Presentation

Presentation	Tonnes
Frozen	913
Gutted	103
Smoked	1
Total	1,017



529 tonnes

of live Oysters were certified for export by the SFPA in 2022.

Exports of Pacific Oysters

A total of 529 tonnes of live Oysters were certified for export by the SFPA in 2022. Cultivated Irish Oysters were exported live to countries primarily in the Far East as set out in the table below.

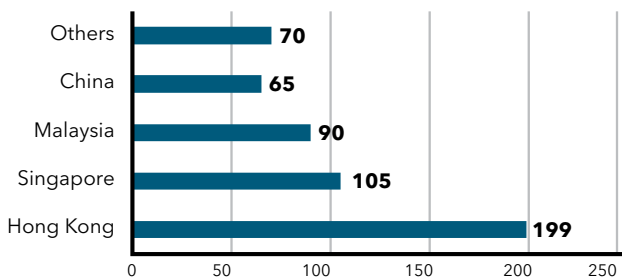
Table 16: Exports of Pacific Oysters by Country and Weight

Country	Tonnes
Hong Kong	199
Singapore	105
Malaysia	90
China	65
Others	70
Total	529

Table 17: Pacific Oysters Presentation

Presentation	Tonnes
Live	529
Frozen	<1
Total	529

Figure 6: Pacific Oysters Exports



Exports of Razor Clams

Most Razor Clams exported to third countries are flown out live within hours of landing; a small proportion (2.6%) were exported frozen. The Asian market and Canada are the primary destinations for this product.

Table 18: Exports of Razor Clams by Country and Weight

Country	Tonnes
Hong Kong	322
China	125
Canada	42
Others	12
Total	501

Figure 7: Razor Clams Exports

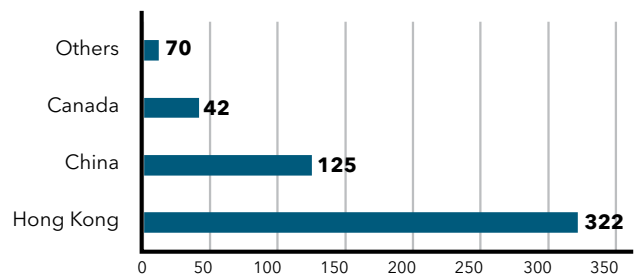


Table 19: Presentation Type Razor Clams

Presentation	Tonnes
Live	488
Frozen	13
Total	501



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