

COUNTRY FACT-SHEET :
IRELAND



PROMOTING **SMART SUSTAINABLE AND INCLUSIVE** GROWTH
FOR THE ATLANTIC AREA

B – Marine and maritime economic activities (MEAs)

Overview of relevant maritime economic activities in IRELAND at NUTS-0 level.

Maritime economic activity		Gross Value Added (EUR, million)	Employment (FTE)	Number of enterprises	Other indicators (EUR, million)	Source & Reference year
0. Other sectors						
0.1	Shipbuilding (excl. leisure boats) and ship repair	9	229	20	Turnover - 25	Census of Industrial Production 2010, Central Statistics Office Ireland (CSO)
0.2	Water projects	1.7	39	7	Turnover – 4	Central Statistics Office Ireland (CSO) – Buildings and Construction 2010
1. Maritime transport						



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Maritime economic activity		Gross Value Added (EUR, million)	Employment (FTE)	Number of enterprises	Other indicators (EUR, million)	Source & Reference year
1.1	Sea and coastal passenger water transport; Sea and coastal freight water transport; Services incidental to water transport; Cargo handling (74% of nace code taken); Renting and leasing of water transport equipment; Other transportation support activities (74% of nace code taken)	422	4,633	500	Turnover – 1,422	<i>Vega, A., Corless, R. and Hynes, S. (2013). Ireland's Ocean Economy, SEMRU Report Series, ISSN 2009-6933 (Online)</i> Reference year: 2010
1.2						
1.3						
1.4						
2. Food, nutrition, health and ecosystem services						



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Maritime economic activity		Gross Value Added (EUR, million)	Employment (FTE)	Number of enterprises	Other indicators (EUR, million)	Source & Reference year
2.1	Fish for human consumption	116	2825	n/a	Turnover – 202	<i>Vega, A., Corless, R. and Hynes, S. (2013). Ireland's Ocean Economy, SEMRU Report Series, ISSN 2009-6933 (Online)</i> Reference year: 2010
2.2	Fish for animal feeding				Exports – 162	
2.3	Marine aquaculture	47	918	n/a	Turnover – 123 Exports – 30	<i>Vega, A., Corless, R. and Hynes, S. (2013). Ireland's Ocean Economy, SEMRU Report Series, ISSN 2009-6933 (Online)</i> Reference year: 2010
2.4	Blue biotechnology	13	304	30	Turnover – 30 Exports – 12	<i>Vega, A., Corless, R. and Hynes, S. (2013). Ireland's Ocean Economy, SEMRU Report Series, ISSN 2009-6933 (Online)</i>



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Maritime economic activity		Gross Value Added (EUR, million)	Employment (FTE)	Number of enterprises	Other indicators (EUR, million)	Source & Reference year
						Reference year: 2010
2.5	Agriculture on saline soils	n/a	n/a	n/a	n/a	
3. Energy and raw materials						
3.1	Offshore oil and gas	4	216	n/a	Turnover – 12	<i>Vega, A., Corless, R. and Hynes, S. (2013). Ireland's Ocean Economy, SEMRU Report Series, ISSN 2009-6933 (Online)</i> Reference year: 2010
3.2 & 3.3	Offshore wind & Ocean Renewable Energy	4	216	n/a	Turnover - 12	<i>Vega, A., Corless, R. and Hynes, S. (2013). Ireland's Ocean Economy, SEMRU Report Series, ISSN 2009-6933 (Online)</i> Reference year: 2010



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Maritime economic activity		Gross Value Added (EUR, million)	Employment (FTE)	Number of enterprises	Other indicators (EUR, million)	Source & Reference year
3.4	Carbon capture and storage	n/a	n/a	n/a	n/a	
3.5	Aggregates mining (sand, gravel, etc.)	10	1471 (number of people employed)	60	Turnover - 414	Census of Industrial Production 2010, Central Statistics Office Ireland (CSO) Nace code : 8.12
3.6	Marine minerals mining	n/a	n/a	n/a	n/a	
3.7	Securing fresh water supply (desalination)					
4. Leisure, working and living						
4.1	Coastal tourism	337	3,502	n//a	Turnover – 841	<i>Vega, A., Corless, R. and Hynes, S. (2013). Ireland's Ocean Economy, SEMRU Report Series, ISSN 2009-6933 (Online)</i> Reference year: 2010



