Iarnród Éireann
Irish Rail

Rosslare ORE Hub

EIAR Technical Appendices

Technical Appendix 15:

Commercial Fisheries

venterra | GDG GAVIN & DOHERTY GEOSOLUTIONS | NICHOLAS O'DWYER an RSK company

Co-funded by the European Union

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15 COMMERCIAL FISHERIES

15.1 INTRODUCTION

Fishing is the longest standing marine activity in the territorial and coastal waters of Ireland. Some fisheries, like those for native oysters, have operated from at least the 16th century with others, fisheries for herring and lobster for example, reported as well developed by the mid-19th century. Others, by comparison, are more recent. Pot fishing for shrimp was only developed in the 1970s and commercial dredging for razor clams in the 1980s.

Today some 2,000 Irish owned craft are registered as commercial fishing vessels and more than 80% of these are under 12 metres in length. These smaller vessels, part of the inshore or small-scale coastal fleet, depend greatly on the territorial, or inshore, waters of the State.

This Technical Appendix presents the existing commercial fisheries and aquaculture baseline established from available fisheries data, desk studies, and local consultation.

15.1.1 STATEMENT OF COMPETENCE

Seaview Marine Economic Consultancy (Seaview Marine) are marine consultants working within Ireland and the European Union. Operating since 2001, Seaview Marine provides advice in support of sustainable fisheries and aquaculture, marine planning, offshore renewable energy, marine protected areas and other potential sources of marine spatial pressure. Seaview Marine services include high quality outputs and solutions across a range of fisheries and marine related projects delivered by its Principal Investigator, Michael Keatinge, with additional expertise in specific areas including aquaculture and modelling provided by a number of associates.

Seaview Marine brings a full understanding of the methodology and best practice for undertaking commercial fisheries impact assessment including a deep understanding of guidance related to undertaking impact assessment for commercial fisheries.

This Technical Appendix has been written by Michael Keatinge, Principal Investigator at Seaview Marine.

Table 15-1 Qualifications

Year	Qualification/Position
1978 - 1981	Diploma Nautical Science, School of Nautical Studies, Plymouth.
1983 -1987	B.A. (Mod), Natural Science, Trinity College, Dublin.
1989 -1990	Graduate Diploma in Statistics, Trinity College, Dublin.
2014	M.A. (Zoology), Trinity College, Dublin
2014	MSc Economics (Policy Studies), Trinity College, Dublin.

Table 15-2 Employment History

Term	Position
2014 – 2017	Interim Chief executive Officer, BIM.
2012 – 2020	Director Fisheries Development and Training Services Divisions, BIM.
2000 – 2012	Director Fisheries Development Division, BIM.
1998 – 2000	Fisheries Development Executive, BIM.
1991 – 1993	Lecturer in Zoology, Trinity College, Dublin.
1994 – 1998	Statistician & Population Modeller, Fisheries Research Centre / Marine Institute.
1978 – 1991	Deck officer in Irish Merchant Navy.
1999 – 2004	Chair Albacore Group International Commission for Conservation of Atlantic Tuna
1998 – 2016	Member of the Standing Committee for Research & Statistics (ICCAT)
1999 – 2007	Member of Scientific, Technical and Economic Committee for Fisheries.
1999 – 2005	Member European Sustainable Use Specialist Group of IUCN.
2000 – 2003	Member National Strategy Review Group on the Common Fisheries Policy.
2003 – 2007	STECF representative to the Advisory Committee for Fisheries and Aquaculture
2004	Work in the fishing sector - 96th Session International Labour Organisation (ILO)
2005 – 2009	Member of National Salmon Commission.

15.1.2 STUDY AREA

The International Council for the Exploration of the Sea (ICES) uses a system of statistical divisions to organize and analyse marine data. These divisions are primarily used for fisheries management and scientific research.

The Proposed Development is located in the south-west part of ICES Division VIIa (Figure 15-1).

The commercial fisheries and aquaculture study has been used to identify commercial fishing activity and aquaculture installations in areas relevant to the Proposed Development. A range of commercial fisheries information and data are recorded at the scale of ICES statistical division and rectangle.

The commercial fisheries and aquaculture study area is further defined as being located fully within ICES statistical rectangle 33E3 (Figure **15**-**2**).

ICES statistical rectangles have been in use since the 1970's. They provide a grid covering the area between 36°N and 85°30'N and 44°W and 68°30'E. Latitudinal rows, with intervals of 30' (minutes), are numbered (two-digits) from 01 at the southern boundary (latitude 36°00'N) and increasing northwards to 99. The northern boundary of the statistical rectangle system is, thus, latitude 85°30'N. Longitudinal columns, with intervals of 1°, are coded according to an alphanumeric system, beginning with A0 at the western boundary (longitude 44°00'W), continuing A1, A2, A3 to longitude 40°W (*see note 1 below). East of 40°W, the coding continues B0, B1, B2, ..., B9, C0, C1, C2, ..., C9, etc., using a different letter for each 10° block, to the eastern boundary of the area covered. Note that the letter I is omitted.

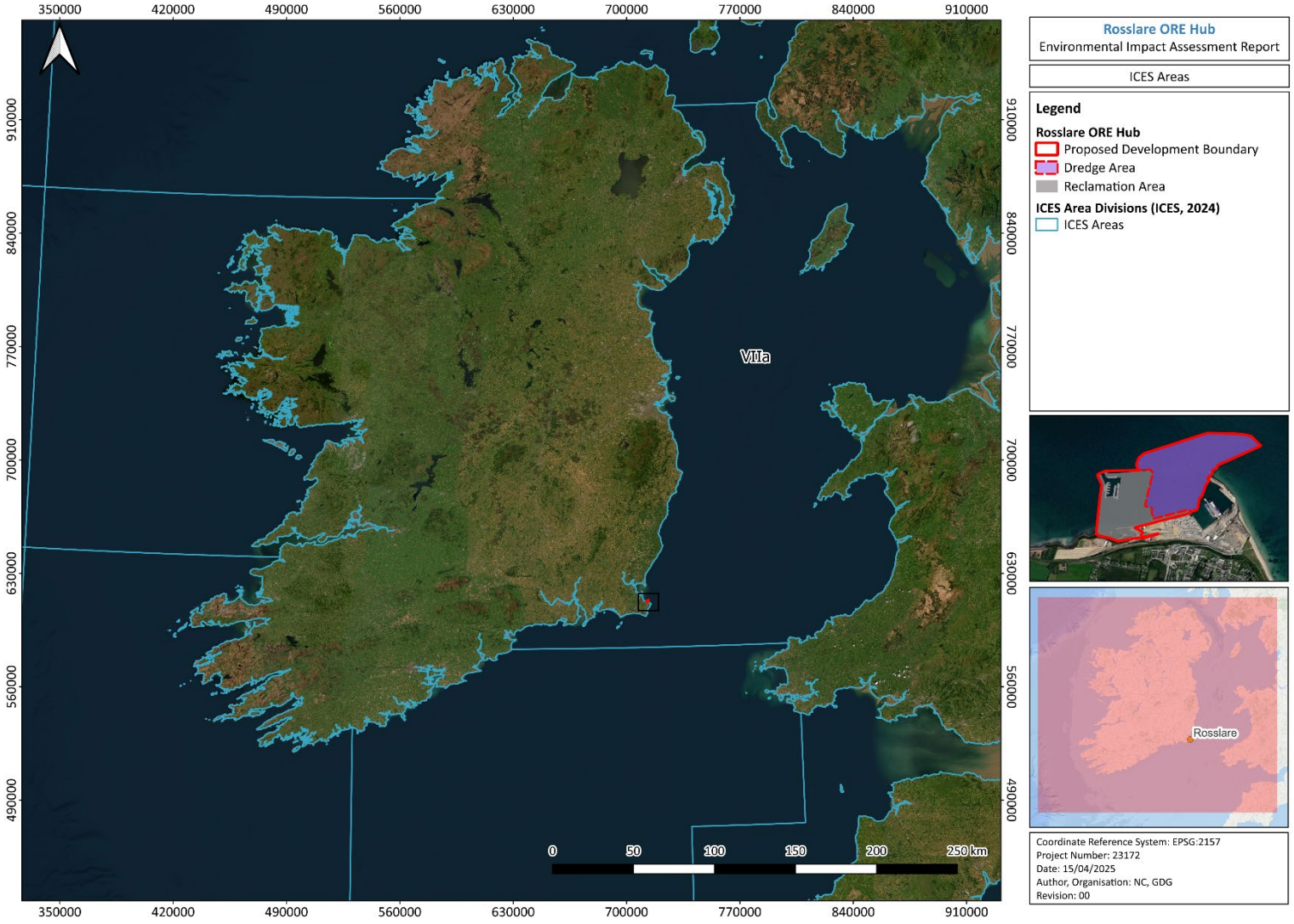


Figure 15-1 ICES divisions (VIIa Irish Sea) relative to the Proposed Development (ICES, 2024)

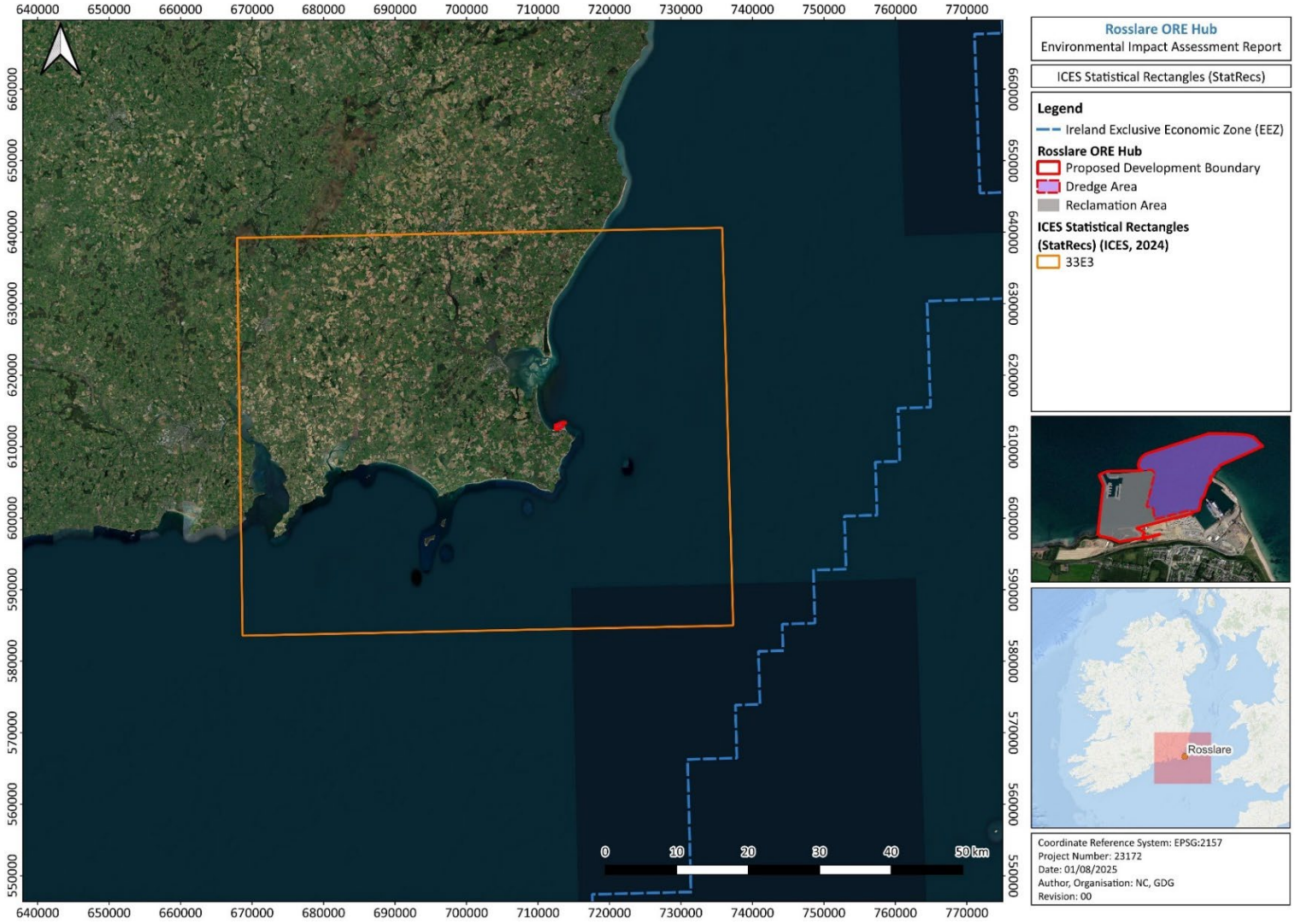


Figure 15-2 **Commercial Fisheries and Aquaculture Study Area / ICES Statistical Rectangle 33E3 (ICES, 2024)**

15.1.3 ROSSLARE HARBOUR (EIAR) FISHERIES CONSULTATIVE GROUP

Topic-specific Consultation: According to the 2022 EPA Guidelines, good practice in preparing EIARs involves clear and focused consultation with various parties at key stages of the assessment process, and compliance with the Aarhus Convention requires that the public is made as fully aware as possible of the likely environmental impacts of projects prior to a decision being made by the Competent Authority.

One of the central aims of the National Marine Planning Framework is the managed utilisation of Ireland's sea-fisheries resources *in consultation with stakeholders* thereby promoting environmental sustainability and the development of the sector's economic and social contribution to rural and coastal communities. In addition, Fisheries Policy 2, which requires developers of any proposal that could result in a significant impact upon fishing activity to prepare a Fisheries Management and Mitigation Strategy in consultation with local fishing interests and other interests. The importance of stakeholder consultation is also highlighted in Fisheries Policy 6 (ports and harbours). This advises project developers to engage with fishing and other relevant stakeholders at an early stage and to discuss any changes in infrastructure that may affect them, taking account of the needs of the dependent fishing fleets with a view to avoiding commercial harm where possible. This is especially important where a port or harbour has reached the minimum level of infrastructure required to support a viable fishing fleet.

The Rosslare Harbour Fisheries Consultative Group was established in February 2024. Comprising local fisheries, aquaculture, and professional charter boat interests, the Group acts as the principal communications and discussion forum for the local commercial fisheries and aquaculture sectors. Membership of the Group is shown in Table 15-3 while a summary of consultation meetings with the Fisheries Consultative Group and other commercial fisheries representative groups are provided in Table 15-5.

Membership of the Seafood Industry Representative Forum (SIRF), a national Group formed to coordinate the seafood industry's response to ORE development, is shown Table 15-4. The latter Group provides the Chair of the Rosslare Harbour Fisheries Consultative Group, Mr John Lynch of the Irish South & East Fish Producers Organisation.

Table 15-3 Stakeholder Consultative Group

Rosslare Harbour (EIAR) Fisheries Consultative Group Members
Mr John Lynch, Chairman, Irish South and East Fish Producers Organisation
Ms Liz Goff, National Inshore Fishermen's Forum
Mr Leslie Bates, Sofrimar, Kilmore Quay (Fish Processing & Exporting)
Mr Micheál Ferguson (Catching Sector)
Mr Eoin Bates (Catching Sector)
Mr Sam Nunn (Catching Sector)
Ms Teresa Morrissey, Irish Farmers Association (Aquaculture)
Mr Séamus Breathnach, National Inshore Fishermen's Association
Mr Joey O'Connor, Gavin & Doherty Geosolutions (Developer Consultant)
Mr Billy Hoey, Project Manager, Irish Rail (Developer)

Table 15-4 Seafood Industry Representative Forum (SIRF)

Members
IFA Aquaculture
Irish Fish Processors and Exporters Association (IFPEA)
Irish Fish Producers Organisation (IFPO)
Irish Seafood Producers Group (ISPG) (Aquaculture)
Irish South & West Fish Producers Organisation (ISWFPO)
Irish South and East Fish Producers Organisation (ISEFPO)
Killybegs Fishermen’s Organisation (KFO)
National Inshore Fishermen’s Association (NIFA)

Table 15-5 Summary of Consultations relating to Commercial Fisheries

Date	Location - Type	Meeting with
02/11/2023	Video Conference	John Lynch, CEO of the Irish South & East Fish Producers Organisation (ISEFPO)
07/11/2023	Video Conference	Meeting with CEO ISEFPO, CEO Killybegs Fisherman's Organisation (KFO), Scientific Advisor KFO Dr Edward Farell.
30/11/2023	Video Conference	Joey O'Connor & Stiofain MacDaibhead, Gavin & Doherty
05/12/2023	Video Conference	Seafood Industry Representatives Forum
01/02/2024	Rosslare Europort – In Person	Rosslare Harbour (EIAR) Fisheries Consultative Group
15/02/2024	Video Conference	Meeting with Seafood Industry Representatives Forum
11/04/2024	Video Conference	Rosslare Harbour (EIAR) Fisheries Consultative Group and CEO Irish Fish Processors and Exporters Association.
19/07/2024	Rosslare Europort – In Person	Rosslare Harbour (EIAR) Fisheries Consultative Group
03/10/2024	Rosslare Europort – In Person	Rosslare Harbour (EIAR) Fisheries Consultative Group
24/10/2024	Video Conference	Commercial fishermen's representatives of Rosslare Harbour (EIAR) Fisheries Consultative Group

15.1.4 KEY DESKTOP REPORTS AND DATA SOURCES

In this section we identify the various fish stocks of commercial importance within the Study Area. Information on commercial fisheries and aquaculture within the study area was collected through a detailed desktop review of existing studies and datasets. These sources are summarised in Table 15-6 and Table 15-7.

Table 15-6 Key desktop reports and data resources (Data Sets)

Dataset	From	To
Estimates of annual landings (tonnes) and value (€) of crustacean and bivalve shellfish (excl. prawns and mussels) by Irish vessels into Ireland 2004-2023 (source: Logbook declarations and sales notes for vessels under 10 m, shellfish registration dockets, co-op data). Unit value (per kilo) from sales note data or other sources.	2004	2023
Landing statistics for Irish Registered Vessels	2015	2022
Irish component of EU Fleet Register, Published: 27-June-24	2024	2024
Irish Fleet Register - Owners addresses	2023	2023
Volume (tonnes), Value (€) of annual landings to Rosslare Harbour	2008	2022
Volume (tonnes) and Value (€) of annual shellfish landings to Rosslare Harbour	2017	2020
Volume (tonnes) and Value (€) of annual Razor clam landings (All ports)	2015	2016

Table 15-7 Key desktop reports and data resources (Publications)

Publication	From	To	Source
Annual Review of Fish Stocks with Management Advice.	2000	2023	Marine Institute
Marine Institute, Atlas of Commercial Fisheries Around Ireland, 3rd edition	2019		Marine Institute
Marine Institute, Atlas of Commercial Fisheries for Shellfish Around Ireland	2017		Marine Institute
Marine Institute, Atlas of Commercial Discarding	2011		Marine Institute
Marine Institute, North Western Waters Atlas, 3rd edition	2015		BIM
Marine Institute/BIM, Shellfish Stocks and Fisheries Review.	2009	2023	Marine Institute/BIM
Marine Strategy Framework Directive 2008/56/EC, Article 17 update.	2008		European Union
Business of Seafood	2016	2023	BIM
Annual Fisheries Report.	2023		BIM
Annual Economic Report on the EU Fishing Fleet (AER).	20112	2023	European Union

15.2 COMMERCIALLY IMPORTANT FISH RECEPTORS

15.2.1 INTRODUCTION

Under the Common Fisheries Policy commercially important fish stocks are managed by the European Commission in conjunction with the European Parliament, Council of Ministers, and Member States. For Ireland this includes a total of 32 species and 64 stocks (many species have two or more actively managed stocks). These fisheries are generally subject to active management including catch limits (EU quotas), capacity limits (measured as gross tons, GT, and engine power, kW), effort limits (kW days fished), catch reporting and an array of technical measures including mesh size and other gear constraints, area and time closures etc.

Commercially important fish stocks are broadly categorised into two groups: demersal stocks and pelagic stocks.

15.2.2 DEMERSAL STOCKS

Demersal stocks (also known as groundfish) live and feed on or near the seabed. They include cod, haddock, whiting, hake, monkfish, megrim, plaice, sole, pollack, saithe and other, non-quota, species including lemon sole. Demersal stocks are taken by a variety of fishing gears with bottom trawls, seine nets, gillnets, and beam trawls being the most common. Longlines, previously fished in Irish waters, are less common.

15.2.3 PELAGIC STOCKS

Pelagic species live and feed in the pelagic zone neither close to the bottom nor too near the shore. Often aggregating in large shoals, this group includes mackerel, horse mackerel, herring, blue whiting, boarfish, albacore tuna, and greater silver smelt.

Ireland also receives a quota for blue shark, however commercial fishing for this species (by Irish vessels) is prohibited under national legislation. There are also non-quota pelagic species including sprat and pilchard which are locally important.

15.2.4 FISHING EFFORT AND LANDED VALUE 2014 -2018

The Marine Atlas of Ireland (Marine Institute) provides aggregated results of fishing effort and landed value of the catch for the years 2014 -2018 for each of these gears. Fishing effort and landed values for demersal gears are grouped as follows:

Table 15-8 Summary of Fishing Effort and Landing Value Figures

Species	Fishing Effort	Landing Value
Bottom Otter Trawls	Figure 15-3	Figure 15-4
Seine Nets	Figure 15-5	Figure 15-6
Gill Nets	Figure 15-7	Figure 15-8
Beam Trawls	Figure 15-9	Figure 15-10
Long Lines	Figure 15-11	Figure 15-12
Pelagic Trawls	Figure 15-13	Figure 15-14

Fishing effort: Defined as the time spent engaged in fishing operations this time may be multiplied by a measure of fishing capacity, e.g. engine power. Data are average hours fishing per kilometre square, per year. These data from years 2014 to 2018 are collated from three sources: vessel monitoring systems, logbooks and EU fleet register.

Landings: Defined as the part of the catch that is retained (not discarded) and landed. Data shown are the distribution of landings by Irish vessels measured as average weight (kg) or value (€) of landing per kilometre square, per year for each gear type group. Vessel Monitoring Systems and logbook datasets from years 2014 to 2018 were used to produce these data.

15.2.4.1 DEMERSAL STOCKS

Figure 15-3 to Figure 15-12 highlight the low level of demersal effort in the waters off Rosslare Harbour and the southern Irish Sea in general. This is confirmed by the landing value figures that show a similar pattern across all gears; little or no value is being generated by demersal fisheries in the southern Irish Sea and, specifically, in the waters adjacent to Rosslare Harbour.

While there are high levels of activity in the Celtic Sea and further North in the Irish Sea, these fisheries are undertaken by larger (> 18 metre length) vessels operating from the National Fishery Harbour Centres at Howth, Dunmore East and Castletownbere, as well as Kilmore Quay in south Wexford, and Union Hall in Cork.

15.2.4.2 PELAGIC STOCKS

Pelagic fish are typically taken by mid water trawls, and the Marine Atlas of Ireland (Marine Institute, 2025) provides aggregated results of fishing effort and landed value of the catch for the years 2014 - 2018: these are shown in Figure 15-13 (Fishing Effort) and Figure 15-14 (Landing Values).

Unlike demersal fishing which occurs around much of the coast, pelagic fishing is concentrated off the south-west, west and north-west coasts and Figure 15-13 (Fishing Effort) and Figure 15-14 (Landing Values) show data for the 'whole island' to provide a summary of the distribution of pelagic fisheries with respect to Rosslare. While pelagic fishing is usually associated with the deeper water and continental slopes west of Ireland, and the ports of Killybegs, Ros a Mhíl, Dingle, and Castletownbere, there are also concentrations of mid-water pelagic trawl effort evident along the coasts of Waterford and east Cork as well as further south in the Celtic Sea. These coastal fisheries, which are primarily directed at herring and sprat, are also evident to the east of Rosslare Harbour and along the coastline to the north of the port, extending intermittently to Wicklow Head and beyond.

In 2020, Ireland's quota of pelagic fish was 158,755 tonnes. In the same year, the SFPA recorded 26 tonnes of pelagic fish landed into Rosslare, representing a tiny fraction (0.02%) of the national total.

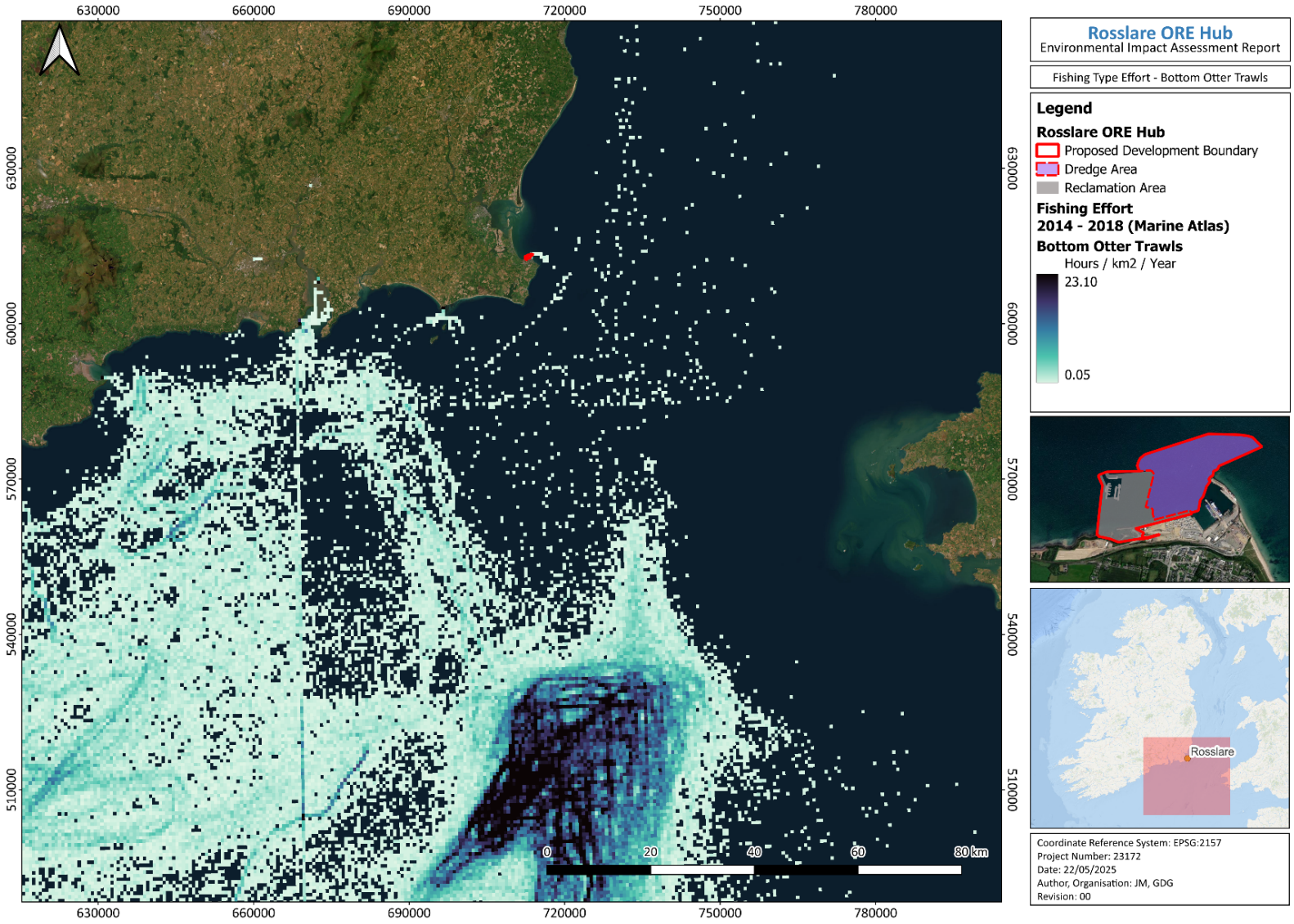


Figure 15-3 Fishing Effort: Bottom Otter Trawls, 2014-2018 (Ireland's Marine Atlas, 2024)

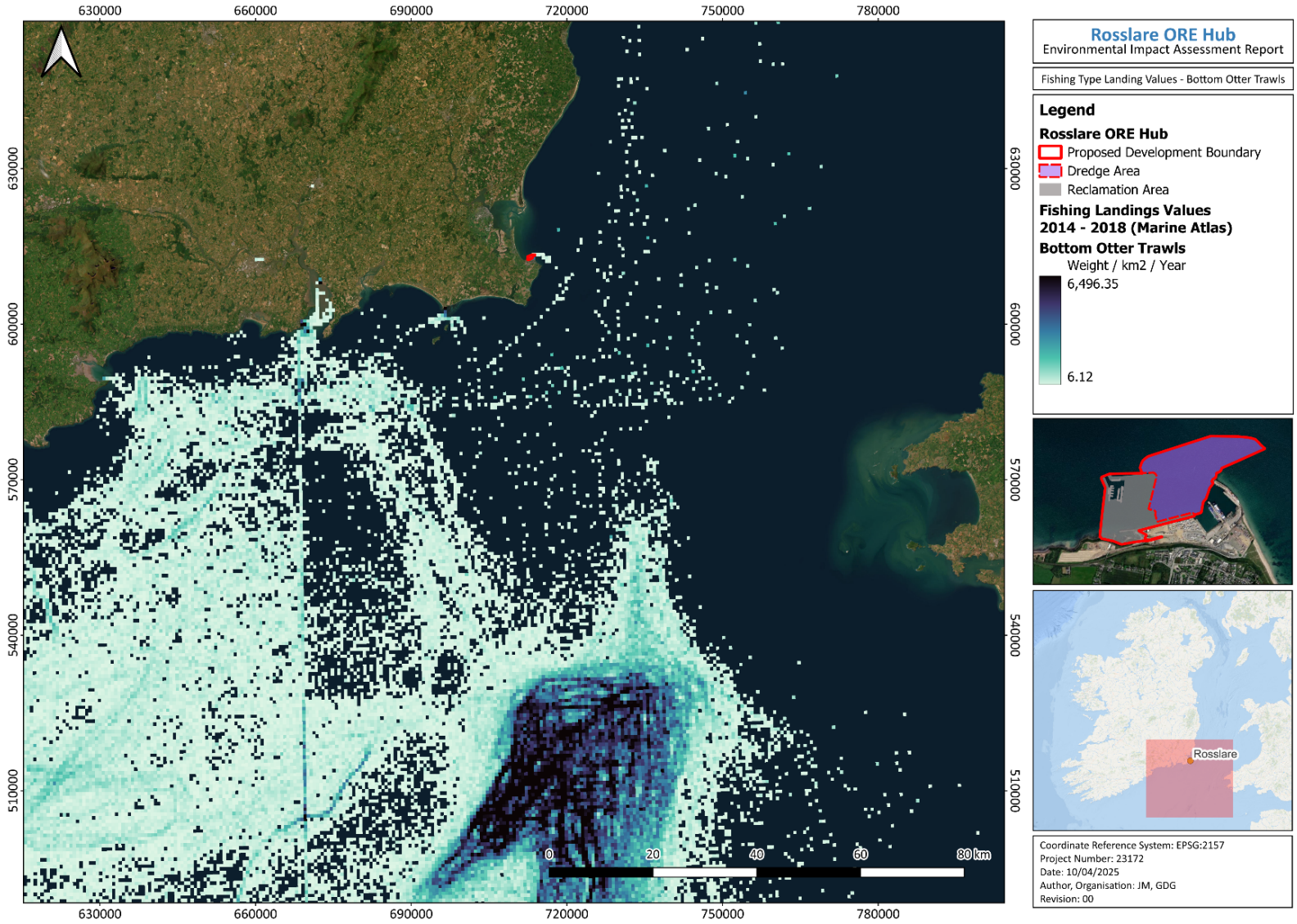


Figure 15-4 Landing Values: Bottom Otter Trawls, 2014-2018 (Ireland's Marine Atlas, 2024)

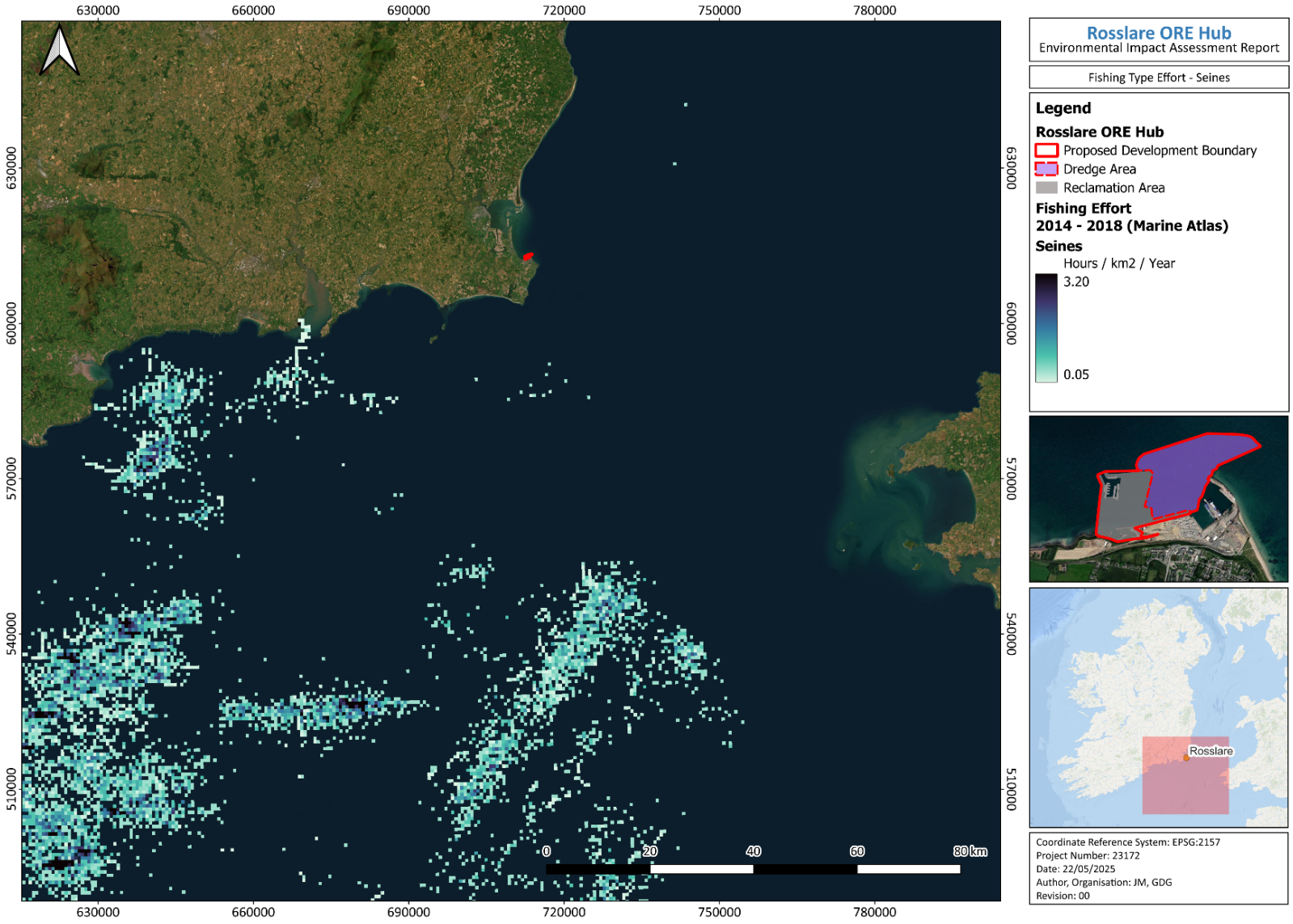


Figure 15-5 Fishing Effort: Seines, 2014-2018 (Ireland's Marine Atlas, 2024)

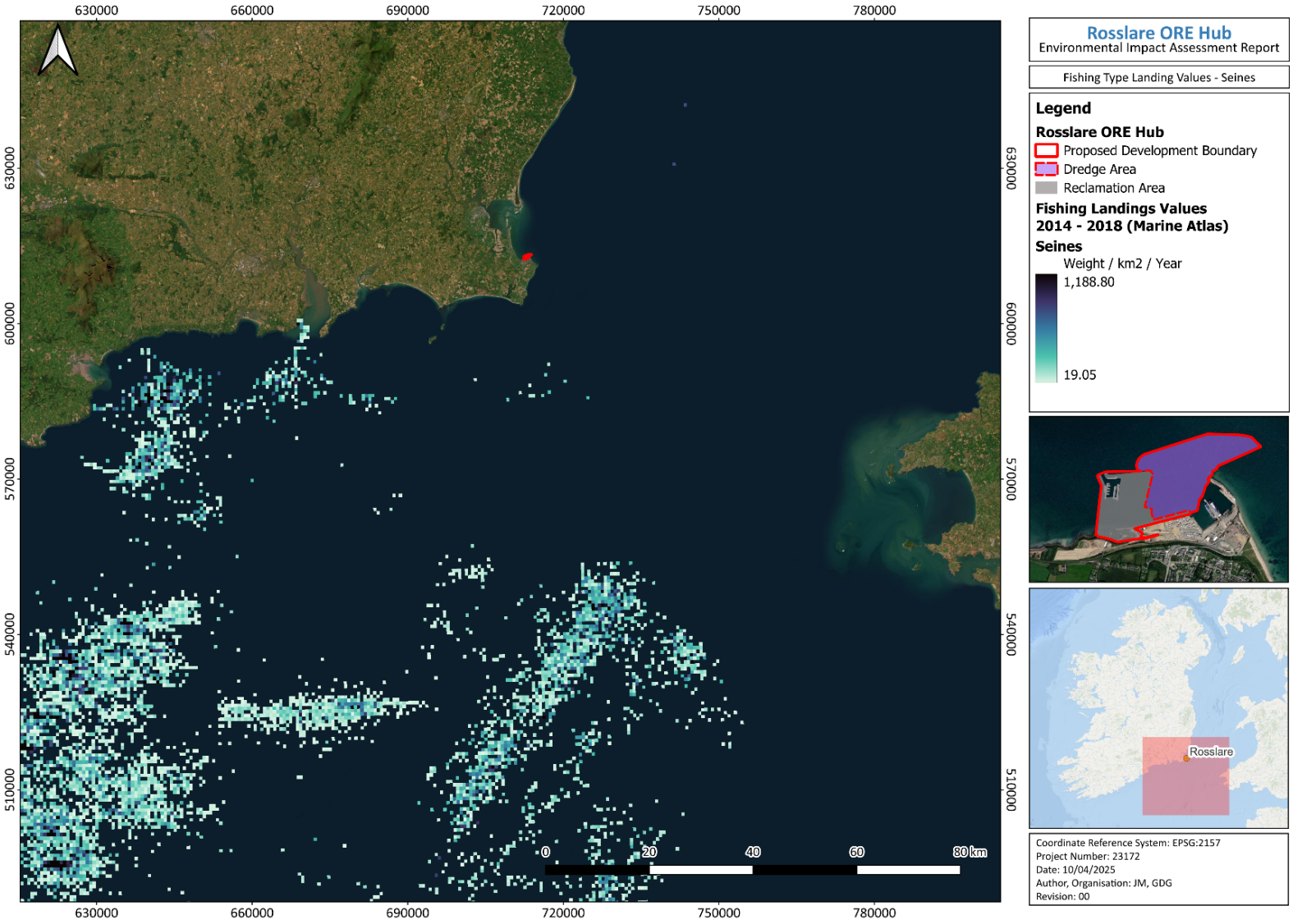


Figure 15-6 Landing Values: Seines, 2014-2018 (Ireland's Marine Atlas, 2024)

