



An Roinn Talmhaíochta,
Bia agus Mara
Department of Agriculture,
Food and the Marine

Market Access Report 2023-2024



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Overview of agri-food exports by Top 20 Destinations in 2024

Table 1 Overview of Top 20 agri-food export markets in 2024

| Agri-food exports 2023 -2024 by country | Jan - Dec 2023 | | Jan -Dec 2024 | |
|--|-------------------|------------------|-------------------|------------------|
| | Exports | | Exports | |
| Country | €000 | Tonnes | €000 | Tonnes |
| United Kingdom | 6,827,592 | 4,334,489 | 7,283,447 | 4,759,819 |
| United States | 1,581,802 | 256,295 | 1,911,909 | 342,259 |
| Netherlands | 1,563,724 | 506,490 | 1,695,023 | 466,591 |
| France | 1,147,715 | 295,504 | 1,225,821 | 327,465 |
| Germany | 919,339 | 217,160 | 1,005,269 | 238,671 |
| China | 681,344 | 208,610 | 619,926 | 217,443 |
| Italy | 515,652 | 100,647 | 518,771 | 107,011 |
| Spain | 357,221 | 88,793 | 416,993 | 101,977 |
| Belgium | 392,744 | 129,663 | 411,250 | 137,567 |
| Poland | 283,802 | 76,958 | 299,044 | 77,082 |
| Sweden | 209,784 | 45,075 | 213,352 | 58,775 |
| Japan | 175,536 | 48,546 | 172,690 | 47,272 |
| Canada | 139,451 | 27,472 | 169,371 | 33,389 |
| Nigeria | 160,409 | 72,502 | 156,611 | 80,910 |
| Denmark | 175,361 | 84,628 | 146,260 | 48,904 |
| Philippines | 129,713 | 45,957 | 114,435 | 59,402 |
| Algeria | 97,051 | 30,850 | 105,145 | 28,453 |
| United Arab Emirates | 113,322 | 35,379 | 104,235 | 38,469 |
| Portugal | 88,831 | 16,803 | 98,272 | 19,465 |
| Saudi Arabia | 120,758 | 25,542 | 98,202 | 22,346 |
| Top 20 Totals | 15,681,152 | 6,647,360 | 16,766,026 | 7,213,270 |

The table above sets out in value terms the top 20 agri-food markets for 2024 and provides a comparison with how those markets performed in 2023.

Note: All data in this report is sourced from the CSO unless otherwise acknowledged.

Minister's Foreword

I welcome the publication of my Department's third Market Access Report, covering the years 2023 and 2024. I hope it provides an overview of the progress made in terms of market access to non-EU countries for Irish food producers and the ongoing efforts of my Department in this area. Irish agri-food exports to countries outside the UK and the EU increased from around €4.9billion in 2023 to €5.2billion for 2024.

Trade is essential for Ireland's export-focused agri-food sector. Our export success is built on our strong reputation for quality, safe and nutritious food, produced in an environmentally sustainable and welfare friendly way, by Irish farmers and fishermen.

One of the key themes of Food Vision 2030 is market development and my Department is focused not just on the development of new non-EU or third country markets but also enhancing and retaining access to existing international markets.

Securing market access includes activity at political, diplomatic, and official/technical levels. The work of staff right across the Department is central to this effort. As Minister of State with responsibility for new market development in the previous Government I saw firsthand the value of trade missions and the need to build relationships at Ministerial and official level which support the Irish agri-food sectors ambition to develop, consolidate and diversify its footprint on international markets.

In terms of market access for agricultural products the following are some of the achievements since this Government entered office:

- Expansion of dairy plant approvals for new and existing Irish companies in countries such as China, South Korea, Indonesia, Morocco, Costa Rica, Honduras, Colombia.
- Agreement with the Saudi Food and Drug Authority (SFDA) for the health and technical requirements was finalised to allow for the import of milk and milk products including infant formula into the Kingdom of Saudi Arabia.

- Agreement on a Veterinary Health Certificate, to commence, the export of Chilled and Frozen Bone-in and Boneless Beef (excluding offal) to Thailand.
- Agreement on a new beef Export Health Certificate which allows for an expansion of the range of beef products eligible for export to Japan.

Our success in gaining and retaining market access is directly related to Ireland's excellent reputation for food safety and traceability. Staff involved in the protection of public and animal health, the provision of laboratory services and the certification of exports, are all directly involved in supporting the Department's efforts to access new markets, through the provision of critical information to competent authorities in third countries, the facilitation of inspection visits by third country officials, or the agreement of export health certificates.

As Minister for Agriculture, Food and the Marine my focus is to continue to support the agri-food industry. While there are uncertainties currently around the global trading landscape, I am confident that the agri-food sector will once again rise to these challenges.



Martin Heydon T.D.
Minister for Agriculture, Food and the Marine

Minister of State's Foreword

I am very pleased to have been appointed Minister of State in the Department of Agriculture, Food and the Marine with specific responsibility for Food Promotion, New Markets, Research and Development.

The agrifood sector continues to play a pivotal role in Ireland's economy and environment, particularly in rural and coastal communities. The market access work undertaken in 2023 and 2024 demonstrates our commitment to the long-term sustainability of our sector.

Ireland's agri-food exports reached €19 billion in 2024, in over 180 countries and confirms the quality, and global reputation of our food system.

Market access successes in the course of 2023 and 2024 included:

- the opening of the Korean market to Irish beef;
- seafood exports to the United Kingdom and non-EU markets reached a combined value of €294 million, representing a 12% increase compared to 2023;
- secured enhanced market access for Irish infant formula and follow on formula products to the Algerian market.

Ireland's economic success has always been underpinned by our openness to trade.

The government's recently published Action Plan on Market Diversification sets out a number of actions for the agri-food sector. This Action Plan aligns with the Food Vision 2030 strategy and the ongoing work, carried out with the support of Bord Bia, Enterprise Ireland and our embassy network around the world, to promote high-quality Irish food and drinks and assist companies in building on opportunities in a variety of markets and market segments.

Ultimately our success is based on our continued focus on food safety, high quality produce, innovation, and market development, delivered in partnership with Government agencies and stakeholders across the supply chain.

I would like to thank everyone who has worked so hard to ensure our success so far, my Department, our Attachés, the Embassy network, Bord Bia and industry. The role of the Department is to open up these markets but it is then up to the industry, with support from the Department and Bord Bia, to avail of these opportunities.