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Maritime economic activity		Gross Value Added (EUR, million)	Employment (FTE)	Number of enterprises	Other indicators (EUR, million)	Source & Reference year
4.2	Yachting and marinas	n/a	n/a	60 (IRELAND'S MARINAS, PONTOONS AND JETTIES)		<i>Irish Coastal Marinas, Pontoons and Jetties, Afloat Magazine (http://afloat.ie/resources/irish-coastal-marinas)</i>
4.3	Cruise tourism	n/a	n/a	n/a	Total expenditure in Ireland 2010: 17,100 Average spend per passenger - €71 (not in millions)	<i>Fáilte Ireland, Cruise Tourism to Ireland Research Report, 2010</i>
5. Coastal protection						
5.1 – 5.2	Coastal protection against flooding and erosion	No figures available but description details below	n/a	n/a		
5.3	Protection of habitats	No figures available but description details below	n/a	n/a		



Breakdown of maritime economic activities in the Atlantic NUTS2 regions of IRELAND.

Maritime economic activity		Overview	Socio-economic indicators	Source & Reference year (ex. Eurostat 2010)
0. Other sectors				
0.1	Shipbuilding (excl. leisure boats) and ship repair	Companies involved in marine manufacturing are found throughout Ireland, both along the coast and inland. However, there are clusters of particular marine product manufacturing to be found in certain areas, particularly counties Galway and Cork (boat building).		<i>Vega, A., Corless, R. and Hynes, S. (2013). Ireland's Ocean Economy, SEMRU Report Series, ISSN 2009-6933 (Online)</i>
0.2	Water projects	Companies involved in water construction are mainly located in Dublin and Offaly.		<i>Vega, A., Corless, R. and Hynes, S. (2013). Ireland's Ocean Economy, SEMRU Report Series, ISSN 2009-6933 (Online)</i>
1. Maritime transport				
1.1	Sea and coastal passenger water transport; Sea and coastal freight water transport; Services incidental to water transport; Cargo handling	Sea-based transport accounted for 99% of the total volume and 95% of the total value of the goods traded in Ireland in 2010.	Companies operating in the ports and maritime transport services area are largely dependent on the	<i>Vega, A., Corless, R. and Hynes, S. (2013). Ireland's Ocean Economy, SEMRU Report Series, ISSN 2009-6933 (Online)</i>
1.2				

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Maritime economic activity		Overview	Socio-economic indicators	Source & Reference year (ex. Eurostat 2010)
1.3 1.4	;Renting and leasing of water transport equipment; Other transportation support activities	The majority of shipping and maritime services activity occurs around the nine commercial ports on the coast of Ireland; Cork, Drogheda, Dublin, Dundalk, Dun Laoghaire, Galway, New Ross, Foynes and Wicklow.	wider performance of the Irish economy to drive growth and investment. The growth in this segment can be linked to future domestic GDP forecasts.	Reference year: 2010
2. Food, nutrition, health and ecosystem services				
2.1 2.2	Fish for human consumption Fish for animal feeding	In 2010, the Irish fishing fleet comprised of 2,119 vessels with a total capacity of 70,800 tonnes and a total engine power of 197,000KW. The number of vessels increased by 24% (or 409 vessels) in the period 2007-2010, while the total engine power of the fleet declined by 6% during the same period. The over 10 meter fishing fleet spent a total of	Nationally, renewed interest in sea fisheries has been stimulated by the publication of the Food Harvest 2020 (FH2020) strategy. FH2020 has set ambitious targets for the expansion of the Irish sea fisheries and aquaculture sectors, with targets being set to increase revenue in these sectors to €1 billion and employment to 14,000	<i>Vega, A., Corless, R. and Hynes, S. (2013). Ireland's Ocean Economy, SEMRU Report Series, ISSN 2009-6933 (Online)</i> Reference year: 2010 <i>Sea Fisheries Protection Authority (SFPA) Annual Report 2010</i> <i>Scientific, Technical and Economic Committee for Fisheries (STECF) – The Annual</i>



