



Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Required Report - public distribution

Date: 10/1/2002

GAIN Report #NL2048

The Netherlands

Fishery Products

Annual

2002

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Report Highlights:

The Netherlands is an important trader in fish, and imported 1.4 billion euro worth in 2000. Dutch households are increasing their consumption of fish products. Salmon has been one of the major products behind this growth. Sales of smoked salmon grew by 260 percent and has become the second most popular fish after herring.

Includes PSD changes: No

Includes Trade Matrix: No

Annual Report

The Hague [NL1], NL

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Executive Summary

The Dutch fishery can be divided into sea, coastal, inland and shell-fish fisheries. Total seafood harvest is limited by a variety of regulatory schemes, and has been declining in recent years. The total catch and total sales (including export) of the fish industry in 2000 was 204,468 MT and 542 million euro.

Dutch households have spent increasing amounts on fish products between 1995 and 2000. In 2000, 315 million euro was spent on fish products, up by 39 percent compared to 1995. Salmon has been one of the major products behind this growth. Sales of smoked salmon grew by 260 percent in the same period and became the second most popular fish product after herring.

The Netherlands is an important trader in fish. In 2000, the Netherlands imported for 1.4 billion euro. Germany, Denmark, the UK and Belgium are the four biggest suppliers of fish to the Netherlands. The Netherlands is also a major exporter, exporting for 1.9 billion euro in 2000. Target markets are Germany, Belgium, France, Italy and Spain, together accounting for 40 percent of total export.

The market for canned salmon has been stable in recent years with imports totaling 5-6,000 metric tons. Imports are supplied by the United States, Canada and Russia.

Exchange Rate			
Year	U.S. \$	EURO	Dutch florin (guilder)
1998	1	-	1.98
1999	1	0.94	2.07
2000	1	1.09	2.39
2001	1	1.12	2.46
2002	1	1.09	

Note: For 2002 exchange rate is only available for the first nine months

I The Dutch Fishery

The Dutch fishing industry can be divided into sea, coastal, inland and shell-fish fisheries. Sea fishery comprises commercial harvest of varieties outside the coastal waters, by either cutters or trawlers. The cutter fleet, the biggest fleet in the Dutch fishery, consists of over 400 fishing-boats. The Dutch cutter fleet has specialized in catching flat fish like sole and plaice and white fish like cod and whiting. The trawler sector is comprised of 4 companies with 24 trawlers. They use freezer trawlers to catch small pelagic fish like herring, mackerel and horse mackerel.

In the Netherlands, coastal fishing catch is comprised mainly of shrimp. The inland fishery forms a small part within the Dutch fishery. Approximately 300 people are active within this industry. Varieties they catch are eel, bass, pike-perch and smelt. The shell-fish industry fishes oysters, mussels, cockles and spisula. This industry employs over 1,200 people and approximately 125 boats.

Sustainable Fishery

The fishery industry is dependant on natural resources. Therefore, it is important to deal with the fish stock and waters in a sustainable way. A sustainable fishery sets the basis for a long term value chain.

Regulation and Policy

The regulation and the policy of the Dutch fishery is established on two levels. There are both European and the Dutch regulations and policies. The regulation of the European Union is comprised by 3 basics: ordinances, guidelines and decisions. The European fishery policy is predominantly established in European ordinances. Guidelines are especially important when guaranteeing product quality and food safety.

Fishery policy is strongly influenced by the European fishery policy: the Common Fishery Policy (CFP). The CFP exists of 4 parts: (1) Maintenance Policy; Including the Total Allowable Catch (TACs) and quota system to protect fish stocks. (2) Structure Policy; To control the fleet capacity and to improve the infrastructure. (3) Market Policy; To stabilize the market. (4) External Policy; To make agreements with non EU countries regarding fishery activities of the European fleet in non EU waters.

Over-capacity and over-fishing are major challenges in the fishing industry. The combined fishing fleet of the EU has an estimated 40 percent over-capacity. In order to limit capacity, a number of governments are going to implement buy-back schemes for vessels.

The Fish Auction

The Dutch fish-auctions receive the fish directly from the ships which unload at port. Wholesalers, processors and retailers are the buyers. All fish are sold via the Dutch auction system.

The freezer trawlers (sea fishery), fish mainly in European waters such as those to the west of Ireland and Scotland and are responsible for 60 percent of total catch. In addition, some vessels have licences to fish in West African waters of Mauritania and Morocco. Recently, the fishery agreement between the European Union (EU) and Mauritania was renewed for a period of 5 years. This agreement is the most important fishery agreement the EU has regarding the catch potential of the EU fleet in third country territories. Due to their flexibility, the freezer trawlers can be used worldwide and are therefore less dependent on local circumstances. Restrictions on EU-licensed catch and over-capacity make fishing under third country licenses vital to the economic viability of many in the Dutch fishing industry.

Figure 1: Supply and Turnover of the Dutch Fish-Auctions in 2000

	Volume Metric Tons	Value mln. Euro
Yerseke	66,843	76.8
Urk	40,741	121.4
Harlingen	15,093	40.9
Lauwersoog	12,761	34.5
Den Helder	14,237	51.4
Den Oever	3,400	11.4
Scheveningen	8,019	21.4
Goedereede	9,807	34.1
Breskens	3,118	11.5
Vlissingen	10,725	34.1
Colijnsplaat	2,507	8.5
Ijmuiden	17,217	48.2
Total	204,468	541.5

Source: Product board of Fish

Consumption

Households have spent increasing amounts on fish products between 1995 and 2000. In 2000, 315 million euro was spent on fish products, up by 39 percent compared to 1995. Salmon has been one of the major products behind this growth. Sales of smoked salmon grew by 260 percent in the same period and became the second most popular fish product after herring. No recent per capita consumption data is available.