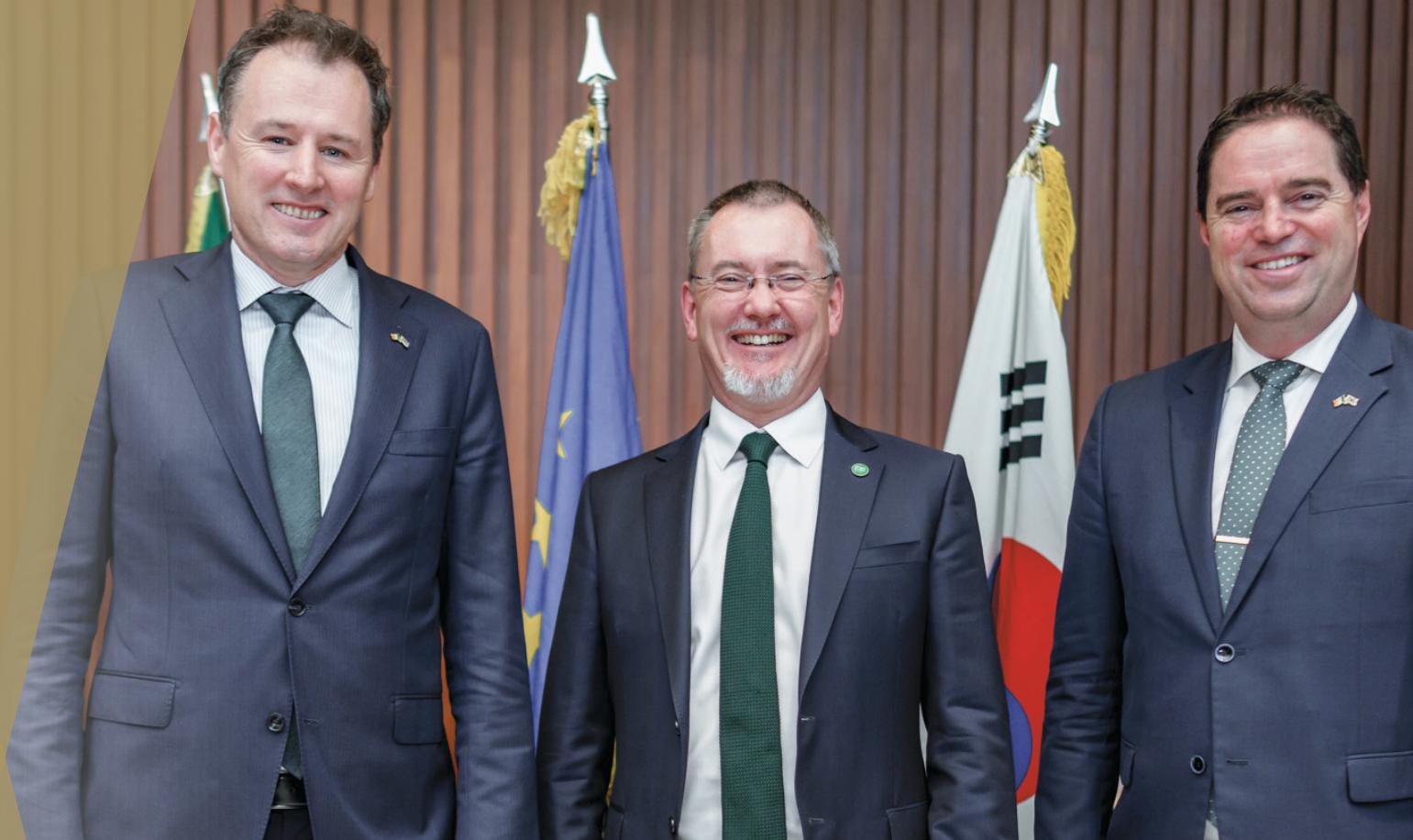
Lastly, I look forward to working with you in securing more new markets, developing and expanding our existing markets.



Noel Grealish T.D.
Minister of State

CHAPTER

1



Trade Missions 2023 and 2024



Ministerial-led Trade Missions play a key role in supporting the agri-food sector's ambition to develop, consolidate and diversify its footprint in international markets. They provide an opportunity to showcase Ireland as a producer of high quality, safe and sustainably produced food and drink products.

Through collaboration with our Diplomatic and Attaché network, Bord Bia, Enterprise Ireland, Teagasc and Sustainable Food Systems Ireland (SFSI), these trade missions enable Government-to-Government negotiations on market access issues and promotion of Irish food and drink products to assist Irish companies in maximising opportunities

to export their agri-food products, ultimately increasing Irish agri-food exports on the international stage.

In 2023 and 2024, the Department carried out a successful programme of Ministerial-led trade missions and overseas visits, which are outlined in greater detail in this chapter.



Trade Missions 2023 and 2024



China 2023

China continues to be a strategically important market for Irish agri-food products.

In April 2023, Minister Heydon attended the 3rd China International Consumer Products Expo in Hainan and met with several Irish food and drink companies and their Chinese customers. The focus was on ensuring the ongoing development of the Irish beef sector and bringing the message of Ireland's high quality and safe agri-food offering to an even wider audience in China. The Minister also travelled to Shanghai where he held a series of high-level engagements with Irish agri-food companies and their Chinese customers, facilitated by Bord Bia.

In May 2023, Minister McConalogue led the first full post-Pandemic in-person Trade Mission to China. The Minister's itinerary included several political meetings with his Chinese Ministerial counterparts in Beijing where the discussions focused on various meat market access issues. These meetings supported the resumption of access for Irish beef in early 2023 and included discussion on market access issues for Irish products to China as well as approaches to sustainable food systems and food security.

Minister McConalogue also held a number of engagements while in Beijing to promote Ireland's high quality food offering, meeting leading players in the Chinese Food Industry and hosting an Enterprise Ireland senior executive business breakfast focussed on Agri-Tech opportunities. In the Shanghai leg of the trade mission, the Minister led a range of activities promoting of Ireland's beef, pigmeat, seafood and spirit drinks, including at the SIAL Food and Beverage trade show, top level customer meetings on beef, Bord Bia's EU Meat Promotion Seminar, and masterclasses showcasing Irish seafood and Irish whiskey.

The Department is currently engaging with the Chinese authorities to reopen the market for Irish beef exports.



Minister McConalogue addressing a dairy conference in China



Marie Dunne, Assistant Secretary General in the Department of Agriculture, Food and the Marine addressing a trade seminar in China.

South Korea 2023

In October/November 2023, Minister McConalogue joined An Taoiseach and other Ministers on the inaugural Whole of Government Trade Mission to South Korea. Minister McConalogue's primary objective here was the progression of Ireland's market access application for beef exports to South Korea. The political engagement undertaken on this Trade Mission by Taoiseach and Minister McConalogue resulted in the Korean Parliamentary Committee approving the application before end of 2023.



Jim O'Toole, Bord Bia, Minister McConalogue and Minister Heydon launching beef onto the South Korea Market in 2024

China and South Korea 2024

In September 2024, Ministers McConalogue and Heydon led a joint Trade Mission to China and South Korea. Following on from the announcement in May that Ireland had secured access for Irish beef to the Korean market, this mission created an ideal opportunity for focused and targeted food promotion. Both Ministers used this Trade Mission to formally launch Ireland's top-class beef into the Korean market in Deoksugung Palace in Seoul.

Due to the huge potential it represents for Irish exporters as the fourth largest meat importer globally, South Korea was designated as a priority target market for Irish Beef. The formal opening of the market came as a result of the Department's dedicated work in collaboration with the Embassy of Ireland in Seoul, Bord Bia, the European Commission and other industry stakeholders. It also provided an opportunity to progress Ireland's applications to further expand market access in both countries and highlighted the Irish agri-food sector as a global leader in high quality, safe and sustainable food and drink products.

Both Ministers also engaged with government, key stakeholders and important commercial partners in the Korean food industry and addressed the Sustainable European Beef from Ireland Trade Seminar.



Ministers McConalogue and Heydon both attending events on their trade mission to South Korea



United States

The United States continues to be a key market for Irish agri-food and drink exports and was worth €1.6 billion in 2023, the bulk of which comes from dairy and beverages.

In March 2024, Minister Hackett led Trade Mission to the US visiting Austin, Houston and Seattle to build on and promote Ireland's reputation in agri-food products in the United States, focusing on dairy produce and beverages. During the four-day itinerary, Minister Hackett met with leading US retail, foodservice and distributors who are customers of Irish food and drink companies. This involved promotion of Irish dairy, meat, prepared consumer foods and beverages and also the opportunity to highlight the sustainability of Irish food exports and the continued growth of the Irish organic sector.

In Austin, Minister Hackett also attended a "Spirit of Ireland" event hosted by Bord Bia in partnership with the Irish drinks industry. Spirit of Ireland is an immersive event focused on building awareness of Irish spirits within the US alcohol trade industry. The event, attracted up to one hundred alcohol buyers and representatives from 18 Irish spirit brands.

The first plant was approved and listed by the USDA in April 2025 for sheep meat.



Minister Hackett at 'Spirit of Ireland'

South-East Asia

Over 2023 and 2024, Minister Heydon and Minister Hackett led Trade Missions to South-East Asia, reflecting the export potential for Irish agri-food products in the region.

Malaysia and the Philippines

In November 2023, Minister Heydon led a Trade Mission to Malaysia and the Philippines. The Philippines is already a successful market for Irish agri-food exports and is the largest overseas market for Irish beef outside of fellow EU Members States and the UK, valued at €50 million in 2022. With a population of over 110 million and growing prosperity, opportunities exist in the Philippines for the further development of trade. Malaysia was Ireland's 30th largest destination for agri-food exports in 2022, with exports totalling approximately €68 million or 26,000 tonnes.