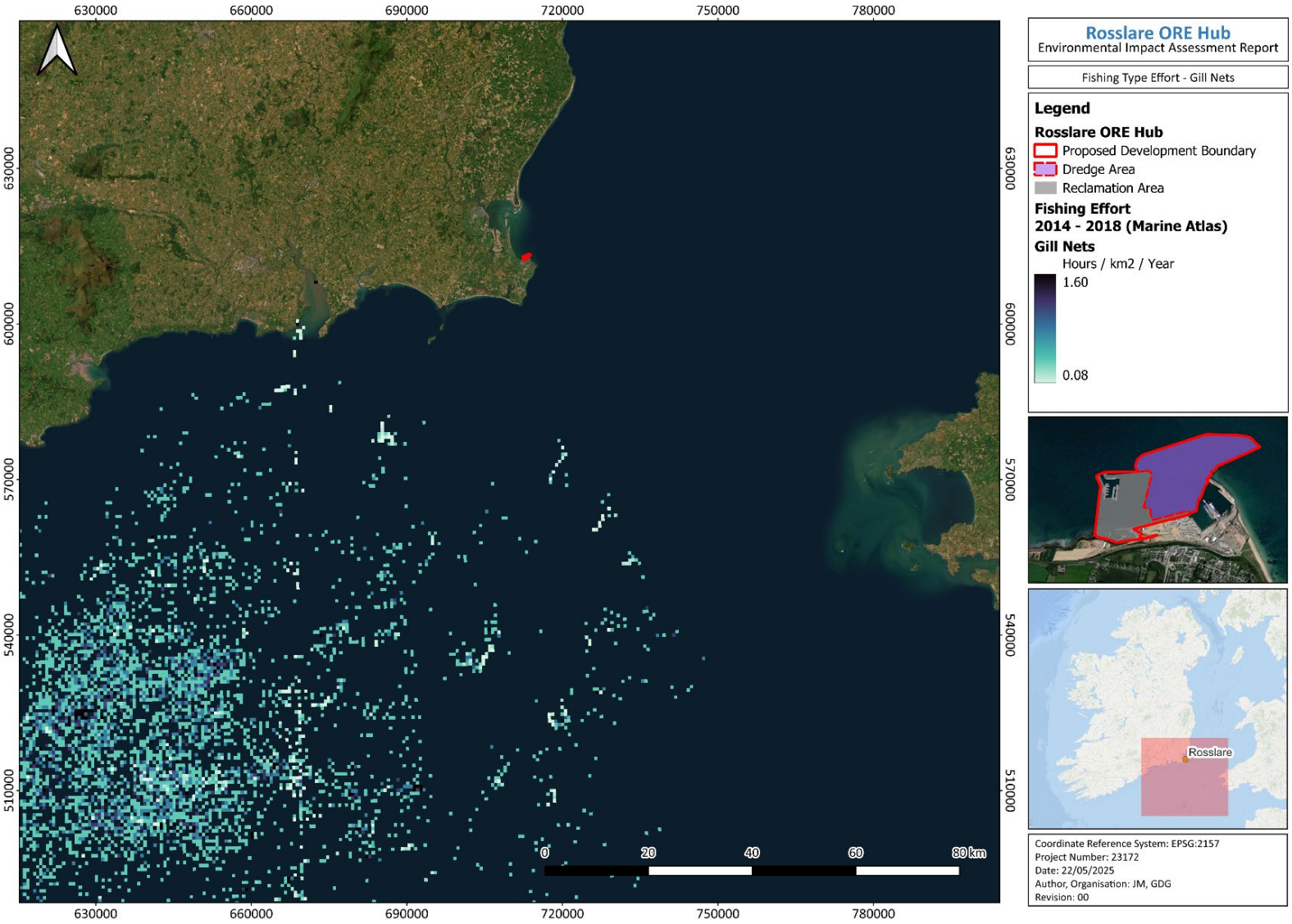


Figure 15-7 Fishing Effort: Gill Nets, 2014-2018 (Ireland's Marine Atlas, 2024)

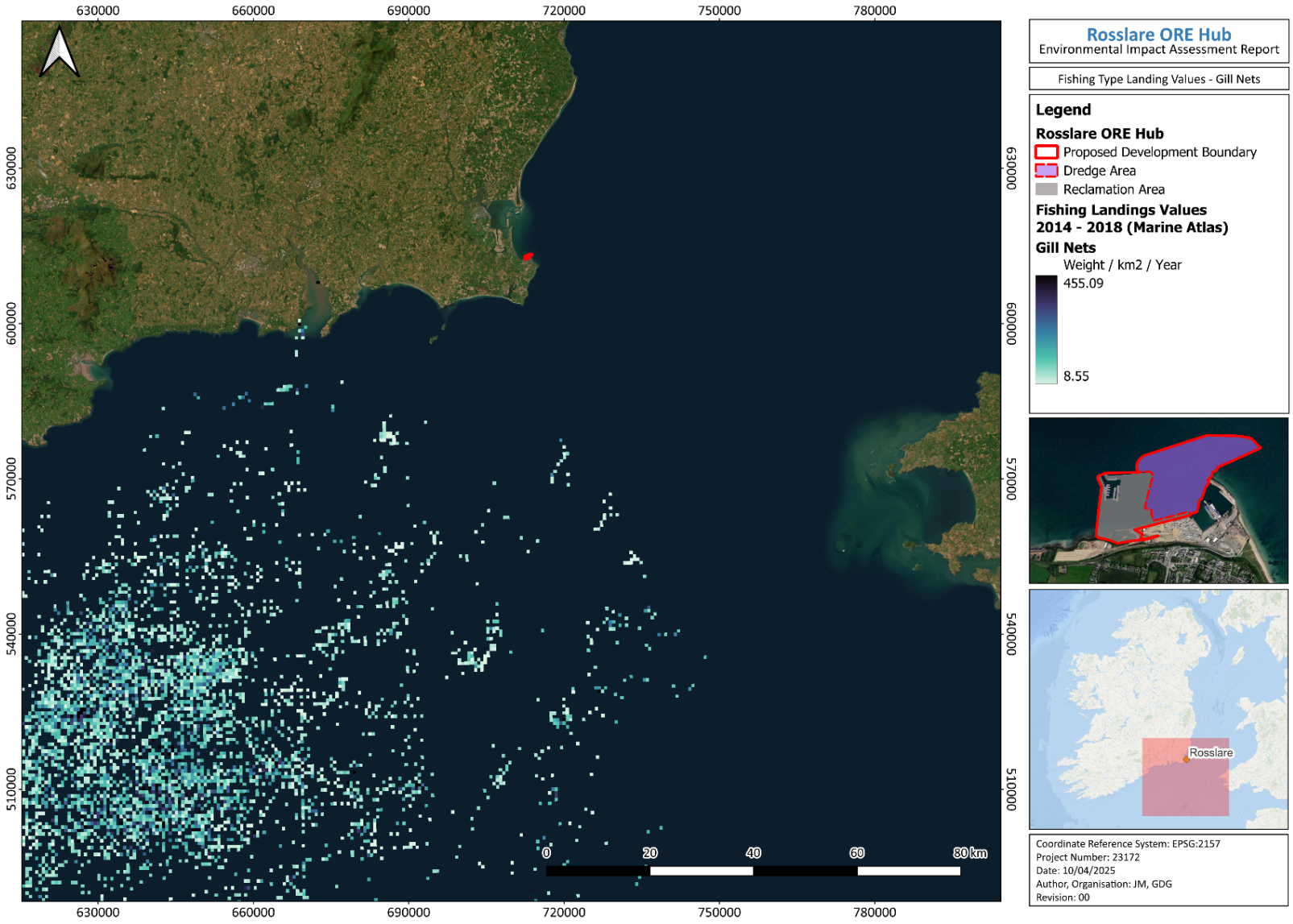


Figure 15-8 Landing Values: Gill Nets, 2014-2018 Ireland's Marine Atlas Database (Marine Institute, 2024)

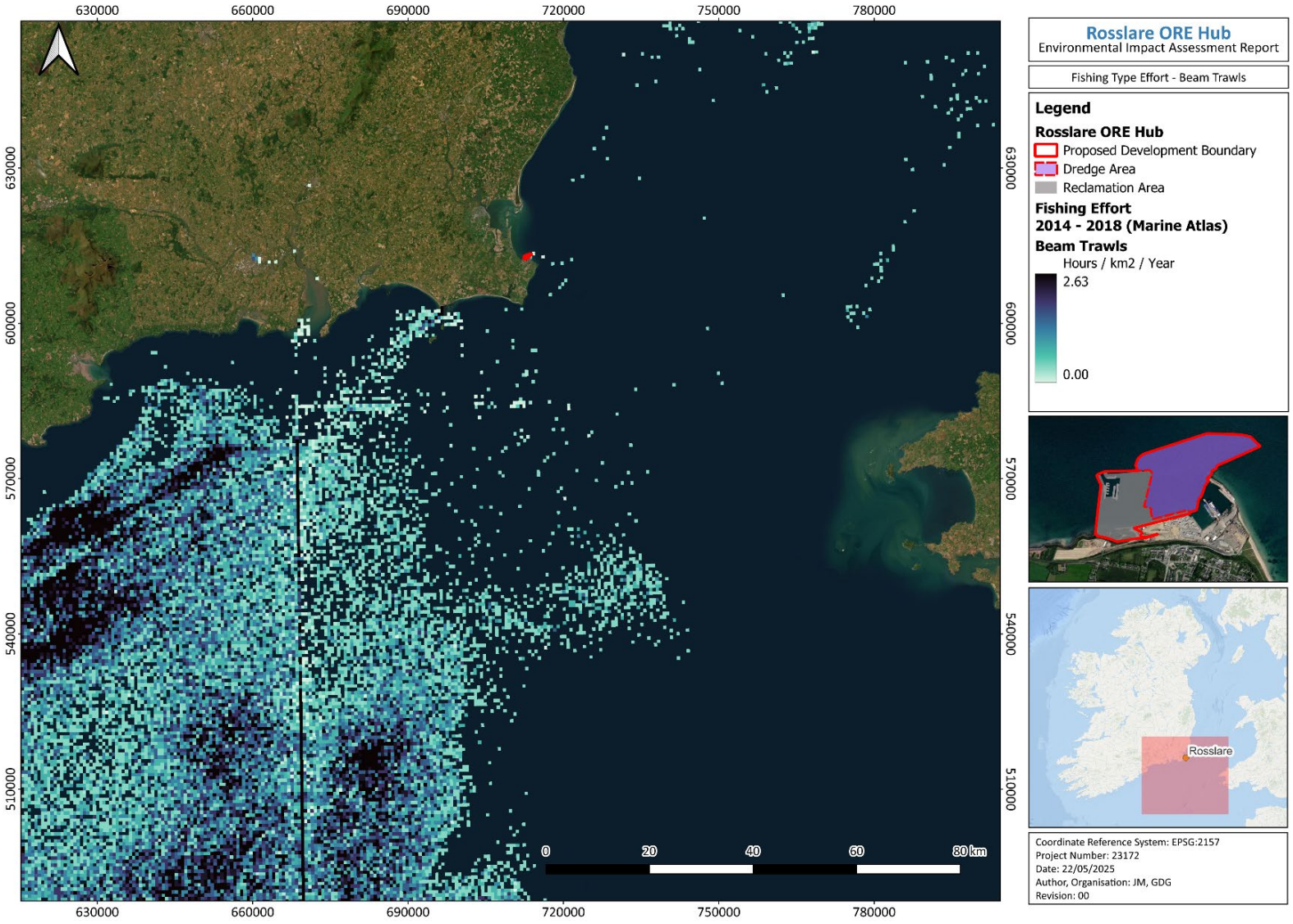


Figure 15-9 Fishing Effort: Beam Trawls, 2014-2018 Ireland's Marine Atlas Database (Marine Institute, 2024)

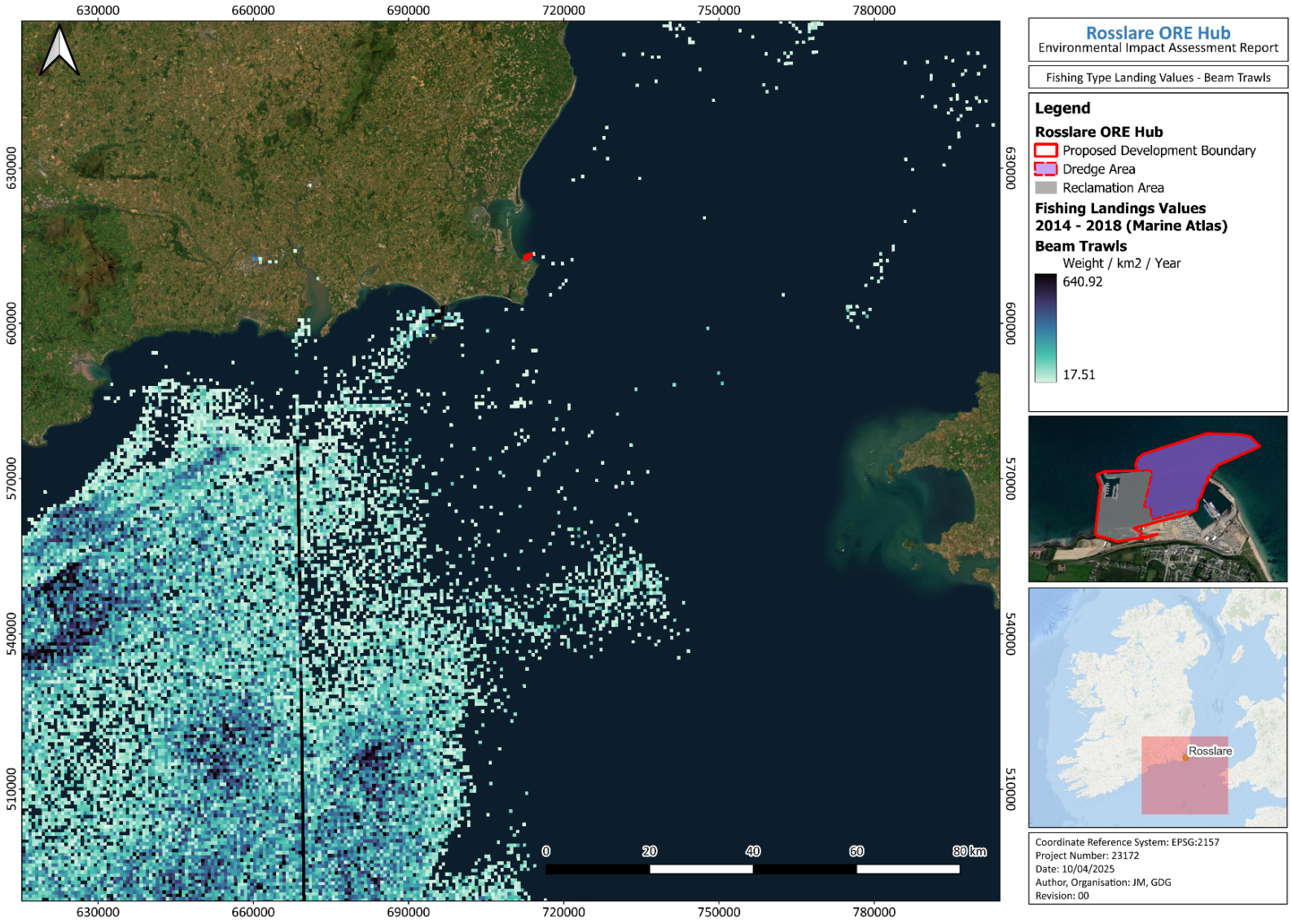


Figure 15-10 Landing Values: Beam Trawls, 2014-2018 Ireland's Marine Atlas Database (Marine Institute, 2024)

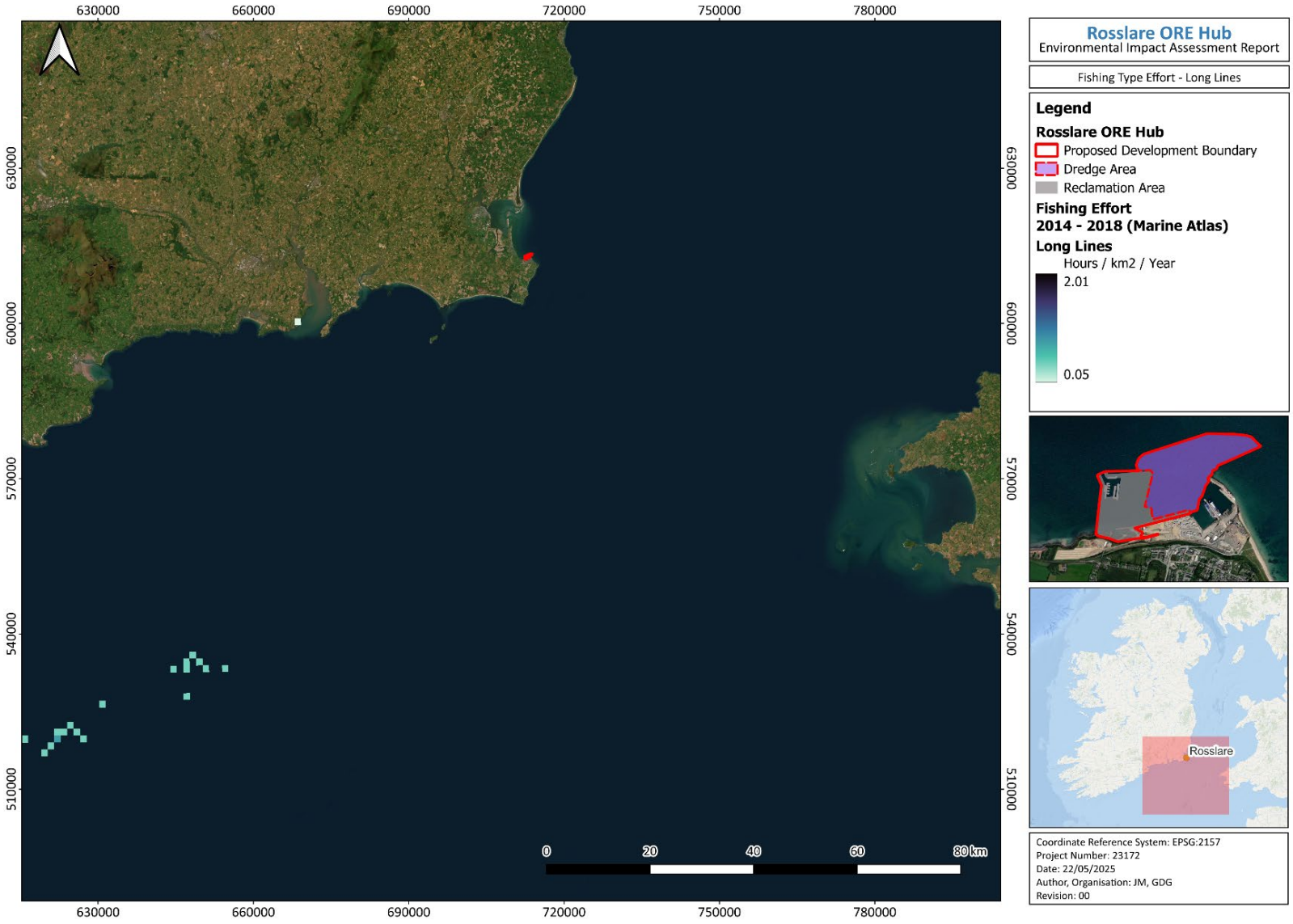


Figure 15-11 Fishing Effort: Long Lines, 2014-2018 Ireland's Marine Atlas Database (Marine Institute, 2024)

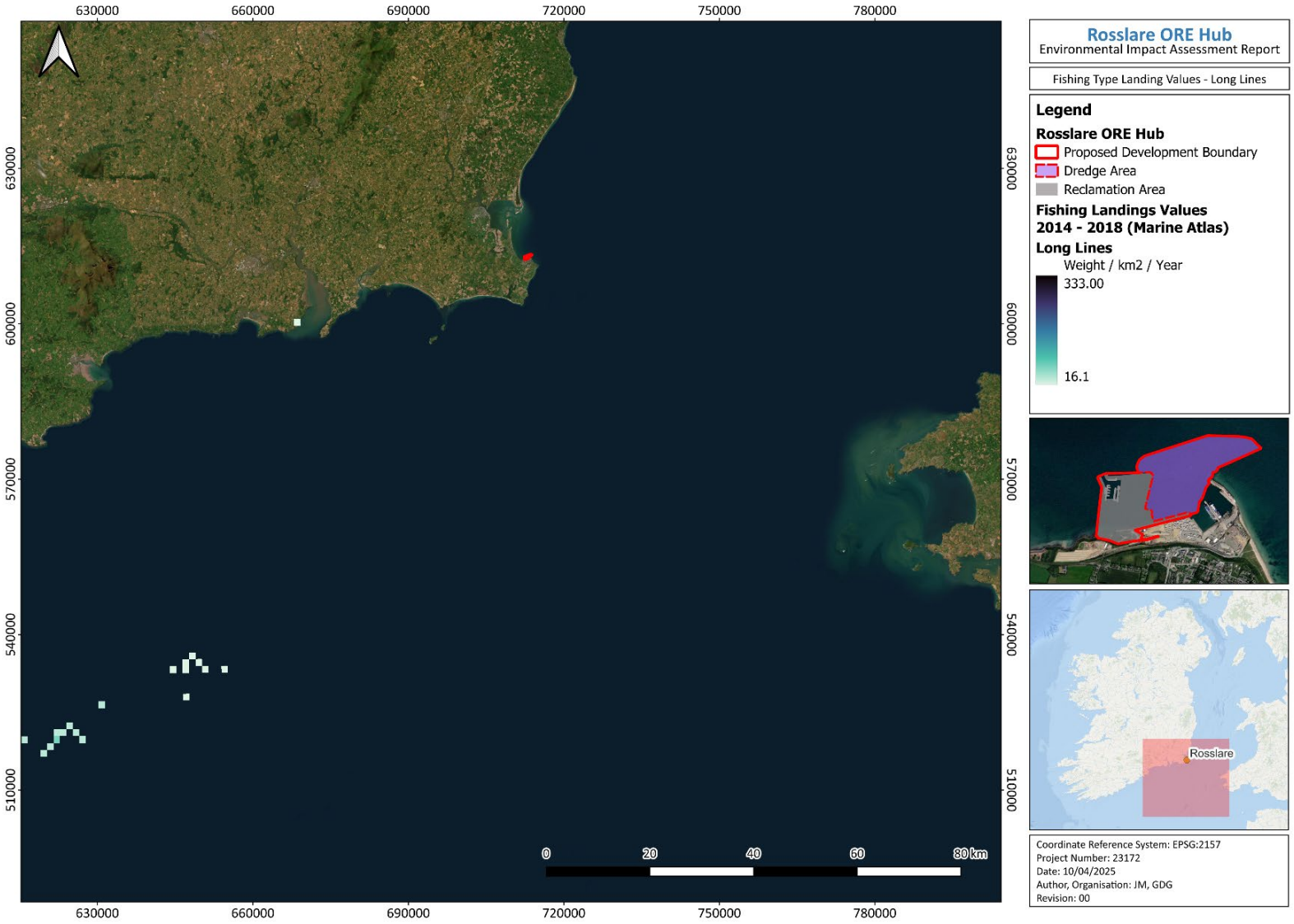


Figure 15-12 Landing Values: Long Lines, 2014-2018 Ireland's Marine Atlas Database (Marine Institute, 2024)

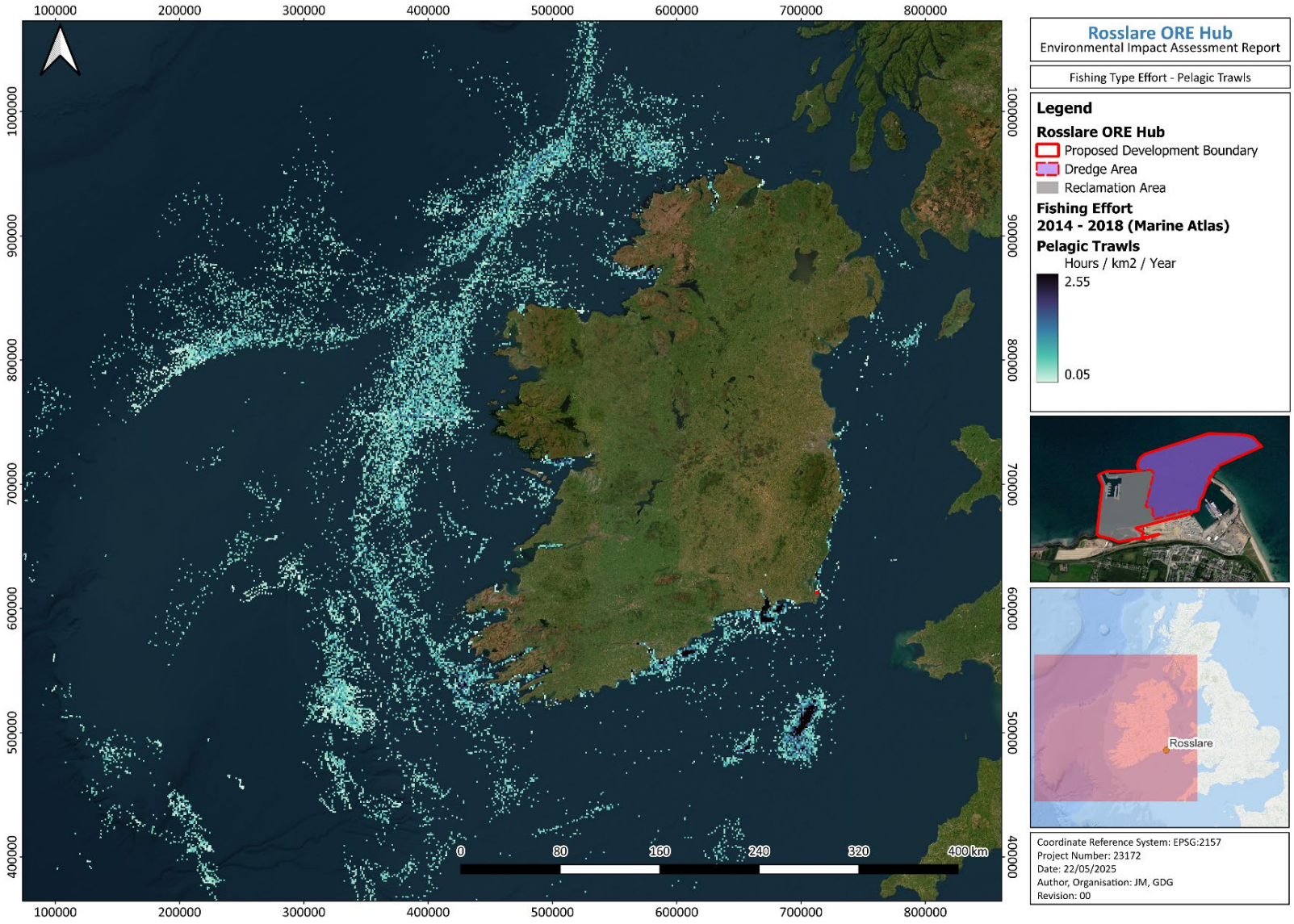


Figure 15-13 Fishing Effort: Pelagic Trawls, 2014-2018 Ireland's Marine Atlas Database (Marine Institute, 2024)

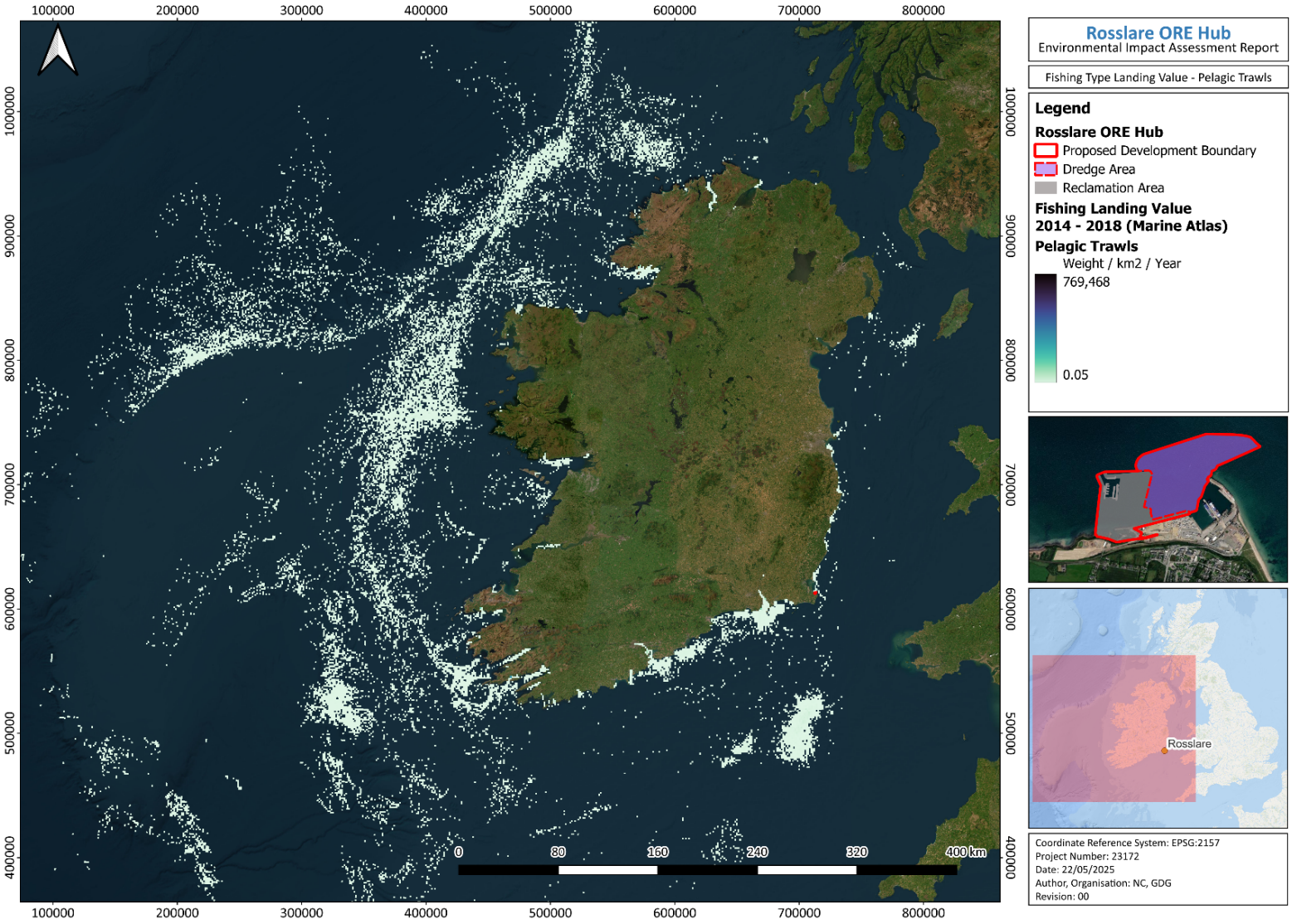


Figure 15-14 Landing Values: Pelagic Trawl, 2014-2018 Ireland's Marine Atlas Database (Marine Institute, 2024)

15.2.4.3 SPAWNING AND NURSERY AREAS

The Marine Institute, in conjunction with the International Council for the Exploration of the Sea, and fisheries research centres in other EU Member States, publish detailed maps setting out the spawning and nursery areas for commercially important fish in Irish waters. These are available from Ireland's Marine Atlas, the institute's online data portal (https://atlas.marine.ie), and the Sea Fisheries Protection Agency (SFPA) 2023, and presented in Figure 15-15 to Figure 15-24 as shown below, and referenced in Table 15-9.

Marine nursery areas: These are habitats that promote the survival of young commercially important fish species. These habitats are essential for the reproduction and understanding of the geographical species distribution. Take them away or degrade them, and the production of commercially harvested species will decline or cease altogether (Ireland's Marine Atlas).

Spawning area, spawning grounds and spawning beds: These are considered the locations where commercially important species of fish leave their eggs for fertilisation. Spawn consists of the reproductive cells (gametes) of fish, some of which will become fertilised and produce offspring. The process of spawning typically involves females releasing ova (unfertilized eggs) into the water, often in large quantities, while males simultaneously or sequentially release spermatozoa (milt) to fertilise the eggs. Spawning grounds help understand the species distribution of a particular commercially important fish (Ireland's Marine Atlas).

Table 15-9 Summary of Nursery and Spawning Area Figures.

Species	Spawning Area	Nursery Area
Nephrops	Figure 15-15	Figure 15-16
Lemon Sole	Figure 15-17	Figure 15-18
Sprat	Figure 15-19	Not Relevant
Cod	Figure 15-20	Figure 15-20
Whiting	Not Relevant	Figure 15-21
Horse Mackerel	Not Relevant	Figure 15-22
Mackerel	Not Relevant	Figure 15-23
Herring	Figure 15-24	Figure 15-24

It should be noted that the spatial resolution of the data presented in these maps is such that when overlayed with the Rosslare Europort area, the data encroach on what is now reclaimed land and overlap with a significant portion of the upper River Slaney, a freshwater body which is not used by these species. Therefore, while spawning or nursery areas may overlap the Rosslare Europort area it doesn't necessarily mean that the Proposed Development Boundary and surrounding area is either suitable for or in use by these species.

Nephrops: Figure 15-15 and Figure 15-16 show that the Proposed Development Boundary overlaps with the spawning and nursery areas of *Nephrops*. This is a high value quota species of shellfish with national landings of 5,523 tonnes valued at €35.5 million in 2020. (Source SFPA). While a shellfish species, Nephrops (Norway lobster or Dublin Bay prawns) are included here with the presentation of other data on nursery and spawning areas.

Lemon Sole: Figure 15-17 and Figure 15-18 show that the Proposed Development Boundary overlaps with the spawning and nursery grounds of lemon sole, a non-quota species which had national landings of 326 tonnes valued at €956,378 in 2020.

Sprat: Figure 15-19 shows that the Proposed Development Boundary overlaps with the spawning. area of sprat, a non-quota species with national landings of 14,301 tonnes valued at €3.2 million in 2020 (SFPA, 2021).

Cod: Figure 15-20 shows that the Proposed Development Boundary overlaps with the nursery area of cod.

Whiting: Figure 15-21 shows that the Proposed Development Boundary overlaps with the nursery area of whiting.

Horse mackerel: Figure 15-22 shows that the Proposed Development Boundary overlaps with the nursery area of horse mackerel.

Mackerel: Figure 15-23 shows that the Proposed Development Boundary overlaps with the nursery area of mackerel.

Herring: Figure 15-24 shows that the Proposed Development Boundary overlaps with the nursery area of herring.

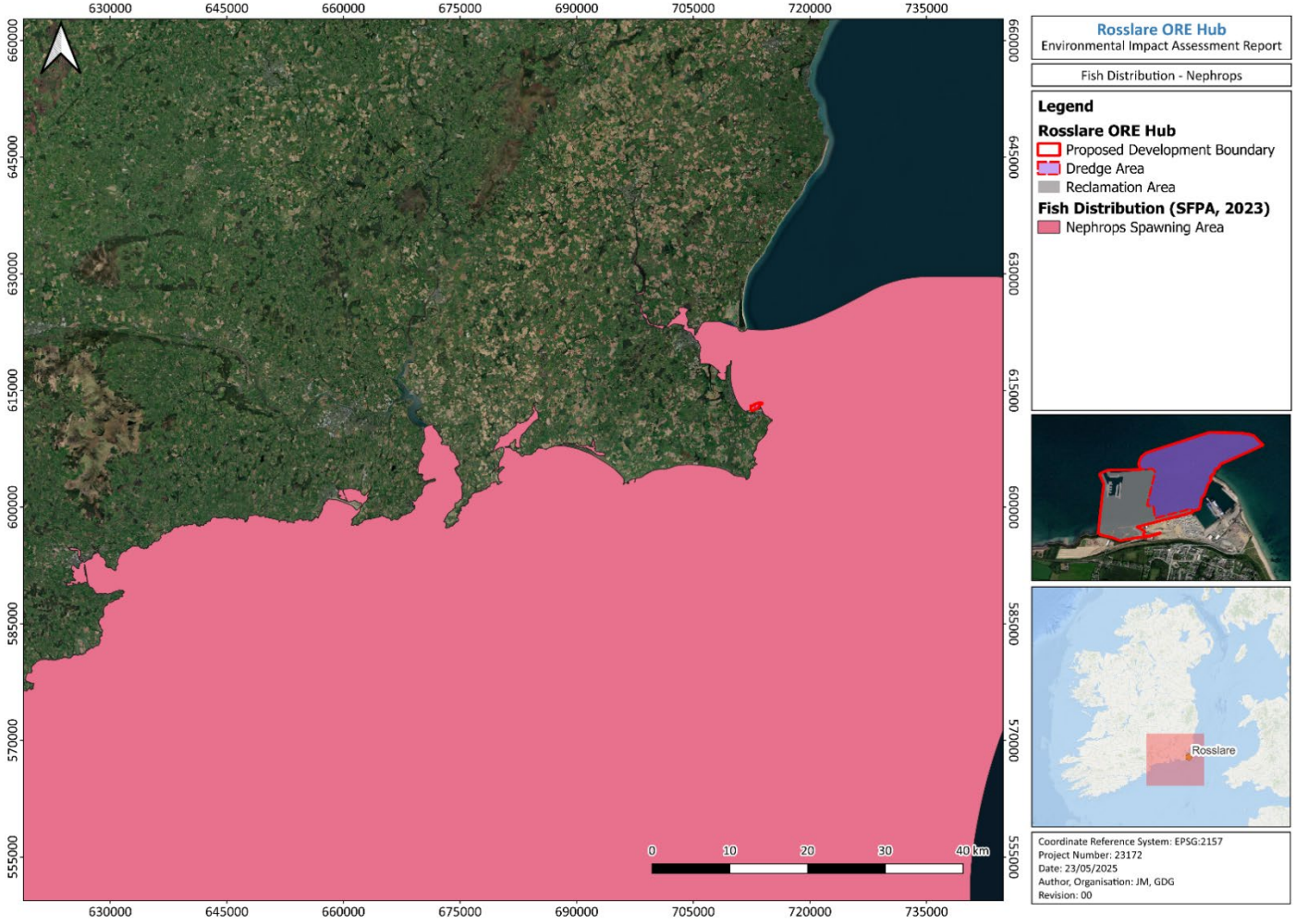


Figure 15-15 Nephrops Spawning Area (SFPA, 2023)

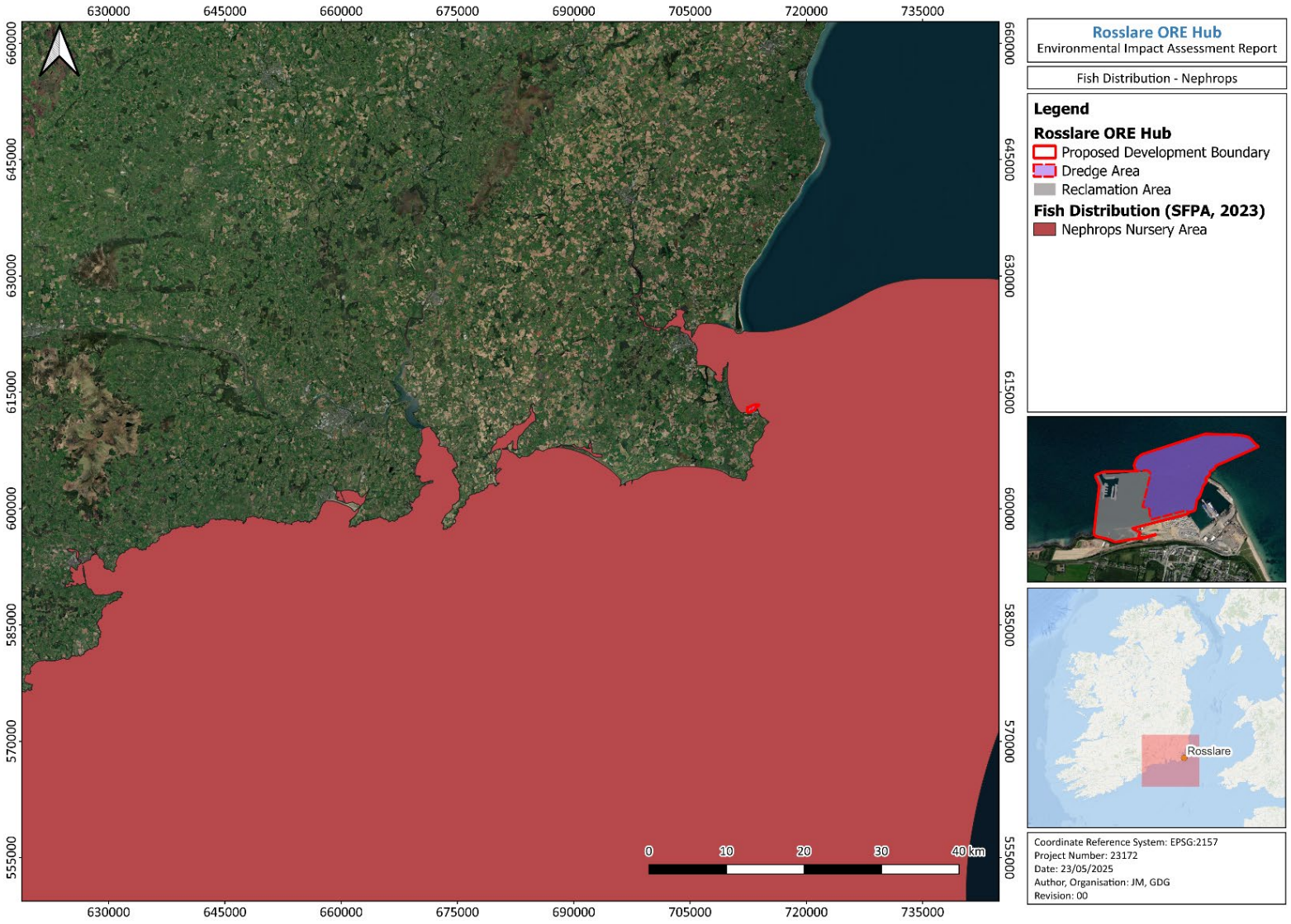


Figure 15-16 Nephrops Nursery Area (SFPA, 2023)

