IFPO PRESENTATION

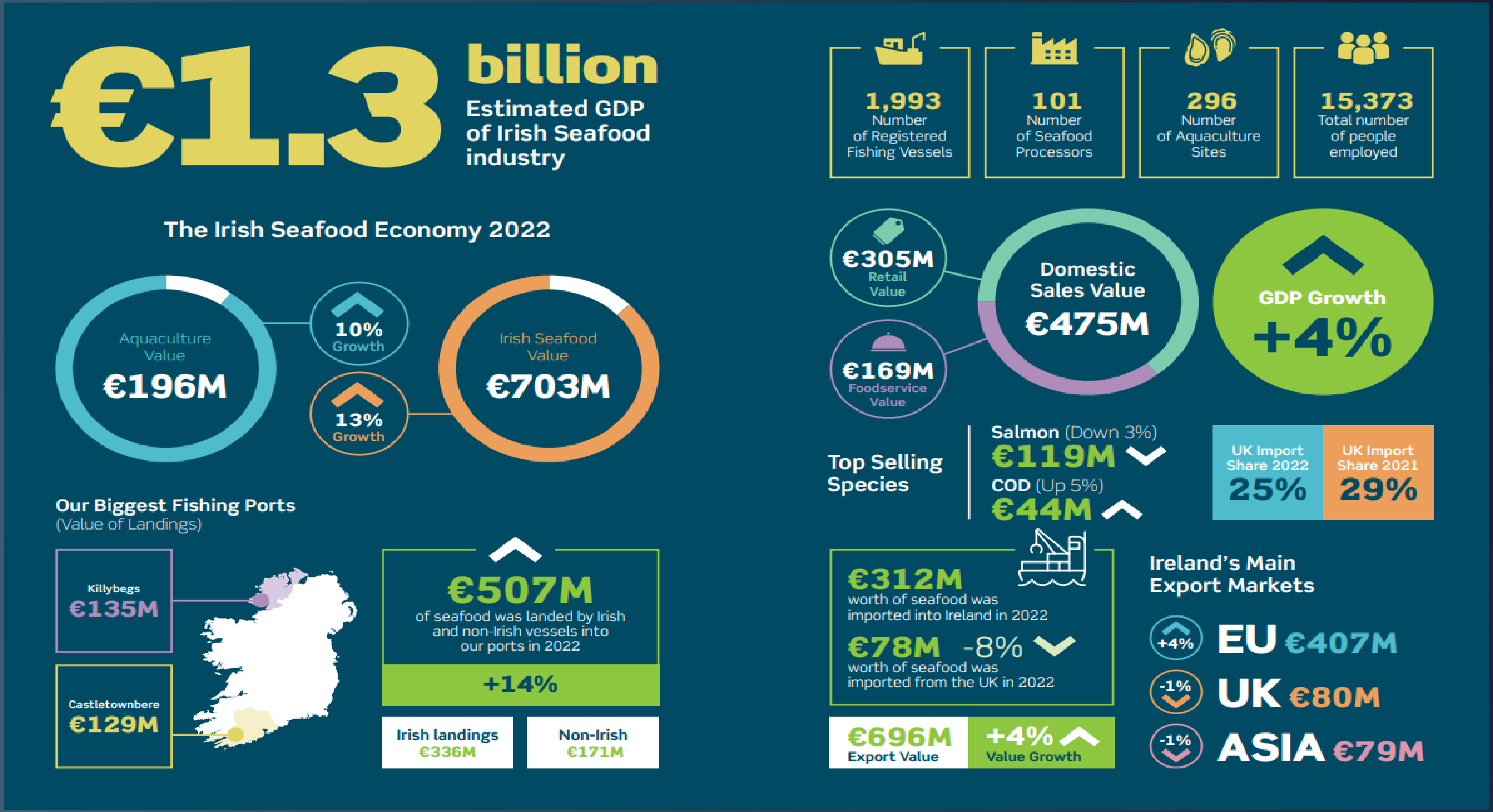
THE MARKET ADVISORY COUNCIL

Aodh O Donnell, CEO

DATE: 19TH SEPTEMBER 2023