Minister Heydon had engagements with Government counterparts exploring opportunities for further collaboration between Ireland and Malaysia and Philippines as series of promotional events for Irish agri-food. While in Manila, the Minister also met with the Secretary of the Department of Trade and Industry. The Ministers also discussed agri-food cooperation and knowledge transfer between both countries, including the potential for Sustainable Food Systems Ireland engagement to examine potential areas of co-operation.

Both legs of the Trade Mission concluded with a large commercial reception which extolled the "Flavours of Ireland". These successful events were attended by a wide range of current and potential customers of Irish food and drink as well as members of the Irish diaspora.

Access for the export of duckmeat was granted by Malaysian authorities in July 2025.

Thailand and Vietnam

In October 2024, Minister Hackett led a successful Trade Mission to Thailand and Vietnam with a primary focus on the development of opportunities to nurture key political relationships and further progress market access applications in both countries. During the Trade Mission, the Minister met with the Minister of Agriculture and Co-operation in Thailand where significant progress was made on securing market access for Irish beef to Thailand through the agreement of a veterinary health certificate. With a population of over 70 million and a significant number of food service establishments with a strong demand for quality, sustainable beef, the Thai market presents an excellent opportunity for Irish farmers.

In Vietnam Minister Hackett met with the Ministry of Agriculture and Rural Development welcoming the fact that a Vietnamese audit team visited Ireland in 2024 to audit our systems of beef controls as part of our application for access for Irish beef to the Vietnamese market. Significant progress was also made in relation to cooked pigmeat.

Access for beef to Thailand was subsequently granted in March 2025 and to Vietnam in December 2025.



Minister Hackett meeting Thamanat Prompow former Minister for Agriculture and Cooperatives in Thailand

West Africa

In September 2023, Minister McConalogue led a Trade Mission to Nigeria and Senegal which focused on opportunities to collaborate at Government-to-Government level on sustainable food systems and included a development co-operation focus in addition to political and commercial elements. The Minister attended a series of meetings organised by Bord Bia and hosted a Trade Reception for a wide range of Nigerian customers for Irish food and drink products and a number of their Irish suppliers as well leading figures in the Nigerian business community.

The Trade Mission concluded in Senegal where senior officials from the Department, together with Bord Bia and Ireland's new Embassy in Dakar, engaged with Senegalese Ministries of Agriculture, Rural Development and Animal Husbandry and regional Directors of UN Agencies including the World Food Programme (WFP), the Food and Agriculture Organisation (FAO) and the International Fund for Agricultural Development (IFAD). There were also a number of trade meetings and Bord Bia hosted a large agri-food business networking event for Irish and Senegalese companies, supported by the Irish Embassy in Dakar.



International Trade Exhibitions

In addition to the formal trade missions the Ministerial team also visited and supported the Irish agri-food sector at a number of international trade exhibitions.

Biofach

In February of 2023 and 2024 Minister Hackett visited Germany to support Irish exhibitors at the BIOFACH Organic Trade Fair. In 2023 Minister Hackett's visit began in Berlin for political and official meetings. Germany is one of the top 10 export markets for Irish food and drink and BIOFACH is the world's largest organic trade fair.

Anuga

Minister Heydon visited the Anuga trade show in Cologne in the autumn of 2023 and helped promote Ireland's reputation as a world class sustainable food producer and supplier.

Seafood Expo Global

In April 2024, Minister McConalogue attended the Seafood Expo Global in Barcelona, Spain, where the focus was on promotion of Irish Seafood. Seafood Expo Global is the world's largest seafood trade fair. Those in attendance include owners, directors, executive purchasing managers, category managers, private label buyers and equipment and packaging buyers from retail, foodservice and other categories including airlines, hotel chains, cruise liners and collective catering companies for corporate businesses and public entities.

SIAL

In October 2024, Minister of State Heydon visited SIAL in Paris. It was the Minister's second opportunity to visit to SIAL and saw first-hand how Irish exporters stand out on the competitive global stage.



Minister Hackett at Biofach Organic Tradefair, Peter Ottman, Jim O'Toole Bord Bia and Nicholas O'Brien Ambassador.

CHAPTER 2

Market Access Update by Sector



Overview of Market Access

Ireland's vibrant Agri-Food sector, which includes primary production in farming, fishing and forestry, and the processing and manufacture of food, beverages and wood products, is a significant contributor to economic growth throughout the country.

A key focus of Food Vision 2030 strategy, the strategic framework for the development of Ireland's agri-food sector, is to grow the value of Ireland's agri-food exports on international markets. Food Vision identifies a number of actions targeted at realising this value growth ambition. These actions include new market diversification and promotion activities.

Agricultural Attachés

During 2023 and 2024 the Department had agricultural Counsellors/Attachés in the following locations: London, Washington DC, Berlin, Brussels, Geneva, Beijing, Tokyo, Mexico, Paris, Rome, Abu Dhabi and Seoul. This network works with colleagues at the various Irish Embassies and other state agencies to promote trade development and support market access opportunities for high quality Irish produce in their respective regions.

The main objectives of the overseas Attaché network is to establish and maintain access and influence; research and identify, purposefully target and build the support of key people of influence who can make a difference on the Department's policy priorities. Agricultural Attachés monitor and report on the trading environment and wider trade policy developments in the region.

The EU based Attachés are a key interlocutor on EU agriculture and fisheries policy development and their locations are a large and growing market for Irish agri-food exports, whilst Attachés in Paris, Geneva and Rome also engage with multilateral institutions in their respective cities such as the OECD, the WTO, FAO and the UN World Food Programme.

Our Non-EU Attachés are strategically posted to concentrate primarily on market access and trade development for Irish Agri-food sector. The Attachés plays a critical role within the Embassy in assisting and promoting Irish business interests in the agriculture and food sector and advancing the interests of Irish companies and individuals involved in the agri-food sector. These Attachés work in close collaboration with colleagues across the Embassy network and Bord Bia colleagues in the region of their posting.



Agricultural Attachés are crucial to Ireland's efforts to gain new market access, and also, to broaden Ireland's existing levels of trade.

Market Access Portal

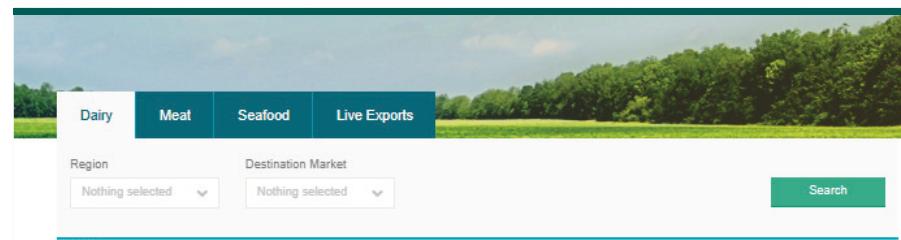
The online Market Access portal provides a repository of market access and export information on open agri-food markets around the world including dairy, meat, seafood and live animals. Content is reviewed on an ongoing basis and additional categories can be added as the need arises.

The portal is available at: <http://www.marketaccess.agriculture.gov.ie/>

The information provided includes certification arrangements, exporter terms and conditions, individual country trading statistics and the typical products exported to individual markets.

This information is updated on an ongoing basis when there are changes in trading conditions or when new markets become accessible. The portal also contains specific e-mail addresses for each sector where further information may be requested from Department of Agriculture, Food and the Marine staff.

The web portal provides easy access for food business operators and their agents to access market information without the need to contact Departmental staff.



Welcome to Market Access



An Roinn Talmhaíochta,
Bia agus Mara
Department of Agriculture,
Food and the Marine

Welcome to the Department of Agriculture, Food and the Marine's Market Access Information portal. This website has been developed following on from the Minister's 7 Point Action Plan on Intensifying Market Access efforts in 2017.

While information in relation to markets for agri-food exports was previously available on the main Department website and from the relevant divisions within the Department, this portal brings together into one location the full range of open markets and products, and the relevant certification conditions into a user-friendly manner for exporters. Therefore this will be a very useful one-stop-shop for exporters and we will ensure that the site will be kept updated, as new markets are opened and if any certification conditions change.