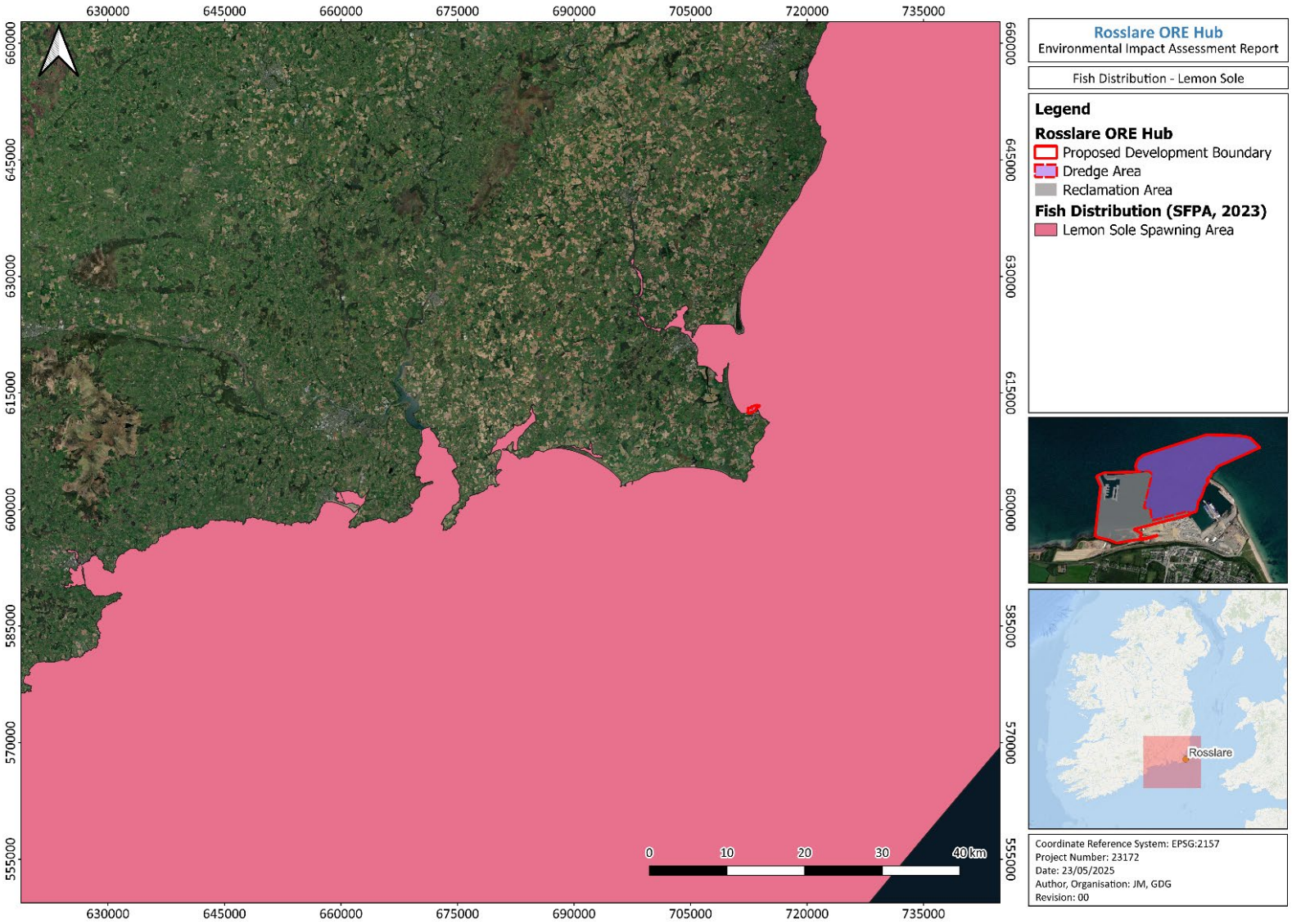


Figure 15-17 Lemon Sole Spawning Area (SFPA, 2023)

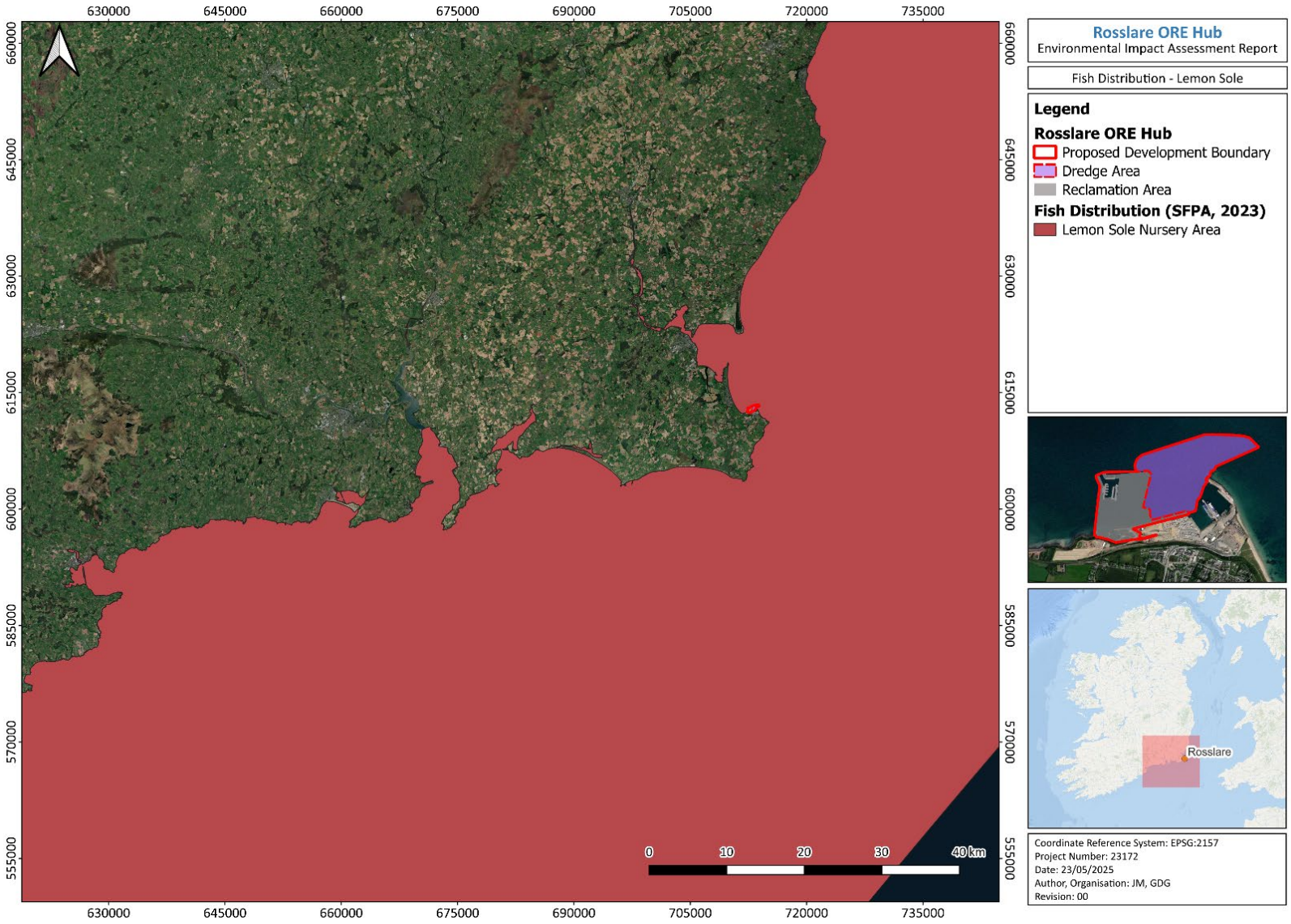


Figure 15-18 Lemon Sole Nursery Area (SFPA, 2023)

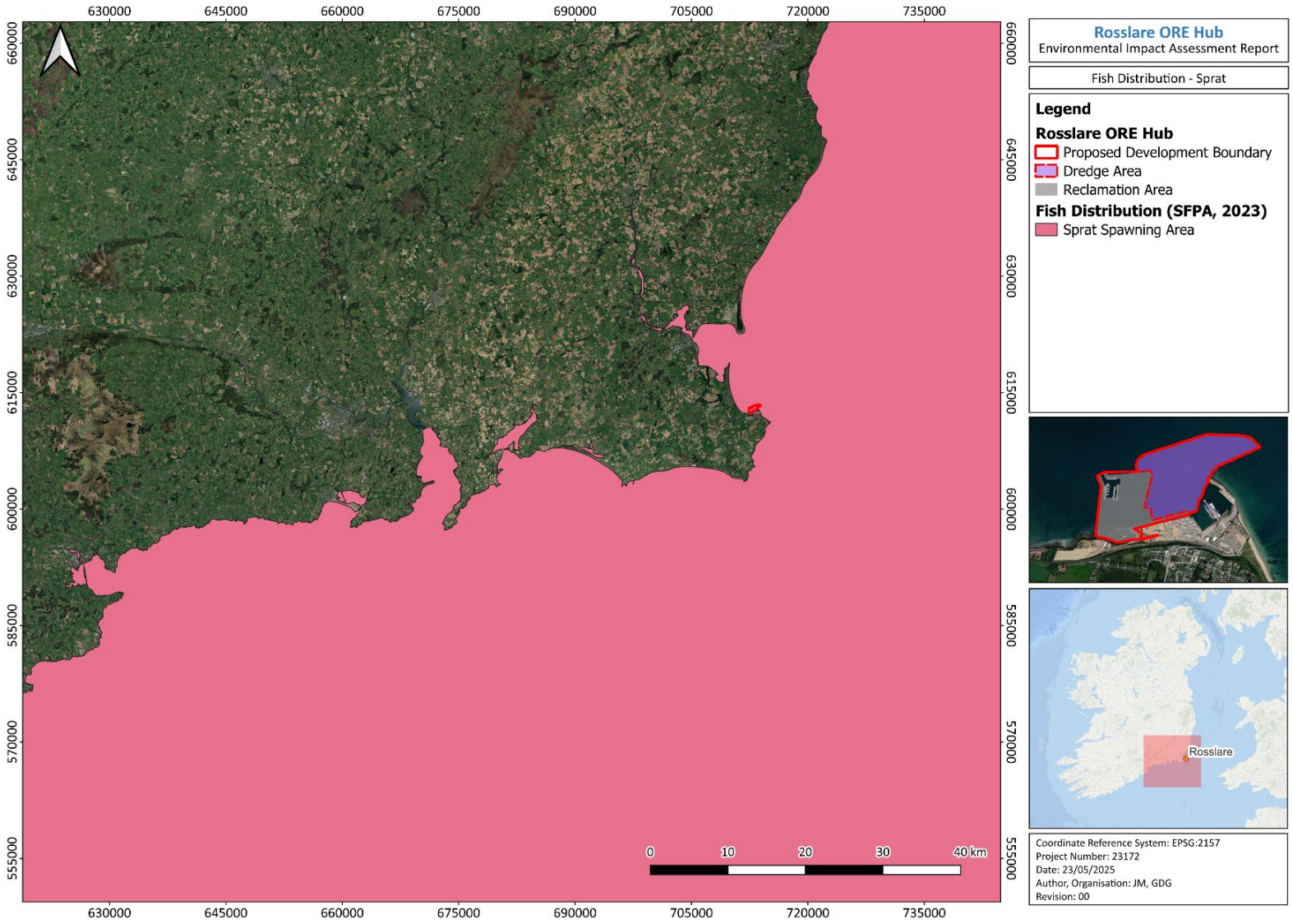


Figure 15-19 Sprat Spawning Area (SFPA, 2023)

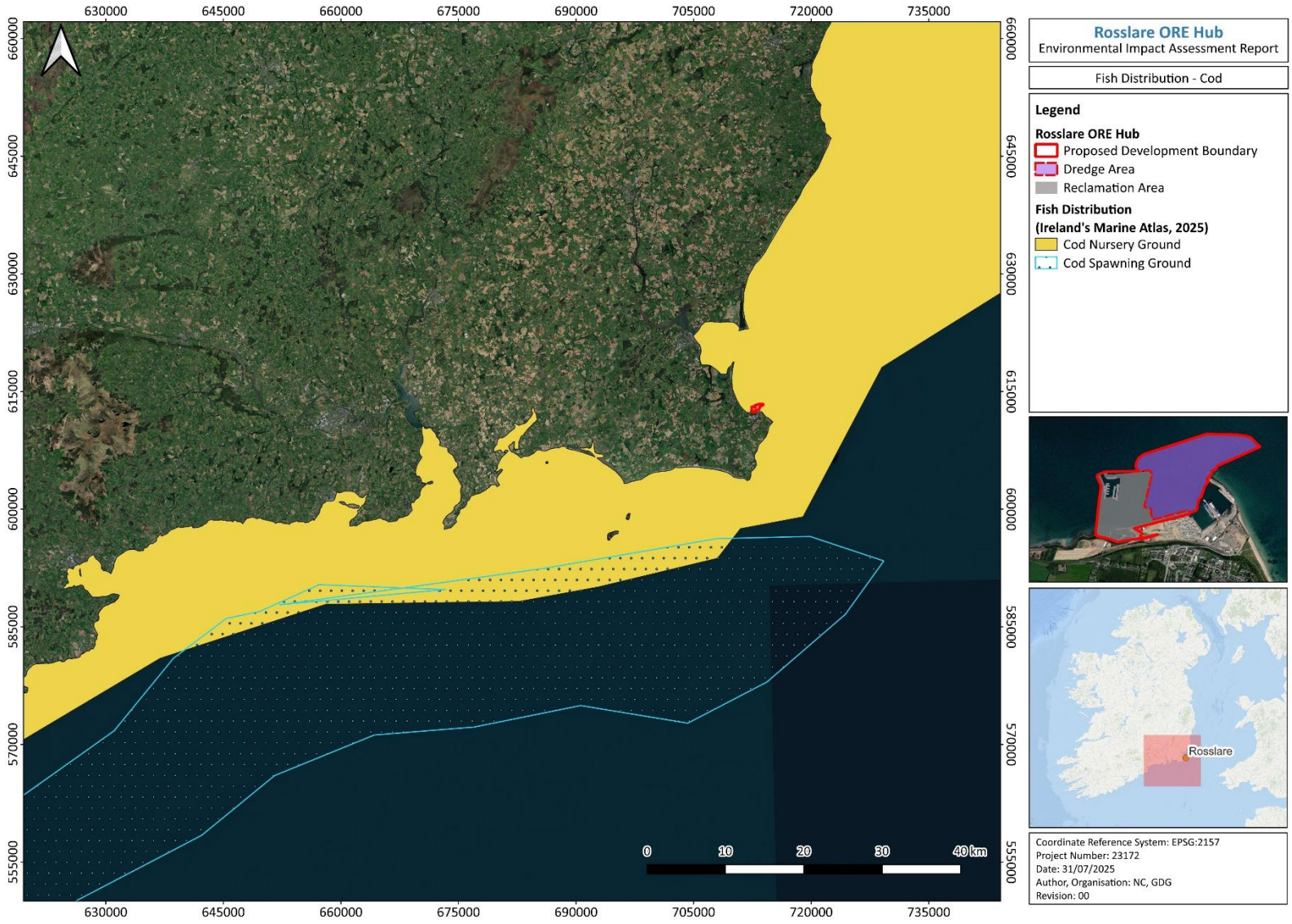


Figure 15-20 Cod Nursery and Spawning Area Ireland's Marine Atlas Database (Marine Institute, 2025)

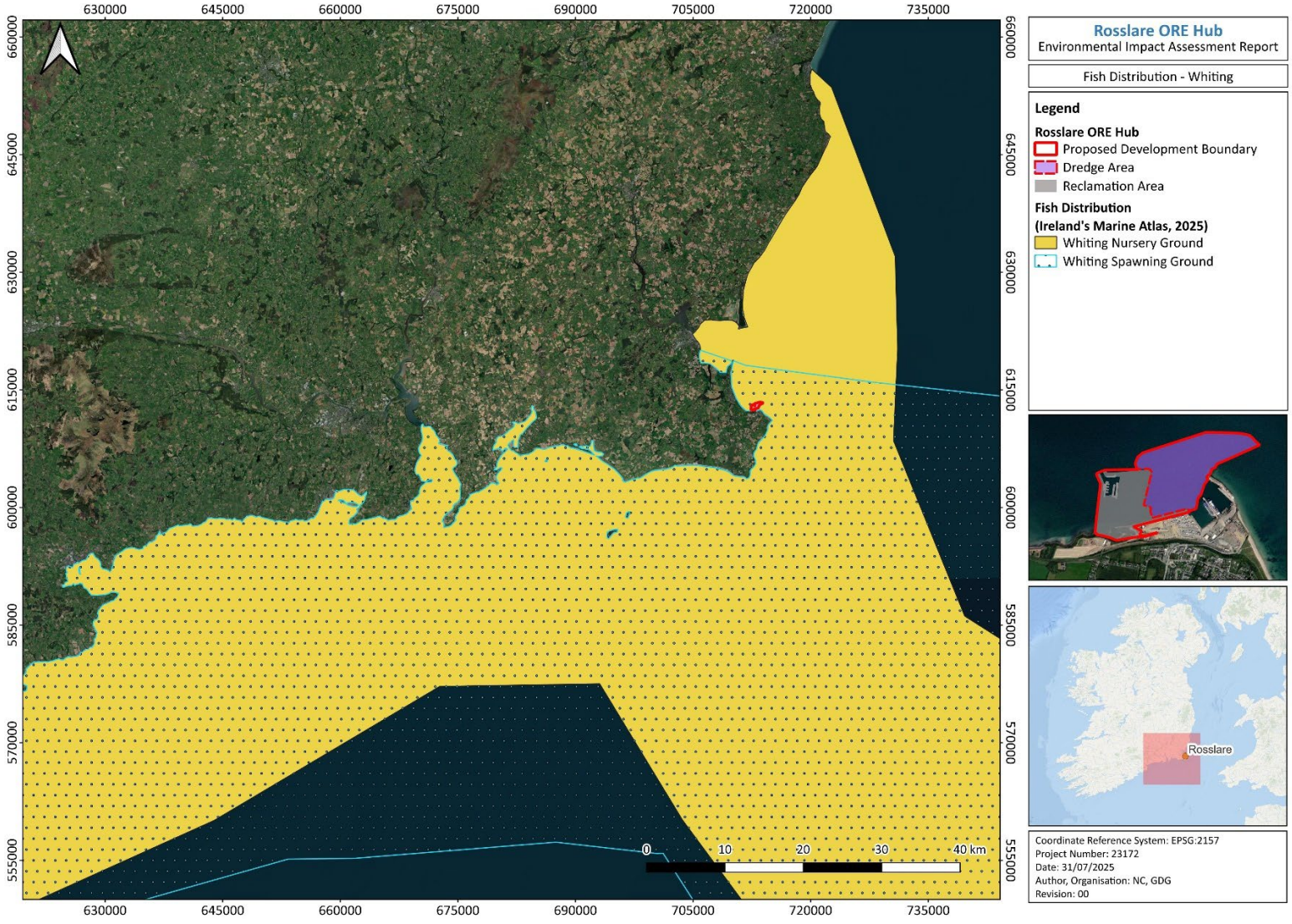


Figure 15-21 Whiting Nursery and Spawning Grounds Ireland's Marine Atlas Database (Marine Institute, 2025)

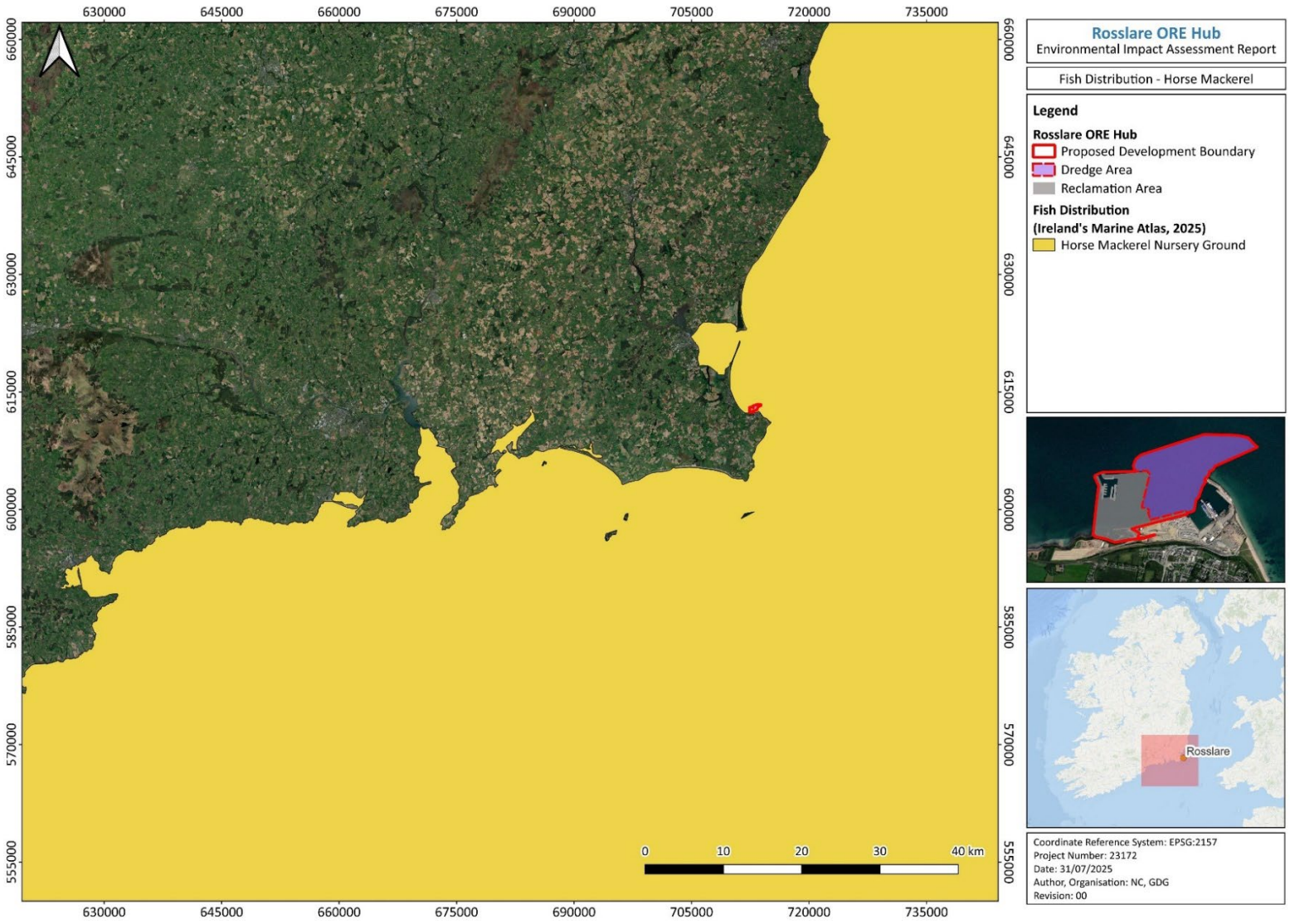


Figure 15-22 Horse Mackerel Nursery Grounds Ireland's Marine Atlas Database (Marine Institute, 2025)

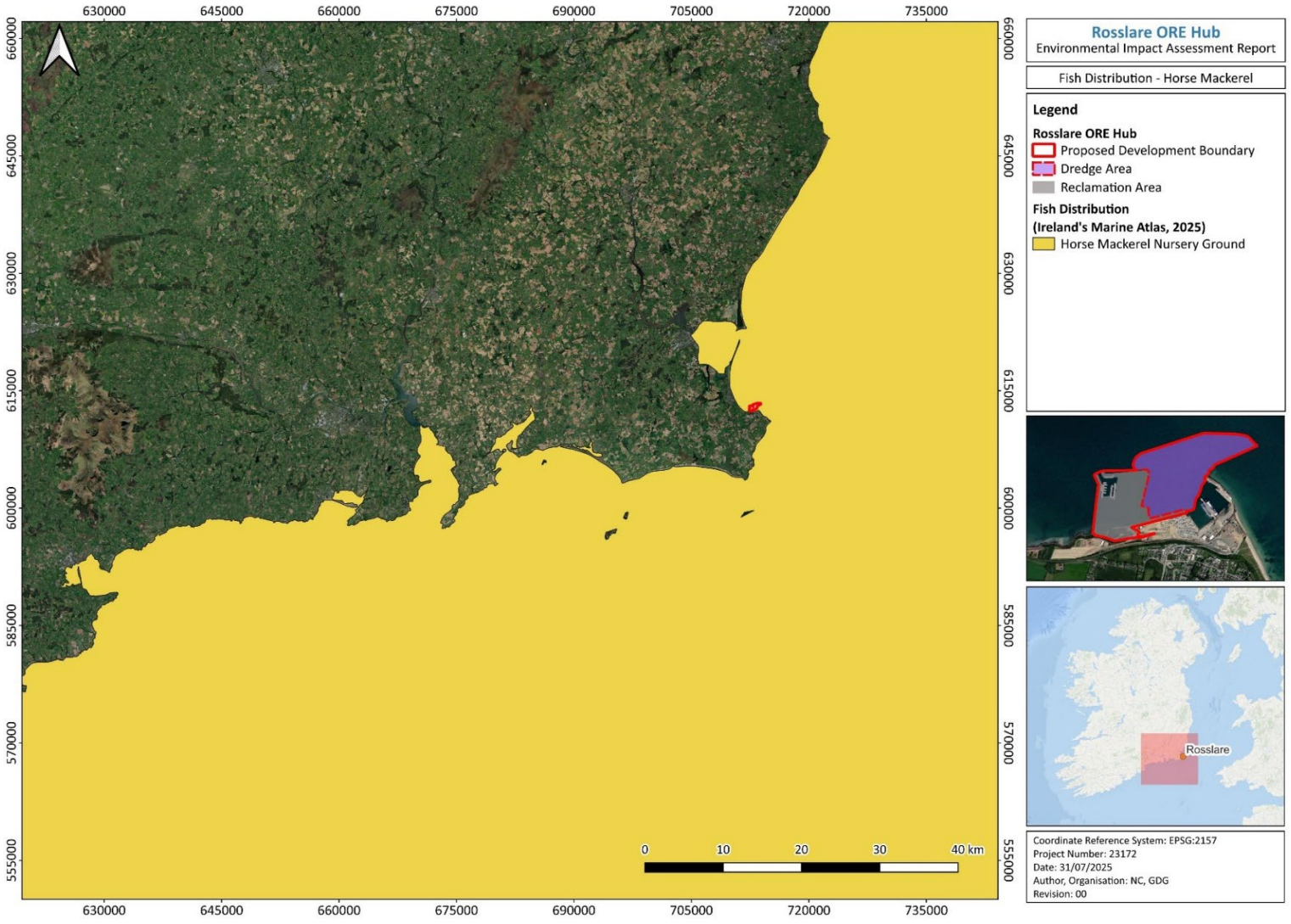


Figure 15-23 Mackerel Nursery Grounds Ireland's Marine Atlas Database (Marine Institute, 2025)

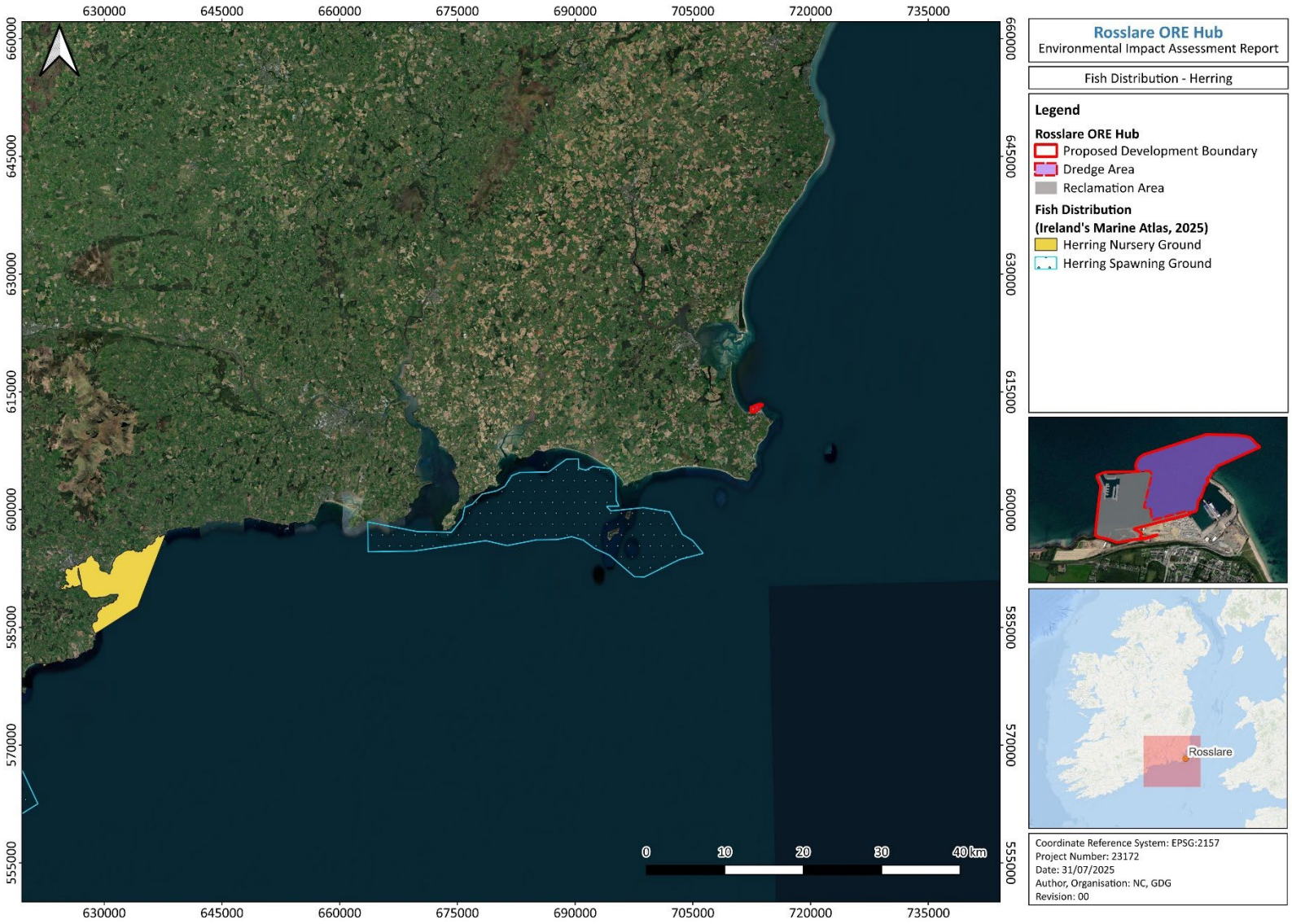


Figure 15-24 Herring Nursery and Spawning Grounds Ireland's Marine Atlas Database (Marine Institute, 2025)

15.2.5 SALMON AND SEA TROUT

15.2.5.1 SALMON

Despite a dramatic decline in the numbers of salmon returning to Irish rivers, the Slaney still gets a reasonable run of spring salmon, but this varies from year to year. Fishing is controlled by local angling associations and riparian owners, under the auspices of the Slaney Rod Fishers Association Ltd. There is free fishing downstream of Enniscorthy Bridge.

In the past the peak of the spring salmon fishing was from opening day to the end of March. Currently (2024) fishing opens on 17th March, with reasonable fishing expected to early May. A small number of grilse are also taken annually.

Once an important fishery in the south Wexford and River Slaney catchment area, commercial fishing for salmon using draft nets was phased out from 2007. This followed a decision to prohibit, for conservation reasons, commercial fishing for salmon in mixed stock fisheries at sea. This move to prohibit mixed stock fishing for Salmon came about as a direct result of the dramatic decline in the overall numbers of Atlantic salmon and sea trout returning to Ireland's rivers to spawn. This was cause for concern because these species connect water quality in the smallest headwater streams with distant marine ecosystems that are changing at an oceanic scale.

It was accompanied by a scheme, the BIM administered Salmon Hardship Scheme, that allowed fishers active in the local net fishery to voluntarily cease fishing and undertake not to seek a licence in the future in return for financial compensation. The scheme closed for applications in 2007.

The importance of the Slaney draft net fishery is illustrated in historic catch data. In the period 1995 to 2000 the commercial draft net fishery produced an average annual catch of 2,394 wild salmon (Table 15-10). This was some 1.1% of the total national catch (all fisheries) and 8.1% of the total national draft net catch. With an average weight of 4.1kg per fish, average landings during the period amounted to 9,714 kg per annum. In the same period the rod and line fishery produced an average annual catch of 463 fish. This was 0.2% of the total national catch or 1.3% of the total national rod catch.

Table 15-10 Annual catch statistics for the River Slaney salmon fisheries 1995 – 2000
(Maoiléidigh, et al 2001)

Year	National Draft Net	National Drift Net	National Rod Catch	National Total	River Slaney Draft Net Fishery	Slaney % National Total	Slaney % National Draft	River Slaney Rod Catch	Slaney % National Total	Slaney % National Rod
1995	40,182	209,602	29,932	279,716	2,882	1%	7%	450	0.2%	1.5%
1996	36,959	161,180	42,229	240,368	2,548	1%	7%	550	0.2%	1.3%
1997	27,320	139,990	43,330	201,640	1,616	1%	6%	175	0.1%	0.5%
1998	29,293	163,565	39,360	232,218	3,181	1%	11%	400	0.2%	1.0%
1999	23,018	120,425	34,416	177,859	3,177	2%	14%	900	0.5%	2.6%
2000	26,037	162,650	37,690	226,377	962	0%	4%	300	0.1%	0.8%
Average	30,468	159,569	37,826	226,363	2,394	1%	8%	463	0.2%	1.3%

Table 15-11 Commercial and Angling Salmon Catch 2022
(Inland Fisheries Ireland, 2023)

River	District	Fishery	Commercial Catch	Rod & Line Catch & Release	Total Catch
Slaney	Wexford	Spring Salmon (Jan – May)	0	142	142
		Sea Winter Salmon (June – Sept)	0	45	45
		Total Salmon	0	187	187

In their most recent report, published in 2023, Inland Fisheries Ireland recorded zero commercial salmon catch on the river Slaney in 2022 (Table 15-11). Today fishing for salmon is solely by rod and line and requires a public licence. Licences are applied for and issued annually. Importantly, an annual public licence does not confer property or other rights on the holder and licences are non-transferable and cannot be offered for sale.

15.2.5.2 SEA TROUT

Like Salmon, commercial fishing for Sea trout in Ireland was largely phased out from 2007. By way of illustration, in 2001 the total national draft net catch of Sea trout amounted to 2,192 fish; by 2007 this had fallen to 311 and by 2022 it was just 61 fish. For angling the comparative figures were 1,066 fish in 2001, 331 fish in 2007 and 208 in 2022.

In 2022, anglers caught (1,801 + 208 fish) 97% of total sea trout catch (including caught and released fish), while commercial fishermen, with 63 fish, accounted for just 3% (Table 15-12).

Despite this huge decline in catches, the Slaney has remained an important Sea trout river. In 2022, some 12.6% of the total national sea trout catch was taken on the Slaney. All of these fish were taken by rod and line under the *catch and release* scheme. The 262 fish caught and released on the Slaney represented 14.5% of all Sea trout caught and released nationally.

The top three sea trout producing water systems made up 26.7% (539) of the national sea trout catch by rod and line in 2022 (Slaney, Moy (Ballina), Erne (Ballyshannon).

Table 15-12 Sea Trout Catch 2022 (Inland Fisheries Ireland, 2023)

Location	Commercial Catch	Rod & Line (Catch & Release)	Rod & Line (Harvest)	Total
National	63	1,810	208	2,081
Slaney	0	262	0	262
	0%	15%	0%	12.6%

Management Measures for Wild Salmon And Sea Trout

The Department of the Environment, Climate, and Communications, provides management measures for Salmon and Sea trout on the River Slaney by way of the Inland Fisheries Acts 1959 to 2017. The Conservation of Salmon and Sea trout (River Slaney) bye law no. 985, 2020 prohibits any person:

- To take by rod and line, any salmon or sea trout (over 40 cm) from the specified waters during the period from 1 January 2021 to 31 March 2021 and from 1 September 2021 to the end of the year.
- To take by rod and line any salmon or sea trout (over 40cm) from the specified waters other than by catch and release during the period from 1 April 2021 to 31 August 2021.
- From using or attempting to use when angling for salmon or sea trout of any size (a) any lure other than artificial fly using single or double barbless hooks in that part of the River Slaney upstream from the Railway Bridge Enniscorthy, or (b) worms as bait or any fish hooks, other than single barbless hooks, in that part of the River Slaney downstream from the Railway Bridge Enniscorthy to the mouth of the River Slaney.

Other Recreational fisheries

The town of Wexford offers good shore fishing for bass, flounder and eel with the largest bass ever taken in the area weighing 5.9kg. In the late nineties the town quays underwent improvement works that created several new vantage points for shore anglers. Bass, flounder, plaice, eel, codling, whiting and coalfish are all taken.

The southeastern side of Wexford harbour is protected from the open sea by a narrow spit of land which runs north for 4.8km terminating at Rosslare Point (Figure 15-25). Bass can be taken here. On the seaward side of Rosslare Point (Figure 15-25), tope weighing up to 18.14kg, spurdog, and dogfish are all taken.

Boat fishing on Rosslare Bay is for ray, plaice, dabs, codling and gurnard. An Irish Record for grey gurnard (3 lbs) has been held there since 1967. During the summer some of the best boat fishing is to be found in the buoyed channel leading into the ferry terminal.

To the southeast of Rosslare Harbour lies a long, shallow underwater reef known as the Splaugh Rock. In the late sixties, this area was once famous for the large numbers of bass that shoaled there in spring and autumn. In the past Wexford cots hunted the free feeding bass and with catches of up to 40 fish per boat on a tide. This fishery subsequently declined and by the mid-eighties, it had all but gone.

To the south of the harbour wall, there is shore fishing over mixed ground for bass, dogfish and flounder. A number of specimen Bass (> 4.53 kg) have been recorded on this stretch, particularly where the flooding tide flows across the rock outcrops at Greenore Point.

Figure 15-25 Recreational Fishing Locations (Dunlop, 2009)

15.3 COMMERCIALLY IMPORTANT SHELLFISH RECEPTORS

15.3.1 INTRODUCTION

Commercially important shellfish stocks in the south Irish Sea may be broadly categorised into two groups, molluscs and crustaceans. A third group, echinoderms are less frequently harvested in Ireland but include species of sea-urchin, some quite popular in the Asian market. As there are no commercial echinoderm fisheries in the vicinity of the Rosslare Europort Offshore Renewable Energy Hub, this group will not be considered further.

Of the two other invertebrate shellfish phyla commercially exploited in the south Irish sea and waters adjacent to Rosslare, the first of these, molluscs, are a diverse assemblage that is further sub-divided into univalve molluscs, bivalve molluscs, and cephalopods. Univalve molluscs include the locally important whelk. All remaining molluscs fisheries in the vicinity of the Rosslare are part of the second group, the bivalve molluscs. This includes scallops, razor shells, clams, and cockles. It also includes the primary farmed species in the area, the mussel. The third group, the cephalopods, include the squid and cuttlefish, species not considered important in the Irish Sea and, again, this group will not be considered further.

Crustaceans are a large and diverse group. The commercially exploited crustaceans comprise mobile creatures with hard segmented shells and flexible joints including lobster, brown crab, spider crab and shrimp.

15.3.2 NATIONAL SHELLFISH FLEETS

In Ireland, commercially important shellfish stocks are targeted by vessels of all size, however for most stocks the primary commercial fleets comprise inshore vessels, less than 12 metres in length (overall), and operating within 12 nautical miles of the coast. There are exceptions:

- Nephrops: (Dublin-bay prawns, Norway lobster, Nephrops). These are targeted by mid-sized vessels 18 - 24 metres in length. There are no prawn vessels operating from or in the vicinity of Rosslare Europort.
- Scallops: While scallop may be targeted by both inshore and larger offshore boats, the primary fleet, including that landing periodically into Rosslare, comprises larger (> 18 metres length, overall) offshore vessels.
- Brown crab: Nationally these are targeted by both inshore and, in some areas, larger, offshore vessels 18 -24 metres in length. The fleet operating from or in the vicinity of Rosslare Europort consists entirely of inshore vessels less than 12 metres in length.

15.3.3 SHELLFISH MANANGEMENT

Although subject to the Common Fisheries Policy, many shellfish stocks are, in practice, managed nationally. These include stocks of whelk, razor clams and many crustaceans that are primarily exploited within the 12-mile limit.

While shellfish stocks are generally not subject to EU catch limits (quotas) Ireland's most valuable shellfish stock, Norway lobster (prawns), are an exception. These are traditionally harvested both inside and, more often, outside the 12 nautical mile limit by both Irish and vessels registered in the UK and other EU Member States (France and Spain). They are subject to EU quotas and sharing arrangements with the UK.