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Maritime economic activity		Overview	Socio-economic indicators	Source & Reference year (ex. Eurostat 2010)
		<p>around 54,300 days at sea.</p> <p>Fishing communities are distributed around the coast of Ireland, centred particularly on the fishing harbours of Killybegs, Co. Donegal, Ros an Mhíl, Co. Galway, An Daingean, Co. Kerry, Castletownbere, Co. Cork, Dunmore East, Co. Waterford and Howth, Co. Dublin.</p>	<p>FTE jobs by 2020.</p> <p>The potential for the sector lies in adding value to the existing catch, which is likely to remain stable. This can be achieved by rebuilding and management of the stocks to enable higher annual fish quotas in line with the CFP objectives and Maximum Sustainable Yield (MSY) obligations.</p>	<p><i>Economic Report on EU Fishing Fleet 2012; 2013.</i></p>
2.3	Marine aquaculture	<p>Aquaculture in Ireland is comprised of 850 licensed operations covering 2,000 sites, primarily consisting of shellfish production. The number of active enterprises engaged in marine aquaculture has remained stable with total of 291 enterprises. In recent</p>	<p>Ireland will have to address difficulties in achieving compliance with the Birds and Habitats Directives before the true potential of the aquaculture sector can be realised.</p> <p>The potential to increase</p>	<p><i>Vega, A., Corless, R. and Hynes, S. (2013). Ireland's Ocean Economy, SEMRU Report Series, ISSN 2009-6933 (Online)</i> Reference year: 2010</p> <p><i>Scientific, Technical and Economic Committee for Fisheries (STECF) – The Economic Performance of the</i></p>



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Maritime economic activity		Overview	Socio-economic indicators	Source & Reference year (ex. Eurostat 2010)
		<p>years, there has been an increase in salmon and Gigas oyster production, while mussel production has decreased due to both seed supply and market demand reduction.</p> <p>Shellfish aquaculture activities are widely distributed around the coast of Ireland, with particular concentrations in Co. Donegal, Connemara, Co. Galway, West Cork, Co. Waterford, Co. Wexford and Carlingford Lough, Co. Louth. Finfish aquaculture is mainly restricted to the Western seaboard in counties, Donegal, Mayo, Galway, Kerry and Cork.</p>	<p>production has been hampered by a shortage of available licensed sites, however there is significant scope for aquaculture expansion in Ireland, including in deep water sites¹. Ireland is well placed to increase aquaculture production but it has to overcome difficulties within the state regulatory structure.</p>	<p><i>EU Aquaculture Sector</i> <i>Bord Iascaigh Mhara (BIM).</i></p>

¹ Government of Ireland, Inter-Departmental Marine Coordination Group (MCG), "Harnessing Our Ocean Wealth - An Integrated Marine Plan (IMP) for Ireland," July 2012, Briefing Document Part II: Sectoral Briefs



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Maritime economic activity		Overview	Socio-economic indicators	Source & Reference year (ex. Eurostat 2010)
2.4	Blue biotechnology	<p>Ireland's emerging marine biotechnology industry is diverse, spanning different industry sectors such as food, pharmaceuticals, medical devices, aquaculture and seaweed and contributes to an array of novel products and processes.</p> <p>Seaweed harvesting takes place around the coast of Ireland, with particular concentrations in Co. Galway, Co. Donegal, Co. Sligo, Co. Kerry, and Co. Cork. Other activities in this sector are not confined to coastal counties and have a wide geographical distribution across the country.</p>	<p>As Ireland is a key location for the international life sciences industry, government funding is an important aspect and attracts foreign companies to locate to Ireland. The marine biotechnology sector is comprised of a growing number of SMEs who are seeking ways to increase capacity and capability for innovation to both increase turnover and employment.</p>	<p><i>Vega, A., Corless, R. and Hynes, S. (2013). Ireland's Ocean Economy, SEMRU Report Series, ISSN 2009-6933 (Online)</i> Reference year: 2010</p>
2.5	Agriculture on saline soils	n/a	n/a	
3. Energy and raw materials				