Any feedback from exporters and our business operators is welcome and can be sent to info@agriculture.gov.ie

Export Information

For specific information regarding the exporting of products from Ireland please choose your sector below.

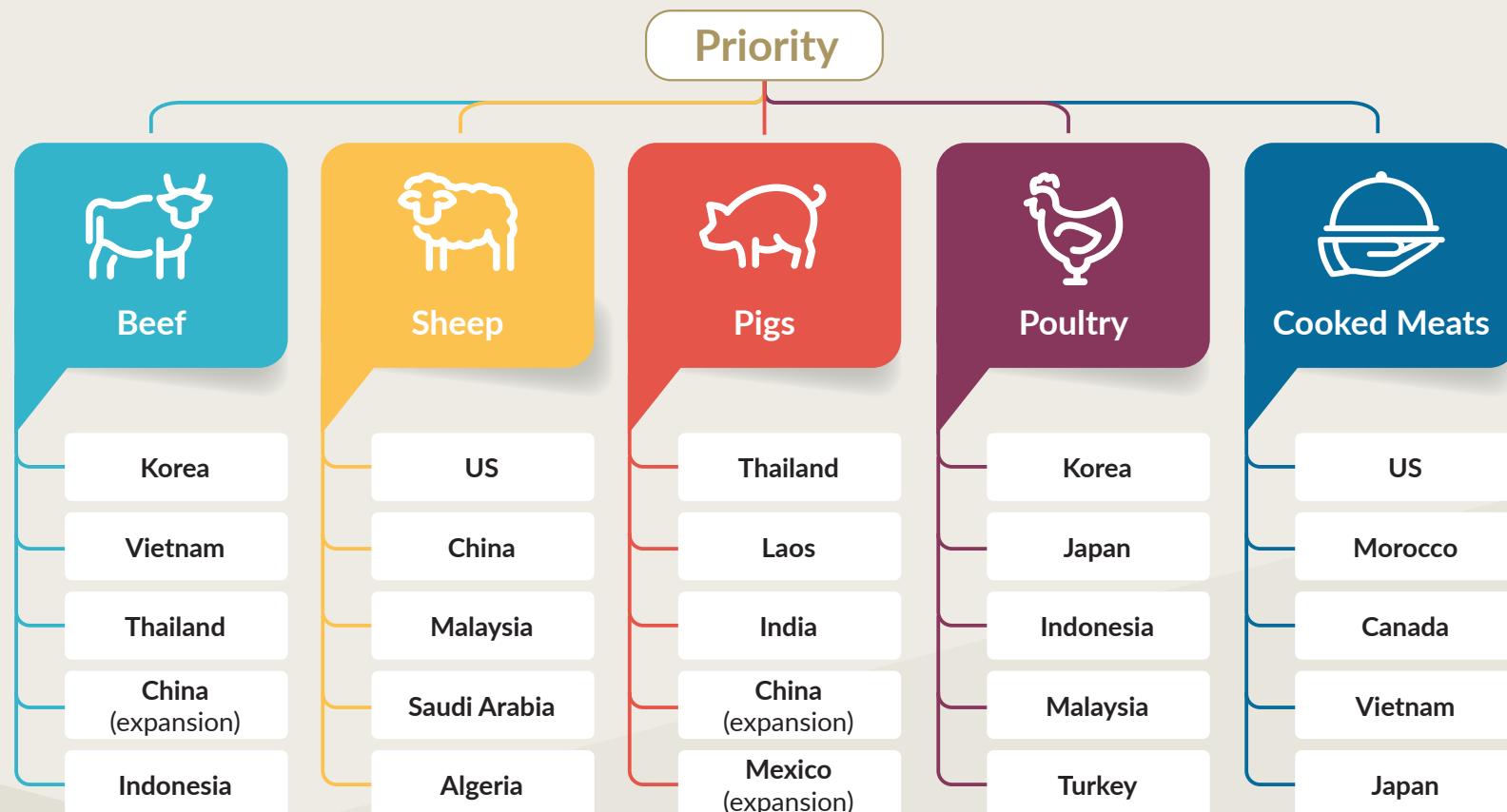


Market Profiling

The Department and the meat industry, in conjunction with the Embassy network and Bord Bia, identified priority markets to be targeted for market access applications and trade missions.

Table 2 Meat Market Access Priorities 2024 -2025

Meat Market Access Priorities 2024 -2025



Overview of the Meat Sector

The agri-food sector is a key contributor to the Irish economy. Ireland's temperate climatic conditions give our agriculture produce its particular characteristics and competitive advantage. Our island location is also beneficial to our animal health status, as a natural barrier against disease.

However, we are by no means an isolated industry; Ireland aims to be a world-leading source of sustainably produced meat produce, and we are eager to apply our expertise internationally.

Our traceability system is at the heart of our food safety system and provides assurances to customers and consumers at home and abroad about the origin and traceability of meat products, protects animal and human health and secures and maintains markets for Irish producers.

The bar charts opposite and overleaf show Ireland's meat exports to global markets across the four major meat species. The proportion of exports by value destined for markets outside the UK and EU ranges was 28% for pigmeat but only between 6% and 7% for poultry, beef and sheepmeat as of 2024. A noteworthy feature in the context of Brexit is that sheepmeat exports to the UK amount to only 13% of total exports. The most valuable export market for sheepmeat was France which accounted for €136.9 million or 34.9% of the total in value terms. Overall, third countries accounted for 10.8% of all meat exports with 45.9% going to the UK and 43.3% going to EU markets.