Other shellfish stocks are subject to EU effort limits (brown crab) and/or other, national, technical measures, including minimum and maximum landing size, catch and effort limits (fishing days per week and or hours per day), closed areas, technical constraints on fishing gear etc., agreed nationally and set out in Statutory Instruments under the seal of the Minister for Agriculture, Food and Marine. These are catalogued in Table 15-13.

Table 15-13 Management Measures for Inshore Stocks

Species	Management Measure (Statutory Instruments)
Brown Crab	Brown Crab (Conservation of Stocks) Regulations 2019 (S.I. 26 of 2019)
Clams	Sea-fisheries (Control on fishing for clams in Waterford Estuary) Regulations 2011 (S.I.221 of 2011)
Cockle	Cockle (Fisheries Management & Conservation) (Waterford Estuary) Regulations 2007 (S.I. 753/2007)
	Cockle (Fisheries Management & Conservation) (Tramore Bay) Regulations 2007 (S.I. 533/2007)
	Cockle (Fisheries Management & Conservation) (Waterford Estuary) Regulations 2007 (S.I. 531/2007)
Crawfish	Crawfish (Conservation of Stocks) Regulations 2019 (S.I. 289 of 2019)
	Crawfish (Fisheries Management and Conservation) Regulations 2006 (S.I. of 233 of 2006)
	Crawfish (Conservation of Stocks) Regulations 2006 (S.I. 232 of 2006)
Lobster	Lobster (Conservation of Stocks) (Amendment) Regulations 2017 (S.I. 640 of 2017)
	Non-Commercial Pot Fishing (Lobster and Crab) Regulations 2016 (S.I. 31 of 2016)
	Lobster (Conservation of Stocks) Regulations 2014 (S.I. 591 of 2014)
Razor Clams	Razor Clam (Conservation of Stocks) (North Irish Sea) Regulations 2018 (S.I. 160 of 2018)
	Razor Clams (Conservation of Stocks) (Amendment) Regulations 2015 (S.I. 588 of 2015)
	Razor Clam (Conservation of Stocks) (North Irish Sea) Regulations 2015 (S.I. 207 of 2015
	Razor Clam (Conservation of Stocks) Regulations 2015 (S.I. 206 of 2015)
Shrimp	Shrimp (Conservation of Stock) Regulations 2014 (S.I. No 592 of 2014)
Spider Crab	Spider Crab (Conservation of Stocks) Regulations 2006 (S.I. 236 of 2006)
Velvet Crab	Velvet Crab (Conservation of Stocks) Regulations 2017 (S.I. 431 of 2017)
Whelk	Whelk (Conservation of Stocks) Regulations 2006 (S.I. 237 of 2006)
Mussel Seed	Mussel Seed (Opening of Fisheries) Regulations 2022 (S.I. 424 of 2022)
	Mussel Seed (Opening of Fisheries) Regulations 2021 (S.I. 461 of 2021)
	Mussel Seed (Opening of Fisheries) Regulations 2020 (S.I. 338 of 2020)
	Mussel Seed (Fishing) Regulations 2006 (S.I. 311 of 2006)
	European Communities (Control on Mussel Fishing) Regulations 2008 (S.I. 347 of 2008)

15.3.4 SHELLFISH EFFORT AND VALUE

The Marine Institute's annual *Shellfish Stocks and Fisheries Review*, together with Ireland's Marine Atlas, the institute's online data portal (https://atlas.marine.ie) provide the most up to date scientific assessments of the location and status of Ireland's shellfish fisheries as well as information on the average fishing effort and value derived from these fisheries. A summary of the effort and value figures are provided in Table 15-14.

Dredges (Fishing Effort): Figure 15-26 This dataset displays offshore fishing effort using dredge fishing by Irish vessels. Fishing effort is defined as the time spent engaged in fishing operations or time spent at sea, this time may be multiplied by a measure of fishing capacity, e.g. engine power. In this dataset fishing effort is measured as average hours fishing per kilometre square, per year. The data is collated from 3 sources: vessel monitoring systems, logbooks and EU fleet register.

Dredges (Landing Value): Figure 15-27 Landings are defined as the part of the catch that is retained (not discarded) and landed. This dataset shows the distribution of landings by Irish vessels measured as average weight or value of landing per kilometre square, per year for each gear type group, in this instance for dredge fishing. Vessel Monitoring Systems and logbook datasets from years 2014 to 2018 were used to produce this data.

Dredges (Inshore Activity): Figure 15-28 Data indicates the location of dredge fishing activity in Irish waters.in Irish waters. Attributes when known include year, area, gear type, species, season, days per year, number of vessels, vessel size, and gear units. This dataset represents dredging activity of vessels <15 metres length in Irish waters. Inshore dredge fishing with mussel dredges target seed mussel for the aquaculture industry. Areas of inshore dredge fishing using hydraulic dredges target Razor Clam.

Pots (Fishing Effort): Figure 15-29 This dataset displays offshore fishing effort using pots by Irish vessels. Fishing effort is defined as the time spent engaged in fishing operations or time spent at sea, this time may be multiplied by a measure of fishing capacity, e.g. engine power. In this dataset fishing effort is measured as average hours fishing per kilometre square, per year. The data from years 2014 to 2018, is collated from 3 sources: vessel monitoring systems, logbooks and EU fleet register.

Pots (Landing Value): Figure 15-30 Landings are defined as the part of the catch that is retained (not discarded) and landed. This dataset shows the distribution of landings by Irish vessels using pots measured as average weight or value of landing per kilometre square, per year. Vessel Monitoring Systems and logbook datasets from years 2014 to 2018 were used to produce this data.

Pots (Activity): Figure 15-31 Data indicates the location for pot fishing activity in Irish waters. Attributes when known include year, area, gear type, species, season, days per year, number of vessels, vessel size, and gear units. This dataset represents potting activity of vessels <15 metres length in Irish waters including the Rosslare Harbour inshore fleet. Inshore pot fishing using top entrance pots target Whelk. Inshore pot fishing using creels target lobster, crab and shrimp.

Table 15-14 Summary of Inshore Fishing Effort and Landing Value Figures.

Gear	Fishing Effort	Landing Value	Inshore Activity
Dredges	Figure 15-26	Figure 15-27	Figure 15-28
Pots	Figure 15-29	Figure 15-30	Figure 15-31

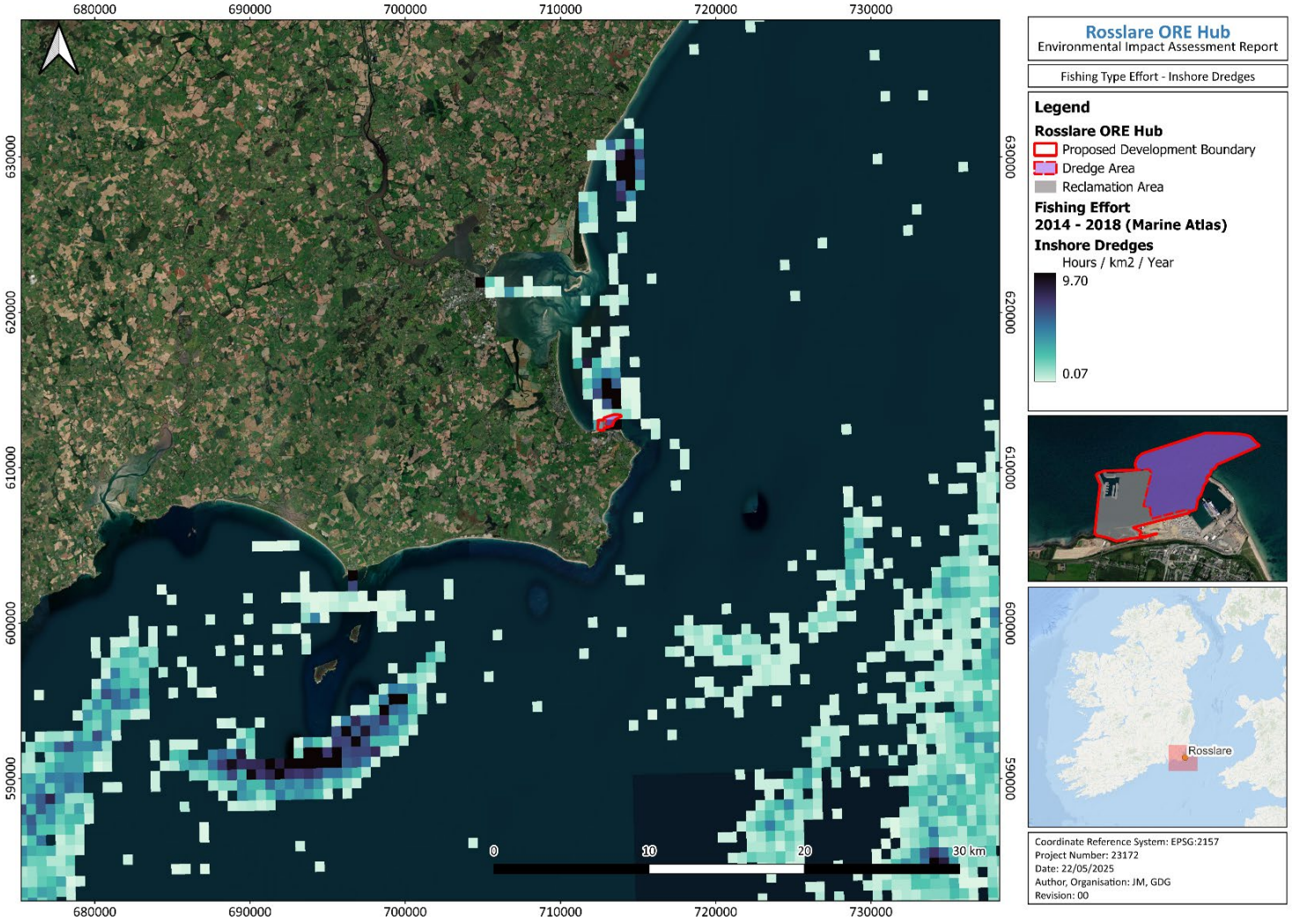


Figure 15-26 Dredges - Fishing Effort, 2014-2018 (Ireland's Marine Atlas, 2024)

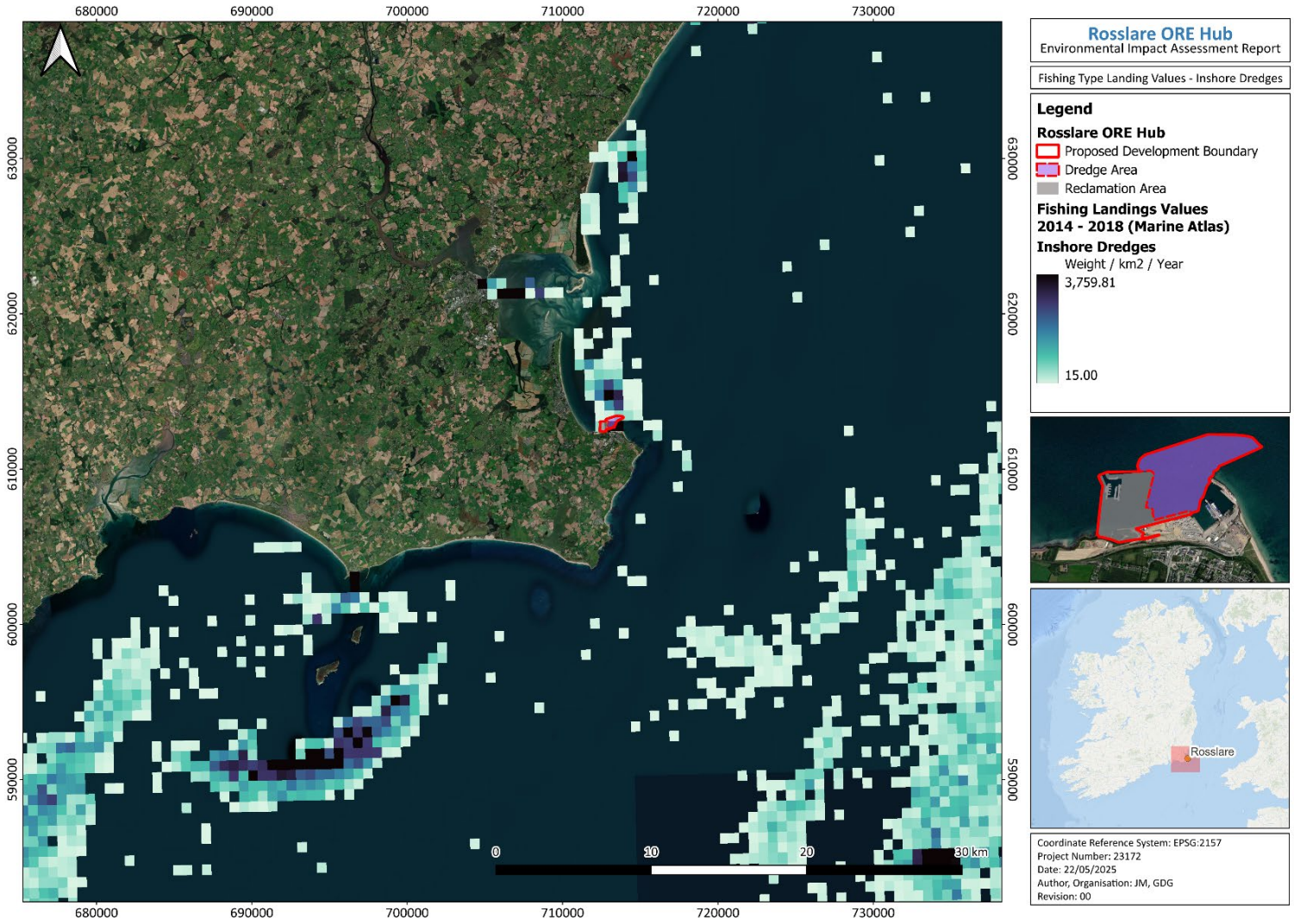


Figure 15-27 Dredges - Landing Values, 2014-2018 (Ireland's Marine Atlas, 2024)

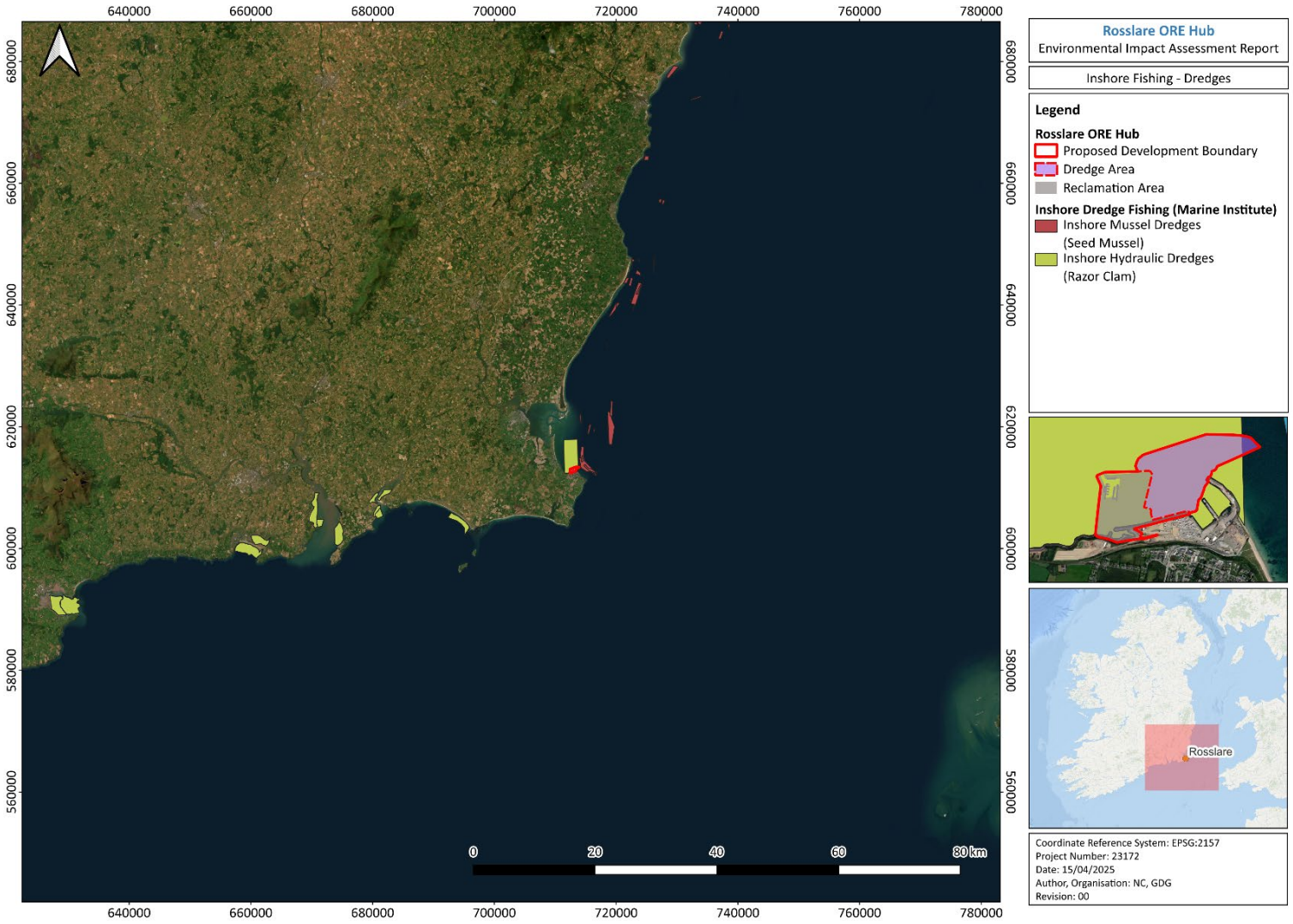


Figure 15-28: Dredges – Inshore Activity, 2014-2018 (Ireland's Marine Atlas, 2025)

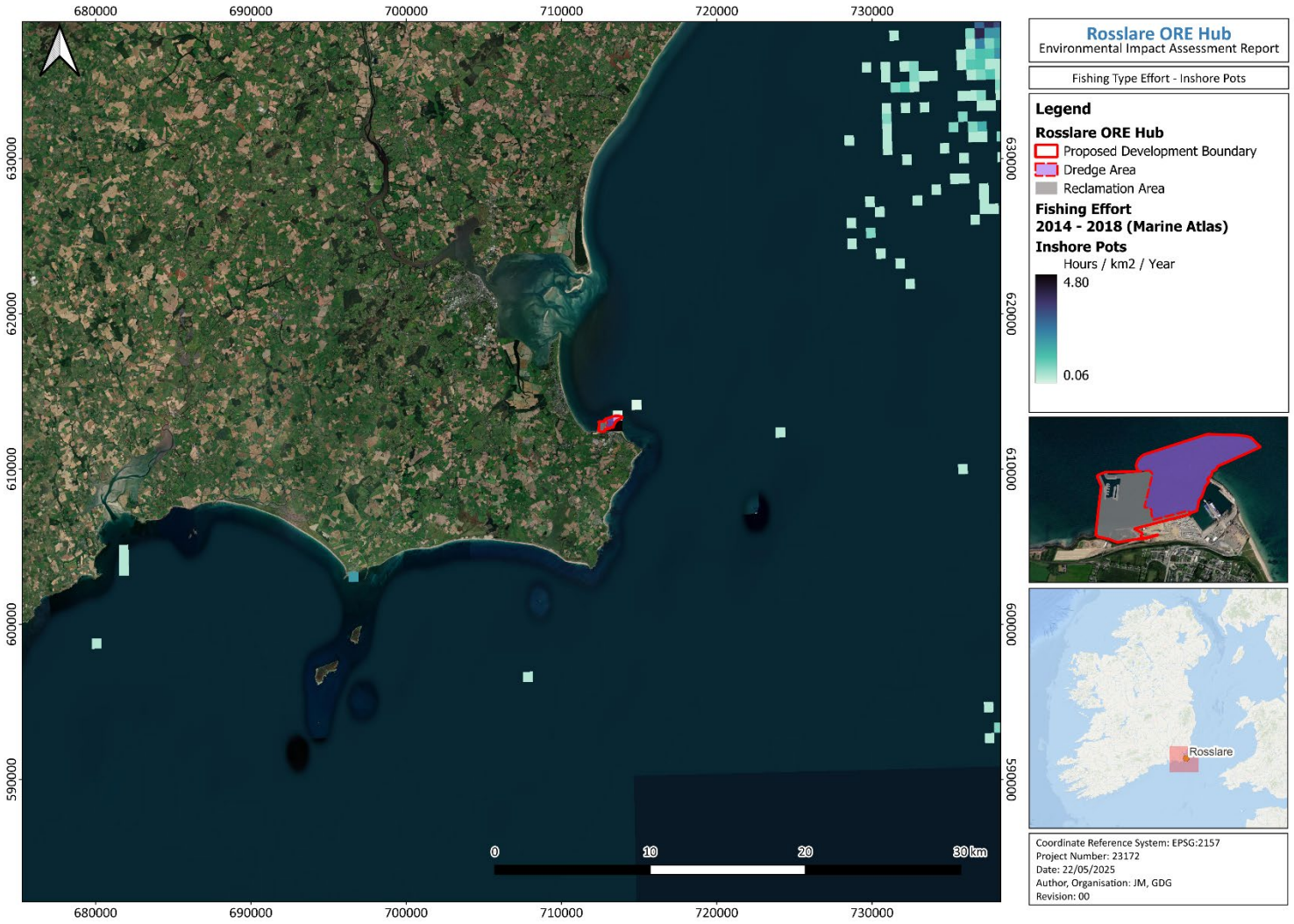


Figure 15-29 Pots - Fishing Effort, 2014-2018 (Ireland's Marine Atlas, 2024)

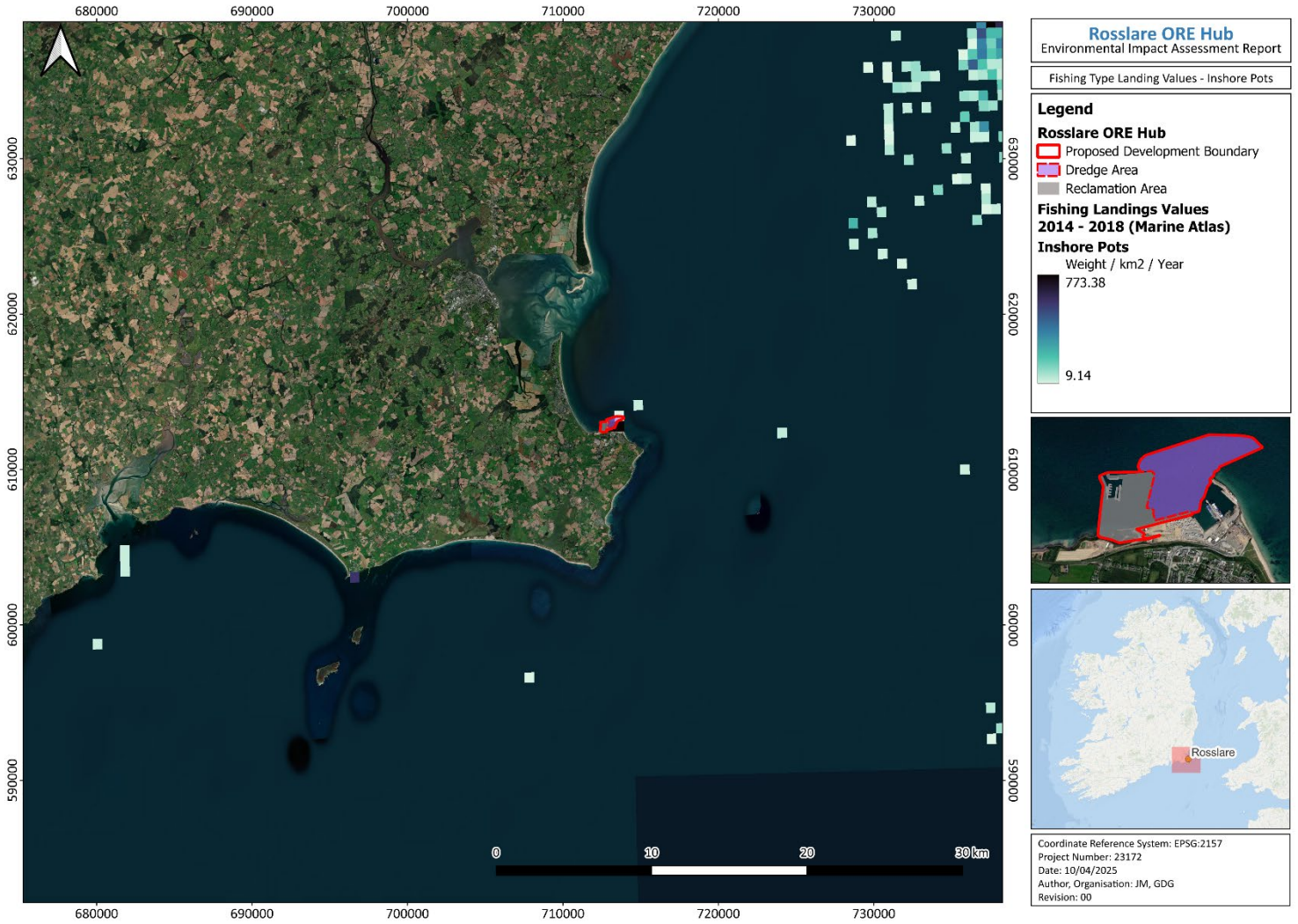


Figure 15-30 Pots - Landing Values, 2014-2018 (Ireland's Marine Atlas, 2024)

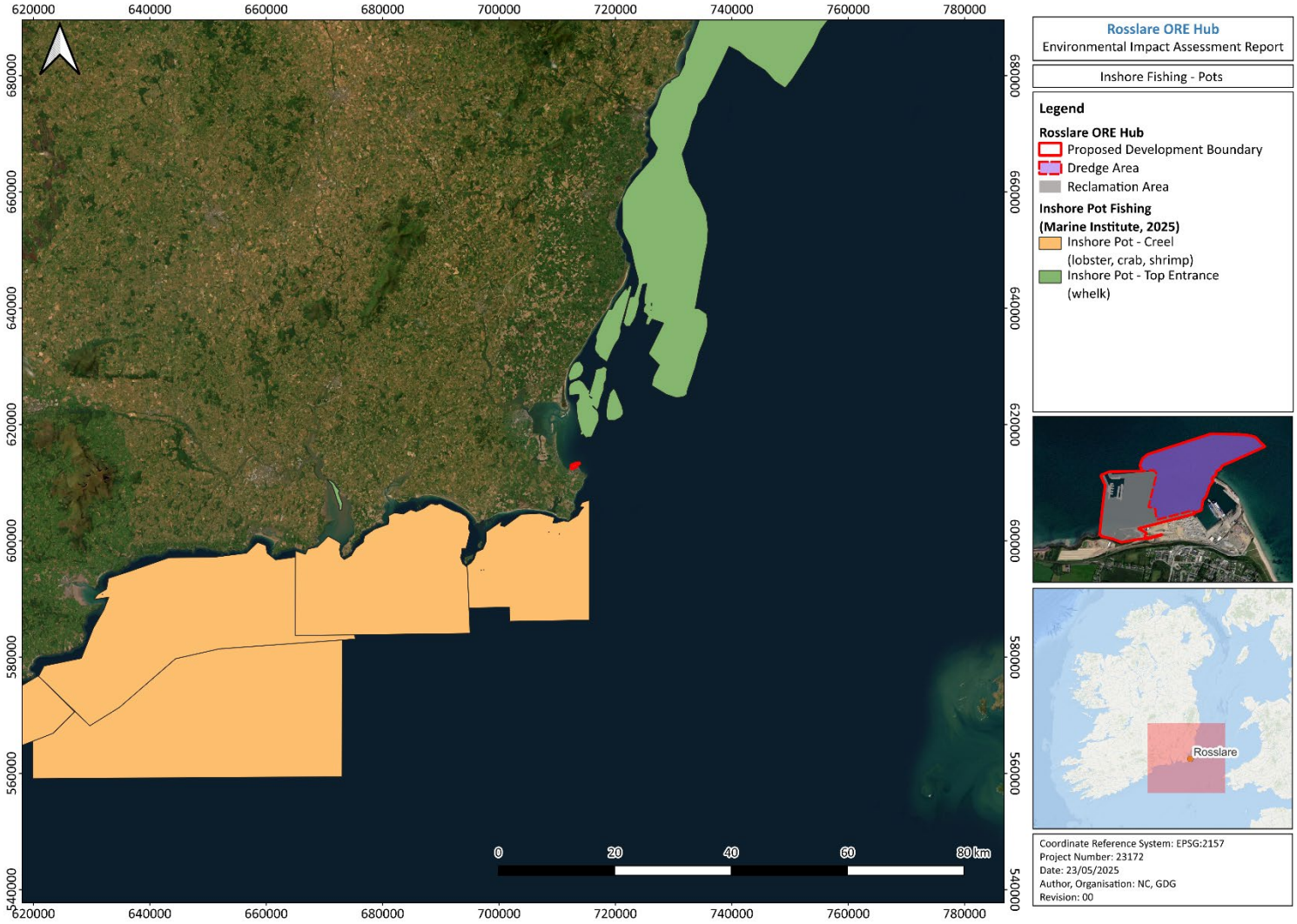


Figure 15-31 Pots - Inshore Activity (Marine Institute, 2025)

15.3.4.1 RAZOR CLAMS (ENSIS SILIQUA)

Razor Clams (*Ensis siliqua*) occur along the east coast of Ireland in mud and muddy sandy sediments from Dundalk to Dublin and from Cahore to Rosslare and in numerous areas along the west coast. A second species, *Ensis arcuatus*, is abundant in clean sand substrates on the west coast. Both species may occur in the same area.

The distribution of this shellfish is based on currently known commercial fisheries which operate in water depths of 4 to 14 metres. Fishing depth is limited because of the fishing method used: dredge plus hydraulically pressurised water to fluidise sediments in front of the dredge. The distribution of razor clams may extend to deeper water outside of the range of the fishery as the species occurs at depths of up to 50 m. However, there is no evidence that significant biomass occurs outside of those areas already fished.

The efficiency of the hydraulic dredge used in razor clam fisheries has been measured at 90%. This is in contrast to non-hydraulic dredges used in other bivalve fisheries such as scallop and oyster where dredge efficiency may be in the region of 10-35%. Discard mortality rates are unknown but may be significant given that damage can be observed on the shell of discarded fish and unobserved shell damage may occur at the dredge head.

Ensis siliqua are slow growing, reaching a maximum shell length of approximately 220 mm, and have relatively low productivity. The apparent resilience of the species in areas subject to persistent fishing by highly efficient gears may possibly be explained by immigration of juvenile and adult razor clams from areas outside of the fishery. Some evidence of size stratification by depth has been shown and considering the known mobility of the species, this suggests that post settlement movement and recruitment into fished areas may occur. *Ensis arcuatus* is faster growing, occur in high densities and reach a smaller maximum size than *E. siliqua*. Physical disturbance of sediments and removal of *Ensis* by a fishery may alter the bivalve species composition and generally the faunal communities in benthic habitats.

In shallow waters, changes in the abundance and species composition of bivalves may have a negative effect on diving sea ducks (Common Scoter) that feed on bivalves. This species is designated under the Birds Directive in the Raven SPA in Wexford. The fishery may also result in changes to habitat due to the deep physical disturbance caused by the dredging process.

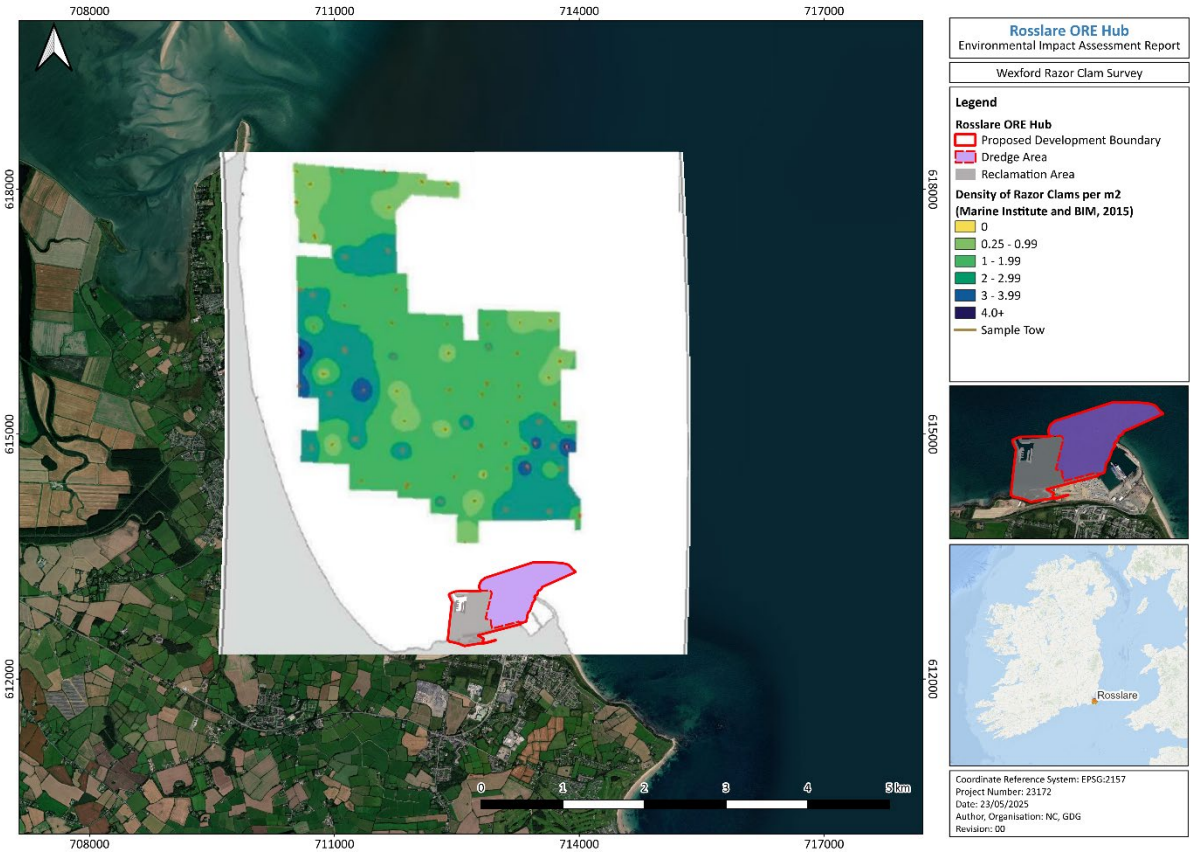


Figure 15-32: Density distribution of Razor clams in Rosslare Bay in April 2015
(Marine Institute and Bord Iascaigh Mhara, 2015)

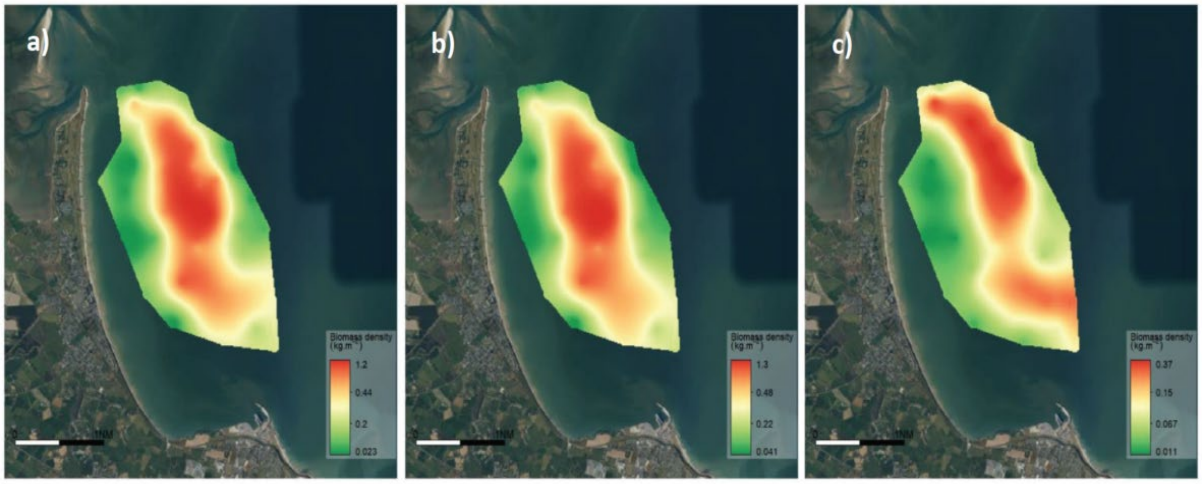


Figure 15-33: Density distribution of Razor clams in Rosslare Bay

(Marine Institute and Bord Iascaigh Mhara, 2023)

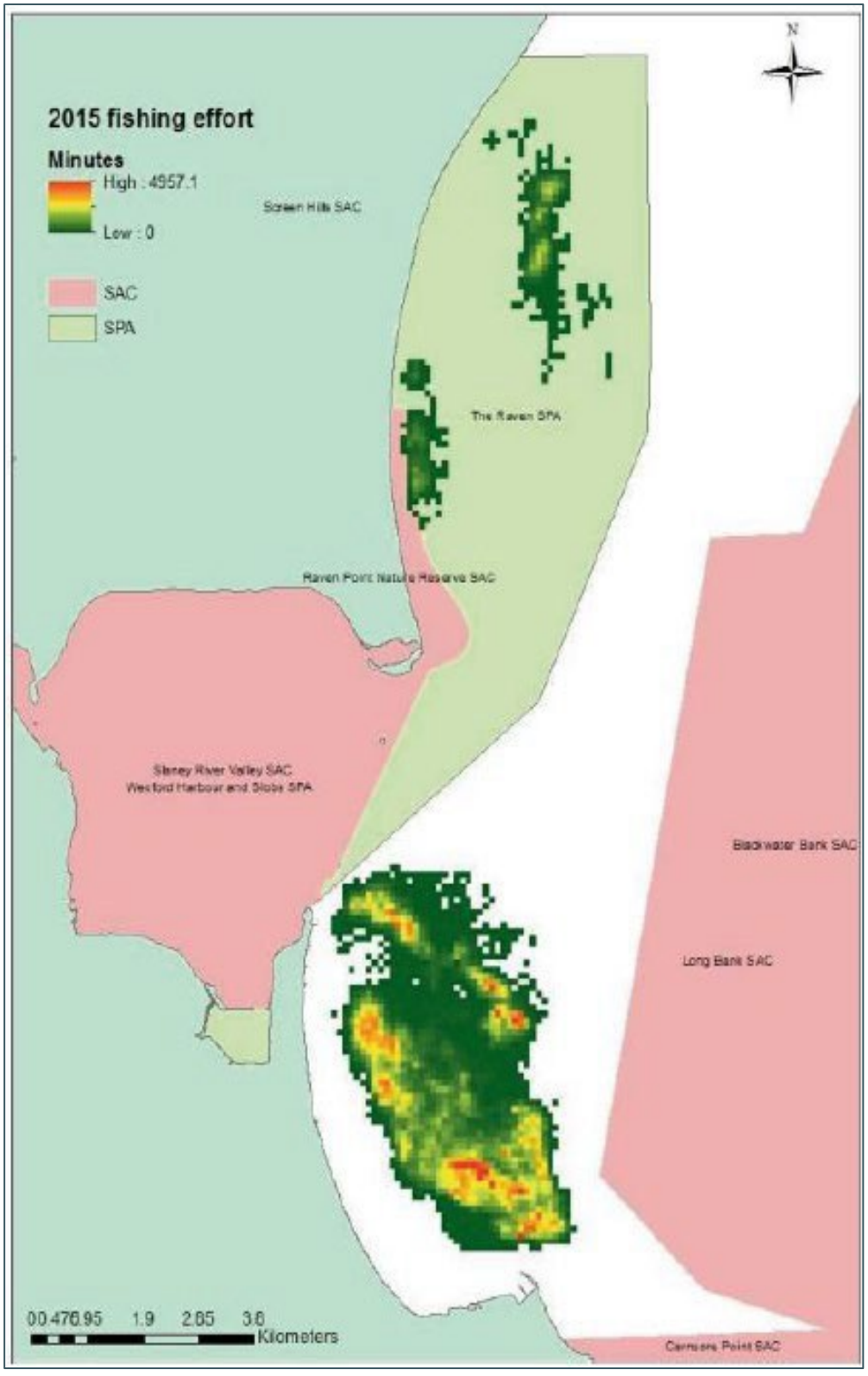


Figure 15-34: Distribution of fishing for Razor clams at Rosslare and Cahore

(Source: Inshore VMS data: from The Marine Institute and Bord Iascaigh Mhara, 2015)

Management Units

According to the Marine Institute, the stock structure of the Razor clam is unknown. Larval dispersal and movement of juveniles (and possibly adults) suggests that the stock structure is relatively open along the east coast of the north Irish Sea and that individual beds are unlikely to be self-recruiting. Fishing is continuous from north Dundalk Bay to Malahide.