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Maritime economic activity		Overview	Socio-economic indicators	Source & Reference year (ex. Eurostat 2010)
3.1	Offshore oil and gas	<p>The Irish offshore oil and gas sector has significant potential. However, there have only been four commercial discoveries in Ireland to date. All four discoveries were gas. Over the last 40 years 129 exploration wells have been drilled with limited success making the probability of a commercial discovery in Ireland low. No commercial oil production in Ireland has been achieved to date.</p> <p>Companies involved in the extraction and production of gas in Ireland are based in Cork and Dublin. However, the companies that provide services to the gas production companies are located across</p>	<p>Ireland's challenging offshore environment, particularly on the Atlantic Coast, the low success rate of exploratory drilling and high offshore operating costs make the oil and gas industry in Ireland less attractive relative to countries such as Norway and the UK.</p> <p>However, the success in applications and licences offered under the Atlantic Margin Licensing Round and the recent Barryroe oil discovery announced in 2011 provide a positive outlook for the industry. The future of the oil and gas sector will vary depending on the amount of exploration activities that take place over the coming years. The review of Ireland's oil and gas</p>	<p><i>Vega, A., Corless, R. and Hynes, S. (2013). Ireland's Ocean Economy, SEMRU Report Series, ISSN 2009-6933 (Online)</i> Reference year: 2010</p>



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Maritime economic activity		Overview	Socio-economic indicators	Source & Reference year (ex. Eurostat 2010)
		Ireland.	fiscal terms in 2013 will have a significant impact on the levels of investment in the sector. For the immediate future, Ireland is forecast to be a small producer of gas.	
3.2	Offshore wind	<p>Ireland's location at the western edge of the Atlantic Ocean means that it is ideally located to take advantage of the emerging opportunities to harness power from marine renewable resources.</p> <p>Developing renewable energy is an integral part of Ireland's sustainable energy objectives and climate change strategy.</p> <p>It is estimated that the total accessible wave energy resource equates to 75% of the total electricity demand for</p>	<p>Irish renewable energy policy is framed in the context of European legal obligations specified in various Directives and Regulations, as well as other international and national targets. Ireland's target set by the EU is that 16% of all energy consumption (up from 3.1% in 2005) is to be from renewable energy sources by 2020.</p>	<p><i>Vega, A., Corless, R. and Hynes, S. (2013). Ireland's Ocean Economy, SEMRU Report Series, ISSN 2009-6933 (Online)</i> Reference year: 2010</p>
3.3	Ocean renewable energy			



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Maritime economic activity		Overview	Socio-economic indicators	Source & Reference year (ex. Eurostat 2010)
		Ireland in 2011. A number of wave energy devices have been tested in a site located in Galway Bay. While there are plenty of different wave energy device prototypes in development, a commercial wave energy device does not yet exist.		
3.4	Carbon capture and storage	n/a	n/a	
3.5	Aggregates mining (sand, gravel, etc.)	n/a	n/a	
3.6	Marine minerals mining	n/a	n/a	
3.7	Securing fresh water supply (desalination)	n/a	n/a	
4. Leisure, working and living				
4.1	Coastal tourism	Marine-based tourism and leisure is a large contributor to the Irish ocean economy and has historically been an important sector for the Irish coastal economy. Demand for	There is significant potential to develop adventure tourism in Ireland, which includes marine activities such as surfing, wind-surfing, kite	<i>Vega, A., Corless, R. and Hynes, S. (2013). Ireland's Ocean Economy, SEMRU Report Series, ISSN 2009-6933 (Online)</i>