Fig 1: Total meat exports by value 2023

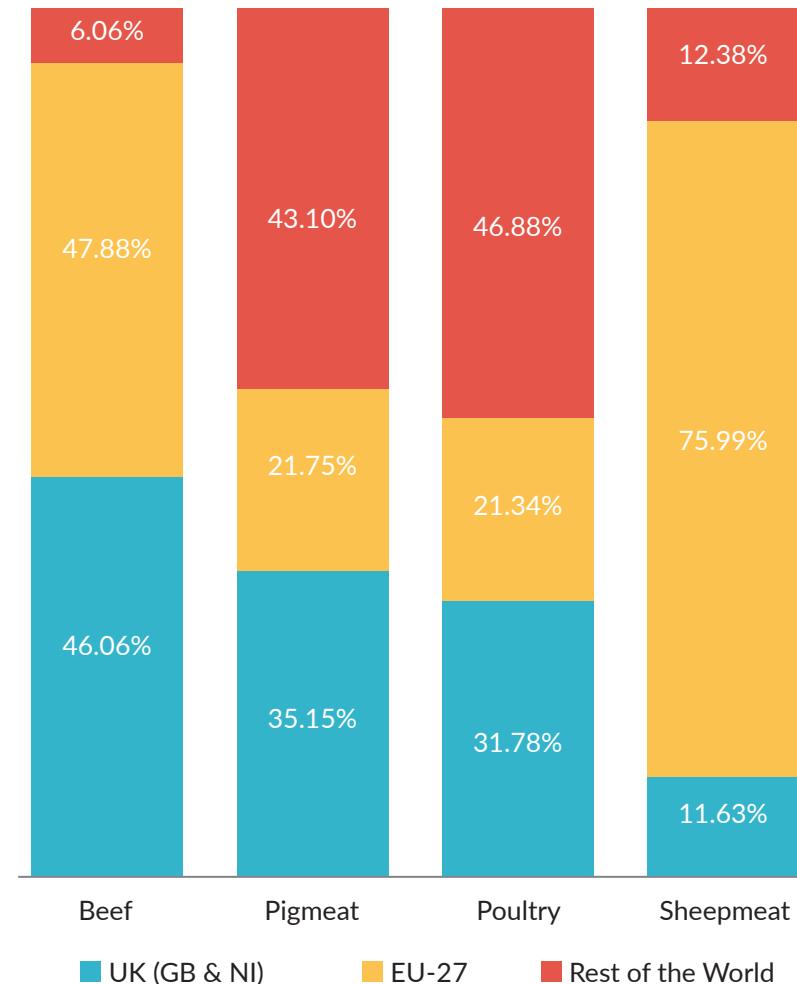


Fig 2: Total meat exports by value 2024

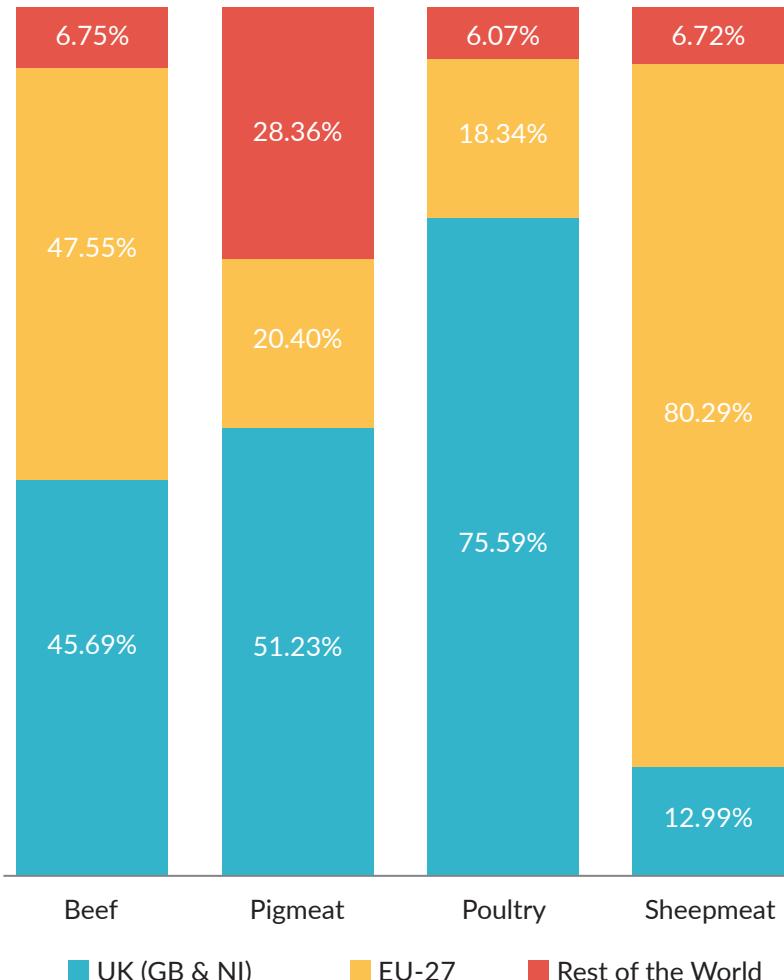


Table 3 : Total meat export by value 2023

| 2023 Export Value (€ 000) | Beef | Pigmeat | Poultry | Sheep | Total Sum |
|---|-----------|---------|---------|---------|-----------|
| UK | 1,372,820 | 306,433 | 90,788 | 48,127 | 1,818,168 |
| EU27 | 1,426,836 | 189,594 | 60,956 | 314,484 | 1,991,871 |
| Rest of the World i.e. (Third Countries) | 180,533 | 375,789 | 133,926 | 51,256 | 741,504 |
| Overall Total | 2,980,189 | 871,817 | 285,670 | 413,867 | 4,551,543 |

Table 4: Total meat export by value 2024

| 2024 Export Value (€ 000) | Beef | Pigmeat | Poultry | Sheep | Total Sum |
|---|-----------|---------|---------|---------|-----------|
| UK | 1,417,290 | 455,679 | 222,751 | 50,993 | 2,146,714 |
| EU27 | 1,474,979 | 181,459 | 54,060 | 315,278 | 2,025,776 |
| Rest of the World i.e. (Third Countries) | 209,414 | 252,271 | 17,888 | 26,399 | 505,971 |
| Overall Total | 3,101,683 | 889,409 | 294,699 | 392,670 | 4,678,461 |



Meat markets opened or enhanced and ongoing work

Irish Agri-Food has been successful in accessing and developing new market opportunities. Diversifying and developing markets continue to be a priority for Meat Market Access.

Trying to gain new market access, or enhance and improve existing market access, has been a particularly prominent feature of recent Ministerial Trade Missions. Meat and Milk Policy Division works in close cooperation with Bord Bia, the agricultural attaches, and the embassy network of the Department of Foreign Affairs and Trade to secure new markets for meat. The Division also hosts a consultative group with Industry which meets quarterly.

Algeria

Ireland has had beef access to Algeria for many years and improved their access in April 2024.

Following discussions with the Algerian authorities, authorisation for beef exports was extended to include vacuum-refrigerated beef. This was an expansion of the existing access for fresh and frozen beef. Algeria was a priority market for sheep meat and access was secured in 2024.

Japan

Following an audit in October 2024, Japan confirmed its intention to engage on expanding the range of beef for export. The Department engaged with the Japanese authorities and expanded access for beef products was subsequently granted in June 2025.

South Korea

In September 2024 Minister McConalogue and Minister Heydon formally launched Irish beef onto the Korean market after many years of negotiations.

Thailand

Thailand has been a priority market for beef for many years. Following an audit in 2023, a Veterinary Health Certificate (VHC) was agreed in 2024.

USA

An agreement was reached in 2022 between the Department and United States Department of Agriculture (USDA) on a bilateral sheep meat Veterinary Health Certificate. In March 2024, following the extension of Ireland's equivalency for sheep meat to the end of 2024, the Department invited interested FBOs to submit their work programme. The first plant was approved and listed by the USDA in April 2025.

Vietnam

The Department hosted an audit team from Vietnam's Department of Animal Health (DAH) in October 2024. They carried out a systems audit of Ireland's beef production and processing sector, visiting factories, farms, laboratories and Department premises.

Upon receipt of the audit report and resolution of any outstanding issues, a Veterinary Health Certificate (VHC) will be agreed.

In relation to pigmeat, agreement was reached in October 2024 on a revised VHC which extends Ireland's access to include cooked/heat-treated pigmeat.

Selected 2024 Achievements

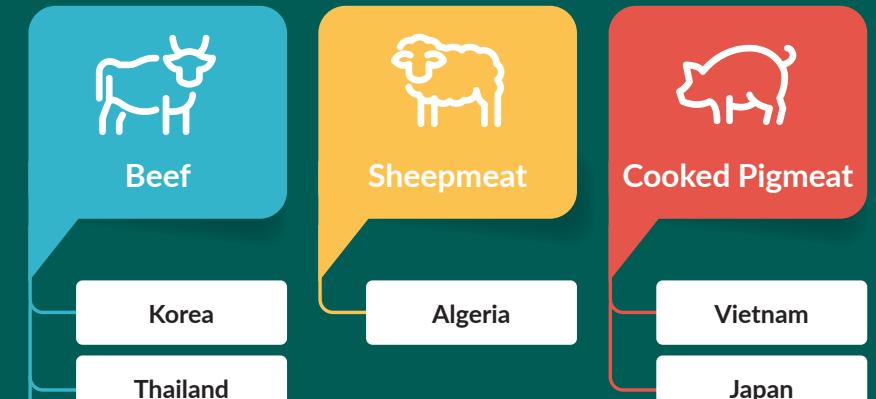


Table 5: Third country markets for which export agreement has been secured since 2021

| Country | Meat | Date |
|------------------|---|---------------|
| Japan | Beef Burgers | March 2021 |
| Papua New Guinea | Beef/Beef Offal | July 2021 |
| Singapore | Bone-in Beef from cattle of any age and Processed Beef Products | February 2022 |
| Saudi Arabia | Beef from cattle of any age | April 2022 |
| Namibia | Poultry | June 2022 |
| Malaysia | Pigmeat | November 2022 |
| Algeria | Sheep meat | March 2024 |
| Korea | Beef | May 2024 |
| Thailand | Beef | March 2025 |
| USA | Sheepmeat (first plant listed by USDA) | April 2025 |
| Libya | Beef | May 2025 |
| Malaysia | Duck meat | August 2025 |
| Vietnam | Beef | Dec 2025 |

Overview of the Audit Process

The initial stage of the Market Access process commences with the identification of priority markets for different species. This is conducted every 18 months or so in consultation with industry, Bord Bia and our Embassy and Attaché network. Once identified, enquires are made of the relevant country as to the import and health requirements governing trade in products of animal origin (POAO). The importing country often requests significant information, usually by way of a detailed questionnaire. In the majority of instances, an onsite audit visit by the competent authorities of the third country is required. This audit is the key element of a market access application.