Stocks in the south Irish Sea are likely to be separate to those north of Dublin given the different hydrodynamic and tidal regimes in the two areas. Other isolated stocks occur in many locations on the south and west coasts including in Clifden Bay and at the Iniskea Islands in Mayo.

Management Measures

Management measures were introduced for the Rosslare – Cahore fishery in December 2014. These include:

- Minimum landing size (MLS) increase from 100 mm to 130 mm
- Fishing hours restricted to between 07:00 to 19:00
- A catch limit of 2.5 tonne quota per vessel per week (previously 2 tonnes)
- 1 dredge per vessel
- Dredge not to exceed 122 cm width and with bar spacing not less than 10 mm
- Prior notice of intention to fish and advance notice of landing
- Mandatory submission of gatherers docket on landings including date and location of fishing
- A defined fishing area to minimise overlap with Natura 2000 sites
- A requirement to transmit GPS position of each vessel on a 1-minute frequency
- All vessels fishing for Razor Clams must have a functioning VMS system on board and report GPS position at defined frequencies
- Only 1 class of production area (A, B, C) can be fished during a fishing trip (SI 206 of 2015)

South Irish Sea Landings

The Razor Clam fishery in the south Irish Sea opened in 2010. Landings increased from 50 tonnes to 100 tonnes in 2011 and 2012 and peaked at over 200 tonnes in 2016. Landings declined from 2016 to 2019, but increased in 2020 to 150 tonnes, mostly from Curracloe. Landings in 2021 were about 80 tonnes and approximately 140-150 tonnes in 2022 and 2023. The Waterford estuary fishery was closed by court order in 2019.

The south Irish Sea Razor Clam fishery occurs mainly in Rosslare Bay and further north at Curracloe and landings for these two areas have varied over time as shown in Figure 15-35. The Rosslare Bay fishery was closed by voluntary agreement in 2017 due to a decline in the availability of large clams. Approximately 12 vessels fish in the area but this number changes seasonally with some vessels moving to the north Irish Sea. The fishery occurs close to or overlaps with a number of SACs and SPAs.

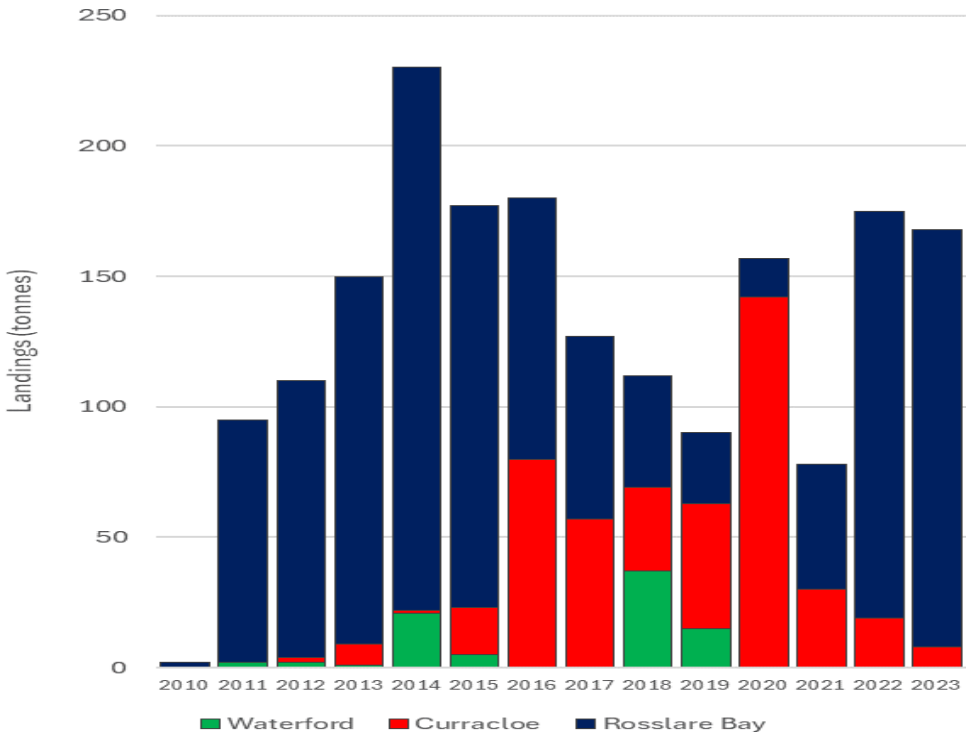


Figure 15-35 South Irish Sea Razor shell landings by location and year (Marine Institute and Bord Iascaigh Mhara, 2023)

15.3.4.2 SURF CLAM (SPISULA SOLIDA)

Biology

Surf clams are a sub-tidal, infaunal, bivalve, inhabiting clean, coarse sand and gravel. When present, it generally occurs in high densities but given the patchy distribution of suitable substrates, stocks are likely locally discrete. These are medium lived animals with a life span ranging from 5 to 10 years. Spawning takes place in early summer and is followed by a pelagic larval dispersal phase. Juveniles recruit to the current fishery from age two.

Fishery

Surf clam fisheries are fished by inshore vessels (< 12 metre length overall) using single, non-hydraulic, clam dredges. Fishing can take place in late spring, or, in some cases throughout the year. The main fisheries occur in Waterford Harbour (Figure **15**-**36**), Clifden, and inner Galway Bay. Other beds (many unfished) mainly occur on the west coast of Ireland in Blacksod Bay, Broadhaven Bay, Bertraghbuoy Bay, Bantry Bay, and near the Saltee Islands on the south coast and other areas where suitable coarse sand is available.

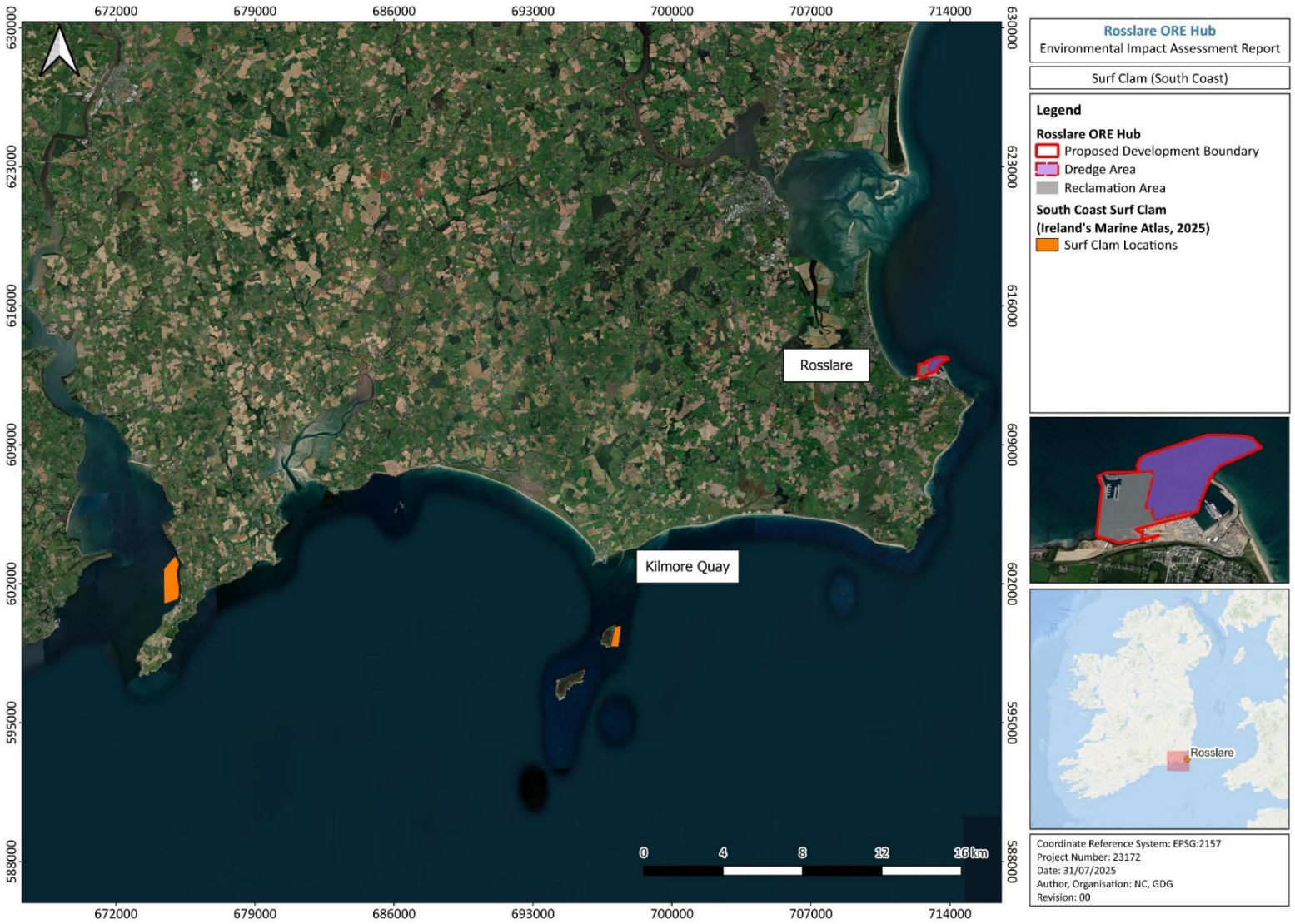


Figure 15-36: Distribution of surf clam on the southeast coast (Tully, 2017; Ireland's Marine Atlas, 2025)

Rosslare

The Marine Institute's Atlas of Commercial Fisheries for Shellfish around Ireland does not include any specific reference to a Rosslare fishery for Surf Clam, but it does note that unfished beds may occur around the Saltee Islands and *other areas where suitable coarse sand is available*.

15.3.4.3 COCKLES (CERASTODERMA EDULE)

Cockle stocks occur in intertidal sand and mud habitats that occur as isolated and discrete areas around the coast. As a consequence, cockle stocks are probably local, self-recruiting populations. Although there are many populations, only Dundalk Bay has supported commercial dredge fisheries in recent years. There is a small-scale commercial hand gathering fishery in Castlemaine Harbour (Kerry) and in Drumcliffe Bay (Sligo). Stocks also occur in Tramore Bay and Woodstown Co.

Waterford and in Clew Bay Co. Mayo but these stocks have not been commercially fished in recent years. In addition, cockle stocks occur in Mayo (other than Clew Bay), Kerry, Sligo and Donegal but these have not been surveyed and are not commercially fished.

In recent years the main fishery has occurred in Dundalk Bay. While recruitment to the stock occurs regularly, overwinter survival can be highly variable. As a consequence, biomass in some years is insufficient to support a fishery.

In most other areas growth rates are lower than in Dundalk and cockles need to survive over 2 winters to reach commercial size compared to 1 winter in Dundalk.

Rosslare

The Marine Institute's Atlas of Commercial Fisheries for Shellfish around Ireland does not include any specific reference to a Rosslare fishery for Cockles.

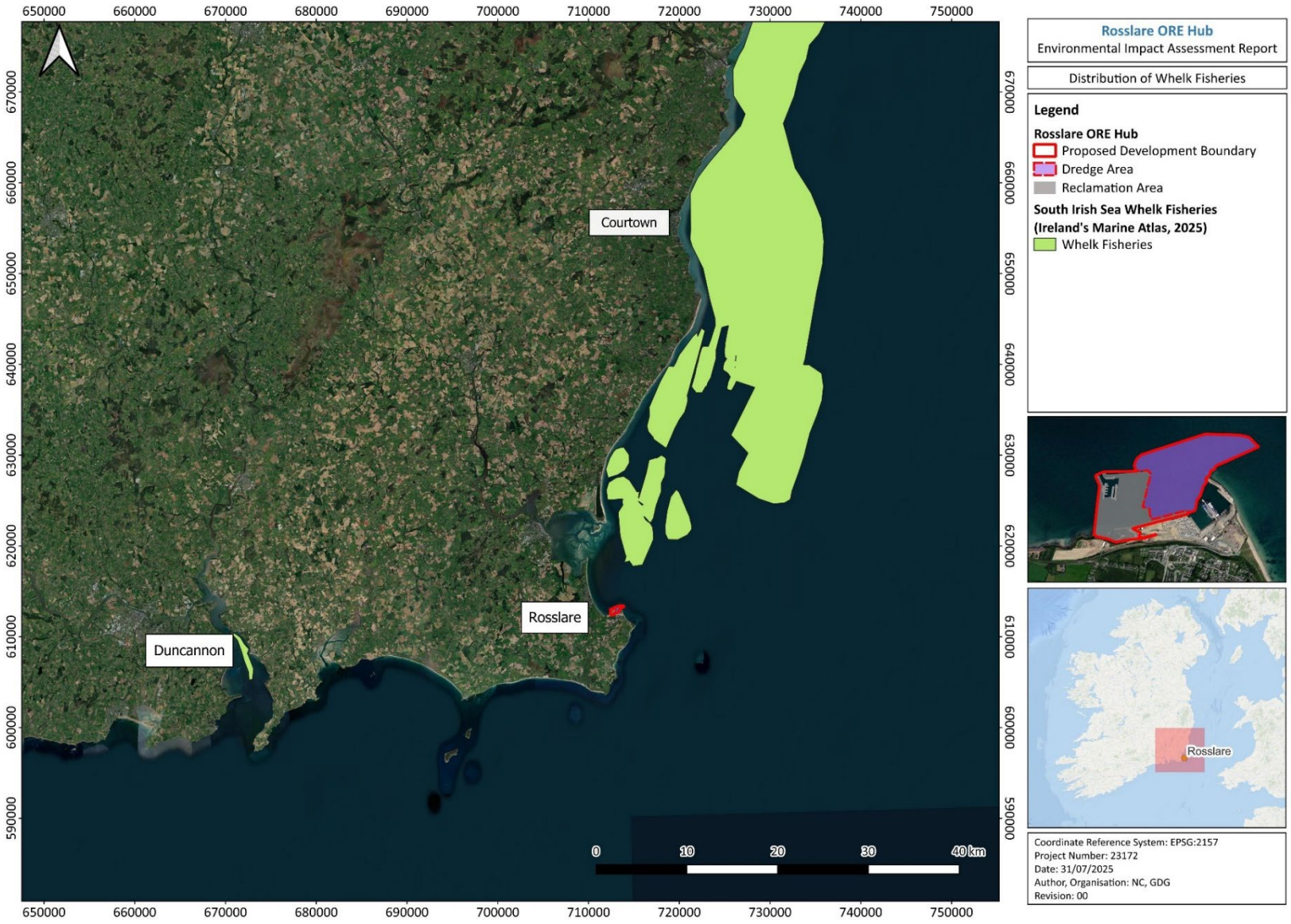
15.3.4.4 WHELK (BUCCINUM UNDATUM)

Biology

Whelk are long-lived (life span to 15 years) epibenthic gastropods inhabiting sand and mixed sediments, at depths to 50 metres, where they feed as scavengers and predators. Animals typically grow to 150mm shell height and are, generally, mature at 70-85mm shell height. Whelk egg masses are deposited directly onto the substrate and there is no pelagic larval phase. As a consequence, stocks may be locally discrete and whelk in the south Irish Sea may be comprised of a number of populations with limited connectivity.

Fishery

Expanded in the early 1990s due to new markets in South Korea and Japan, fisheries for whelk use baited traps (pots), with dogfish and crab (including spider carb) often used as the main bait. Fishing occurs throughout the year and there has been a commercial fishery in the south Irish Sea (Howth to Rosslare) since the 1960s. The fisheries in proximity to Rosslare Harbour are shown in Figure **15**-**37**. The boundaries of the current Rosslare Whelk fishery are shown in Figure **15**-**38**. These are based on plotter data provided by the stakeholder group.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Proposed Development Boundary
Dredge Area
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South Irish Sea Whelk Fisheries
(Ireland's Marine Atlas, 2025)
Whelk Fisheries
Rosslare
Coordinate Reference System: EPSG:2157
Project Number: 23172
Date: 31/07/2025
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Figure 15-37: Distribution of whelk fisheries in the south Irish Sea (Tully, 2017/ Ireland's Marine Atlas, 2025)

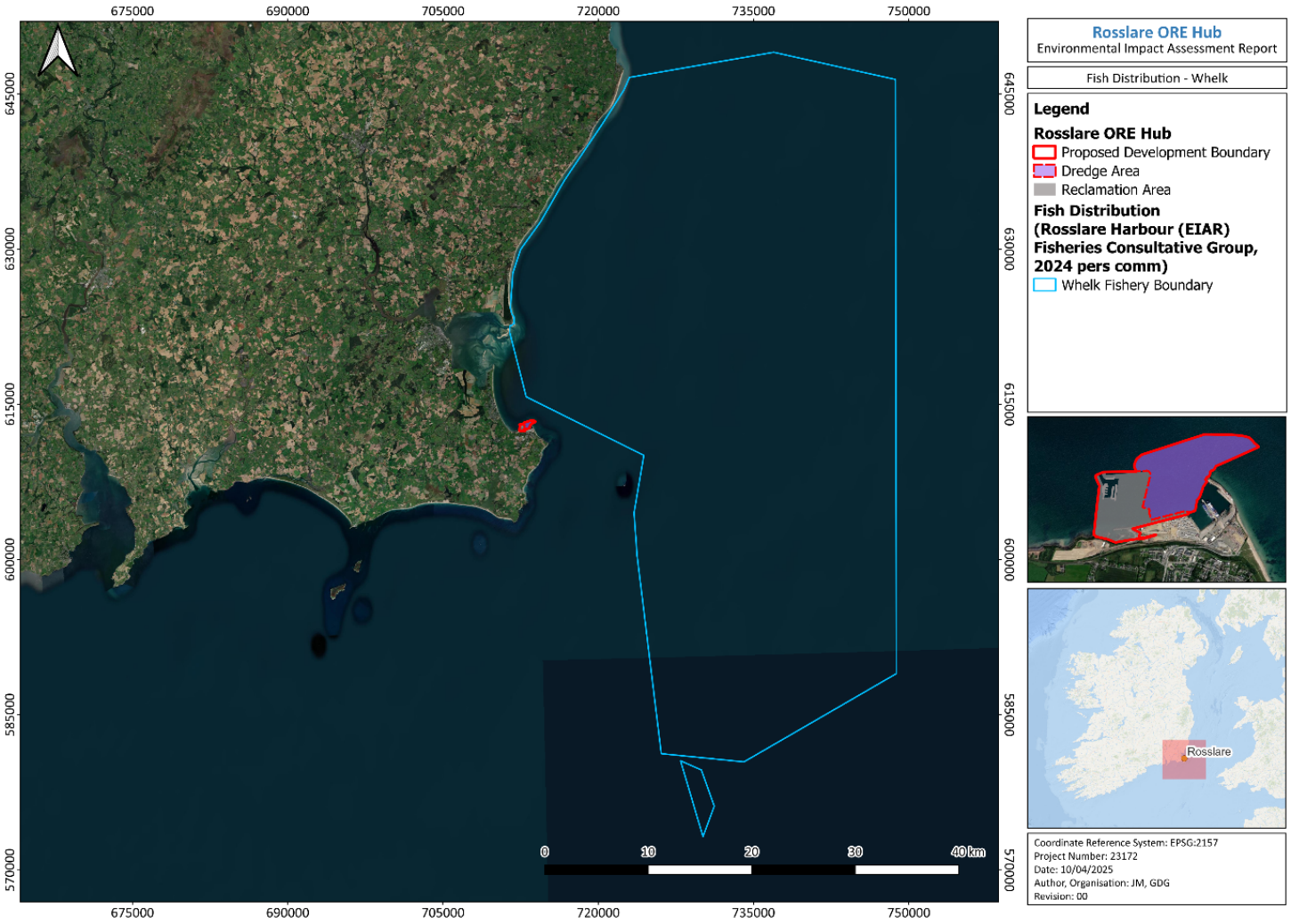


Figure 15-38**: Boundary of Rosslare Whelk Fishery (Rosslare Fisheries Consultative Group, *pers comm* 2024)**

The Marine Institute's Atlas of Commercial Fisheries for Shellfish around Ireland (Marine Institute & BIM 2023) includes a specific reference to a Rosslare fishery, noting that the *South Irish Sea fishery (Rosslare to Howth)* employs some 50 vessels and up to 25,000 pots. It also provides an assessment of whelk landings by county and harbour from 2014 – 2022 based on EU Sales Notes and Logbooks (Figure 15-39 and Table 15-15).

Historically landings of whelk were as high as 10,000 tonnes per annum, however this figure has averaged around five thousand tonnes more recently (2015 – 2024).

The Marine Institute has assessed whelk stock in the Irish Sea as generally depleted or locally depleted due to high fishing mortality. There is currently no limit on landings, and the whelk fishery is managed through a minimum landing size of 25mm shell width.

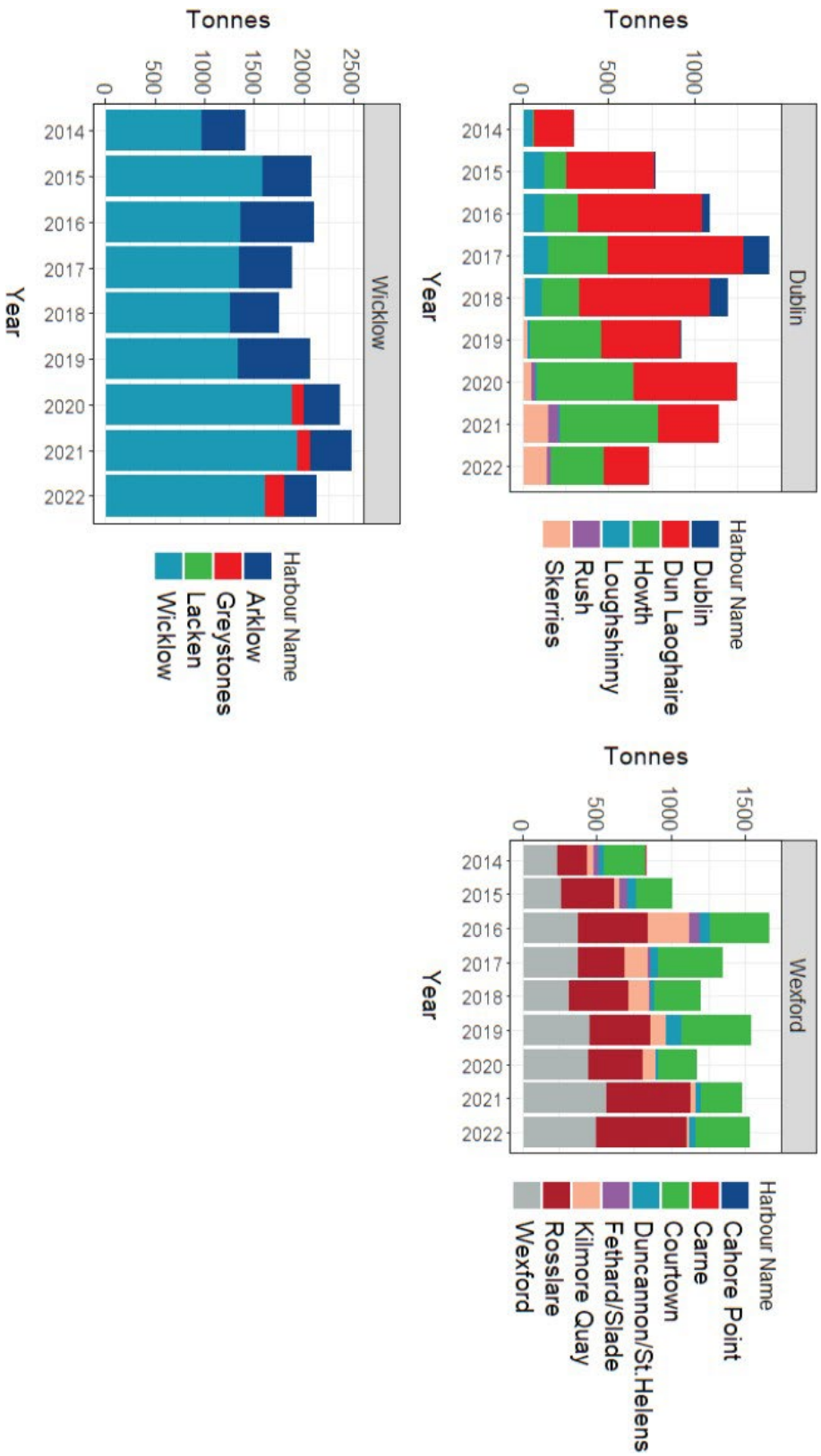


Figure 15-39: Whelk landings by County and Harbour 2014-2022 (Marine Institute and Bord Iascaigh Mhara, 2023).

Table 15-15: Annual landings (tonnes) of whelk by Irish vessels into Ireland 2004-2024. Source: Logbook declarations, sales notes, co-op data). Unit value (per kilo) from sales note data (Marine Institute and Bord Iascaigh Mhara, 2024)

Year	Landings (tonnes)	Year	Landings (tonnes)
2004	2,600	2,015	5,014
2005	4,154	2,016	5,822
2006	2,917	2,017	4,977
2007	2,644	2,018	4,638
2008	2,097	2,019	5,090
2009	2,163	2,020	5,302
2010	2,975	2,021	5,772
2011	3,174	2,022	6,329
2012	3,446	2,023	5,021
2013	2,628	2,024	4,515
2014	2,180		
Average 2015 - 2024 (tonnes)		5,248	
Unit Price €/kg		€1.79	
Value 2024 (€ million)		€8.08	

15.3.4.5 LOBSTER (HOMARUS GAMMARUS)

Biology

Lobster are long lived, non-migratory crustaceans that, typically, inhabit underwater reefs where they feed as scavengers and predators. Animals moult in summer, growing about 6mm at each moult. Moulting in some cases is annual but often moulting and spawning occurs in alternate years. Post spawning, larvae generally undergo a dispersal phase lasting about 30 days with larvae hatching from June to August. Larval behaviour may limit dispersal.

Fishery

Lobster fisheries are undertaken by inshore vessels (< 12 metre length overall) using baited traps. Fishing often occurs throughout the year with the main fishery between March and October.

Table 15-16 Annual landings (tonnes) of lobster by Irish vessels into Ireland 2004-2024
Based on logbook declarations, sales notes, and co-op data (Marine Institute and Bord Iascaigh Mhara, 2024)

Year	Landings (tonnes)	Year	Landings (tonnes)
2004	855	2,015	363
2005	644	2,016	402
2006	611	2,017	415
2007	297	2,018	345
2008	498	2,019	488
2009	423	2,020	437
2010	470	2,021	628
2011	250	2,022	612
2012	244	2,023	601
2013	367	2,024	660
2014	445		
Average 2015 - 2024 (tonnes)			495
Unit Price €/kg			€18.98
Value 2024 (€ million)			€12.53

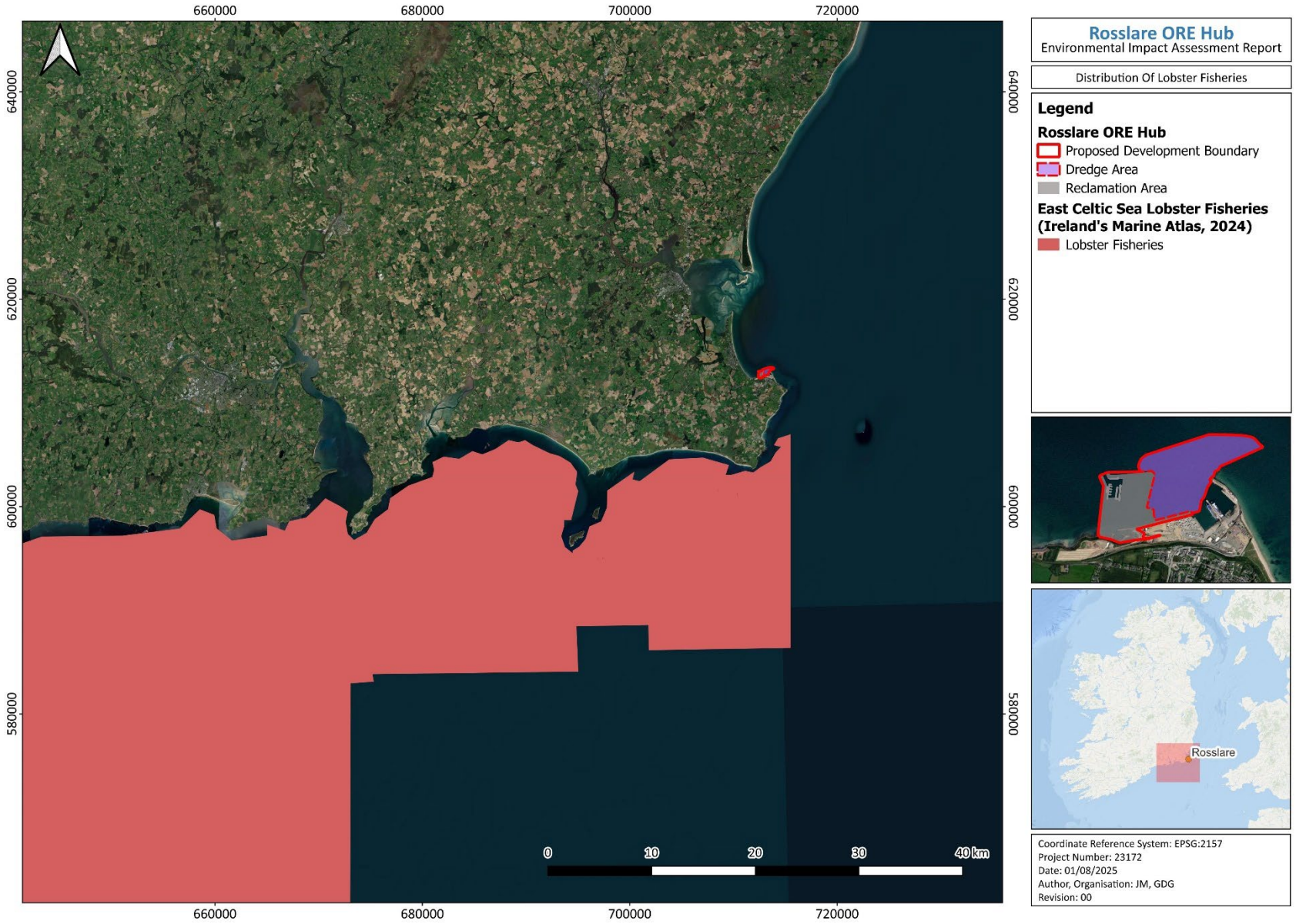


Figure 15-40: Geographic distribution of lobster fishing off the southeast coast (Tully, 2017/Ireland's Marine Atlas, 2024)

While there is currently no limit on landings or fishing effort the lobster fishery is managed using technical measures. These include a minimum (87mm carapace length) and maximum landing size (127mm carapace length) and a prohibition on the landing of v-notched lobsters. As the number of v-notched lobsters in any stock at any given time depends on the scale of any local v-noting programme the efficacy of this measure varies on different coasts.

- Annual overall landings can vary from 244 to 855 tonnes (Table 15-16).
- Total activity also varies from year to year; in 2013 it was estimated to be some 765 vessels fishing 214,000 pots.
- Lobster becomes less abundant and brown crab are more abundant with increasing depth.
- Although the fishery for lobster is targeted there is often a significant by-catch of brown and velvet crab is a common by-catch in the fishery close to shore.

Rosslare Fishery

The Marine Institute's Atlas of Commercial Fisheries for Shellfish around Ireland does not include any specific reference to a Rosslare fishery, but it does note that fishing takes place to the west and south of Dunmore East, around the Saltee Island and of the South Wexford (South coast), see

15.3.4.6 VLEVET CRAB (NECORA PUBER)

Biology

Velvet crab are relatively short-lived animals (life span 4-6 years) found on shallow water reefs or patchy reefs with crevices and on mixed sediments. Juveniles are also found in sand and, generally, velvet crab are more common in bays than on open coasts. These are fast growing animals that mature at 1-2 years (45-50mm carapace width) and generally exhibit high fecundity.

Fishery

Velvet crab fisheries are taken in baited traps set from inshore (< 18 metres) vessels operating in shallow coastal waters. Fishing occurs throughout the year with the main season from March to October. Apart from targeted pot fisheries (southwest, and coasts of Dublin, Galway and Donegal) there is also a significant by-catch taken in lobster fisheries. Landings in 2023 were 242 tonnes and varied between 200 and 328 tonnes in the period 2014 - 2023. Landings in 2020, the first year of Covid-19, dropped to 12 tonnes.

The distribution of velvet crab fisheries is similar to lobster but usually in shallow waters less than 20m depth. Landings are mainly into ports on the west (Rossaveal), southwest (Bantry, Castletownbere, Crosshaven, Schull, Skibbereen), east (Clogherhead Howth, Dun Laoghaire) and southeast coasts (Rosslare, Kilmore Quay).

Rosslare

The Marine Institute's Atlas of Commercial Fisheries for Shellfish around Ireland includes a specific reference to a Rosslare fishery.

15.3.4.7 BROWN CRAB (CANCER PAGURUS)

Biology

Brown crab are long lived animals found on all coasts living in sedimentary and reef habitats where they feed as scavengers and predators. They mostly moult in summer, but the moulting season can be protracted. The moult frequency of commercial size classes is annual however, this declines with size. Post spawning, the larval dispersal phase lasts about 30-50 days with larvae hatching from March to November. The size at 50% maturity for female crab is 120mm (carapace width). Growth increment at moult is 15-25% of pre-moult size for main commercial size classes and is higher in male crab.

Fishery

Brown crab fisheries (Figure 15-41) are taken in baited traps set from smaller (< 18 metres) inshore boats operating in shallow coastal waters all the way up to larger (18 – 23 metre) offshore *'vivier'* vessels operating off the northwest coast and fishing out to depths of 200m. Fishing occurs throughout the year with the main season from March to November. Apart from targeted pot fisheries, there is also a by-catch taken in set nets and bottom trawls.

Landings in 2023 were 7,893 tonnes and varied between 6,500 and 9,300 tonnes in the period 2014 - 2023. Catch rates are highly variable between vessels, areas, seasons and years making it difficult to identify patterns.

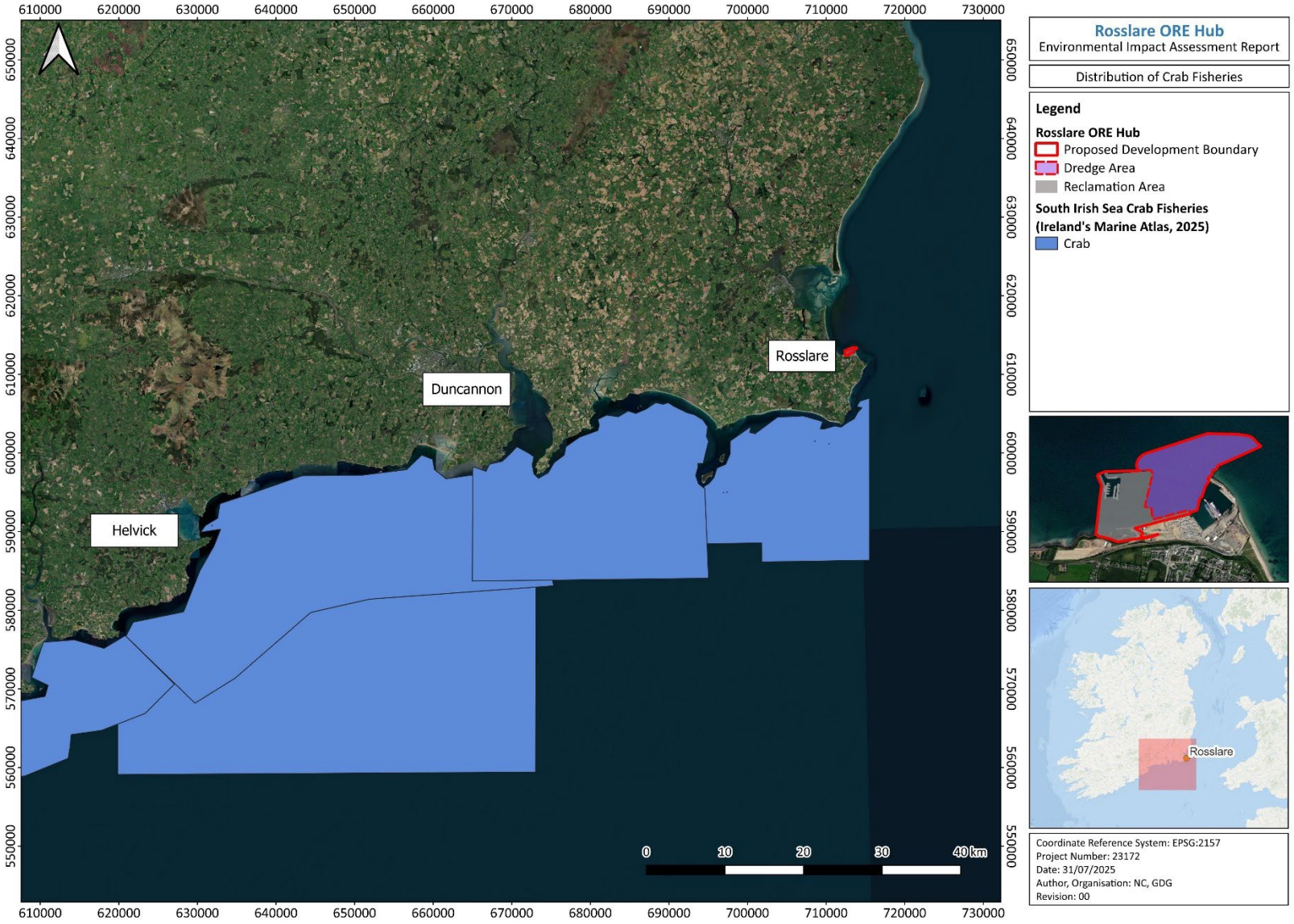
While there is currently no limit on landings, crab fishing is managed using a combination of technical measure and effort limitation, specifically:

- A minimum landing size (MLS) of 130mm carapace width (140mm north of 56°N). As the female, long-lived size at 50% maturity is 120 mm, the minimum landing size largely prevents growth overfishing
- Annual effort by vessels over 15 m in length fishing the north west stock is restricted to 465,000 kw.days (ICES Area VI - 1415/2004 EC)
- Annual effort by vessels over 15 m in length fishing in ICES Area VII outside of the Biologically Sensitive Area is restricted to 40,960 kw.days (1415/2004 EC).
- Annual effort by vessels over 10 m in length fishing in the Biologically Sensitive Area is restricted to 63,198 kw.days (1415/2004 EC). Effort by vessels under 10 m in length is unrestricted.

These restrictions have resulted in some displacement of offshore effort (>18 m in length) from the Malin Shelf to the North Sea and on occasion the restrictions may limit fishing activity towards the end of the year by vessels over 10 m.

Rosslare

The Marine Institute's Atlas of Commercial Fisheries for Shellfish around Ireland does not include any specific reference to a Rosslare fishery however it does note that targeted fishing takes place on the southeast coast and specifically that crab stocks off the southeast coasts are mainly exploited by Irish vessels <13 m in length inside 12 nm, Figure 15-42.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(Ireland's Marine Atlas, 2025)
Crab
Rosslare
Coordinate Reference System: EPSG:2157
Project Number: 23172
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Figure 15-41: Geographic distribution of brown crab fishing off the south east coast (Tully, 2017/Ireland's Marine Atlas, 2025).