IFPO

Market Advisory Council

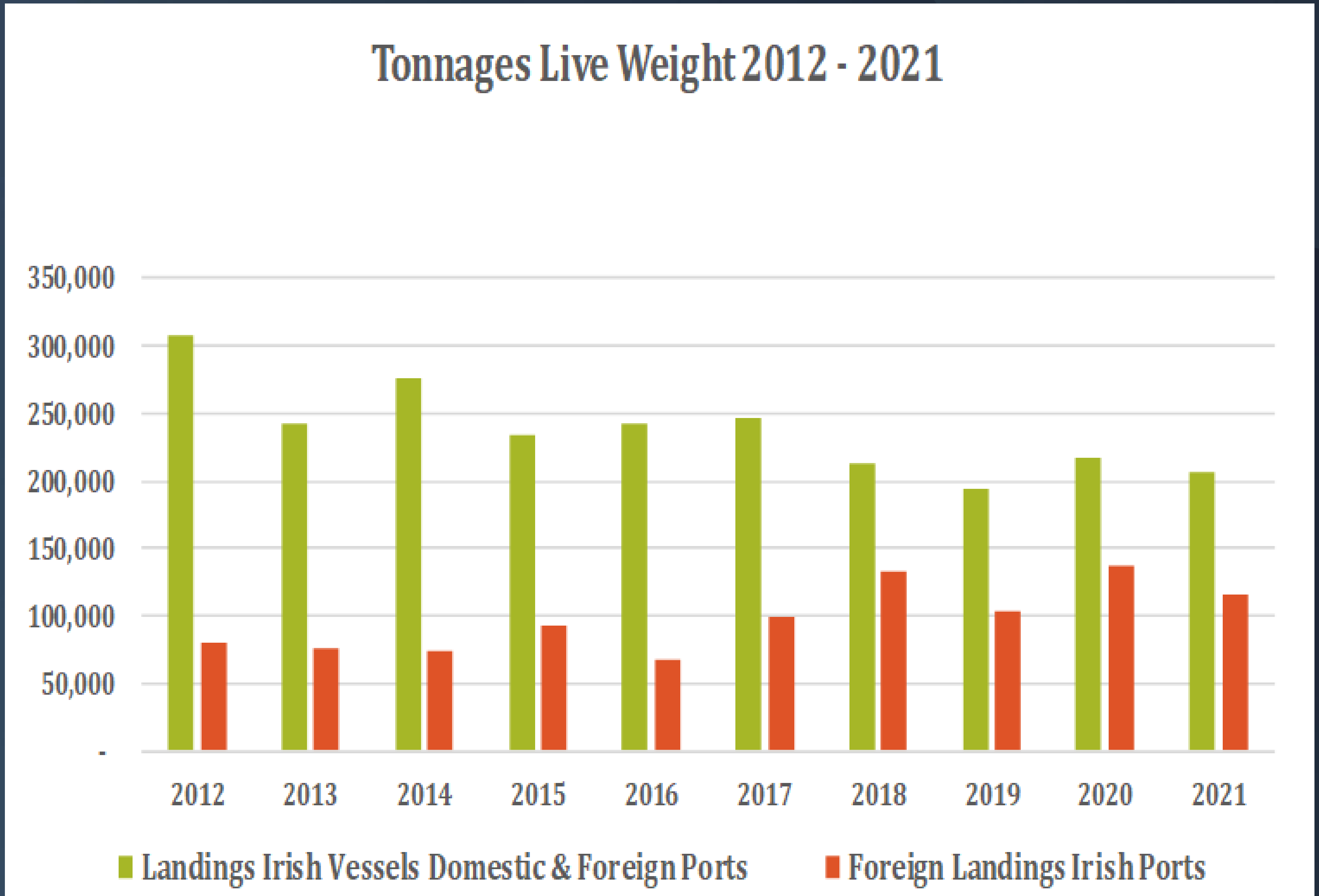


(Source: BIM The Business Of Seafood)