Audit Schedule for 2023

Mexico

A pigmeat recertification audit took place in early 2023, which consisted of visits to 13 pigmeat establishments. In September following the audit, Mexican Authorities SENASICA granted approval of an extension for plants already approved to export.

Audit Schedule for 2024

In 2024, DAFM and Meat Market Access Unit hosted five audit visits.

Korea

In April, a beef audit from both competent authorities in Korea took place. In May 2024, the Export Health Certificate was agreed, with all 7 audited plants approved to export beef to Korea. This successful outcome is the subject of a separate case study in this Report.

Separately, two poultry meat audits took place. The first one in June and the second in October from a separate Competent Authority.

In June, the audit itinerary included visits to a hatchery, breeding and finishing farms (poultry and duck), poultry and duck processing plants. It included visits to the Department's laboratory complex at Backweston, a DAFM Regional Office and a visit to Dublin port.

In October, a further audit was carried out by the second Competent Authority adhering to a similar itinerary.

Vietnam

In October, a Vietnamese beef systems audit visited two plants, two beef farms and one pig farm. Auditors also visited a DAFM regional office and the Department's laboratory complex at Backweston, where presentations were given on details required to complete the audit.

Japan

Also in October, a Japanese beef recertification was carried out. Three plants were visited by the auditors. To ensure the smooth operation of the audit, a number of detailed presentations were provided ahead of their visit.

The Department works closely with Bord Bia and industry to ensure the audit visits to Ireland run smoothly and audits are closed out successfully.

Summary of 2024 audit

In 2024 DAFM hosted:

April

A beef audit from both competent authorities in Korea.

June & October

Two poultry meat audits, one from each Competent Authority in Korea.

October

A beef systems audit from Vietnam and beef recertification audit from Japan

Live exports 2023-2024

Trade in Live Animals

The movement of live animals from Ireland to other EU Member States countries play a valuable role in maintaining a viable livestock sector.

DAFM supports the intra-community trade and export of live animals as it plays an important part in competition in the market-place particularly for cattle. In that context, however, DAFM demands the highest standards of animal welfare during transport.

The value of live animal trade to the EU during the period January 2023 – November 2023 was estimated at €698m which rose to €745m for the same period in 2024 (source: CSO).

Live Export Statistics

The majority of live animal trade continues to take place between Ireland and other EU Member States.

During 2023 and 2024, increased volumes of bovines were dispatched from Ireland to Spain, Poland, Romania and Croatia. Demand from the Netherlands dipped but still remains one of the main destinations for live Irish bovines. The total number of live bovines moved to other EU Member States increased from 251,460 animals in 2023 to 279,313 animals in 2024.

Exports to Third (non-EU) Countries also increased year on year. Exports to Northern Ireland increased slightly whilst exports to Great Britain doubled to 6,799 live bovines exported in 2024. Exports to Morocco accounted for approximately 25% of the total non-EU bovine exports comprising of nearly 25,000 animals. Exports to Tunisia also increased from 235 animals in 2023 to 1,390 in 2024.

Live Export Market Access and Maintenance

Revised certificates were proposed and agreed to by Algeria in May 2023 for trade in cattle for breeding and production. The revised certificates recognised Irelands achievement of negligible risk status (recognised by WOAH in May 2021) for BSE.

A trade certificate for the export of sheep to Algeria was also agreed in February 2024.

A trade certificate for the export of breeding bovines to the United Arab Emirates (UAE) was agreed in September 2023.



Table 6: Live cattle exports within the EU by year

| Live cattle exports by destination country (EU) by year | | | | |
|---|----------------|----------------|----------------|----------------|
| | 2024 | 2023 | 2022 | 2021 |
| Spain | 109,622 | 75,043 | 73,239 | 73,538 |
| Netherlands | 78,801 | 107,284 | 97,780 | 49,179 |
| Italy | 40,750 | 36,465 | 29,789 | 29,811 |
| France | 438 | 935 | 79 | 2,628 |
| Greece | 3,832 | 2,229 | 2,653 | 2,245 |
| Belgium | 6 | 0 | 0 | 2,044 |
| Hungary | 7,002 | 4,175 | 1,463 | 1,863 |
| Poland | 25,581 | 16,987 | 3,973 | 1,544 |
| Portugal | 662 | 280 | 113 | 190 |
| Slovakia | 950 | 1,584 | 1,293 | 121 |
| Lithuania | 890 | | 101 | 120 |
| Bulgaria | 64 | 2,403 | 450 | 119 |
| Romania | 6,102 | 3,532 | 76 | 100 |
| Luxembourg | 0 | 0 | 4 | 49 |
| Germany | 10 | 0 | 8 | 3 |
| Croatia | 4,239 | 433 | 62 | 0 |
| Czech Republic | 17 | 0 | 17 | 0 |
| Estonia | 0 | 0 | 7 | 0 |
| Austria | 0 | 0 | 4 | 0 |
| Slovenia | 347 | 73 | 0 | 0 |
| Latvia | 0 | 37 | 0 | 0 |
| Total | 279,313 | 251,460 | 211,111 | 163,554 |

Table 7: Live cattle exports to countries outside the EU

| Live cattle exports by destination country (non-EU) by year | | | | |
|---|---------------|---------------|---------------|---------------|
| | 2024 | 2023 | 2022 | 2021 |
| Northern Ireland | 58,826 | 54,405 | 48,794 | 72,782 |
| Great Britain | 6,799 | 3,637 | 3,649 | 4,021 |
| Russia | 0 | 0 | 111 | 244 |
| Kosovo | 61 | 34 | 66 | 44 |
| Libya | 842 | 2,405 | 9,196 | 6,467 |
| Kazakhstan | 0 | 0 | 0 | 500 |
| Türkiye | 0 | 2,229 | 5,571 | 0 |
| Egypt | 0 | 0 | 3,617 | 0 |
| Jordan | 0 | 0 | 3,387 | 0 |
| Lebanon | 0 | 1,070 | 791 | 0 |
| Algeria | 550 | 1,875 | 0 | 0 |
| Tunisia | 1,390 | 235 | 0 | 0 |
| Morocco | 24,989 | 30 | 0 | 0 |
| Israel | 5,466 | 6,840 | 0 | 0 |
| Albania | 438 | 0 | 0 | 0 |
| Belarus | 76 | 0 | 0 | 0 |
| Total | 99,437 | 72,760 | 75,182 | 84,058 |



Other Agricultural Products

Germinal products

Certificates for the export of bovine semen were agreed with Mexico and Kazakhstan in 2023. Exports of bovine, porcine and equine germinal products to a number of third countries continued to take place under previously agreed certificates.

Certificates for the export of equine semen to Kuwait and porcine semen to Kenya, were agreed in 2022 and utilised in 2023.

Ongoing work to achieve access to the Chinese market for both bovine and porcine germinal products also continued.

A concerted effort was made to minimise the impact on exports of germinal products to GB, arising from new certification requirements associated with Brexit.

In consultation with exporters, DAFM commenced the negotiation of market access for germinal products to a number of countries including, Peru, Ecuador, Korea and Japan.

Animal by-products

Agreement was reached with Chile on the text of a veterinary certificate for the export of Processed Animal Protein in 2023.

Agreement was also reached on the text of a veterinary certificate for Petfood for Vietnam and Mexico (porcine only) in 2024.

Overview of the Dairy Sector

Ireland is a global leader in the dairy sector in terms of the safety, sustainability, and traceability of our processing and facilities and on our justified and hard-earned reputation for quality. The quality and nutritional value of Irish milk produced from our sustainable grass-based production systems gives us a key competitive advantage. Ireland is rated as having the most carbon efficient dairy production in the EU, primarily attributable to our grass-based systems of production.