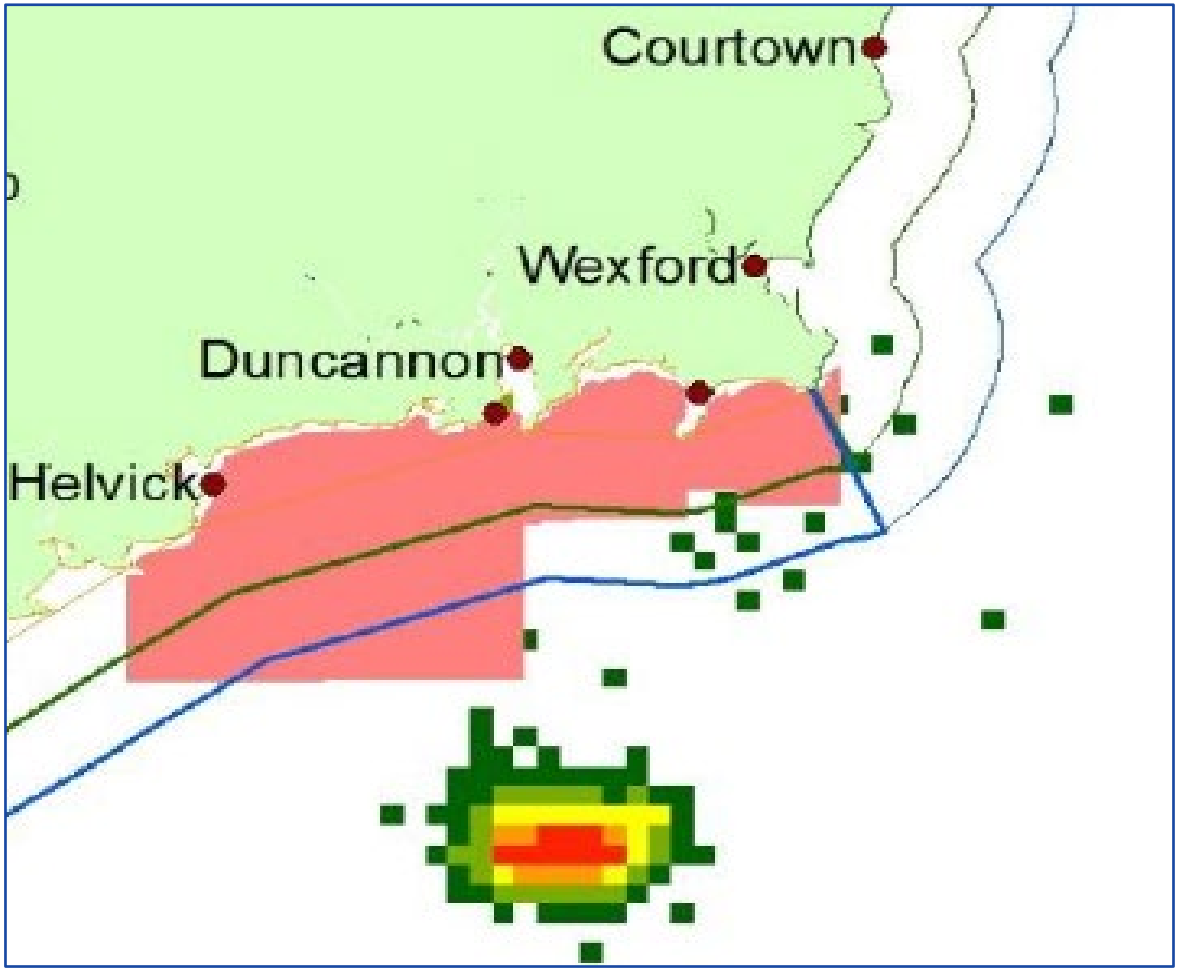


Figure 15-42: Distribution of fishery for brown crab (Tully, 2017)

15.3.4.8 SPIDER CRAB (MAJA BRACHYDACTYLA)

Biology

Spider crab are a relatively short lived (<10 years) species that inhabit mixed reef-sedimentary habitats and clean sand. Animals migrate inshore in spring to release larvae and moult. Larval life is short, comprising only 2 stages. Spider crab have a terminal moult meaning that they reach a certain size and stop growing. The life span following terminal moult is limited to 2-3 years as the shell ages.

Fishery

Spider crab are common on all coasts. The Tralee Bay fishery is the main targeted fishery in the spring of each year. This relies on spider crab migrating from deeper water into the shallow sandy confines of the bay. Apart from Tralee, spider crab are lightly exploited in many areas and may even have expanded its distribution in the past 20 years. There may also be local depletion in some areas when a targeted fishery is present.

Rosslare

While the Marine Institute's Atlas of Commercial Fisheries for Shellfish (Tully, 2017) around Ireland does not include any specific reference to a Rosslare fishery, it does note that targeted fishing takes place on the southeast coast.

Evidence of the presence of spider crab aggregations was collected from the project specific benthic surveys described in Technical Appendix 11: Benthic Ecology of this EIAR. The spider crab fishery takes place in late spring and early summer (May – July) and coincides with the moulting season.

The boundaries of the current Rosslare spider crab fishery are shown in Figure 15-43. These are based on 'plotter' data provided by the stakeholder group.

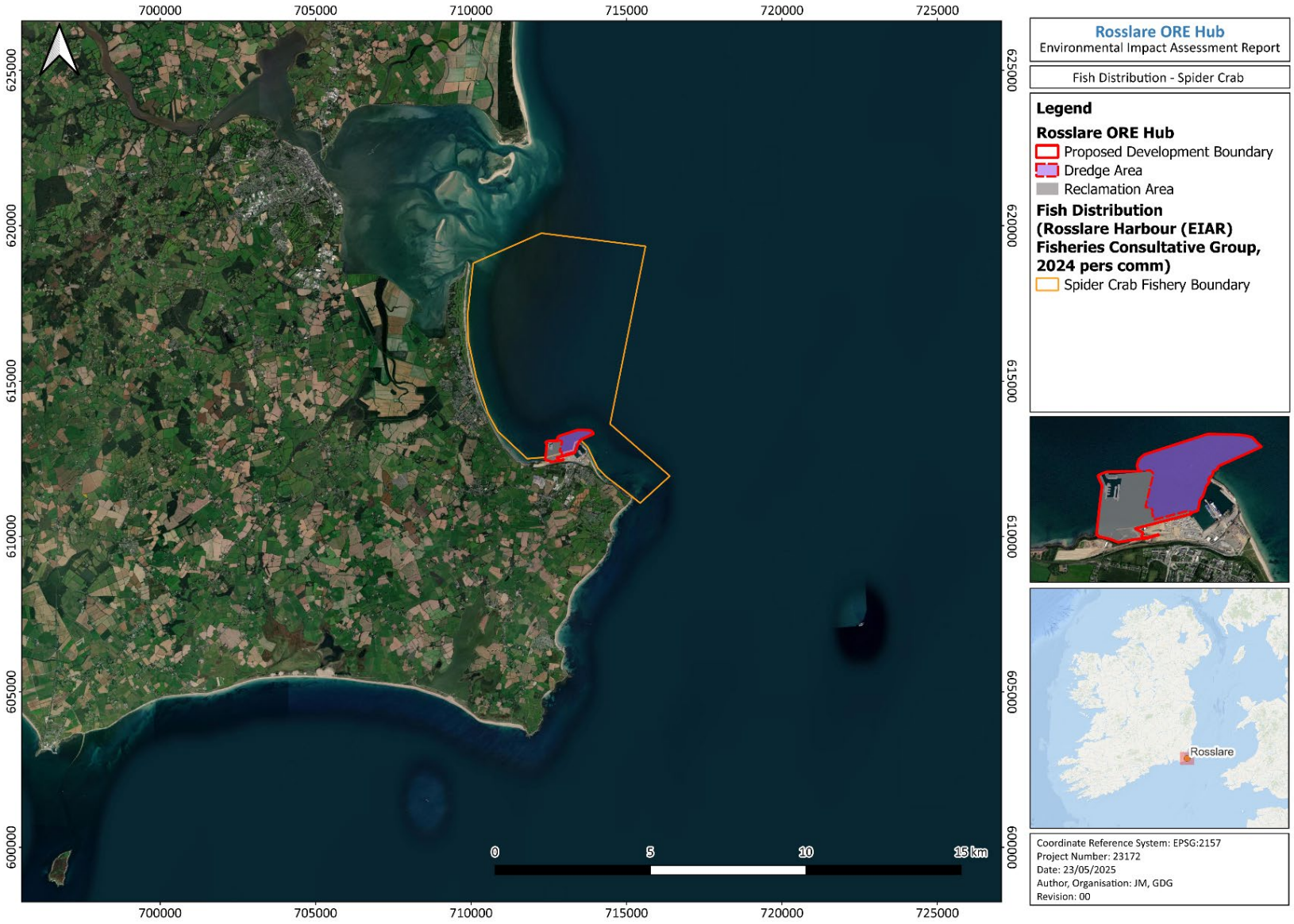


Figure 15-43: Boundary of Rosslare Spider Crab fishery (Fisheries Consultative Group, 2024, pers comm)

15.3.4.9 SHRIMP (PALAEMON SERRATUS)

Biology

The shrimp, *Palaemon serratus*, is a short lived (2 years) demersal species inhabiting mixed sedimentary and reef habitat. Local stocks occur within bays. The status of these stocks is highly variable and appears to be recruitment driven which is, itself, also highly variable. Larvae hatch from May to July and juveniles (0+ age group) recruit to fisheries in October.

Fishery

The shrimp fishery, Figure 15-44, is pursued by many small (< 8 metre length overall) inshore vessels using baited traps in targeted, single species, fisheries in shallow inshore waters and coastal Bays on the south, west and north west coasts. Smaller fisheries also occur in the Irish Sea.

Shrimp fishing occurs between the months of August and March with a closed season from mid-March to August 1st. Voluntary agreements in some areas delay the opening of the fishery until September.

- Annual (national) landings vary from 100 - 400 tonnes.
- As female shrimp are larger than males, the fishery takes place mainly on 1 year old females and fishing of mature females in spring may limit recruitment.

As recruitment of the 0+ age group occurs in October, growth overfishing (not allowing time for growth of shrimp before they are caught) can be a feature of the autumn fishery if the catch is not graded. That said, voluntary grading and live discarding is a common practice in all areas.

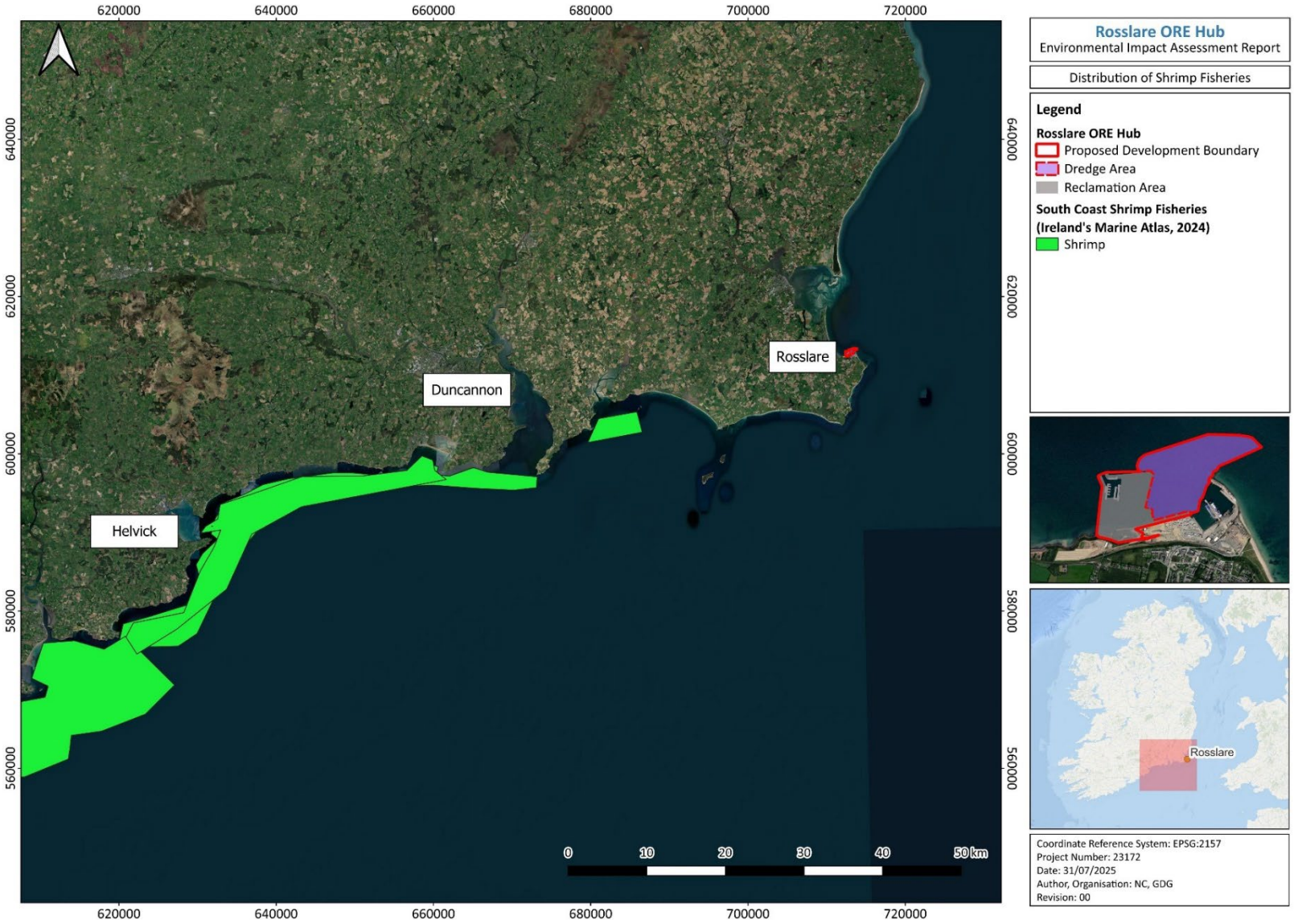


Figure 15-44: Geographic distribution of shrimp fishing off the south coast (Ireland's Marine Atlas, 2024)

15.3.4.10 SCALLOP (PECTEN MAXIMUS)

Biology

Scallop are long-lived (life span 10-15 years) epifaunal bivalves found on sand, gravel and mixed sediments, usually recessed in the surface material. When disturbed, the largely sedentary adults can use their shells to 'swim' vigorously and quite effectively for distance from 1 to 5 metres. Scallop spawn in summer and their larvae undergo a pelagic dispersal phase before settling.

There are a number of scallop beds, interconnected by larval dispersal, in the Irish Sea and Celtic Sea. These are mostly outside the 12 nm fishery limit. Inshore stocks are small and limited in distribution within bays on the southwest and west coasts and are regarded as separate populations to the offshore stocks. On the west coast a number of isolated stocks occur off Donegal, Blacksod, Clew, Kilkieran, and Galway bays, the Blasket Islands, Kenmare River, Dunmanus, Bantry and Roaringwater bays.

Table 15-17: Annual landings (tonnes) of King Scallop by Irish vessels into Ireland 2004-2024 (Marine Institute & BIM, 2024)

Year	Landings (tonnes)	Year	Landings (tonnes)
2004	2,413	2,015	2,077
2005	1,229	2,016	2,237
2006	644	2,017	2,580
2007	917	2,018	2,301
2008	1,217	2,019	2,345
2009	2,610	2,020	1,940
2010	1,959	2,021	2,739
2011	2,612	2,022	2,252
2012	2,621	2,023	2,470
2013	2,797	2,024	2,599
2014	2,597		
Average 2015 - 2024 (tonnes)		2,354	
Unit Price €/kg		€3.21	
Value 2024 (€ million)		€8.34	

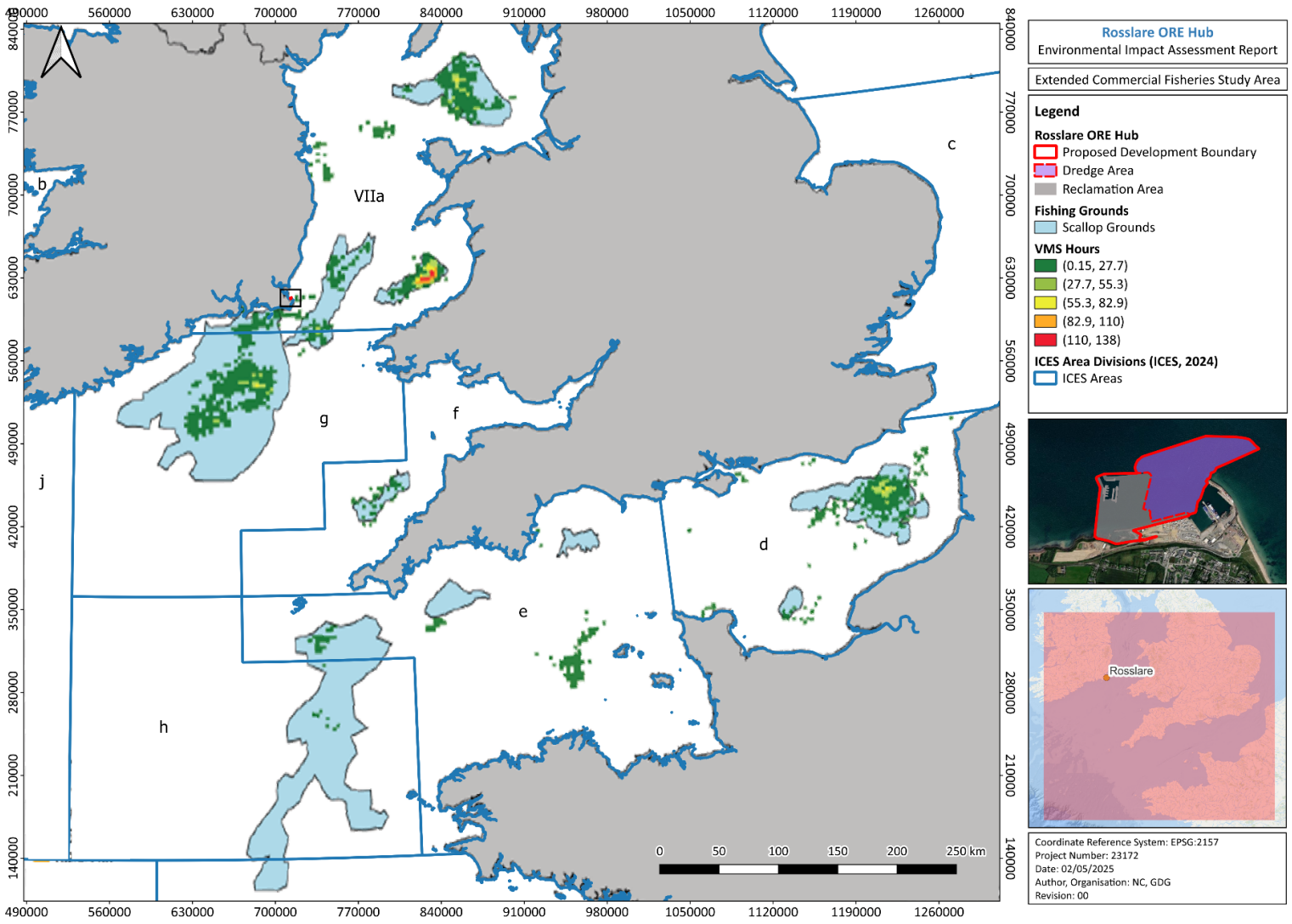


Figure 15-45: Scallop grounds fished by the Irish fleet in the Irish Sea and Celtic Sea (based on Tully, 2017)

Fishery

Scallops are taken using spring loaded dredges towed by a variety of vessel sizes; larger (> 20 m length) for the offshore fisheries in the Celtic Sea, Irish Sea and English Channel (Figure 15-45). These, typically, use 24 spring loaded dredges per vessel. Inshore fisheries are also fished by smaller boats with single or up to 8 toothed dredges per vessel. Animals recruit to the fisheries, typically, at age 3.

Landings in 2024 were 2,599 tonnes and varied between 1,940 and 2,739 tonnes in the period 2014–2024 (Table 15-17).

While there is currently no limit on landings, scallop fishing is managed using effort limitation, specifically:

- The capacity of the scallop fleet (over 10 m in length) has been limited since 2006 and a specific authorisation is required to fish for scallop.
- The total annual effort (kw.days) of the fleet is also capped by the Western Waters agreement (EC 1415/2004).
- Given the relationship between vessel length and dredge number the number of dredges in the fleet can be predicted: this has varied from 198-230 in recent years compared to estimated 500+ dredges prior to 2006 when the fleet was partially decommissioned.

Rosslare

The Marine Institute's Atlas of Commercial Fisheries for Shellfish around Ireland includes a specific reference to a Rosslare fishery.

15.4 COMMERCIALLY IMPORTANT AQUACULTURE RECEPTORS

15.4.1 BOTTOM CULTURED MUSSELS (MYTILUS EDULIS)

According to BIM's *Annual Aquaculture Report, Findings of the National Seafood Survey 2024,* bottom cultured mussels generated 3,626 tonnes of product in 2023 (down from 6,864 tonnes in 2022) valued at €3.957 million (down from €8,966 million in 2022).

The bottom culture of mussels is based on the principle of relaying mussel seed or spat, fished with mussel dredges, from areas where they have settled naturally to areas where they can be placed in lower densities to increase growth rates, facilitate harvest, and control predation. Spat is the term given to very young shellfish, which in their larval form float around in the surface layers of water until they come into contact with a suitable substrate to which they then attach themselves, using hairlike structures called byssal threads.

One of the areas where mussel spat has traditionally been harvested is the southern Irish Sea close to the Wexford coast, Figure 15-46. Once fished, spat are relayed for on-growing to licensed sites in Wexford Harbour, Figure 15-47.

15.4.2 AQUACULTURE LICENSING

The aquaculture (farming) of marine shellfish is carried out through licensing of specific sites. This gives the licence holders exclusive access to the licensed site for the purpose of producing shellfish. The licence also entitles the licensee to have excluded any activity that might interfere with the licensed aquaculture production. Licences may also be issued to groups, usually co-operatives, to undertake extensive bottom culture of certain shellfish including mussels.

15.4.3 MANAGEMENT

Mussels fished for relay and on growing in the south Irish Sea are managed mainly under Fishery Natura Plans implemented through Fishery Natura Declarations. Fishing for mussels in other areas, is prohibited. These areas are mainly intertidal.

The mussel seed fishery on the island of Ireland is managed on an all-island basis by the Department of Agriculture Food and Marine in Ireland (IE), the Department of Agriculture, Environment and Rural Affairs in Northern Ireland (NI) and the cross-border Loughs Agency.

Ireland is now Marine Stewardship Council (MSC) certified for both Bottom & Rope mussels. This certification is held centrally, by BIM, for the whole mussel industry and represents an innovative approach to the certification process as well as value for money for the sector.

15.4.3.1 NORTHERN IRELAND: VOISINAGE ARRANGEMENTS

Voisinage arrangements allowing mutual and reciprocal cross-boundary fishing practices in inshore waters exist throughout the world. In the case of the island of Ireland, the practice between Irish and Northern Irish fishermen was articulated in an exchange of letters between Northern Ireland and Ireland in the mid-1960s, the terms of which proved later to be incomplete, unpublicized, and to be overtaken by subsequent changing fishery practices. The issue surrounding Voisinage rights for

Northern Irish fishermen in Irish waters culminated in litigation by Irish mussel-seed fishermen before the Supreme Court. In 2016 the Court found the existing arrangement to be deficient in Irish domestic law. This necessitated amending legislation and in 2019, Ireland legislated to give vessels 'owned, operated and registered' in Northern Ireland access to Ireland's 0-6-mile zone for the purpose of fishing, including for mussels.

15.4.3.2 DESIGNATED SHELLFISH WATERS

In addition to the licensing requirements, areas approved for on-growing must also be designated as shellfish waters, in compliance with the requirements of the Shellfish Waters Directive (2006/113/EC), Figure 15-48. The aim of this Directive is to protect or improve shellfish waters in order to support shellfish life and growth. It is designed to protect the aquatic habitat of bivalve and gastropod molluscs, which include oysters, mussels, cockles, scallops and clams. The Directive requires Member States to designate waters that need protection. It sets physical, chemical and microbiological requirements that designated shellfish waters must either comply with or endeavour to improve. It also provides for the establishment of pollution reduction programmes for the designated waters. The Directive is implemented in Ireland by the European Communities (Quality of Shellfish Waters) Regulations 2006 (SI No 268 of 2006) and responsibility for its implementation rests with the Department of the Environment, Heritage and Local Government.

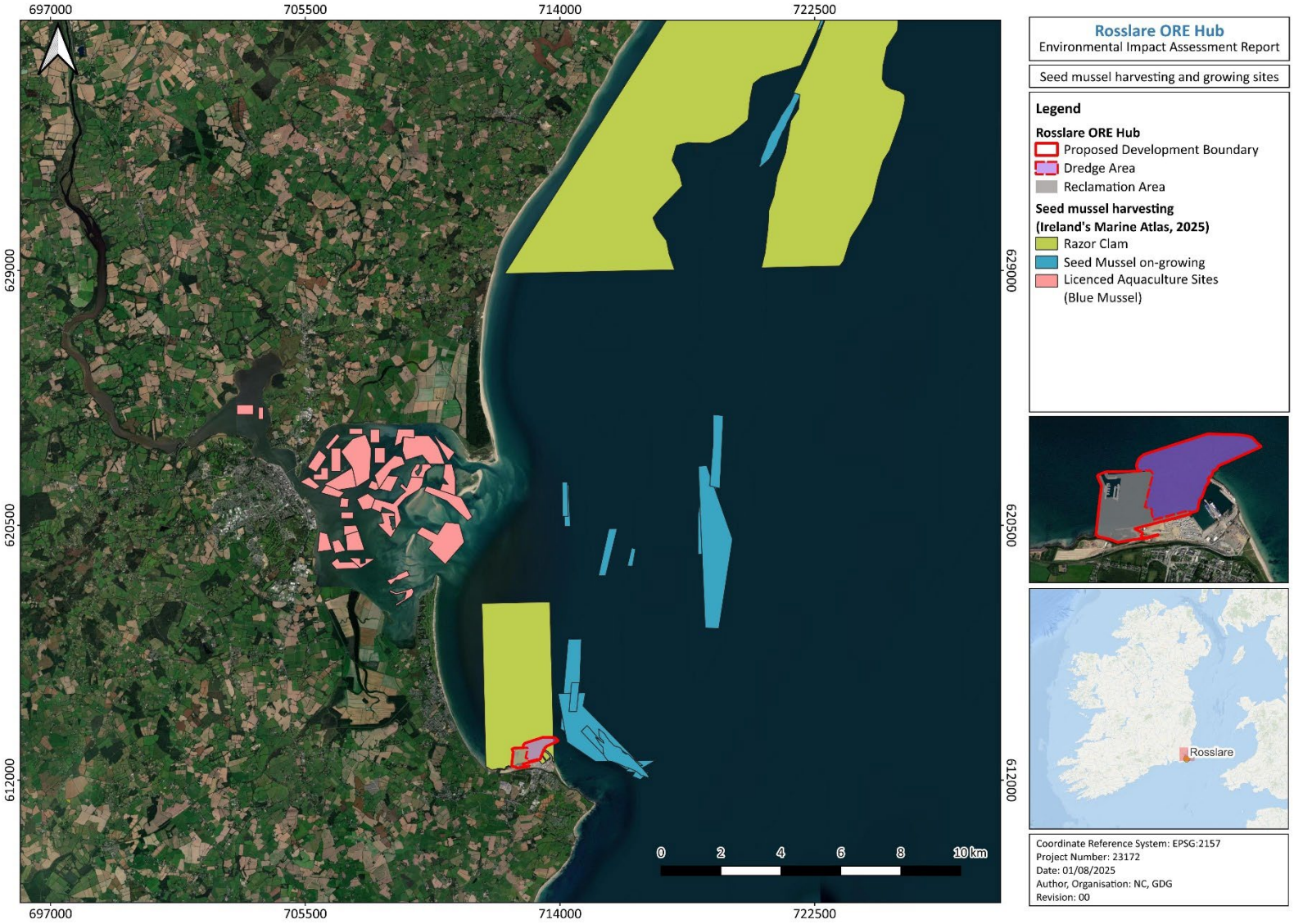


Figure 15-46: Distribution of Seed Mussel Harvesting Areas Ireland's Marine Atlas (Marine Institute, 2025)

Figure 15-47: Licenced Mussel Aquaculture Sites Ireland's Marine Atlas (Marine Institute, 202

Figure 15-48: Designated Shellfish Waters (Marine Institute Ireland's Marine Atlas, 2025)

15.4.4 CURRENT STATUS OF THE BOTTOM CULTURED MUSSEL SECTOR

The sector suffered a steep decrease in output volume to 3,626 tonnes and sales value to €3.96 million in 2023, down 47% and 56%, respectively, from 2022 (BIM, 2024), Figure 15-49. Average unit sales price fell by 16.5% to €1,091 in 2023. All seabed cultured mussels are sold fresh. High mortalities of maturing stocks and weak market demand contributed to this decline. Seed mussel input for 2023 also declined significantly, impacting output for 2024.

Figure 15-49: Production value of Seabed Cultured Mussels 2014 – 2023 (BIM, 2024)

Employment in the segment dropped by 13 persons to 90 in 2023, with no change in FTE. The decline occurred in part-time and casual employment levels, with some of these positions being made full-time. The number of production units decreased by four to 18, with some remaining units operating at a low level. The average production unit employed five persons (FTE 3.5) and produced 201 tonnes worth €219,374 in 2023. The licensed area for seabed culture mussels in 2023 was 2,154 hectares.

The Netherlands and France were the main export destinations for Irish bottom-cultured mussels. In 2023, 1,836 tonnes (50% of total production) went to the Netherlands, with a further 1,545 tonnes (43%) exported to France. The average sales value per tonne of consumer-ready product nationally was €1,091. Falling incomes and rising costs have caused a severe downturn in the segment's economic performance. Gross value added (GVA), earnings before interest and tax (EBIT), and net profit—are all in negative figures indicating that the segment is in economic distress. Improving seed resource procurement and management, protecting transplanted stock, retaining licensed capacity, and accessing stronger markets are all essential to revitalise the segment. Despite the current challenges facing the segment, BIM, in the *2024 Annual Aquaculture Report,* does note that the industry retains the licensed capacity to rebuild output should seed supply and survival improve along with markets.

15.5 ECONOMIC ASSESSMENT OF COMMERCIAL FISHING

15.5.1 INTRODUCTION

Situated in the south-eastern part of the Irish Sea, Rosslare Europort is a recognised transport hub for cars, passengers and freight and Ireland's best geographically positioned port to the UK and mainland Europe. With excellent road, rail, and sea connectivity the port can handle roll on roll off freight and passengers, agricultural and trade vehicles, bulk cargo and oversize loads.

While Rosslare Eurosport's role as a fishery harbour may be less well documented, in this section we will consider the extent to which it supports a viable fishing fleet, and how best to take account of the needs of that fleet(s) with a view to avoiding commercial harm during the construction and operation of the Rosslare Europort ORE Hub.

Noting that commercial fisheries activity is defined as fishing activity legally undertaken where the catch is sold for taxable profit, the information on commercial fisheries activity presented here is intended to inform the EIAR of the Proposed Development, by providing a detailed understanding of the commercial fisheries baseline against which the potential impacts of the Proposed Development can be assessed.

The information contained in this section has been developed following a detailed and rigorous desk-based assessment of data and literature, supplemented with qualitative information gained through direct consultation with the fisheries in Rosslare (both catching and processing sectors) and communication and discussion with the representatives of the Irish South & East Fish Producers Association, the National Inshore Fishermen's Association, the south east Regional Inshore Fisheries Forum, and the Irish Fish Processors and Exporters Association.

15.5.2 VOLUME AND VALUE OF SEAFOOD LANDED TO ROSSLARE HARBOUR

In 2023, the Sea Fisheries Protection Authority (SFPA), using landing declarations (EU logbook) and sales notes, recorded a total of 1,263 landing events through the port of Rosslare, Table 15-18.

Landing events refer to individual landings of declared quantities of fish or shellfish (commercial fisheries or seafood), by species, from registered fishing vessels. These events amounted to a total of 1,484 tonnes of seafood valued at €3,458,621.

For comparison with Ireland's main fishing ports, the total landed volume and value of seafood by the top 15 ports are shown in Table 15-18.

In 2023 the Sea-Fisheries Protection Authority (SFPA) published an updated Fisheries Information Notice (FIN) on European logbook requirements. This summarises key requirements for masters and owners under Council Regulation (EC) 1224/2009 and Commission Implementing Regulation (EU) 404/2011.

Fishing vessels of 10 metres overall length or more that are engaged in commercial fishing are required to maintain a fishing logbook. Fishing vessels with an overall length (LOA) of 10 meters or more but less than 12 metres, are required to complete a paper logbook.

Fishing vessels with an overall length (LOA) greater than or equal to 12 metres must be fitted with an electronic logbook. The Sea Fisheries Protection Authority currently provide the necessary equipment for this purpose.

Table 15-18: Seafood landings (all species) by port, volume, and value (SFPA, 2023)

	Landing Port	Landing Events	Volume (Tonnes)
1	Killybegs	768	166,423
2	Castletownbere	2,757	27,065
3	Dingle	1,347	6,596
4	Dunmore East	2,046	6,566
5	Kilmore Quay	2,642	4,315
6	Greencastle	752	4,141
7	Cork	280	3,605
8	Howth	1,856	3,301
9	Union Hall	1,057	2,002
10	Wicklow	1,854	1,767
11	Rossaveel	320	1,743
12	Rosslare	1,263	1,484
13	Clogherhead	2,156	1,299
14	Kinsale	410	1,149
15	Baltimore	283	1,009

	Landing Port	Value €
1	Killybegs	€118,477,211
2	Castletownbere	€95,948,781
3	Dingle	€20,582,609
4	Dunmore East	€17,835,878
5	Cork	€17,103,432
6	Howth	€13,407,416
7	Kilmore Quay	€13,101,354
8	Rossaveel	€12,943,357
9	Greencastle	€10,654,410
10	Union Hall	€9,278,069
11	Clogherhead	€7,756,547
12	Ballycotton	€3,844,472
13	Kinsale	€3,836,264
14	Rosslare	€3,458,621
15	Wicklow	€3,394,668

Article 62 of European Union Regulation (EU) 2023/2842 requires that registered buyers, auctions or producer organisations record specified information (including vessel, landing port, and quantity of each species) and submit a sales note containing this information to the SFPA.

Masters of fishing vessels engaged in fishing for certain stocks are required to provide prior notification of landing. In addition, certain quantities and species of fish must be landed to designated ports. Rosslare is a designated port for vessels landing 750 kilograms or more of Monkfish.

The significance of seafood landing through the port of Rosslare is apparent when compared with landings into the national fishery harbour centres (Killybegs, Castletownbere, Dingle, Dunmore East, Howth, and Rossaveel) and other fishery harbours around the coast. In terms of volume landed, in 2023, Rosslare ranked in 12th place nationally, falling between Rossaveel and Clogherhead. In terms of value, it ranked in 14th place nationally, falling between Kinsale and Wicklow, Table 15-18.

As with all capture fisheries, volumes landed (and its realised value) vary from year to year with changing stock dynamics, weather patterns, consumer demand and other exogenous factors. This is illustrated in Figure 15-50 - Figure 15-51, and Table 15-19 -

Table **15**-**20** that show the volume (tonnes) and value (€'millions) of seafood landed to Rosslare Europort between 2008 and 2023.

During this period the volume of seafood landed through Rosslare varied from a low of 572 tonnes (year: 2010) and a high of 1,704 tonnes (year: 2009). The median value was slightly more than one thousand tonnes (1,019 tonnes) while in 50% of years it fell between 783 and 1,382 tonnes.

In terms of value, Rosslare landings varied from a low of €1.097 million (Year: 2010) to a high of

€5.773 million (Year: 2020). The median value of seafood landed was €2.686 million while in 50% of years evaluated it fell between €2.198 and €3.195. (Note: Landings figures are provided as reported and have not been adjusted for inflation).

In terms of importance (rank), Rosslare varied from a low of 20th most important port by volume landed (year: 2010) and a high of 12th place (years: 2008, 2009, 2014 and 2023). The median value was 16th place while in 50% of years evaluated it fell between 12th and 18th place.

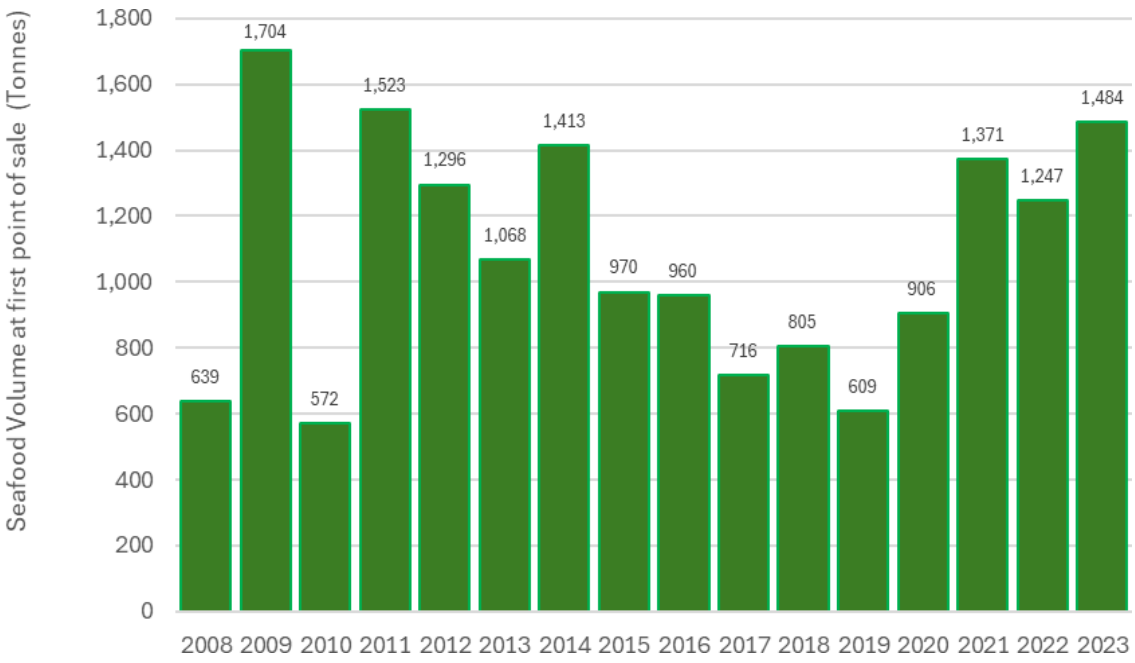


Figure 15-50: Volume of seafood landed to Rosslare by year (SFPA, 2023).

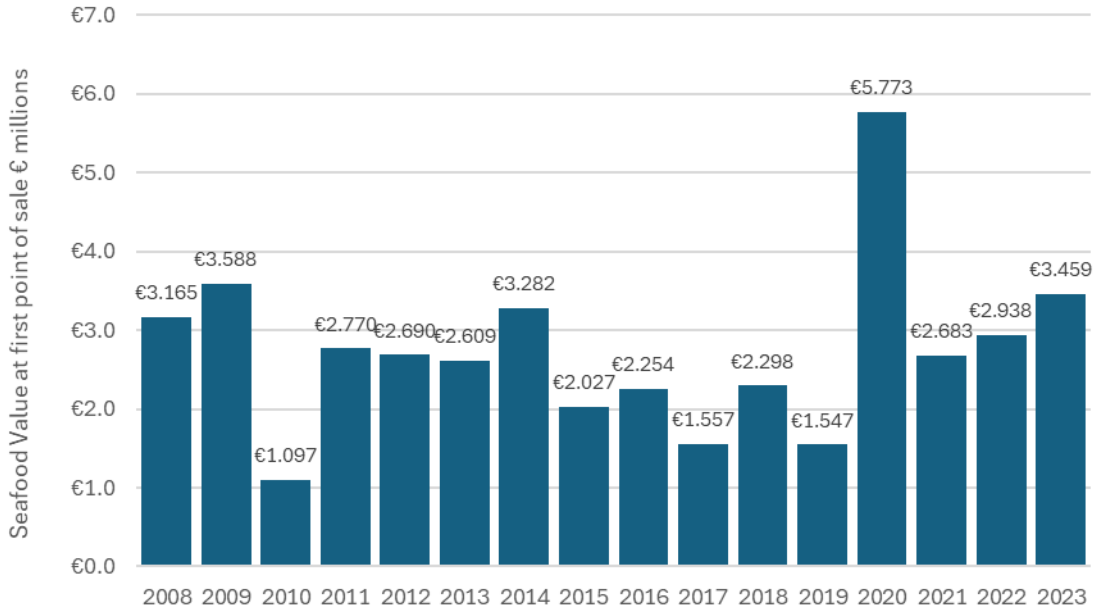


Figure 15-51: Value of seafood landed to Rosslare by year (SFPA, 2023).

Table 15-19: Volume and Value of seafood landed to Rosslare by year (SFPA, 2023).

Year	Volume (Tonnes)	Rank (By volume)	Rosslare Value (€million)
2008	639	12	€3.17
2009	1,704	12	€3.59
2010	572	20	€1.10
2011	1,523	16	€2.77
2012	1,296	N/A	€2.69
2013	1,068	13	€2.61
2014	1,413	12	€3.28
2015	970	18	€2.03
2016	960	16	€2.25
2017	716	19	€1.56
2018	805	18	€2.30
2019	609	19	€1.55
2020	906	15	€5.77
2021	1,371	NA	€2.68
2022	1,247	NA	€2.94
2023	1,484	12	€3.46

Table 15-20: Summary statistics for seafood landed to Rosslare, 2008 – 2023 (SFPA, 2023).