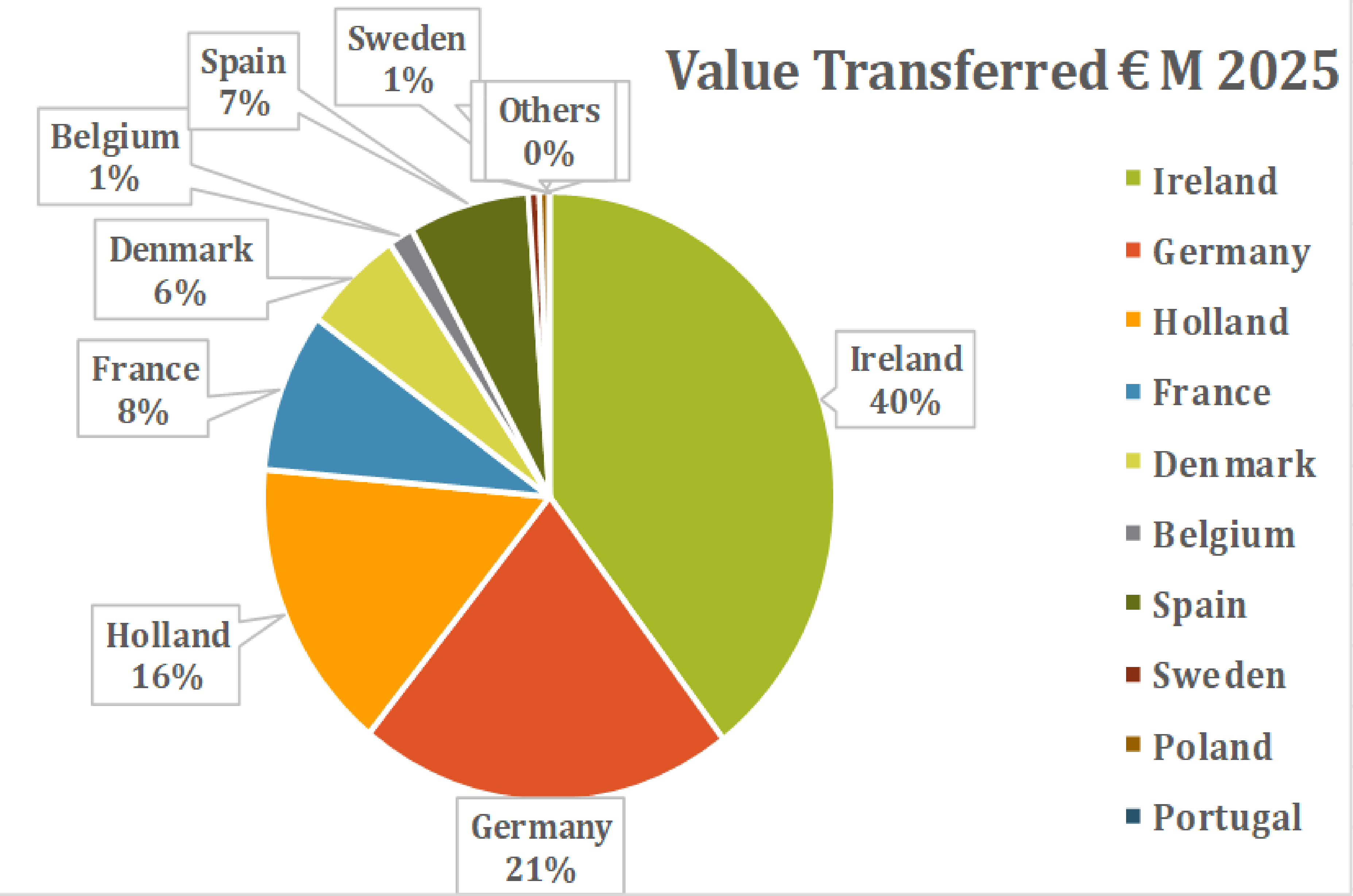
Landings Key Indicators Ireland.

10 Year Trend: Irish Landings & Foreign Landings Irish Ports.

	Tonnage Live Weight Equivalent			
Year	Landings Irish Vessels Domestic & Foreign Ports		Foreign Landings Irish Ports	
2012	306,544	100%	80,349	100%
2013	242,635	79%	76,943	96%
2014	275,696	90%	74,039	92%
2015	234,028	76%	93,938	117%
2016	241,553	79%	68,012	85%
2017	245,482	80%	100,305	125%
2018	213,897	70%	132,477	165%
2019	194,956	64%	103,386	129%
2020	217,981	71%	136,257	170%
2021	206,068	67%	116,719	145%



Economic impact of Brexit Quota Transfers in 2025, by Member State in values € M (STECF).



Full Brexit Changes 2025 Value €M Country	Value Transferred € M STECF	Percentage of Total Share
Ireland	€ 28	40%
Germany	€ 15	21%
Holland	€ 11	16%
France	€ 6	8%
Denmark	€ 4	6%
Belgium	€ 1	1%
Spain	€ 5	7%
Sweden	€ 0	1%
Poland	€ 0	1%
Portugal	€ -	0%
Others	€ -	0%
Total	**€ 71**	

(SOURCE: STECF ANNUAL ECONOMIC REPORT)

IFPO – Role- what we do

- Formed in 1975 - the longest-established PO IRL
  - Representing owners of commercial sea-fishing vessels of all sizes in the Pelagic, Whitefish, and Shellfish sectors.
- Membership Nation Wide– National PO
- We support the management of member's fishing activities, both catching and marketing, with a view to making the best use of the available fish stocks and optimising returns.
- We carry out responsibilities in line with the principles of the CFP & CMO

The Irish Fish Producers Organisation is the longest established fish producer's organisation in the State. We represent our members at National and EU levels, focusing on the policies and issues that affect them.