In 2024, Irish dairy exports reached €6.5 billion with approximately 1.78 million tonnes of dairy product being exported to over 140 different countries. This represented a +2.8% value growth and +12.2% volume growth from 2023. In 2024, dairy amounted to 34% of total Irish agrifood exports.

Butter is our leading dairy product in terms of value of exports and had an exceptional year in 2024, especially in the US and continental Europe. Butter exports amounted to €1.6 Billion (250,374 tonnes) in 2024. This was the sixth consecutive year the value of Irish butter exports exceeded €1 billion in 2024 and was a 21.1% increase on 2023 value. The volume of butter exports increased by 0.9% from 2023. Butter accounted for 25.7% of total dairy exports in 2024. Our other main dairy exports include Cheese, Infant Formula, Milk Powders, Casein and Fat Filled Powder.

North America, the EU and the UK markets accounted for 68% of exports in value terms in 2024. The EU remains largest primary destination for Irish dairy, accounting for 38% of all value exports in 2024, up from 32% in 2023. Irish dairy exports to the UK account for 17% of total Irish dairy exports. Cheese and butter account for over 50% of dairy exports to the UK. North America grew its share of Irish dairy exports to 13% in 2024. Butter, cheese, and casein are the key products relevant to this region.

Irish dairy exports to Africa countries increased by 4% from 2023 to a value of €705 million, accounting for 11% of exports.

Irish dairy exports value to Asia stood at €755 million in 2024, representing a year-on-year decline of 10%. The continent now accounts for 11.6% of all value dairy exports.

Dairy Market Access

While Irish dairy has well established markets, enhanced market access for Irish dairy products and Infant formulas was secured to several destination markets in recent years.

The Department is engaged in ongoing negotiations with authorities in various third countries to which Ireland is exporting milk and milk products. This includes the completion of market access questionnaires, negotiations in relation to health and veterinary certificates and establishment registration and application approvals as well as participating in a range of technical and diplomatic meetings to address market access issues where appropriate.

Ongoing communications include collaboration with agricultural attachés and our wider network of Irish representations overseas, to maintain access for Irish dairy exporters in other destination markets. Negotiations with several Third Countries continue into 2025 with several trading partners in order to further enhance market access for Irish dairy products.

Dairy Certification

All consignments of dairy produce leaving Ireland, and destined for non-EU countries, are subject to inspection and certification. In recent years, DAFM reached agreement with third country competent authorities in the following destination markets, resulting in renegotiated bilateral certification requirements for various product categories:

- India
- Mexico
- Algeria
- Morocco

Ireland's certification system provides continued assurance to third-country competent authorities on the quality and traceability of Irish dairy produce and dairy ingredients. Ireland exports dairy products to over 140 different destination markets worldwide. DAFM issued 25,653 and 25,722 dairy export certificates in 2023 and 2024 respectively.

Dairy Controls and systems audits

A number of market access projects were completed during the period covered by this report, including but not limited to: Market access for Irish infant formula products to Algeria; confirmation of the renewal of registration of Irish infant formula manufacturers and Irish dairy manufacturers with authorities in several countries including China. The Integrated Veterinary Health certificate for exports of dairy products to India was negotiated successfully and agreed between the competent authorities of both countries. Over the past few years, the Department has been working on developing a new Electronic Certification System (ECS) for dairy and this will be replacing the DPCS system.

Algeria

Algerian market access for Irish infant milk powders was a priority for DAFM at the beginning of 2024. Following a process of extensive consultation with the Algerian government Veterinary Services Department as well as significant positive engagement with the Algerian Embassy in Ireland, enhanced market access for Irish infant formula and follow on products was secured. The new certificate which includes infant formula products is now available on the DPCS system.

China

China is a market of strategic importance and a priority for Irish dairy exports. Accordingly, the Department commits considerable resources to ensure that Irish exporters and controls systems meet the food safety requirements of the Chinese import authorities. DAFM received confirmation of successful applications from Irish infant milk formula manufacturers and Irish dairy manufacturers to renew their approval by Chinese authorities to supply product to that market for the next few years.

India

The two Indian competent authorities responsible for import certificates for dairy products, the Department of Animal Husbandry and Dairying (DAHD) and the Food Safety and Standards Authority of India (FSSAI) introduced a new integrated Veterinary Health Certificate (IVHC) for exports of pork, fish and milk and milk products to India. Every consignment must be accompanied by this IVHC to be permitted to import into the Indian market.

After a long negotiation process, DAFM reached agreement with the Indian Authorities to introduce the new IVHC for Irish dairy exports to India. This new certificate is now available on the DPCS system for all exporters to India.

ECS system

The new Electronic Certification System (ECS), which has been developed by DAFM, is replacing the old system (DPCS) to modernise and streamline the certification process. This upgrade aims to improve efficiency, reduce paperwork, and enhance traceability. The ECS also ensures compliance with international standards.

Our dairy certification team supports exporters daily, processing health and veterinary certificates and dealing with queries. The dairy certification team process about 100 certificates a day or 25,000 certificates a year.

ECS development has been a multi-year project involving business requirements development and multi stakeholder input and went live in November 2024. Since then, the Department is focused on rolling it out based on user feedback for improved features and stakeholder training programmes.





Overview of the Irish Seafood Sector

Ireland has long been recognised as a leading food-exporting nation, renowned for its commitment to producing safe, traceable, and sustainably sourced high-quality food. The Irish seafood sector, which encompasses commercial sea-fishing, aquaculture, and seafood processing, is a vital component of this reputation. The sector continued to demonstrate considerable resilience and adaptability, achieving growth in key markets despite global economic challenges and fluctuating demand. The ability to innovate, diversify, and respond to market conditions has been significant in terms of Ireland maintaining its position as a reliable and consistent supplier of premium seafood products.

Irish Seafood Exports

Export Performance Overview

The Irish seafood sector achieved a notable export performance in 2024, with the total value of exports estimated at €594 million, according to the Central Statistics Office. This represents a 9% increase in value, or €45 million, compared to the €549 million recorded in 2023. This growth was driven by strong performances across several key species, reflecting the sector's ability to capitalise on market opportunities and adapt to shifting consumer preferences.

Bord Iascaigh Mhara (BIM) reported that salmon exports were a standout performer, with a 22% increase in volume and a 23% rise in value. Nephrops (Dublin Bay prawns) and crab also recorded significant growth, with volumes increasing by 12% and 29%, respectively, and corresponding value increases of 8% and 11%. However, not all species experienced growth. Mackerel exports declined by 11% in volume and 3% in value, while oysters saw a slight decrease of 1% in volume and a more pronounced 11% drop in value. Despite these challenges, value growth was recorded for other species, including blue whiting, lobsters, shrimps and prawns, highlighting the sector's diverse product portfolio.

Key International Markets

Bord Bia continued to showcase Ireland's quality seafood produce at international seafood exhibitions. In April 2024, Minister McConalogue attended the Seafood Expo Global in Barcelona, Spain, where the focus was on promotion of Irish Seafood.

Bord Bia hosted Irish seafood companies at the China Fisheries and Seafood Expo in 2023 and 2024. The expo based in Qingdao brings Irish exporters and Chinese importers and industry partners together to identify trade opportunities for Irish seafood in the Chinese market.

In 2024, Ireland's seafood exports to the United Kingdom and non-EU markets reached a combined value of €294 million, representing a 12% increase compared to 2023. Export volumes rose by 10%, from 142,872 tonnes to 157,202 tonnes, with an average price growth of 2%. This growth underscores the importance of international markets in driving the sector's overall performance.