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Maritime economic activity		Overview	Socio-economic indicators	Source & Reference year (ex. Eurostat 2010)
		<p>marine-based tourism and leisure comes from domestic and overseas visitors. Sea-angling companies actively advertise at overseas angling exhibitions generating interest in Ireland. Coastal attractions, such as the Cliffs of Moher, also receive high numbers of international visitors.</p> <p>Adventure tourism, which includes marine activities such as surfing, wind-surfing, kite surfing, sailing and kayaking, has a strong domestic market and is becoming increasingly popular.</p> <p>Marine based tourism and marine activities are offered all along the coast of Ireland.</p>	<p>surfing, sailing and kayaking. A range of supports have been identified and prioritised to deliver high quality adventure holidays around the country.</p> <p>There is also the potential to host international marine focused events in Ireland. Additionally, The Wild Atlantic Way project aims to develop a long-distance driving route stretching along the Atlantic coast from Donegal to West Cork that will achieve greater visibility for the west coast of Ireland in overseas tourist markets.</p>	Reference year: 2010
4.2	Yachting and marinas	There are 60 Irish coastal marinas, pontoons and jetties, with 800 berths.		<i>Irish Coastal Marinas, Pontoons and Jetties, Afloat Magazine (http://afloat.ie/resources/irish-</i>



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Maritime economic activity	Overview	Socio-economic indicators	Source & Reference year (ex. Eurostat 2010)
			<i>coastal-marinas)</i>
4.3	Cruise tourism	<p>Since the launch of Cruise Ireland in 1994, Ireland has enjoyed significant success attracting cruise ships. The strong growth of the European cruise industry has continued despite the global economic downturn. In 2012, the largest cruise ports in Ireland have recorded very positive cruise traffic levels, with Dublin Port and the Port of Cork.</p>	<p>While 2009 was a tough year for cruise line operators, the industry is performing well and modest growth is predicted in the coming years.</p> <p>While the number of cruise liners calling is estimated to increase, there have been concerns regarding the lack of infrastructure at Irish ports to handle the increased traffic of large ships and the implications for maritime safety.</p> <p>The recently published National Ports Policy aims at facilitating a competitive and efficient</p>



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Maritime economic activity	Overview	Socio-economic indicators	Source & Reference year (ex. Eurostat 2010)
		market for maritime transport services in Ireland. One of the main policy developments is the introduction of a categorisation of the ports sector into Ports of National Significance (Tier 1), Ports of National Significance (Tier 2) and Ports of Regional Significance.	
5. Coastal protection			
5.1 – 5.2	Coastal protection against flooding and erosion	<p>Under the coastal protection measure of the National Development Plan 2000-2006, €52.01 million was spent on coastal protection.</p> <p>Under the NDP 2007-2013, some €203 million will be invested under the Fisheries and Coastal Infrastructure Sub-Programme to ensure the</p>	Fishery Harbour and Coastal Infrastructure Development Programme



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Maritime economic activity	Overview	Socio-economic indicators	Source & Reference year (ex. Eurostat 2010)
		<p>future viability of the fishing industry, to bring the Fishery Harbour Centres up to international practice, to reduce congestion at the harbours and to improve safety for the fisheries sector.</p> <p>The Fishery Harbour and Coastal Infrastructure Development programme is administered by the Sea Fisheries Administration Division of the Department of Agriculture, Food and the Marine. The programme funds capital development projects at the six designated Fishery Harbour Centres and also co-funds projects at regional fishery harbours which are the responsibility of Local Authorities.</p>	