The IFPO has a diversified membership base and is represented on key organisations such as:

- *Quota Management Advisory Commitee* **(QMAC)**
- *Consultative Committee* **(SFPA)**
- *European Association of Producer Organisations* **(EAPO)**
- *North Western Waters Advisory Council* **(NWWAC)**
- *Pelagic Advisory Council* **(PELAC)**

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What We Do:

CMO Role:

•Market Optimisation Initiatives- diversification and revenue generation.

•Representation, Communication, Media and Lobbying.

•Information Dissemination and emerging trends/ legislation.

•Liaison and research partnerships : participate in Bottom Up Industry Science Partnership in collaboration with other PO s e.g. PORCUPINE Survey 2023 (IFSRP)

•Membership in Advisory Councils (AC s) and Focus Groups (FG s).

•Promote Sustainability & Good ocean Governance.

•National Quota Management Advisory.

•Employment legislation : mediation of best practice

IFPO Members

Vessel- High Level Profile

38 members, as follows in Vessel Type:

• Refrigerated Sea Water (RSW)- Pelagic	9
• Freezing at Sea (FAS) Demersal	11
• Polyvalent, Demersal, Shellfish and other	18

- **Indicative Annual IFPO Member Landings rank by Value (ex pier first sale)**
- **Species Mix= 35 species approx.**

IFPO Landing Profile Aggregated by Species

Species		Value €
Grand Total		51,721,982
Atlantic Mackerel	€	21,260,089
Norway lobster	€	16,833,645
Blue whiting (=Poutassou	€	2,147,391
Jack and horse mackere	€	1,862,172
Albacore	€	1,598,425
Anglerfishes nei	€	1,532,058
Atlantic Herring	€	1,260,876
Whiting	€	895,776
Haddock	€	875,176
Boarfishes nei	€	731,907
European sprat	€	704,142
Other Species*	€	440,315
European hake	€	361,321
Common sole	€	240,701
Atlantic cod	€	154,343
Megrims nei	€	143,481
Pollack	€	94,307
Edible crab	€	84,738
Saithe (=Pollock)	€	70,025
John dory	€	67,199
Turbot	€	51,796
Various squids nei	€	41,696
Blonde ray	€	40,407
Swordfish	€	34,379
Lemon Sole	€	33,966
European lobster	€	32,676
Ling	€	27,327
Witch flounder	€	22,902
Atlantic bluefin tuna	€	22,776
European plaice	€	17,898
Brill	€	13,321
Thornback ray	€	12,532
Common squids nei	€	11,656
Gurnards, searobins nei	€	483
Small-spotted catshark	€	81

BREXIT and TRADE AND CO OPERATION AGREEMENT (TCA) impacts:

- Mackerel and Pelagic Sector most affected (66 %)
- Nephrops ranks as second most adversely impacted by the TCA.
- Other
  - Permanent Decommissioning - no of local vessels and consequent loss of jobs/heritage.
  - Loss of resilience and critical mass
  - Variations in Technical measures – e.g. variations in Mesh Sizes and Gear differences

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Key Sectoral & Member Challenges

1. <u>Spatial Squeeze</u>

   a. Offshore Renewables (ORE) in the Irish Sea - Concentration of Phase 1 projects with 4 in Irish Sea.

   b. Marine Protected Areas – MPA Targets 30 % by 2030 (30:30).

2. <u>Environmental Drivers & Impacts</u>

   c. Bottom Trawling Ban proposals - and No Take Zone proposal - 10% target.

   d. Special Areas of Conservation (SAC s')

   e. Vulnerable Marine Ecosystems VME- Nephrops Fishery 10 % of area

   f. Energy Transition (Fuel intensity) and Fleet renewal

3 <u>Other</u>

   g. Low Quota Share- Resilience- Management- Landing Obligation- SWAPS

THREATS AND OPPORTUNITIES

- **THREATS**
- Quota share & International Scale= 15 %- 18 % in EU - Irish EEZ.
- International market weakness.
- Marine fuel cost escalation = € 0.90 vs €0.60 STECF B/E.
- Ageing Fleet – requires modernisation.
- Energy Transition - and adaption -fuel-intensive fisheries e.g.Nephrops.
- Spatial Squeeze and displacement.