Table 8: Main Export Markets for Seafood outside the EU

| Main Export Markets for Seafood outside the EU | | | | | | | |
|--|-----------------|-----------------|------------------|----------------------|----------------------|-------------------|------------------|
| Market | 2023 Value (€m) | 2024 Value (€m) | Value Growth (%) | 2023 Volume (tonnes) | 2024 Volume (tonnes) | Volume Growth (%) | Price Growth (%) |
| United Kingdom | 102 | 125 | 22% | 35,350 | 43,855 | 24% | -2% |
| Asia | 68 | 78 | 15% | 26,121 | 25,509 | -2% | 18% |
| Africa | 52 | 48 | -9% | 45,719 | 47,154 | 3% | -12% |
| Middle East | 11 | 8 | -29% | 10,637 | 7,973 | -25% | -5% |
| Rest of World | 29 | 35 | 21% | 25,045 | 32,711 | 31% | -13% |
| Overall | 262 | 294 | +12% | 142,872 | 157,202 | +10% | +2% |

Source: Bord Iascaigh Mhara

United Kingdom

Outside of the EU, the United Kingdom remained Ireland's largest single market in 2024, with exports valued at €125 million, a 22% increase compared to the previous year. This growth was supported by a 24% rise in export volumes, which reached 43,855 tonnes.

Key products driving this performance included fish meal, which accounted for 23% of UK-bound exports, salmon (18%), and fish oils and fats (9%). Despite these gains, price growth in the UK market was slightly negative at -2%, reflecting competitive pressures in certain segments. The UK's proximity and historical trade ties with Ireland continue to make it a cornerstone of the Irish seafood export strategy.

Asia

Asia emerged as the second-largest regional market outside the EU, with exports increasing by 15% to €78 million in 2024. This growth was driven by strong demand for high-value species such as salmon, crab, and nephrops. Improved pricing, which rose by 18%, offset a slight decline in volume (-2%), highlighting the region's appetite for premium seafood products.

China was the standout growth market in Asia, with exports surging by 52% to €28 million. This striking performance was underpinned by robust demand for crab, which accounted for 27% of Chinese imports, nephrops (25%), and mackerel (9%). China's expanding middle class and increasing preference for high-quality imported products have positioned it as a key growth market for Irish seafood.

Japan also performed convincingly, with exports increasing by 12% to €18 million. This growth was led by mackerel, which accounted for

73% of Japanese imports, followed by horse mackerel (14%) and seaweed and algae (5%). Japan's emphasis on premium seafood products and its discerning consumer base make it a strategic market for Ireland, offering additional opportunities for growth.

Africa

African markets acquired €48 million worth of Irish seafood in 2024, representing a 9% decline in value compared to 2023. However, export volumes increased slightly by 3%, reaching 47,154 tonnes. Nigeria, the largest African partner, imported €28 million worth of seafood, with mackerel and blue whiting dominating the product mix, accounting for 49% and 47% of Nigerian imports, respectively. While the African market presents challenges, it remains an important destination for Irish pelagic species.

Middle East

The Middle East experienced a challenging year in 2024, with the value of Irish seafood exports declining by 29% to €8 million. Export volumes also fell by 25%, reflecting reduced demand for bulk shellfish products. Price growth in the region was negative at -5%, highlighting the competitive pressures faced by Irish exporters in this market.

Rest of World

Exports to the Rest of World markets grew by 21% in value to €35 million, with significant volume gains of 31%. However, price growth was negative at -13%, reflecting competitive pricing strategies aimed at capturing market share in emerging markets.

Table 9: Top Export Countries for Seafood outside the EU by Species

| Top Export Countries for Seafood outside the EU by Species | | | | | |
|--|-----------------|-----------------|------------------|---------------------|----------------------------|
| Rank | Partner Country | 2024 Value (€m) | Value Growth (%) | Main Export Species | Share of Partner Total (%) |
| 1 | United Kingdom | 125 | 22% | Fish meal | 23% |
| | | | | Salmon | 18% |
| | | | | Fish oils and fats | 9% |
| 2 | China | 28 | 52% | Crab | 27% |
| | | | | Nephrops | 25% |
| | | | | Mackerel | 9% |
| 3 | Nigeria | 28 | -32% | Mackerel | 49% |
| | | | | Blue Whiting | 47% |
| | | | | Herring | 3% |
| 4 | Japan | 18 | 12% | Mackerel | 73% |
| | | | | Horse Mackerel | 14% |
| | | | | Seaweed | 5% |

Source: Bord Iascaigh Mhara

In addition, the Sea-Fisheries Protection Authority (SFPA) reported a significant increase in export health certification in 2024. A total of 5,959 health certificates were issued for seafood exported outside the EU. The increase was driven by post-Brexit requirements for health certification for exports to the United Kingdom and increased exports of pelagic species to West Africa.

The Irish seafood sector demonstrated resilience and adaptability in 2024, achieving growth in key markets despite global challenges. There are opportunities for growth in high-value segments such as organic salmon and value-added products. However, challenges remain, particularly in the shellfish sector and in markets facing economic pressures. By focusing on strategic priorities such as market diversification, product innovation, and targeted expansion in high-growth regions, Ireland can continue to strengthen its position as a leading supplier of premium seafood products.

Case Study: Opening of South Korean Market for Irish Beef

Developing and diversifying markets is a priority in our shared strategy for the agri-food sector, Food Vision 2030. This case study outlines the journey which culminated in the launching of Irish beef on to the Korean market in 2024.

Gaining market access usually starts with the identification of market access priorities, which is carried every 18 months or so in consultation with industry, Bord Bia and our embassy network. Set out below are the main stages of any application and while the process appears straightforward in theory gaining market access is a complex process.

The main stages of any application are:

- A desktop risk assessment of control systems
- An onsite inspection of control systems and of food business operators wishing to export
- Negotiation on the import conditions set out in the export health certificates and / or protocols.

In 2010 Department of Agriculture, Food and the Marine (DAFM) officials travelled to Seoul for discussions focused on our control systems with officials in the Korean Ministry of Agriculture, Food and Rural Affairs (MAFRA). Following this an official request for access was submitted by the Department's Chief Veterinary Officer to MAFRA.

At this time the EU was excluded from trade with Korea and the Korean authorities needed to assess the EU systems first and then the individual Member States.



2012

In December, the Department received a detailed questionnaire from MAFRA, indicating the start of negotiations. The Department was engaged in the completion of this detailed questionnaire and follow up questionnaires, together with the European Commission over a three-year period with the two Korean competent authorities - MAFRA and the Ministry for Food and Drug Safety (MFDS).

2016

In May a delegation from MAFRA, held an inspection visit to Ireland. They met with the Department, visited two beef factories, a beef farm, state and private labs, a rendering plant and a knackery. In September a trade mission to Korea allowed us to raise the issue of access with the Ministry.

2017

In June a delegation from MFDS conducted a further systems inspection of beef factories and cold stores. Whereas the previous inspection in 2016 was focused on animal disease protocols, this inspection concentrated on food safety, animal hygiene, factory processes and risk procedures.

With a view to maintaining good relations the Department hosted two study visits involving officials from MAFRA and MFDS focused on traceability and the National Residues Control Programme. In November 2017, Minister Creed met with his counterpart in Korea as part of a Trade Mission and raised the issue of beef access.

2018

In May the Department received the proposed Import Health Requirements from MAFRA, which were agreed later that year.

2019

In January the Department received the proposed Importation Sanitation Requirements from MFDS. The Trade Mission in June gave the Department an excellent opportunity to hold technical meetings with officials and discuss these proposals in detail, resulting in agreement of that document early the following year.

2020

Agriculture Attaché appointed to Korea.

2021

Both Korean Ministries approved our application and sent it to the Korean Parliament to review.

2023

Minister Heydon visited Korea for St. Patricks Day and raised the issue of beef access with both the Korean Minister for Agriculture and the Chair of the National Assembly Agriculture Committee. In October, the whole of Government Trade Mission gave the opportunity to raise the issue of access in a number of fora – including a key meeting between Minister McConalogue and the Chair of the National Assembly Agriculture Committee. In late 2023, the application successfully passed a Parliamentary vote.

2024

DAFM hosted auditors from both MAFRA and MFDS for a joint 10-day audit in April. In May, the Department received the audit report, confirming that all seven audited plants were approved to export beef to Korea. Simultaneously, an Export Health Certificate was agreed.

In September, Ministers McConalogue and Heydon formally launched Irish beef onto the Korean market.