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Maritime economic activity	Overview	Socio-economic indicators	Source & Reference year (ex. Eurostat 2010)
5.3	<p>Protection of habitats</p> <p>% of marine protected waters in Ireland for 2012 is 0.4%</p> <p>The conservation of biodiversity in Ireland has been strengthened and expanded by EU law, most notably by the EU Birds Directive and EU Habitats Directive.</p> <p>'Actions for Biodiversity 2011-2016', Ireland's 2nd National Biodiversity Plan, launched on 9 November 2011 builds upon the achievements of the first plan and focuses on actions that were not fully completed and addresses emerging issues.</p> <p>The measures Ireland will take are presented as 102 actions under a series of 7 Strategic Objectives. Some of the actions within the plan are continuing</p>	<p>Increase in % of marine protected waters, or policy monitoring</p>	<p>% marine protected waters - World Bank 2012 data</p> <p>National Parks and Wildlife website – www.npws.ie</p>



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Maritime economic activity	Overview	Socio-economic indicators	Source & Reference year (ex. Eurostat 2010)
	<p>elements of existing work and many are requirements under existing EU Directives. The objectives cover the conservation of biodiversity in the wider countryside and in the marine environment, both within and outside protected areas; the mainstreaming of biodiversity across the decision making process in the State; the strengthening of the knowledge base on biodiversity; increasing public awareness and participation; and Ireland's contribution to international biodiversity issues, including North South co-ordination on issues of common interest.</p>		

Description of the economic and infrastructural scenario for the most relevant maritime economic activities + list of main players per activity

Maritime Transport - Sea-based transport accounted for 99% of the total volume and 95% of the total value of the goods traded in Ireland in 2010. It is the largest marine sector in the Irish ocean economy in terms of turnover, GVA, and employment. There has been a significant decrease in activity in recent years, in line with the general economy, as companies operating in the ports and maritime transport services area are largely dependent on the wider performance of the Irish economy to drive growth



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and investment. The growth in this segment can be linked to future domestic GDP forecasts. Recent reports by the Irish Maritime Development Organisation shows signs of recovery in the sector, with growth reported so far in the roll on/roll off freight segment in 2014. Recent policy developments at the national and European level have been of relevance for the shipping and maritime transport sector in Ireland. The National Ports Policy (2013) provides a vision for the future of the sector in line with European transport policy objectives. The European Atlantic Action Plan (2013) identifies the importance of improvements in accessibility and connectivity through the promotion of port cooperation as a priority for the development of the blue economy. The ports and maritime transport services sector in Ireland is likely to see modest growth over the next 3-5 years. A proposal to build an international shipping services centre in Dublin could facilitate a growth in employment. The scheme, similar to the International Financial Services Centre, is being promoted by ISSC Dublin, the Irish Maritime Development Office (IMDO) and IDA Ireland. It is expected that such a hub would attract firms involved in ship leasing, shipping finance, operations management and maritime education

Marine Tourism – is the second largest sector in the ocean economy in Ireland. Although it is hard to measure marine tourism, it is a significant contributor to the Irish economy when taking into account the direct and indirect values. As with maritime transport above, there has been a decline in marine tourism activity in recent years, but again this is in line with general tourism, and the wider economy in Ireland. Since the preparation of the two tourism development strategies – the Marine Tourism and Leisure Strategy (2007-2013) by the Marine Institute and the Fáilte Ireland (FI) Tourism Product Development Strategy (2007-2013) - major changes have taken place in the global and Irish economy which has impacted heavily on tourism. To reflect this, a number of policy documents/strategies relating to the survival, renewal and growth of the sector have been published and at a local level, strategies for marine tourism have been developed and implemented.

There is significant potential to develop adventure tourism in Ireland, which includes marine activities such as surfing, wind-surfing, kite surfing, sailing and kayaking. A range of supports have been identified and prioritised to deliver high quality adventure holidays around the country. There is also the potential to host international marine focused events in Ireland, which can positively impact on the Irish ocean economy. For example, an assessment of the economic value of the 2012 Volvo Ocean Race stopover in Galway showed that the event generated an economic impact of €60.5m in the Irish economy. Additionally, FI is involved in projects to rejuvenate Irish tourism such as The Wild Atlantic Way. This project aims to develop a long-distance driving route stretching along the Atlantic coast from Donegal to West Cork that will achieve greater visibility for the west coast of Ireland in overseas tourist markets.