Trade

The Netherlands is an important trader in fish. In 2000, the Netherlands imported for 1.4 billion euro or 682,008 MT. Over 30 percent is frozen fish. Germany, Denmark, the UK and Belgium are the four biggest suppliers of fish to the Netherlands. In 2000, they exported 530 million euro worth of fish to the Netherlands. The top 5 imported fish species are shrimp, cod, plaice, herring and sole.

Figure 2: Import of Shrimp, 2000

1,000 x Euro

	Value
Germany	21,845
France	1,266
UK	4,436
Denmark	13,010
Other	186,136
Total	226,653

Source: LEI, 2000

Figure 3: Import of Cod, 2000

1,000 x Euro

	Value
Germany	14,112
France	906
UK	1,959
Denmark	14,175
Other	99,716
Total	130,868

Source: LEI, 2000

Figure 4: Import of Plaice, 2000 1,000 x Euro	
	Value
Germany	5,001
France	4,628
UK	18,695
Denmark	10,519
Other	27,323
Total	66,166

Source: LEI, 2000

Figure 5: Import of Herring, 2000 1,000 x Euro	
	Value
Germany	13,728
France	6,116
UK	2,291
Denmark	9,699
Other	11,116
Total	42,950

Source: LEI, 2000

Figure 6: Import of Sole, 2000 1,000 x Euro	
	Value
Germany	7,696
France	1,779
UK	6,000
Denmark	3,452
Other	12,589
Total	31,516

Source: LEI, 2000

The Netherlands is also a major exporter, exporting 1.9 billion euro worth of fish in 2000. The trade is dominated by the export of frozen fish, 70 percent of total exports (540,693 MT). Target markets are Germany, Belgium, France, Italy and Spain, together accounting for 40 percent of total export. In value they account for almost three quarters of total export value. The top 5 exported fish species are plaice, sole, herring, (horse) mackerel, shrimp and mussels.

Figure 7: Export of Plaice and Sole, 2000 Million Euro		
	Country	Export Value
1	Italy	112.5
2	Germany	52.2
3	Spain	41.7
4	France	28.1
5	Belgium	14.5

Source: www.dutchfish.nl

Figure 8: Export of Herring and Mackerel, 2000 Million Euro		
	Country	Export Value
1	Germany	32.7
2	Belgium	5.4
3	France	3.2
4	Spain	0
5	Italy	0

Source: www.dutchfish.nl

Figure 9: Export of Shrimp, 2000

Million Euro

	Country	Export Value
1	Belgium	80.8
2	France	64.4
3	Germany	51.3
4	Spain	11.8
5	Italy	2.3

Source: www.dutchfish.nl**Figure 10: Export of Mussels, 2000**

million Euro

	Country	Export Value
1	Belgium	58.5
2	France	17.7
3	Germany	5.9
4	Spain	3.6
5	Italy	0.5

Source: www.dutchfish.nl**Figure 11: Export of Other Fish, 2000**

million Euro

	Country	Export Value
1	Germany	224.6
2	Belgium	192.4
3	France	174.3
4	Italy	138.4
5	Spain	111.2

Outside the EU, Nigeria is the most important export market. Over 180,000 MT fish, predominantly small pelagic fish,

were exported to Nigeria in 2000.

II Canned Salmon

Farmed Versus Wild Catch

The supply of salmon can be divided in farmed salmon and wild catch. The farmed salmon is produced in countries like Norway and Chile. This fish is produced along the coast line. After processing the fish is sold through large retailers and food service companies in mature markets like North America, West Europe and Japan. The biggest salmon producer in the world is the Dutch based Nutreco, operating in Norway, Chile, Canada, Ireland, Australia and the UK.

Consumption

Unlike fresh/smoked salmon, the consumption of canned salmon has been stable over the past few years. The packing industry is trying to build on consumers' need for convenience. As a result, they are developing ideas for pouch-packing of salmon, as is already happening in the tuna industry.

Import

Wild salmon (pink and red) is caught in Alaska (USA) and British Columbia (Canada) and to a lesser extent Russia. All countries are active in the export market and as figure 12 shows, they are all suppliers of wild salmon to the Dutch market.

The wild catch industry is, unlike the farmed salmon industry, a highly fragmented industry. Local fishers catch the salmon and deliver it to bigger ships. Ships are owned by the canning companies. These ships deliver the collected salmon to the various canning plants in North America. Some salmon goes directly to Asia where harvested salmon is processed into skinless and boneless canned salmon.

Figure 12: Import in Volume of Canned Salmon
1,000 x Metric Tons

	1999	2000	2001
USA	1,523	1,339	2,131
Russia	338	509	1,195
Germany	699	791	981
Canada	2,580	2,551	493
Belgium	170	277	361
Other	689	499	457
Total	5,999	5,966	5,618

Source: Central Bureau of Statistics

Figure 13: Canning Companies in North America

USA Companies:	Canadian Companies:
• Icicle	• Focus Seafoods
• Northern Pacific	• Canfisco
• Peter Pan	
• Trident	
• ConAgra	
• Wards Cove	

Once arrived in the Netherlands, trading companies supply the canned salmon to retailers and the food service industry. In the Netherlands the 3 largest trading companies are Princes (brand name, Princes), MCM (Deep Blue) and BOAS (Royal Mail).