OPPORTUNITY

- Additional Focus - Good Ocean Governance and Sustainability
- Innovation and Avoidance / Selectivity


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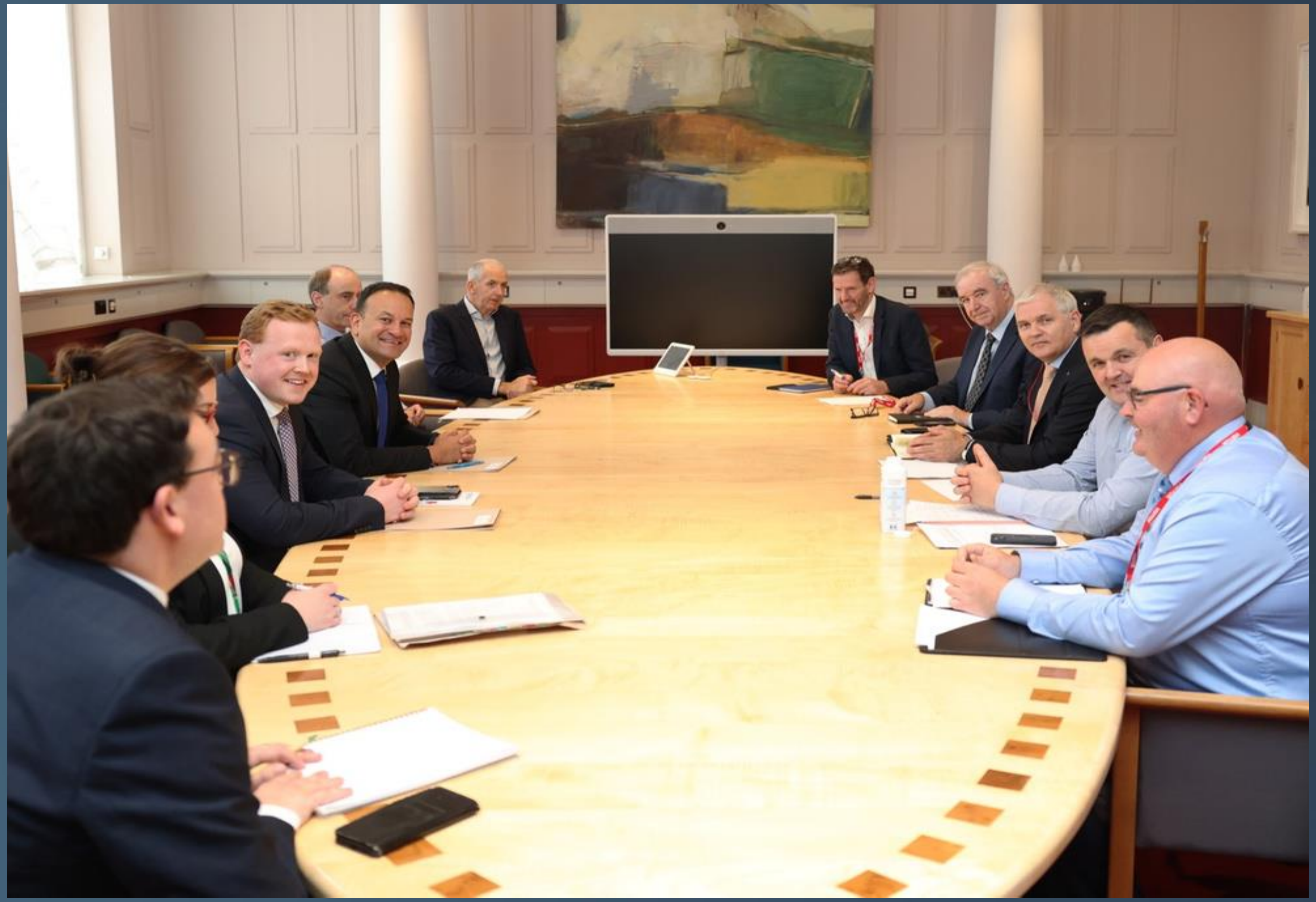

Go Raibh Maith Agaibh

Merci

Gracias

Grazie

Danke

Efcharistó

Thank You

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