Year	Volume (Tonnes)	Rank (By volume)	Rosslare Value (€million)
Min	572	12	€1.10
25% percentile	783	12	€2.20
Median	1,019	16	€2.69
75% percentile	1,382	18	€3.19
Max	1,704	20	€5.77

15.5.3 VOLUME AND VALUE OF SHELLFISH LANDED AT ROSSLARE EUROPORT

To understand better the nature of commercial fish and shellfish moving through the port of Rosslare, data from the Sea Fisheries Protection Authority for 2020 were analysed. These data provide a breakdown of landings for each port, grouped by seafood category (shellfish, pelagic, demersal, and deepwater species), Table 15-21.

Table 15-21 Volume and Value of seafood landed to Rosslare by species group (SFPA, 2021).

ALL LANDINGS			ROSSLARE					
Species class	**Volume Tonnes**	**Value €million**	**Volume Tonnes**	**% Rosslare**	**Rank**	**Value €million**	**% Rosslare**	**Rank**
Shellfish	24,888	€101.497	856	94.4%	7	€5.680	98.4%	6
Pelagic	252,601	€111.998	26	2.9%	20	€0.006	0.1%	20
Demersal	49,663	€132.323	24	2.7%	--	€0.087	1.5%	--
Deepwater	622	€0.962	0	0.0%	--	€0.000	0.0%	--
Total	327,773	€346.780	**906**	100%	15	€5.773	100%	11

Of the 906 tonnes of seafood landed through the port of Rosslare in 2020, 856 tonnes (94.4% of the total) were accounted for by various species of mollusc and crustacean shellfish. These had a total value of €5.680 million representing 98.4% of the total value of seafood (€5.773 million) landed through the port that year.

These figures place Rosslare port as the 6th most important, nationally, for shellfish by value, Figure 15-52, and the 7th most important for shellfish by volume (SFPA, 2020).

While Rosslare accounted for just 3.4% by volume and 5.6% by value of shellfish landed to Irish ports in 2020, it is important to note that these figures include Dublin Bay Prawns (*Nephrops norvegicus*); a stock managed by quota, agreed at a European level under the Common Fisheries Policy, and fished in Irish waters by vessels from France, Spain, the United Kingdom, as well as Ireland.

With a total quota in 2020 of 6,416 tonnes, valued at €53 million (BIM, 2021) Dublin Bay prawns account for more than half (52%) of the value of all shellfish landed

nationally. As Rosslare landings do not include any Dublin Bay Prawns, the *non-prawn* shellfish landed through the port represents 11.7% of all non-prawn shellfish landed nationally (Table **15-22**).

Table 15-22: Shellfish and Nephrops landings to Irish ports (all) and Rosslare (SFPA, 2023 and BIM, 2023)

All Landings into Irish Ports		Volume (Tonnes)	Value (€million)
A	All Shellfish Species (SFPA)	24,888	€101.50
B	Nephrops (Quota & BIM: BoS)	6,414	€53.00
C = A - B	Shellfish Excluding Nephrops	18,474	€48.50
D	Rosslare	856	€5.68
Rosslare		**Volume**	**Value**
	Rosslare shellfish as percentage of All Shellfish landed into		
D/A	Irish ports	0	€0.06
	Rosslare shellfish as percentage of All Shellfish excluding		
D/C	Nephrops landed into Irish ports	0	€0.12

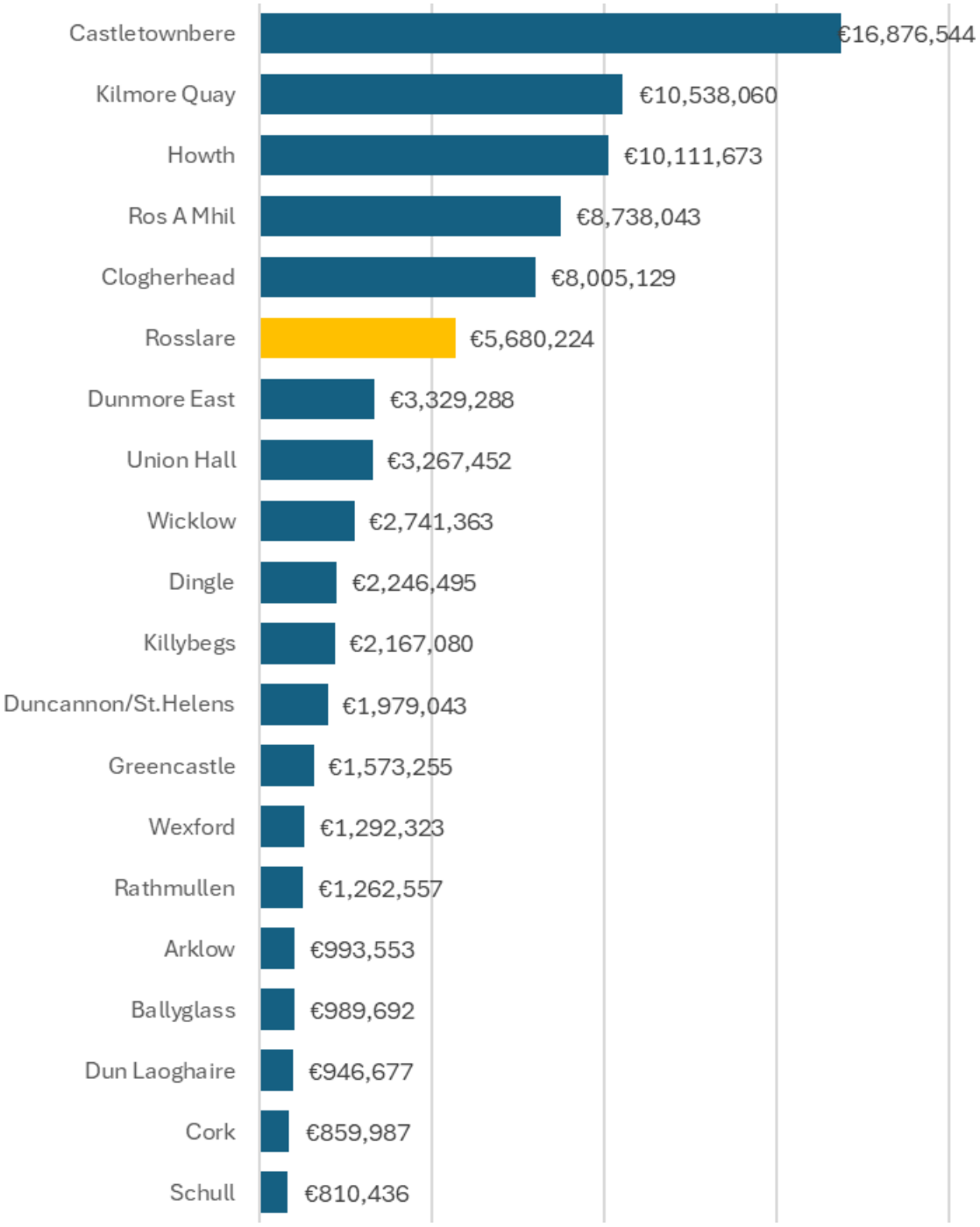


Figure 15-52: Top 20 Shellfish Species Landing Ports by value in 2020 (SFPA, 2021).

15.5.4 COMMERCIAL FISHING FLEET OPERATING AT ROSSLARE EUROPORT

Challenges in identifying the fleet attached to any port at a given time is confounded by a number of factors.

- Vessels are registered or deregistered from the Fleet Register on a daily basis. For example, the Department of Agriculture, Food and Marine, Sea Fisheries Administration Division, recorded 151 Sea-Fishing Boat Licence applications in the ten months between January and October 2024.
- The active or home port of a vessel is not always fixed. Some operate from more than one port depending on the time of year and fishery being prosecuted. The capacity to do this is restricted in the case of smaller vessels (under 18 metre length) and severely restricted for those vessels under 10 meters.
- Some vessels may be inactive for some or all of the year due to seasonal fisheries and other
- factors. Others may be out of service undergoing surveys, repairs etc.
- Smaller vessels, in particular those less than 10 meters in length, are generally severely restricted in their ability to operate at sea beyond 12 nautical miles or at night. Instead, these vessels traditionally operate as day boats, fishing during daylight hours and on fishing grounds close to their home port.

Data collected by the State that may be used to identify a home port include:

- Landing declarations (from EU logbook) for fishing vessels of 10 metres overall length or more
- engaged in commercial fishing.
- For vessels with an overall length (LOA) greater than or equal to 12 metres, the electronic logbook.
- Sales notes submitted to the SFPA under Article 62 of European Union Regulation (EU) 2023/2842.

These data however are protected under the Data Protection Act 2018, and information deemed commercially sensitive is not made available. This specifically relates to financial, commercial, scientific, technical or other information the disclosure of which could reasonably be expected to result in a material financial loss to the person to whom it relates, or could prejudice the competitive position of that person in the conduct of his or her business or otherwise in his or her occupation, or is information the disclosure of which could prejudice the conduct or outcome of contractual or other negotiations of the person to whom it relates.

Noting that while these data are not necessarily available for impact analysis, individual vessel owners may volunteer such information, including sales notes, landing declarations etc. as part of a Fisheries Management and Mitigation Strategy or other locally agreed arrangement.

In the analysis below, the national fleet register (DAFM, 2024) was interrogated in September 2024, by segment, for all vessels with an owner resident in County Wexford. Next considered are those vessels 18 meters and over in length. Many of these operate form Kilmore Quay, the main fishing port in county Wexford, or Wexford Town. Finally, the inshore and small-scale coastal fleet are considered. These boats are mostly day boats operating close to their home port and generally by owners that live close by, travelling to and from their boats on a daily basis.

15.5.5 FLEET SEGMENTATION: NATIONAL FLEET

Ireland's fishing fleet is highly diversified with a broad range of vessel types and sizes. Traditionally divided into operational units or segments with similar characteristics (target species, fishing gear and fishing patterns), in September 2024 the fleet comprised 1,949 vessels grouped into five segments. Two of these, the polyvalent and specific segments, are further divided into a number of sub segments (Table 15-23).

15.5.5.1 AQUACULTURE SEGMENT

These vessels do not have fishing entitlements but, instead, are used exclusively in the management, development and servicing of aquaculture areas. In September 2024 the segment comprised 98 vessels, with a total capacity of 4,290 GT and 11,804 kW. Of these, 5 are registered to owners with addresses in County Wexford.

15.5.5.2 BEAM TRAWL SEGMENT

This segment consists entirely of vessels dedicated to targeting demersal fish using characteristic beam trawls. In September 2024 the segment comprised 9 vessels, with a total capacity of 943 GT and 2,597 kW. Of these, 8 were registered to owners with addresses in County Wexford, all of whom are located in Kilmore Quay, County Wexford.

Table 15-23: Characteristics of the national fishing fleet, by segment (DAFM, 2024)

Segment	Sub Segment	Vessels	Average Length (m)	Capacity (GT)	Engine Power (kW)	Wexford Fleet
Aquaculture		98	12.1	4,290	11,804	5
Beam Trawler		9	24.2	943	2,597	8
RSW Pelagic		23	53.7	27,819	47,223	0
	Polyvalent 18 and over	104	24.2	19,533	47,795	13
	Polyvalent under 18	1,261	7.8	6,794	43,406	80
	Polyvalent Scallops	3	11.9	60	264	0
	Polyvalent Potting	311	6.6	652	8,797	6
	Sub Total	1,679		27,039	100,262	99
	Specific Scallops	8	23.1	953	2,138	8
	Specific General	132	10.2	1,296	9,601	10
	Sub Total	140		2,249	11,739	18
Grand Total		1,949	9.5	62,339	173,624	130

15.5.5.3 RSW PELAGIC SEGMENT:

These are large vessels with refrigerated seawater tanks that target pelagic species including mackerel, horse mackerel, herring, blue whiting, tuna, and boar fish. In September 2024 the segment comprised 23 vessels, with a total capacity of 27,819 GT and 47,223 kW. None were registered to owners with addresses in County Wexford.

15.5.5.4 POLYVALENT SEGMENT:

With more than 86% of the national fishing fleet, the polyvalent segment is a diverse collection of multi-purpose craft including small inshore netters and potters, medium and large offshore vessels targeting Nephrops (prawns), mixed whitefish, some pelagic species (mackerel, herring, sprat) as well as a range of vessels targeting bivalve molluscs and crustaceans. In September 2024 the segment comprised 1,679 vessels, with a total capacity of 27,039 GT and 100,262 kW. Of these, 99 were registered to owners with addresses in County Wexford. The polyvalent segment is further divided into four sub segments, Polyvalent 18 and over, Polyvalent under 18, Polyvalent Scallops, and Polyvalent Potting.

Polyvalent General (over 18 metres)

Vessels with fishing entitlements for a broad range of species other than those fisheries authorised or subject to secondary licencing (Determination No. 21/2013 (http://agriculture.gov.ie/fisheries/).

In September 2024 the sub-segment comprised 104 vessels with a total capacity of 19,533 GT and 47,795 kW. Of these, 13 were registered to owners with addresses in County Wexford.

Polyvalent general (under 18 metres): Like the polyvalent general (over 18 metre) sub segment, these vessels are entitled to fish a broad range of species other than those fisheries authorised or subject to secondary licencing. In September 2024 the sub-segment comprised 1,261 vessels with a total capacity of 6,794 GT and 43,406 kW. Of these, 80 were registered to owners with addresses in County Wexford.

Polyvalent Scallop

Together with fishing entitlements for a broad range of species other than those fisheries authorised or subject to secondary licencing, these vessels (10 metres and over in length) also have the required scallop (*Pecten maximus*) fishing history entitling them to fish this species. In September 2024 the sub-segment comprised 3 vessels with a total capacity of 60 GT and 264 kW. None were registered to owners with addresses in County Wexford.

Polyvalent Potting

Comprising vessels licensed and registered under the *Scheme for the Licensing of Traditional Pot Fishing Boats in the Irish Inshore Fleet*, these previously unlicensed boats may only fish for certain non-quota species, crustaceans and whelk, and exclusively by means of traps or pots. Further, as polyvalent potting vessels are ring-fenced within their segment, their capacity may not be used elsewhere in the segment for the purposes of compliance with the entry/exit regime. Polyvalent potting vessels are less than 12 metres in length (LOA) and under 20 Gross Tonnes (GT) and are identified by a 'P' at the end of their external marking. In September 2024 the sub-segment comprised 311 vessels with a total capacity of 652 GT and 8,797 kW. Of these, 6 were registered to owners with addresses in County Wexford.

15.5.5.5 SPECIFIC SEGMENT

Vessels licensed in the specific segment are permitted to fish bivalve molluscs and aquaculture species only. In September 2024 the segment comprised 140 vessels, with a total capacity of 2,249 GT and 11,739 kW. Of these, 18 were registered to owners with addresses in County Wexford.

The Specific segment is further divided into two sub segments, specific scallop and specific general.

Specific Scallop

This is a sub-segment for vessels 10 metres and over in length with the required scallop (*Pecten maximus*) fishing history to allow them to target this species. In September 2024 the sub-segment comprised 8 vessels with a total capacity of 953 GT and 2,138 kW. Of these 6 were registered to owners with addresses in County Wexford.

Specific General

This sub-segment is for all other *specific* vessels irrespective of length. In September 2024 it comprised 132 vessels with a total capacity of 1,296 GT and 9,601 kW. Of these, 10 were registered to owners with addresses in County Wexford.

15.5.6 FLEET SEGMENTATION: WEXFORD FLEET

Analysis of the fleet register available from the Department of Agriculture, Food, and Marine reveals that in September 2024 there were 130 fishing vessels registered to owners in County Wexford; 7% of the national fleet of 1,949 vessels, Table 15-24.

- 5 in the aquaculture segment (service the bottom mussel sector).
- 8 in the Beam Trawl segment.
- Nil in the pelagic sector registered to owners with a home address in Wexford.
- 99 in the polyvalent segment. This included 13 in the Polyvalent 18 metres and over, 80 in the
- Polyvalent under 18 meter, and 6 in the Polyvalent potting sub-segments.
- 18 vessels were registered in Specific segment of which 8 were in the specific scallop sub-segment and 10 in the specific general (non-scallop shellfish) sub-segment.

Table 15-24: Wexford based fishing fleet (DAFM, 2024).

Segment	Sub Segment	Vessels	Average Length (m)	Capacity (GT)	Engine Power (kW)
Aquaculture		5	38.6	1,532	2,979
Beam Trawler		8	24.3	848	2,376
RSW Pelagic		0	-	-	-
Polyvalent	Polyvalent 18 and over	13	25.3	2,177	6,091
	Polyvalent under 18	80	8.5	415	3,398
	Polyvalent Scallops	0	-	-	-
	Polyvalent Potting	6	9.5	24	452
	Sub Total	99	-	2,617	9,940
Specific	Specific General	10	12.4	208	1,094
	Specific Scallops	8	23.4	963	2,041
	Sub Total	18	-	1,171	3,135
Total		130	13.6	6,167	18,430

15.5.6.1 WEXFORD FLEET BY LOCATION

Table **15**-**25** provides a breakdown of the 130 Wexford based fleet by segment and location within Wexford County; the latter based on the owner's home addresses (provided in the fleet register). In each case the owners address has been linked to a townland in the county and using this information it is possible to predict the likely port of operation for these vessels; this is presented below, see *Wexford Based Inshore and Small-Scale Coastal Fleet*.

Table 15-25: Geographical distribution of the County Wexford fishing fleet (DAFM, 2024)

Segment	Sub Segment	Arthurstown	Bridgetown	Broadway	Curracloe	Duncannon	Fethard On Sea	Gorey	Kilmore Quay	Mulgannon	New Ross	Other	Rosslare	Wellington Bridge	Wexford Town	Total
Aquaculture					2							1			2	5
Beam Trawler									8							8
RSW Pelagic		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Polyvalent	Polyvalent 18 and over	2							10		1					13
	Polyvalent under 18	4	2	5		4	10	6	19	2	5	5	14	2	2	80
	Polyvalent Scallops	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Polyvalent Potting						1	1	1		0	2	1			6
	Sub Total	6	2	5	0	4	11	7	30	2	6	7	15	2	2	99
Specific	Specific General					3	1		1			4			1	10
	Specific Scallops								4		2			1	1	8
	Sub Total	0	0	0	0	3	1	0	5	0	2	4	0	1	2	18
Total		**6**	**2**	**5**	**2**	**7**	**12**	**7**	**43**	**2**	**8**	**12**	**15**	**3**	**6**	**130**

Wexford BASED OFFSHORE – LARGE-SCALE FLEET (LCF)

Of the 130 fishing boats registered to owners in County Wexford, 34 were over 18 metres in length. Generally, vessels 18 metres and over are considered offshore vessels with the ability to stay at sea over long periods and operate at distance from their home port. A number of these 34 offshore vessels show some dependency on the port of Rosslare.

- 5 were registered in the Aquaculture segment however all operate from Wexford Town.
- Dependency on Rosslare – low to negligible. Possible port of refuge.
- 8 were registered in the Beam Trawl segment and operate from Kilmore Quay.
- Dependency on Rosslare – low to negligible. Possible port of refuge.
- 13 were registered in the Polyvalent segment and operated by owners with addresses in Kilmore Quay (10), Arthurstown (2) or New Ross (1). At least one of these demersal trawlers is reported by the Rosslare Harbour (EIAR) Fisheries Consultative Group to use Rosslare as a landing port on occasion. In addition, there are low levels of demersal landings to Rosslare reported by the SFPA indicating occasional use of the port by larger polyvalent vessels.
- Dependency on Rosslare – low. Occasional landings. Possible port of refuge.
- 7 were registered in the Specific Scallop sub-segment. These were all registered to owners with addresses in Kilmore Quay (4), New Ross (2) and Wexford Town (1).
- All of these large scallop boats are reported to use Rosslare as a landing port when fishing on the west coast of England and Wales, Cardigan Bay and the southern Irish Sea. They do this to shorten the journey time from these fishing grounds to their home port of Kilmore Quay. In most cases Kilmore Quay is the final destination for landings as it is the location of the main processors in the Southeast.
- 1 registered in the Specific General segment. This operates from Wexford Town in the mussel sector. Dependency on Rosslare – low to negligible. Possible port of refuge.

WexfOrd Based Inshore - Small-Scale Coastal Fleet (SSCF)

Of the 130 Wexford based fishing boats:

- 34 were 18 meters and larger and,
- 96 were under 18 meters in length and classified as the Inshore or Small-Scale Coastal Fleet. All of these are considered to have a moderate to high dependency on their home port due

to their size and limited range of operation.

Of the 96 Wexford based fishing boats under 18 meters in length:

- Seven were between 12 and 14.5 metres in length and are classified as inshore vessels. These have moderate range and generally operate as day boats operating on grounds close to their home port. (Vessel length category VL12-18).
- The remaining 89 were under 12 meters in length and classified in the Small-Scale Coastal Fleet. The EU defines the small-scale coastal fleet as fishing vessels that are less than 12 meters in length and do not use towed gear. These vessels are typically owned by family-based companies with few employees. They use low-impact gear and operate close to their home ports.

Of the 89 inshore vessels under 12 meters in length and classified in the Small-Scale Coastal Fleet

- 9 were between 10 – 12 meters. These have limited range and always operate as day boats fishing on grounds close to their home port. (Vessel length category VL10-12)
- 80 were under 10 meters. These have very limited range and always operate as day boats operating on grounds adjacent to their home port. (Vessel length category VL00-10)

Rosslare BAsed Inshore - Small-Scale Coastal Fleet (SCCF)

Of the 96 Wexford based Inshore & Small-Scale Coastal Fleet (SSCF) the following 36 vessels are considered to have or potentially have a high dependency on the port of Rosslare. This is based on (i) their size dependent operating constraints (ii) the home address of their owner/operator or (iii) their traditional/established use of Rosslare as a home port.

- **1** vessel, registered in the Polyvalent Potting sub-segment, is operated by an owner with a home address in Rosslare.
- **30** vessels, registered in the Polyvalent (under 18 metres) sub-segment, are operated by owners with a home address in Rosslare (14), a home addresses within easy commuting distance of Rosslare (11) or are current users of the port (5).
    - The 11 owners with home addresses within easy commuting distance of Rosslare include Bridgetown (2 owners, 18 minutes by road from Rosslare), Broadway (5 owners, 8 minutes), Mulgannon (2 owners. 20 minutes) and Wexford Town (2 owners. 20 minutes).
    - The 5 owners identified by the Rosslare Harbour (EIAR) Fisheries Consultative Group as frequent users of Rosslare included vessels whose owners reside in Kilmore Quay

(24 minutes away by road); Fethard-on-Sea (24 minutes away by road); and Duncannon (47 minutes away by road).

- **4** vessels registered in the Specific General sub-segment, are operated by owners identified by the Rosslare Harbour Fisheries Consultative Group as frequent users of Rosslare and included vessels whose owners reside in Kilmore Quay (24 minutes away by road); Fethard-on-Sea (24 minutes away by road); and Duncannon (47 minutes away by road).
- **1** vessel, registered in the Specific Scallop sub-segment, is operated by an owner with a home address in Wexford Town.

Table 15-26: Rosslare Inshore and Small-Scale Coastal Fleet (SSCF) (DAFM, 2024)

Segment	0-10	10-12	12-18	Total	Length Min	Length Mean	Length Max
Polyvalent Potting	1			1	7.9	7.9	7.9
Polyvalent under 18	25	1	4	30	4.6	7.9	14.5
Specific General	1	2	1	4	9.3	10.9	13.3
Specific Scallops			1	1	13.7	13.7	13.7
Total	27	3	6	36	4.6	8.4	14.5

Table 15-27: Size (length) and Capacity of fishing fleet with owner's resident in Rosslare (DAFM, 2024)

	Min	Median	Max
Average Length (m)	4.6	6.3	14
Capacity GT	0.7	1.8	11.4
Engine Power kW	3.4	13.2	124

15.5.7 ECONOMIC AND SOCIAL CONTRIBUTION OF SEAFOOD LANDED AT ROSSLARE

15.5.7.1 INTRODUCTION

Like all capture fisheries, the amount of seafood landed through the port of Rosslare, its value and realised economic and social impact, varies from year to year with changing stock dynamics, weather patterns, consumer demand and other exogenous factors. It also varies as a direct result of changing fleet dynamics, including the number and size of vessels active in the local fleet, the choice of fishery prosecuted by each, and the deployed effort (days fishing or GT days fishing. This is borne out in the landings data for Rosslare presented earlier and summarised below.

- Between 2008 and 2023, for example, the volume of seafood landed through the port of Rosslare varied from a low of 572 tonnes in 2010 to a high of 1,704 tonnes in 2009.
- The median value was slightly more than one thousand tonnes (1,019 tonnes) while in 50% of years it fell between 783 and 1,382 tonnes.
- Over the same period the value of seafood landed through the port varied from €1.097 million (2010) to €5.773 million (2020).
- The median value of seafood landed was €2.686 million while in 50% of years evaluated it fell between €2.198 and €3.195.

Table 15-28: Fisheries contributing to the economic and social impact of Rosslare seafood.

Species	Classification	Fishing Gear
Scallop (Pecten maximus)	Mollusc - Bivalve	Scallop Dredge
Razor Clams (*Ensis siliqua*)	Mollusc - Bivalve	Hydraulic Dredge
Whelk (Buccinum undatum)	Mollusc - Univalve	Top Entrance Pot
Lobster (Homarus gammarus)	Crustacean	Pots (Creels)
Velvet crab (*Necora puber*)	Crustacean	Pots (Creels)
Brown crab (*Cancer pagurus*)	Crustacean	Pots (Creels)
Spider crab (Maja brachydactyla)	Crustacean	Pots (Creels)
Shrimp (Palaemon serratus)	Crustacean	Shrimp Pots

The species (fisheries) contributing to the economic and social impact of Rosslare landed seafood are shown in Table 15-28 however, as shown in Table 15-21 Volume and Value of seafood landed to Rosslare by species group (SFPA, 2021)., demersal and pelagic species make up just 2.7% and 2.9% of the total, with the remaining 94.4% made up from various species of shellfish.

There is currently no published information on the economic and social contribution of seafood landed at Rosslare to the port and its users, the post-harvest sector (including processing and transport) nor to its immediate surroundings or the wider community. However, critical data sets and analysis are made available by the relevant State Agencies (SFPA, BIM, and Marine Institute), by the European Union's Joint Research Centre, and by the Scientific, Technical and Economic Committee for Fisheries (STECF). These contain all the information currently collected, analysed, and made available to address the specific questions of economic and social impact. All are based on extensive surveys of the seafood sector's activity at sea (VMS, logbook operations, economic activity), in port (logbook declarations, sales notes), and their economic impact thereafter through processing, transport, route to market data, etc. (the Economic Impact of the Seafood Sector series, BIM).

In this section we provide an overview of data sources and propose a methodology to estimate the socio-economic impact of Rosslare seafood and its direct, indirect, and induced impact on the economy of the south Wexford area. This involves the following steps:

1. Describe, using recent and representative landings data, the typical vessel type exploiting the shell fisheries exploited by the Rosslare fleet.
2. Examine the consistency of the Rosslare based fleet with the national fleet profile. In the current analysis recent landings data were sourced from the 2023 Annual Economic Report on the EU Fishing Fleet (STECF 23-07 - EU Fleet Economic and Transversal data national level.xlsx).
3. Using the Annual Economic Report and the Annual Fisheries Report (Findings of the National Seafood Survey, BIM 2024) estimate the fleet size and gear profile economically consistent with the fisheries exploited and seafood landed at Rosslare.
4. Estimate the economic and social characteristics of this fleet.
5. Using the Economic Impact of the Seafood Sector series (BIM 2019) estimate the importance (employment, wages and gross value added) of the seafood sector directly and downstream of Rosslare Europort and its hinterland.

Data Sources

The data sets, reports, and analysis used to support an assessment of the economic value of the Rosslare Seafood Industry to the area consist of the following:

EU Logbook:

The EU logbook is the primary source of all information on fishing activities. Logbooks are legal requirements for Irish fishing vessels under Council Regulation (EC) 1224/2009 and Commission Implementing Regulation (EU) 404/2011. EU, managed in Ireland, by the SFPA.

- Logbooks constitute a system for recording, reporting, processing, storing, and transmitting fisheries data (catch, landing, sales, and transhipment) according to the EU rules.
- Fishing vessels of 10 metres overall length or more that are engaged in commercial fishing are required to maintain a fishing logbook.
- Fishing vessels with an overall length (LOA) of 10 up to 12 metres (VL10-12), are required to complete a paper logbook.
- Fishing vessels with an overall length (LOA) greater than or equal to 12 metres (VL12-xx), must be fitted with an electronic logbook. The Sea Fisheries Protection Authority (SFPA) currently provide the necessary equipment for this purpose. The electronic logbook is used to securely record and transmit details of fishing operations. The information is entered by the master of the fishing vessel and is transmitted to the Member States authorities.
- Logbooks must be updated every day, no later than midnight, immediately atter the last fishing operation has been completed, before entering port, and at the ﬁne of any inspection at sea.
- Part of the EU logbook, the landings declaration, contains a summary of the logbook data for each fishing trip.
- Under the CFP (EC, 2009), all vessels over 10 metres in length are required to declare all landings over 50 kg.

EU Sales Notes:

Logbooks are not required by all vessels, therefore landings declarations do not provide a complete record of the fishing activities of the inshore fleet, particularly for those vessels under 10 meters although some of these vessels do make declarations. It is noteworthy that 27 of the 36 vessels that have or potentially have a high dependency on the port of Rosslare are under 10 meters and therefore are not required to keep EU logbooks. For these vessels sales notes provide an independent source of data that can be used to determine landings. Information recorded in sales notes includes the catching vessel, the place of sale and more detailed data on the quality and format of the seafood sold. The sales notes database is composed of these data from individual transactions and completed by all buyers of seafood at first point of sale (at the point of landing).While the landings declarations database is the primary database detailing the volume of

seafood landed, the sales notes database is the primary database that informs the value of seafood sold.

Unlike landing declarations which are not required for vessels under 10 metres in length, sales notes are completed for all transactions and may therefore be used as a secondary source for landings form vessels under 10 metres.

Prior Notification and Designated Ports:

In addition to logbooks and sales notes, Masters of fishing vessels engaged in fishing for certain stocks are required to provide prior notification of landing (Prior Notification & Designated Ports for Community Fishing Vessels). This also requires that certain quantities and species of fish *must* be landed to designated ports. Rosslare is a designated port for vessels landing 750 kilograms or more of Monkfish.

EU Data Collection Framework (DC-MAP):

The EU framework for the collection, management and use of data in the fisheries sector and support for scientific advice regarding the common fisheries policy, has been in place since 2000. The framework is set out in Regulation (EU) 2017/1004 and a multiannual programme or MAP. The data collection framework/multiannual programme (DC-MAP) requires Member States to collect the data set out in their national work plans and report annually on its implementation. They also coordinate their activities in regional groups that may also prepare regional work plans.

Once collected and scrutinized, Member States upload some of the collected data to EU databases in response to data calls issued by DG MARE. Following upload, the EUs Joint Research Centre (JRC D.2. Water and Marine resources) extracts and analyses the uploaded data, assesses its quality, and prepares it for the various working groups. The data are analysed by the experts of the Scientific, Technical and Economic Committee for Fisheries (STECF) whereafter it underpins STECF scientific opinions and recommendations that are used in the CFP decision-making process. Once the STECF reports are finalised, the aggregated data is published for further use in scientific analyses and policymaking. Estimating the economic impact of Rosslare seafood is one such example.

Other end users also partly base their scientific advice on the DCF data. These include the International Council for the Exploration of the Sea (ICES), various regional fisheries management organisations, sustainable fisheries partnership agreements, and others.

The most recent data sets, made available by the EU Joint Research Centre under the data collection framework/multiannual programme, are available from the European Commission's website: AER - European Commission (https://stecf.ec.europa.eu/data-dissemination/aer).

In particular the Annual Economic Report. Information on the on the structure and economic performance of European Union (EU) fishing fleets. The European Commission also makes available a consolidated version of the data from both the EU logbooks and sales notes databases which is produced annually for scientific, technical and economic analysis. These data (aggregated by fleet size segment) may be accessed, online, through the European Commission's Scientific, Technical and Economic Committee for Fisheries (STECF) website: AER - European Commission (https://stecf.ec.europa.eu/data-dissemination/aer).

The following are used in this report:

- EU Fleet Economic and Transversal data by fleet segment.
- EU Fleet Economic and Transversal data at national level.

Annual Fisheries Report (Findings of the National Seafood Survey):

The National Seafood Survey is a critical part of Ireland's legal obligations under the European Union's data collection framework/multiannual programme (DC-MAP). Based on the findings of the National Seafood Survey, BIM's Annual Fisheries Report provides insights into the status of Ireland's catching sector on an annual basis. In particular it examines the economic performance of the fleet and the social demographics of people employed in the sector. The current report, the Annual Fisheries Report 2024, presents a comprehensive analysis of the data collected by Ireland (BIM) along with the financial and operational performance of the Irish fishing fleet for the year 2022.

Economic Analysis of the Irish Small-Scale Fleet:

An integral part of Ireland's fishing industry, the small-scale fleet (SSF) represents the majority of registered vessels and over half of all employment in the sector. It is widely distributed around the coast with vessels registered in over 400 towns and villages. BIM's Economic analysis of the sector utilises multiple data sources to assess the economic state of the small-scale fleet and to understand fishing patterns, fleet structure, landing volumes, sales values and export patterns. Databases accessed by BIM include EU logbooks (landings declarations), sales notes, the fleet register, the European Union's data collection framework/multiannual programme (DC-MAP), as well as specialist providers including market trade data.

In the current report BIM note that high fuel costs have placed strong pressures on all parts of the fleet, none more so than the small-scale sector. Additional pressures include the price of bait, a factor squeezing margins for smaller boats in potting fisheries. This is particularly important in Rosslare where an active, but poorly documented, spider crab fishery supplies both the local processing sector and provides a locally sourced bait supply.

Economic Impact of the Seafood Sector:

The seafood sector is a primary driver of rural economies around the coastline of Ireland and acts as an anchor in these locations around which other supporting service sectors develop. BIM's Economic Impact (BIM, 2019) series evaluate Irelands' top ten seafood centres and assesses the importance of the seafood sector both directly and downstream of these ports, their hinterlands and at the regional and national levels.

The 10 ports covered by the series are Clogherhead, Howth, Kilmore Quay, Dunmore East, Union Hall, Castletownbere, Dingle, Ros an Mhil, Killybegs, and Greencastle. These are the ports with the highest volume and value of seafood landings.

While Rosslare is not one of the 10 primary ports studied, much of the seafood landed through Rosslare is processed in Kilmore Quay and the latter's data are considered appropriate to the current analysis.

15.5.7.2 FLEET CHARACTERISTICS – ROSSLARE FLEET

Based on the current fleet register and the home address of vessel owners, the fleet considered to have or potentially have a high dependency on the port of Rosslare consists of up to 36 vessels of which 30 are under 12 metres. Included is one vessel registered in the polyvalent potting sub-segment, thirty in the polyvalent under 18 metre, four in the specific general, and one in the specific scallop sub-segments. All of the vessels involved are under 15 metres in length (hence part of the inshore fleet) and thirty of the thirty-six (83%) are under 12 metres in length.

- 95% of the seafood passing through the port of Rosslare are shellfish
- Scallop are landed from larger vessels that occasionally use Rosslare
- The remaining shellfish are landed by the local small boat fleet. These vessels, under 15 metres in length, target whelk, razor clams, various species of crab (spider, edible, velvet), lobster, and shrimp.
- Apart from razor clam dredging (specific segment) all other fishing for shellfish uses pots, all of which are classified as static gear
- The EU defines the small-scale coastal fleet as fishing vessels that are less than 12 meters in length that do not use towed gear. Instead, they use low-impact static gear and operate close to their home ports.
- It is reasonable to conclude that the local Rosslare fleet is primarily (26 out of 36) part of the small-scale coastal fleet with the balance in the wider inshore sector.

In 2022, the SFPA recorded 1,267 tonnes of seafood, valued at €2.969 million, landed through Rosslare Europort. Table 15-29 gives a breakdown of these landings by species and fleet characteristics.

- Whelk were the main species landed, accounting for 869 tonnes or 69% of the total by weight.

These were valued at €1.364 million at first point of sale.

- Scallop were in second place with 212 tonnes (17%, €0.801 million) and razor clams in third place with 97 tonnes (8%, €0.603 million).
- The balance comprised 89 tonnes of various crustaceans (spider, brown, and velvet crab, and lobster) making up 7% of the total and valued collectively at €0.199 million.

Table 15-29 highlights another important feature of Rosslare based fisheries. The pot fisheries (*i.e.* whelk and all the crustacean fisheries) represent 75% of all landings by weight but only 53% by value. Secondly, these fisheries are entirely conducted by polyvalent vessels. These landings correspond directly to the profile presented earlier as the fleet considered to *have or potentially have* a high dependency on the port of Rosslare.

- 204 tonnes of mostly whelk and spider crab landed by up to 25 vessels in the polyvalent under 18 and 1 in the polyvalent potting segments and all under 10 metres (0-10) small scale coastal fleet,
- 754 tonnes of mostly whelk and brown crab landed by landed by 1 vessel in the polyvalent 10-12 metre and 4 vessels in the polyvalent 14-18 metre length class.
- 97 tonnes of Razor clam landed by up to 5 vessels in the specific segment.
- 212 tonnes of scallop landed by up to 7 vessels registered in the Specific Scallop sub-segment.

Table 15-29: Seafood (tonnes) landed at Rosslare (2022) by species and fleet segment (SFPA, 2022)

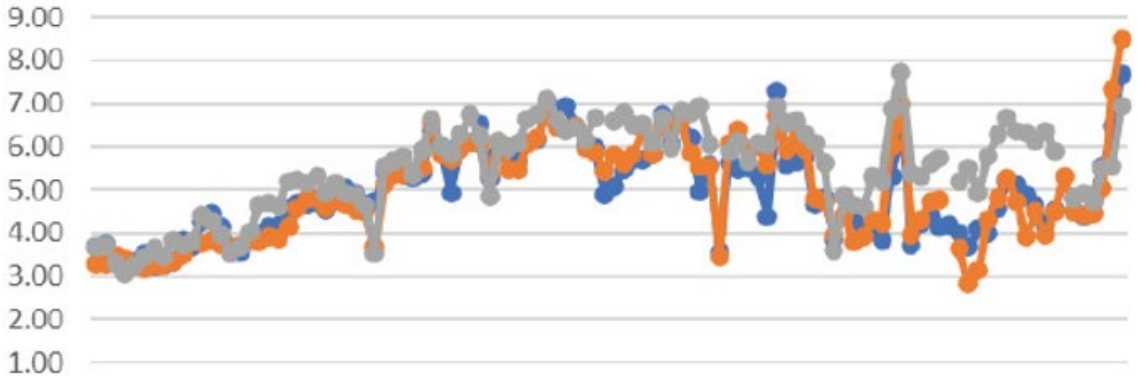
Species	Method	Polyvalent 0-10	Polyvalent 10-18	Specific	Total	%	Value (€ million)
Scallop	Dredge			212	212	17%	€0.801
Razor Clams	Dredge			97	97	8%	€0.603
Whelk	Pots	149	720		869	69%	€1.364
Lobster	Pots	1	1		2	0%	€0.039
Velvet crab	Pots	8			8	1%	€0.021
Brown crab	Pots	6	33		39	3%	€0.117
Spider crab	Pots	40			40	3%	€0.023
Shrimp	Pots	0			0	0%	€0.000
Total		204	754	309	1267	100%	€2.969
%		16%	60%	24%	100%		

15.5.7.3 FLEET CHARACTERISTICS OF IRISH SEA SHELLFISH FISHERIES

Having estimated the seafood landed at Rosslare Europort over time, by volume, value and by species, fleet segment, vessel size category for a given year it is now possible to compare the landing profile against the typical profile, by species, across all shellfish landings in the Irish Sea. This is done using the aggregate results of landings declarations and sales notes presented by Member States for the Scientific, Technical and Economic Committee for Fisheries (Data source: AER STECF 23 07 - EU Fleet Economic and Transversal data).

Razor Clam: In 2022, 92% of all razor clams landed from fisheries in the Irish Sea were taken by dredgers (EU gear code DRB). Of these 97% were taken by vessels in the (under 12) small-scale coastal fleet (SSCF); 78% by vessels under 10 metres in length and a further 19% by vessels between 10 and 12 metres.

BIM, in its economic analysis of the Irish small-scale fleet (Curtin, 2023) note that, more generally, the specific segment generates 71% if its value in from razor clams, followed by cockles which account for 18% (by value). BIM further confirms that 'of those vessels mainly selling shellfish, those with razor clams can be classified as specific dredgers' and that these fisheries are almost exclusively across the vessel length classes; 6-10 metres, 10-12 metres and 12-15 metres.



Vessels 9-10m in length (---), Vessels 9-10m (---), Vessels 12-15m (---).

Figure 15-53: Monthly prices (€/kg) for razor clams from dredge fisheries (Curtin, 2023)

In 2022, 97 tonnes of razor clams were landed through Rosslare port (Table 15-29). These represented 13% of all razor clams landed nationally, 8% of the landings through the port by volume and 20% by value (total value €603,340, unit price €6.322). All were taken by vessels under 12 metres in length operating in the specific segment of the fleet. This is consistent with licensing policy where vessels licensed in the specific segment are permitted to fish only bivalve molluscs (and aquaculture species); razor clams are a bivalve mollusc. It is also consistent with the general observations found in the BIM analysis.

Note: Prices used to estimate the value of shellfish, unless stated otherwise, are taken from Shellfish Stocks and Fisheries Review, An assessment of selected stocks, The Marine Institute and Bord

Iascaigh Mhara, 2023. These were sourced from logbook declarations and sales notes (vessels under 10m) as well as shellfish registration dockets and co-op data.

Whelk: In 2022, 81% of all whelk landed from fisheries in the Irish Sea (Table 15-32) were taken by pots (EU gear code FPO). Of these 88% were taken by vessels in the under 12, small-scale coastal fleet (SSCF); 40% by vessels under 10 metres in length and a further 48% by vessels between 10 and 12 metres.

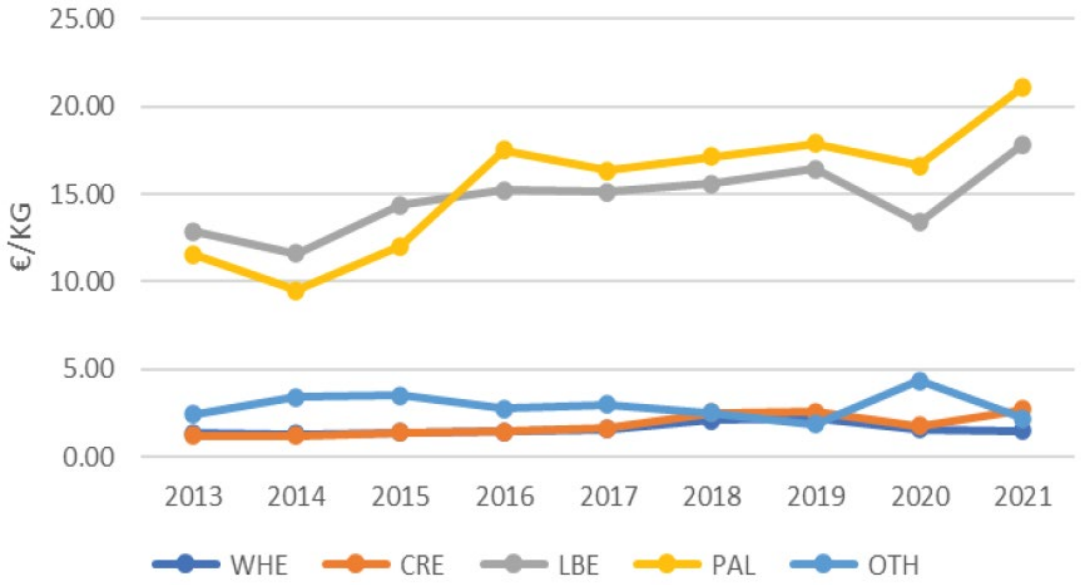


Figure 15-54: Average prices of main species sold by polyvalent potting segment. (Curtin, 2023)

Noting that while whelk is a species of mollusc, it is a univalve species and therefore may not be targeted by vessels in the specific segment of the fleet. Whelk fisheries are fished exclusively by vessels in the polyvalent sector, and primarily by vessels using pots. BIM, in its economic analysis of the Irish small-scale fleet (Curtin 2023), note that, nationally, the polyvalent potting segment generates more than half its value from whelk. In the polyvalent general segment, of the main gears used (pots, gillnets, trawls and pelagic nets), those fishing with pots generate most of their revenue

from crab (62%), whelk (19%), and lobster (14%). BIM further notes that, nationally, for vessels 6-10 metres, whelk and crab are the most important species by volume while lobster and shrimp are the most important species by value. Likewise with vessels 10 – 12 metres, crab and whelk once again are the most valuable species while for vessels 12 – 15 metres crab accounts for around half the landings by value.

In the same year, 2022, 869 tonnes of whelk were landed through Rosslare port. These represented 14% of all whelk landed nationally, 69% of the landings through the port by volume and 46% by value (total value €1.364 million, unit price €1.57). Of the total, 17% were taken by vessels under 10 metres in the polyvalent segment of the fleet and the balance, 83% by polyvalent vessels under 10-18. This is consistent with licensing policy and with the general observations found in BIM's analysis.

Lobster and Crab: In 2022, 58% of the lobster, 74% of the velvet crab, 69% of the brown crab, and 39% of all spider crab landed from fisheries in the Irish Sea were taken in pots. Overall, across the 4 species, 62% of the entire catch came from pot fisheries and of these 96% were taken by vessels in the under 12 metre, small-scale coastal fleet: 77% by vessels under 10 metres and 19% by vessels between 10 and 12 metres.

BIM, in its economic analysis of the Irish small-scale fleet (Curtin 2023), point out that, nationally, boats registered in the polyvalent general segment and fishing with pots, generate most of their non whelk revenue from crab (62%) and lobster (14%).

BIM further notes that, of the three segments - specific, polyvalent pots and polyvalent general - the specific segment is clearly distinct while the other two are broadly similar targeting the same species albeit in different proportions. They also note that most vessels use just one gear with only a small minority using 2 gears (~12%).

In 2022, 2 tonnes of lobster, 8 tonnes of velvet crab, 39 tonnes of brown crab, and 40 tonnes of spider crab (89 tonnes in total) were landed through Rosslare port. While just 7% of all landings through the port by volume and value (total value €199,850) the spider crab landings were 7% of the national landings.

Scallop: The last major fishery using Rosslare as a landing port is the scallop fishery. Scallop fishing is a deep-rooted tradition, which in Ireland extends back to at least the 16th century. Scallops are commercially fished in numerous locations and landed into more than 40 ports around the coast.

Stocks along the west and south coasts are small and discrete. Off the southeast coast and in the Irish Sea scallops are widely distributed and abundant in both inshore and offshore waters.

The south and east coast scallop fishery is fundamentally different to the small inshore scallop fisheries off the west coast. These offshore stocks are fished by large vessels that may tow as many as 34 spring loaded dredges with each dredge approximately 0.8 m wide. The dredges are held in series on two beams, which are fished on each side of the vessel.

The fishery off the southeast coast began in inshore waters, south of the Wexford coast, in the 1970s and gradually expanded offshore and into the south Irish Sea. Further expansion occurred in the 1990s and by 2002 the Irish fleet had increased its range, from the southeast coast and south Irish Sea to the English Channel and west of France. In 1997 the total number of dredges in the fishery was 103. This expanded to 498 dredges between 1997 and 2000 and peaked at 528 dredges in 2002.

By 2003 the majority of Irish fishing effort had transferred from the Irish coast to the Irish Sea and English Channel due to an apparent decline in stocks off the southeast coast. From 2002, however, there was a gradual decline in total fishing effort due to various economic constraints. The physical condition of the vessels, increasing fuel prices and declining market prices for scallops in 2002-2004 all contributed to a reduction in fishing activity. In addition, a days at sea regime was imposed on the Irish fleet by the European Commission (Council regulation 1415/2004) in 2005 which, when transposed to Irish legislation, limited the activity of the vessels. The resultant economic difficulties culminated in the decommissioning of a number of vessels from the fleet in 2005.

Today there are just 8 vessels registered in the Specific scallop subsegment. Apart from a single 11-meter boat the other 7 are all large, 24-27 metres vessels. The owners of all 7 of these vessels are residents of county Wexford; four in Kilmore Quay, two in New Ross, and one in Wellington Bridge.

In 2022, a total of 2,217 tonnes of scallop were landed to Irish ports. Of these, 949 tonnes (43%) were taken in the various fisheries in the Irish Sea (Table 15-30), 911 tonnes (41%) in the Eastern or Western English Channel, and 357 tonnes (16%) in the Celtic Sea (along with smaller amounts on other coasts). More than 99% of the catch was taken by larger vessels. This is consistent with the current fleet profile (7 of the 8 vessels registered in the Specific scallop subsegment are large, 24-27 metres vessels, registered to owners living in Wexford). In the same year, 212 tonnes of scallop were landed through Rosslare port. This was 9.6% of the total landings.

Table 15-30: Scallop fisheries by volume, value and location (BIM, 2022)

Fishery	Tonnes	%	Value
Irish Sea	949	43%	€3,586,490
Celtic Sea	357	16%	€1,349,460
Eastern Channel	710	32%	€2,682,577
Western Channel	201	9%	€758,283

Grand Total	2,217	100%	€8,376,810

The queen scallop (*Aequipecten opercularis*) is a medium-sized species of scallop fished in parts of the Irish Sea. The Isle of Man for example is famous for the queen scallop, or "Manx queenie" as it is known locally. Landing of this species to Ireland are occasional, Table 15-31.

Table 15-31: Queen Scallop landing by volume, value and year (Irish Sea) (BIM, 2022)

Year	Tonnes	Value
2018	5	3,930
2019	4	2,925
2020	1	1,022
2021	0	176
2022	833	€666,186
Total	843	€670,308

Table 15-32: Fleet Characteristics for Ireland's main shellfish fisheries in the Irish Sea (Part 1)

Category	Dredgers	Pots	Other gears	Total	Main Gear:
Razor (Tonnes)					
0-10	258	0	16	272	78%
10-12	63		2	64	19%
12-18	8		11	19	3%
Total	327 (92%)	0 (0%)	28 (8%)	356	100%
Whelk (Tonnes)					
0-10	0	1,402	645	2,048	40%
10-12	98	1,671	9	1,778	48%
12-18					12%
Total	98 (2%)	**3,486 (81%)**	727 (17%)	4,311	100%
Cockles (Tonnes)					
0-10					
10-12	0			0	100%
Total	0.3 (100%)	0	0	0	100%
Lobster (Tonnes)					
0-10	2	47	45	94	71%
10-12	0	17	0	17	26%
12-18	0	2	0	2	3%
Total	2 (1%)	66 (58%)	45 (40%)	113	100%

Table 15-33: Fleet Characteristics for Ireland's main shellfish fisheries in the Irish Sea (Part 2)

Category	Dredgers	Pots	Other gears	Total	Main Gear:
Brown Crab (Tonnes)					
0-10	0	301	257	558	53%
10-12	0	218	0	218	38%
12-18	0	51	0	51	9%
Total	0 (0%)	570 (69%)	257 (31%)	827	100%
Spider Crab (Tonnes)					
0-10	0	116	195	311	94%
10-12	0	7	0	7	6%
Total	0 (0%)	124 (39%)	195 (61%)	319	100%
Velvet Crab (Tonnes)					
0-10	1	91	41	133	77%
10-12	0	27	0	27	23%
Total	1 (1%)	118 (74%)	41 (26%)	160	100%
Lobster, Brown, Velvet and Spider Crab (Tonnes)					
0-10	3	556	538	1,097	77%
10-12	0	269	0	269	19%
12-18	0	54	0	54	4%
Total	3 (0%)	878 (62%)	538 (38%)	1,419	100%

15.5.7.4 ECONOMIC PROFILE OF THE ROSSLARE FLEET

In this section we use the Annual Economic Report and the Annual Fisheries Report (Findings of the National Seafood Survey, BIM 2024) to estimate the fleet size and gear profile economically consistent with the fisheries exploited and seafood landed at Rosslare.

Given i) the documented local fisheries, ii) the seafood landed at Rosslare Europort (2022) by species and fleet segment and iii) the characteristics of 36 vessels that have or potentially have a high dependency on the port of Rosslare, the Rosslare fleet can be categorised into the following fleet-fishery combinations:

- Polyvalent, Small scale coastal (under 10 m), fishing with pots, targeting welk and/or crustaceans
- Polyvalent, Inshore (10 – 12 m), fishing with pots, targeting welk and/or crustaceans
- Polyvalent, Inshore (12 – 18 m), fishing with pots, targeting welk and/or crustaceans
- Specific, Small scale coastal (under 10 metres), fishing with dredges, targeting razor clams
- Specific, Inshore (10 – 12 m), fishing with dredges, targeting razor clams
- Specific, Inshore (12 – 18 m), fishing with dredges, targeting scallop

Considering the expected number of boats in each of these fleet-fishery combinations and the expected Gross Value of Landings for the same fleet-fishery combination from the Annual Economic Report on the EU Fishing Fleet, the total financial value of each fleet-fishery combination can be calculated and compared with the value of landings recorded at the port.

Estimating the Number of Full-Time Equivalent Boats in Rosslare

Based on the DC-MAP surveys carried out annually by member states, the Annual Economic Report provides detailed information on the structure and economic performance of European fishing fleets. These are summarised in Table 15-34 while details on the calculation of each may be found on the European Commission's web site: AER - European Commission.

In Ireland's case, DC-MAP surveys are conducted by BIM and complemented by additional reports including the Annual Fisheries Report (Findings of the National Seafood Survey) and the Economic analysis of the Irish small-scale fleet. These provide insights into the status of Ireland's catching sector on an annual basis.

Table 15-34: EU Reported Fleet Statistics & Economic Performance metrics (STECF, 2023)

Statistics & Economic Performance metrics	
Mean age of vessels	Maximum days at sea
Mean LOA of vessels	Number of fishing trips
Number of vessels	Engaged crew
Total vessel power	FTE national
Total vessel tonnage	Total hours worked per year
Gross debt	Unpaid labour
Investments	Gross value of landings
Subsidies on investments	Income from leasing out quota
Total assets	Operating subsidies
Value of physical capital	Other income
Value of quota + fishing rights	Expenditure
Days at sea	Consumption of fixed capital
Energy consumption	Energy costs
Fishing days	Lease/rental payments for quota
GT days at sea	Other non-variable costs
GT fishing days	Other variable costs
kW days at sea	Personnel costs
kW fishing days	Repair & maintenance costs
Maximum days at sea	Value of unpaid labour
Number of fishing trips	

AER profiles are presented at a Member State and aggregated EU level for the following categories:

i) All vessels, ii) Large Scale Fleet, iii) Small Scale Coastal Fleet, iv) North Western Waters (NWW), and

V) Principal fleet segments. The last set, fleet statistics and economic performance results by principle fleet segments, are the most disaggregated and give detailed results for six vessel length classes including 0–10 metres (VL0010), 10-12 meters (VL1012), and 12-18 meters (VL1218), and eleven gear groups (Table 15-35) including dredgers and vessels using pots or traps.

Table 15-35: Gear groupings for disaggregated fleet statistics (STECF, 2023)

Fishing Gear Categories used in AER Report	
Beam trawlers	Purse seiners
Demersal trawlers/seiners	Vessels using active/passive gears
Dredgers DRB	Vessels using hooks
Drift and/or fixed netters	Polyvalent passive gears only
Pelagic trawlers	**Pots and/or traps FPO**

Table 15-36: Fleet and Gear Combinations for Rosslare Fleet (STECF, 2023)

	Polyvalent Potting	Polyvalent Under 18	Specific General	Polyvalent Potting	Polyvalent Under 18	Specific General
0-10	1	25	1	FPO	FPO	DRB
10-12		1	2		FPO	DRB
12-18		4	1		FPO	DRB
Total	1	30	4			

In the left-hand panel of Table 15-36 the Rosslare fleet is separated into fleet segment (polyvalent potting, polyvalent under 18, specific general) and vessel length category (0-10, 10-12 etc) For example, based on the home address of the registered owner, 25 vessels, under 10 metres in length and registered in the *polyvalent (under 18 metre)* segment might be expected to use Rosslare harbour to access the shellfish ground adjacent to the port.

The corresponding reference tables from the Annual Economic Report are shown in the right-hand panel. For example, vessels registered in the polyvalent (under 18 metre) segment of the fleet that fish the shellfish ground adjacent to Rosslare all do so using pots (Gear code FPO).

The most recent edition of the EU's Annual Economic Report, published in 2023, provides performance results for the Irish fleet of polyvalent vessels under 10 metres in length (VL0010) fishing with pots or traps (FPO). In 2021, vessels in this category landed on average (Gross value of landings) €23,338 of seafood per vessel. A fleet of 25 such boats, therefore, could on average be expected to land €583,443.

This approach was repeated for each of the seven length – gear combinations identified (Table 15-36) with the results presented in Table 15-37, Scenario 1.

Scenario 1 represents a 'base case' that includes all 36 vessels identified as *having or potentially having* a high dependency on the port of Rosslare. However, in this case the total expected *Gross*

value of landings comes to €2,239,490 which is more than the landings reported by the SFPA for that year.

An alternative scenario (Scenario 2) reduces the number of polyvalent under 18 metre vessels in the small-scale coastal fleet from 25 to 22. In this case the expected value of landings exactly matches the known landings indicating that such a fleet is not inconsistent with the known landings.

Methodology Notes

The seven large (VL2440) scallop dredgers, identified as landing frequently at Rosslare on their return from fishing in the Irish Sea but not resident at the port, have been discounted from the calculations shown in Table 15-37.

The AER Report does not distinguish between polyvalent potting and polyvalent under 18. As there is only one polyvalent potting boat, the same Gross value of landings has been used for both.

The 4 Rosslare based polyvalent (under 18 metre) vessels in the 12 – 18 metre category have an average length of 13.2 metres. The Gross value of landings presented in the AER report refer to the national fleet and includes vessels up to 18 metres in length with correspondingly higher landings. This could introduce a small bias whereby the Gross value of landings in the AER dataset is higher than might be expected for the 4 smaller Rosslare vessels. To overcome this, the value used in scenario testing was statistically adjusted downward to match the average vessel length (13.2 metres) observed.

While there is one Rosslare vessel expected in the Specific General, 12- 18 m, fishing with dredges (DRG) category, there are no results for this group in the 2023 AER report. Given the vessel in question is 13.34 metres in length, it has been treated as a member of the 10 – 12 metre category.

The results presented for the alternative scenario (Scenario 2) are just one of the possible alternatives. For example, the small-scale coastal fleet might be more than the sixteen polyvalent: 0 – 10 metre, and 1 polyvalent potting: 0-10 m shown in scenario 2 but with some boats pending fewer days at sea than the national average. However, collectively, the fleet may only accumulate the Gross value of landings shown if the overall Rosslare fleet is to remain in balance. An alternative sees the loss of a large vessel and its replacement by a number of smaller ones. This scenario was discounted however by the Rosslare Consultative Group. More importantly, the Group independently confirmed the results presented in Scenario 2.

Table 15-37: Scenario Modelling of Rosslare Inshore Fleet (STECF, 2023)

SCENARIO 1							
Length Class	Polyvalent Potting	Polyvalent under 18	Specific General	Length Class	Polyvalent Potting	Polyvalent under 18	Specific General
Expected Fleet Size				Corresponding Gear Codes			
0-10	1	25	1	0-10	FPO	FPO	DRB
10-12		1	2	10-12		FPO	DRB
12-18		4	1	12-18		FPO	DRB
Total	1	30	4				
Gross Value of Landings (AER)				Expected value of landings Rosslare			
0-10	€23,338	€23,338	€86,653	0-10	€23,338	€583,443	€86,653
10-12		€168,766	€85,396	10-12	€0	€337,532	€170,793
12-18		€317,445	€85,396	12-18	€0	€952,335	€85,396
Total	€23,338	€509,549	€257,446	Total	€23,338	€1,873,310	€342,842

Landings	Expected (above)	Actual (SFPA)	Difference
Total	€2,239,490	€2,167,520	-€71,970

SCENARIO 2							
Length Class	Polyvalent Potting	Polyvalent under 18	Specific General	Length Class	Polyvalent Potting	Polyvalent under 18	Specific General
Expected Fleet Size				Corresponding Gear Codes			
0-10	1	22	1	0-10	FPO	FPO	DRB
10-12		2	2	10-12		FPO	DRB
12-18		3	1	12-18		FPO	DRB
Total	1	27	4				
Gross Value of Landings (AER)				Expected value of landings Rosslare			
0-10	€23,338	€23,338	€86,653	0-10	€23,338	€511,472	€86,653
10-12		€168,766	€85,396	10-12		€337,532	€170,793
12-18		€317,445	€85,396	12-18		€952,335	€85,396
Total	€23,338	€509,549	€257,446	Total	€23,338	€1,801,339	€342,842

Landings	Expected (above)	Actual (SFPA)	Difference
Total	€2,167,519	€2,167,520	€1

15.5.7.5 ECONOMIC AND SOCIAL IMPACT OF THE ROSSLARE FLEET

Fleet Statistics and Performance Results for the Rosslare Fleet

To estimate the expected fleet statistics and performance results for the vessels in the Rosslare fleet, the most recent edition of the EU's Annual Economic Report, published in 2023, was first used to determine national results disaggregated by gear (Potting boats: FPO, Dredgers: DRB) and vessel length category (0-10, 10-12, 12-18 meters, length overall). These are shown in Table 15-38, weighted by the number of vessels in the Rosslare fleet. This weighted average generates the percentage breakdown for Rosslare shown in the last column.

For example, using the gross value of landings reported by the SFPA for Rosslare in 2022 (minus the value of scallop), it is possible to breakdown the €2,166,461 first point of sale value into its constituent cost categories. Based on these landings, the resident fleet is estimated to have generated Gross Value Added of €1.7 million, including €482,165 in wages and a further €63,809 in unpaid labour. Spouses and other family members often do a variety of unpaid tasks for the business including accounts, summer work etc. The fleet is estimated to have generated a Gross profit of €1.16 million having spent €163,801 on fuel, €128,407 on repairs and maintenance, €151,476 on other variable costs and €130,397 on non-variable costs.

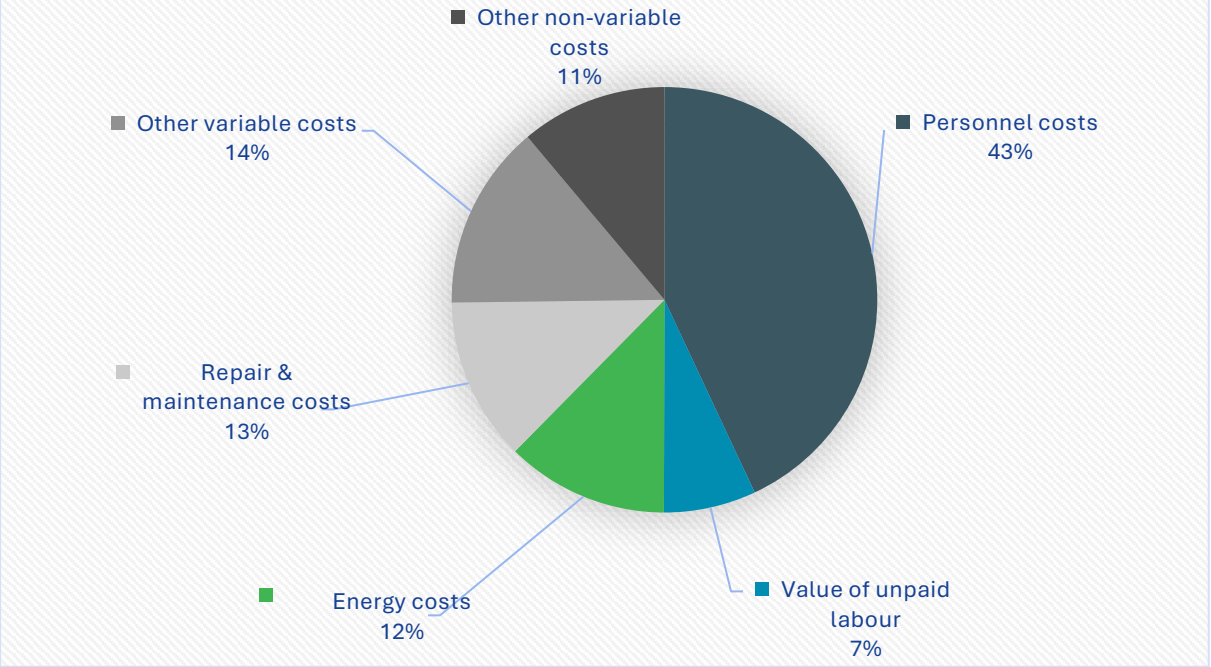


Figure 15-55: Cost Profile for the Rosslare under 18, resident fleet (STECF, 2023).

Table 15-38 Expected cost profile for the Rosslare fleet
Based on national fleet statistics and economic performance results (STECF AER Report, 2023)

	FPO 0-10	FPO 10-12	FPO 12-18	DRB 0-10	DRB 10-12	DRB 12-18	Weighted Average	Expected Profile Rosslare
Number of vessels	26	2	3	1	2	1	35	
Gross value of landings	€606,780	€337,532	€952,335	€86,653	€170,793	€85,396	€2,239,490	94%
Other income	€84,618	€0	€44,317	€3,071	€2,000	€1,000	€135,006	6%
Total Income	€691,399	€337,532	€996,653	€89,724	€172,793	€86,396	€2,374,496	
Personnel costs	€248,246	€85,285	€153,298	€28,980	€32,403	€16,202	€564,413	43%
Value of unpaid labour	€65,148	€12,256	€5,340	€4,761	€2,970	€1,485	€91,961	7%
Energy costs	€39,636	€17,585	€75,466	€8,978	€13,504	€6,752	€161,921	12%
Repair & maintenance	€67,463	€42,081	€34,116	€8,956	€6,740	€3,370	€162,726	13%
Other variable costs	€88,098	€30,712	€42,927	€7,237	€10,492	€5,246	€184,712	14%
Other non-variable costs	€55,300	€18,208	€41,337	€14,432	€11,101	€5,550	€145,927	11%
Total Expenditure	€563,891	€206,127	€352,483	€73,345	€77,210	€38,605	€1,311,661	

Rosslare Fleet Employment Estimates

The estimated employment statistics for the Rosslare under 18 metre fleet are presented in Table 13-39 disaggregated by segment and vessels size. Overall, the fleet is estimated to employ 46 persons (engaged crew) with a full time equivalent (FTE) employment figure of 32 persons.

Table 15-39: Fleet Employment Results: Rosslare under 18 resident fleet (STECF, 2023)

	Polyvalent Segment			Specific Segment			Total
	VL0010	VL1012	VL1218	VL0010	VL1012	VL1218	
Fleet	17	2	3	1	2	1	26
Engaged Crew	22	5	9	2	5	3	46
FTE	14	4	10	1	2	1	**32**
FTE*	6	4	11	2	6	3	

These estimates are calculated using the figures published in the EU's Annual Economic Report, 2023, which gives the employment, estimated nationally based on sampling, by segment, disaggregated by gear (in the case of Rosslare potting boats & dredgers) and vessel length categories (0-10, 10-12, 12-18 meters, length overall). The total engaged crew includes all those employed by the fleet including full and part time employees. The total FTE, 32 persons, is the full-time equivalent number and adjusts the part time and or seasonal nature of some of those employed.

Employment estimates from the EU's Annual Economic Report are based on average total employment across all active vessels in a given fleet segment, nationally. However, as some vessels in the fleet may be part time this can lead to over-estimates of the number employed. In other cases, additional crew may be carried to allow crew rotation. For example, according to the stakeholder group, it is normal practice to employ 3 crew on a razor shell dredger: a skipper and 2 deck. A number of vessels in the whelk fleet carry 3 crew normally with a fourth ashore at any given time giving a complement of 4 FTEs. Finally, many of the boats in the polyvalent 0-10 metre category fish only occasionally and the FTE is significantly less than estimated initially when all are assumed to be fully active. These factors have been taken into account when estimating the final FTE* results. Note however that the *Total* (FTE or FTE*) has not changed.

15.5.7.6 FLEET STATISTICS AND PERFORMANCE RESULTS FOR THE RAZOR SHELL FLEET

One of two main fisheries based out of Rosslare Europort, the south-east razor shell fleet consists of 4 vessels ranging in size from 9.95 – 14 metres in length. All are registered in the specific general segment of the fleet. These vessels fish with hydraulic dredges and typically carry a crew of 3 persons including a skipper. In addition to the onboard crew, 2 other shore-based staff are employed, full time, undertaking repair and maintenance work on the hydraulic dredges and other equipment. Total employment FTE* is therefore 12 persons onboard (4 x skippers + 8 crew) + 2 maintenance crew.

Table 15-40: Fleet Statistics and Performance Results (Razor Shell Fleet)
Source: (1) 2024 Annual Economic Report - EU Fishing Fleet (European Commission 2024), (2) SFPA landings data (3) BIM Business of Seafood 2021.

Rosslare Razor Fleet	From	To
Annual landings (tonnes)[2]	350	400
Average Price per tonne	€6,500	€6,500
Value of Landings[2]	€2,275,000	€2,600,000
Total Expenditure	49%	
	€1,114,750	€1,274,000
Personnel costs (43%)[1]	€479,881	€548,436
Value of unpaid labour (6%)	€63,506	€72,579
Energy costs (15%)[1]	€163,025	€186,315
Repair & maintenance costs (11%)	€127,799	€146,056
Other variable costs (14%)[1]	€150,758	€172,295
Other non-variable costs (12%)	€129,779	€148,319

The razor fleet typically fish 10 – 11 months per annum and spend 1 month undergoing annual maintenance. This is always during the summer and usually in June. In addition to maintenance periods the vessels are also weather dependent, and the total number of days fished per annum will vary from year to year. Boats in the razor shell fleet typically land up to 2.5 tonnes per week and generate total landings per annum of approximately 100 tonnes per boat. This gives a total expected landing figure of 350 – 400 tonnes per annum into Rosslare. Prices for razor shell vary ranging from €3 per kg (€3,000 per tonne) for small animals, to €5.50 - €7.50 for mediums and up to €15-18 per kg for large. Based on landings of 350 – 400 tonnes per annum and an average price of €6.50, the value of this fishery is approximately €2.275 - €2.6 million per annum.

Using the cost profile estimated for the Rosslare fleet it is reasonable to assume that the Total Costs for this fleet will be approximately 49% of the gross landings or €1.114 - €1.274 million per annum into the local economy. The expected personnel costs for the fleet (43% of total costs) are estimated between €479,881 and €548,436. This provides for an income of €30,000 to €35,000 for each of the 8 crew and €55,000 to €60,000 for each of the 4 skippers. Noting the part time nature of employment amongst vessels under 10 metres, average salary estimates are based on the crew employed in vessels over 10 metres.

15.5.7.7 FLEET STATISTICS AND PERFORMANCE RESULTS FOR THE WHELK FLEETFLEET STATISTICS AND PERFORMANCE RESULTS FOR THE WHELK FLEET

The other significant fishery based out of Rosslare Europort is the south-east or Rosslare Bay whelk fishery. This fleet consists of 5 vessels ranging in size from 9.5 – 14 metres in length, all registered in the polyvalent under 18 metre segment of the fleet. These fish with pots and typically carry a crew of 3 persons including a skipper. Total FTE* is therefore 15 persons onboard (5 x skippers + 10 crew). The vessels in the whelk fleet can fish between 7 - 11 months per annum and will spend another month undergoing annual maintenance. The main maintenance period is traditionally during the summer months. In additional to maintenance periods the vessels are also weather dependent, and the total number of days fished per annum will vary from year to year. Typically, the smaller boats in the fleet might fish 120 to 130 days per annum while the 3 bigger vessels fish up to 200 days a year. Boats in the whelk fleet typically land up to 1.5 tonnes of whelk per week per vessel and generate total landings per annum of approximately 150 to170 tonnes per boat. This gives a total expected landing figure of 850 tonnes per annum into Rosslare. Prices for whelk vary from €1.60 - €2.00 per kg (€2,000 per tonne), and based on landing of 850 tonnes per annum, the value of this fishery is approximately €1.7 million per annum.

The whelk fleet also spends up to one third of the year fishing crustaceans. This can vary from as few as 10 days to as many as 80 but on average is approximately 55 days per annum per vessel. With typical landings of 0.4 tonnes per week per vessel this gives a total expected landing figure of 115 tonnes into Rosslare. Based on an average price of €2.20 per kg (€2,200 per tonne) the value of this fishery is approximately €0.25 million per annum.

The combined landings of the 5-boat fleet is therefore approximately €1.957 million per annum, and using the cost profile estimated for the Rosslare fleet, it is reasonable to assume that the Total Costs for this fleet will be approximately 49% of the gross landings or €0.959 million per annum. The expected personnel costs (43% of total costs) are estimated to be €412,000. In addition, the fleet is estimated to spend a further €480,000 per annum in the local economy on fuel, repairs and maintenance and other fixed and variable costs.

Table 15-41: Fleet Statistics and Performance Results (Whelk Fleet)
Source: (1) 2024 Annual Economic Report on the EU Fishing Fleet (European Commission 2024), (2) SFPA landings data (3) BIM, 2021 Business of Seafood.

Rosslare Whelk Fleet	From	To
Annual landings (tonnes)[2]	700	900

Average Price per tonne	€1,500	€1,500
Value of Landings[2]	€1,050,000	€1,350,000
Total Expenditure	49%	
	€514,500	€661,500
Personnel costs (43%)	€221,484	€284,765
Value of unpaid labour (6%)	€29,311	€37,685
Energy costs (15%)[1]	€75,243	€96,740
Repair & maintenance costs (11%)	€58,984	€75,837
Other variable costs (14%)[1]	€69,581	€89,461
Other non-variable costs (12%)	€59,898	€77,012

15.5.7.8 INDIRECT AND INDUCED EMPLOYMENT IN THE CATCHING SECTOR

Based on the reported landings in 2022, it is estimated that the Rosslare fleet spent over €1.1 million on various costs including wages (€482,165), fuel (€163,801), repairs and maintenance (€128,407151) along with other variable (€151,476) and fixed costs (€130,397).

These items, in turn, generate indirect employment, and gross value added in other sectors downstream of the port of Rosslare, in particular in the processing sector in Kilmore Quay.

In 2018, BIM evaluated Ireland's top ten seafood ports and assessed the importance of the seafood sector directly and downstream in these ports, their hinterlands and at the regional and national levels. The project report (BIM, 2019) provides detailed results of this project.

- The seafood sector is a primary driver of rural economies around the coastline of Ireland and acts as an anchor in these locations around which other supporting service sectors develop.
- Kilmore Quay is an important seafood port in Ireland with high volumes of whitefish landed here annually. It also hosts a significant fish processing sector that sources fish from Kilmore Quay, Rosslare and a number of other ports in the south-east region.
- The seafood sector has significant multiplier effects in terms of gross value added, employment, and wages downstream in the economy. In total, 30% of the Kilmore Quay hinterland economy can be attributed to the seafood sector encompassing direct, indirect and induced effects.
- Direct employment of the seafood economy in the region is 500 with a further 225 full-time employees generated downstream.
- The sector generates €14 million in wages and salaries directly with a further €8 million generated indirectly and through induced effects of the seafood sector at the regional level.

- Further downstream effects occur outside the region at the national level.

The BIM-Kilmore Quay report (The Economic Impact of the Seafood Sector: Kilmore Quay) provides the basis for the calculations that follow. By estimating the proportion of the overall seafood activity that can be attributed to seafood landed in Rosslare it is the possible to estimate the indirect and induced components that in turn derive from Rosslare landings.

Based on the estimates of direct employment and wages calculated earlier using the European Commission (STECF) Annual Economic Report and GVA provided by local processors (Scallop, Razor clams, Whelk and Crustaceans), it is estimated that along with 32 FTEs directly employed in the catching sector, nine are indirectly employed in a range of support activities including fuel supplies, repairs and maintenance, transport, food etc (see section 4.6). These indirect jobs represent €0.8 million in GVA and result in annual wages of €0.3 million. There are also 7 induced jobs generating a GVA of €0.5 million and a wage bill of €0.3 million.

Table 15-42: Benefits of the Rosslare Catching Sector

Fishing	GVA (€m)	Employment	Wages (€m)
Direct	€2.70	32	€1.00
Indirect	€0.80	9	€0.30
Induced	€0.50	7	€0.30
TOTAL	€4.00	48	€1.60

15.5.8 ECONOMIC IMPACT OF ROSSLARE SEAFOOD

Located in the south-east of Ireland a short distance south of Wexford town, Kilmore Quay is in a region characterised by undulating lowlands with agricultural land that is classified as good. Kilmore Quay is also a popular tourist village given its scenic location and a range of local amenities including sea angling. Connectivity of the port is fair with a regional road connecting it with Wexford town (23km) while a national road connects Wexford to Dublin, which is at a distance of 176km from Kilmore Quay. Its proximity to Rosslare port (21km) means that the seafood sector has both access to shellfish stocks in the south Irish Sea landed through the port and very good access to international markets in France and the rest of Europe with freight outward bound through Rosslare Europort.

The seafood sector is a significant driver of the economy of the southeast. Centred on the port of Kilmore Quay but drawing landings from ports across the county (including Courtown, Duncannon, St. Helens, Fethard/Slade, Rosslare and for some species, Dunmore East) BIM has shown that seafood processing has significant multiplier effects in terms of gross value added, employment and wages downstream in the economy.

Table 15-43: Seafood landed at Kilmore Quay and Rosslare 2017 – 2021

	Rosslare		Kilmore		Total	
	Tonnes	Value	Tonnes	Value	Tonnes	Value
2017	716	€1,556,671	4,286	€10,482,883	5,002	€12,039,554
2018	805	€2,297,504	3,653	€10,620,052	4,458	€12,917,556
2019	609	€1,547,191	3,467	€10,682,466	4,076	€12,229,657
2020	906	€5,773,115	3,793	€16,882,730	4,699	€22,655,845
2021	1371	€2,682,767	4,151	€13,284,436	5,522	€15,967,203
Total	4407	€13,857,248	19,350	€61,952,567	23,757	€75,809,815

BIM estimate that in 2018 some 30% of the Kilmore Quay/South Wexford hinterland economy could be attributed to the seafood sector encompassing direct, indirect and induced effects. Direct employment of the seafood economy in the region was 500 FTEs with a further 225 full-time employees generated downstream. The sector generated €14 million in wages and salaries directly

with a further €8 million generated indirectly and through induced effects of the seafood sector at a regional level. Further downstream effects occur outside the region at the national level.

BIM (2019) once again provides the basis for the calculations that follow. By estimating the proportion of the overall seafood processing activity that can be attributed to seafood landed in Rosslare it is the possible to estimate the direct, indirect and induced components that derive from Rosslare landings.

During the 5-year period 2017 – 2021, official SFPA seafood landings through Rosslare amounted to €13.857 million. (SFPA seafood landings are published annually and may be directly accessed via the SFPA web site at https://www.sfpa.ie/Statistics/Data/Annual-Statistics). This represented 18% of the total landings of Rosslare and Kilmore. Using this factor and information from local processors to account for additional seafood sourced from other ports in the South-east it is estimated that there are 38 fulltime jobs in processing directly dependent on Rosslare landed seafood. These jobs are supported by a wage bill of €1.0 million and generate a gross value added (GVA) of €3.5 million. In addition to the direct employment the processing of Rosslare landed seafood generates an additional 20 indirect and 8 induced jobs with wage bills of €0.6 million and €0.3 million respectively. The GVA of the indirect and induced activity amounted to€1.3 million and €0.6 million respectively.

Table 15-44: Benefits to the south Wexford processing Sector (estimated using SFPA, 2023)

Processing	GVA (€m)	Employment	Wages (€m)
Direct	€3.50	38	€1.00
Indirect	€1.30	20	€0.60
Induced	€0.60	8	€0.30
TOTAL	€5.30	66	€1.90

Based on the results for the two components (catching and processing) it is now possible to estimate the overall benefit of the Rosslare seafood sector. These results are shown in Table 15-45 and the sectoral benefits of this activity is shown in Table 15-46.

Table 15-45: Total Benefits of the Rosslare Seafood Sector

Seafood	GVA (€m)	Employment	Wages (€m)
Direct	€6.20	70	€2.00
Indirect	€1.70	25	€0.80
Induced	€0.90	12	€0.50
TOTAL	€8.70	107	€3.30

Table 15-46: Sectoral benefits of the Rosslare Seafood Sector

SEAFOOD	GVA (€m)	Employment	Wages (€m)
Agriculture, forestry & fishing	€3.4	46	€1.40
Manufacturing	€3.8	39	€1.00
Electricity, gas, steam	€0.0	< 1	€0.00
Water supply	€0.0	< 1	€0.00
Construction	€0.0	< 1	€0.00
Wholesale & retail	€0.6	8	€0.30
Transportation & storage	€0.2	3	€0.10
Accommodation & food	€0.1	3	€0.10
Information & communications	€0.0	< 1	€0.00
Financial & insurance	€0.1	< 1	€0.00
Real estate	€0.3	3	€0.10
Professional, scientific & technical	€0.1	1	€0.00
Administration & support	€0.0	< 1	€0.00
Public administration	€0.0	< 1	€0.00
Education	€0.1	1	€0.00
Human health	€0.1	1	€0.10
Arts, entertainment & recreation	€0.0	< 1	€0.00
Other service activities	€0.0	< 1	€0.00
Total	€8.7	107	€3.30

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