# *Netherlands*

updated on 09-05-18

## NETHERLANDS IN THE WORLD AND IN THE EU

**(2015, source: FAO and Eurostat)**

The Netherlands rank 5th in the EU in terms of fisheries and 6° for farmed production.

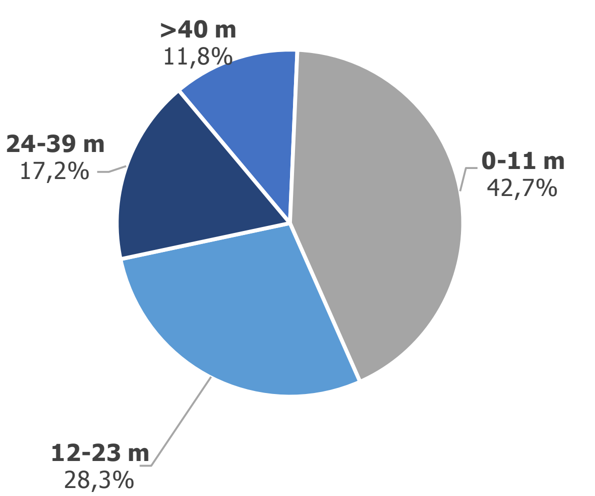
| (1.000 tonnes) | World | EU-28 | Netherlands | % world | % EU-28 |
|---|---|---|---|---|---|
| Catches | 104.635 | 5.144 | 365 | 0,3% | 7% |
| Aquaculture | 106.094 | 1.307 | 62 | 0,1% | 5% |
| Total | 211.511 | 6.451 | 427 | 0,2% | 7% |

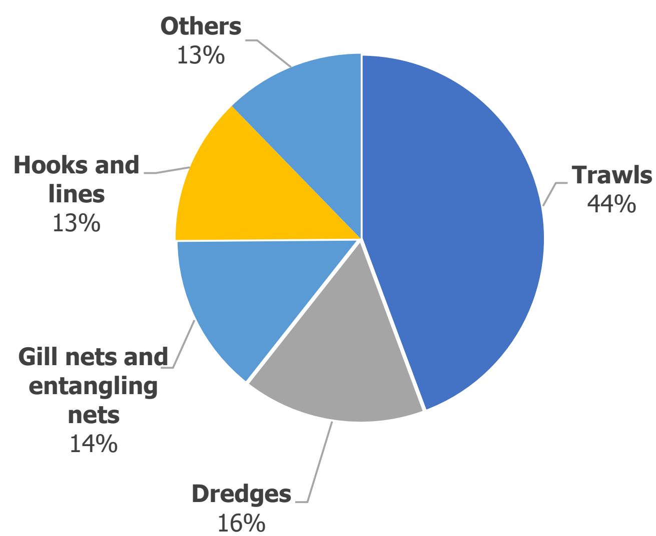
## FISHING FLEET

(**fleet** - 2017, source: EU fishing fleet register; **employment** – 2015, source: JCR)

| Vessels (2017) | | Capacity (2017) | | Power (2017) |
|---|---|---|---|---|
| Number: **848** | | GT: **133.404** | | KW: **316.147** |
| TOTAL FTE: **1.619** (2015, source: JRC) | | | | |
| 0-11 m | 12-23 m | | 24-39 m | >40 m |
| Jobs (FTE): **6%** | Jobs (FTE): **32%** | | Jobs (FTE): **17%** | Jobs (FTE): **45%** |

The Dutch **fishing fleet** and **gear composition**:



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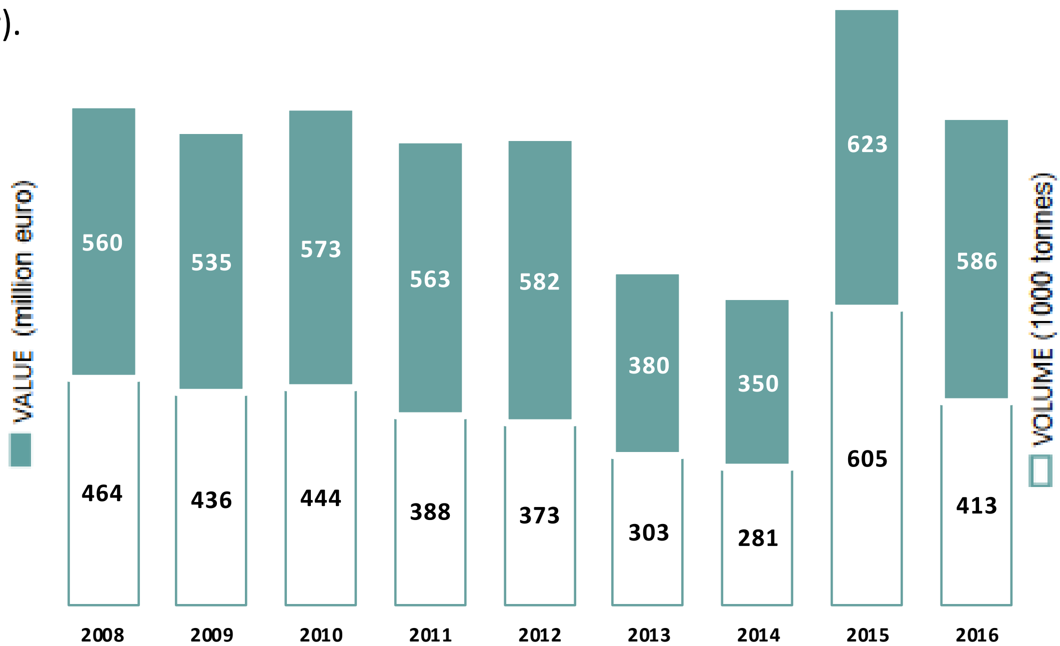
# LANDINGS

Landings represent the initial unloading of any fisheries products, including aquatic plants, from on board a fishing vessel to land in a given country, regardless of the nationality of the vessel making the landings. They are recorded in net weight.

In 2016, 45% of the species was landed fresh, 35% frozen and 20% cooked. All were destined to human consumption, with 90% landed by Dutch vessels.

Total fishing ports reported in the Netherlands are 53 (source: EU Master Data Register).




### Main commercial species landed and % over total (2016, million euro and 1.000 tonnes)

| | | | | | |
|---|---|---|---|---|---|
| SHRIMP CRANGON SPP. | 113 | 19% | 127 | 31% | HERRING |
| SOLE | 106 | 18% | 64 | 15% | BLUE WHITING |
| HERRING | 91 | 15% | 58 | 14% | MACKEREL |
| PLAICE | 60 | 10% | 37 | 9% | SARDINE |
| MACKEREL | 51 | 9% | 35 | 9% | PLAICE |
| HORSE MACKEREL | 30 | 5% | 33 | 8% | HORSE MACKEREL |
| OTHERS | 135 | 24% | 59 | 14% | OTHERS |

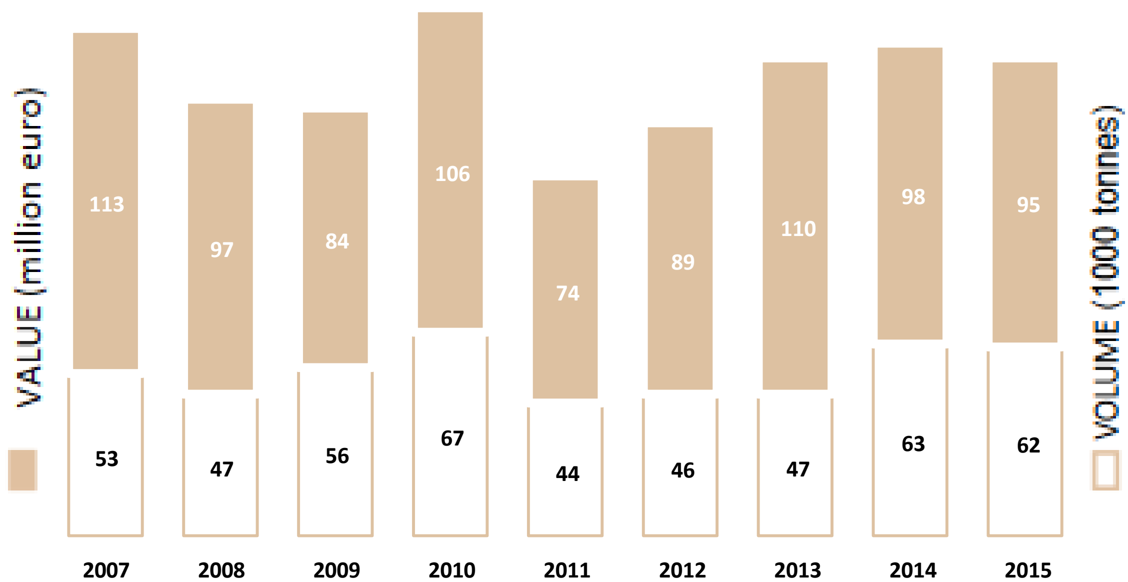
(source: EUROSTAT)

# AQUACULTURE

Aquaculture refers to the farming of aquatic (freshwater or saltwater) organisms, such as fish, molluscs, crustaceans and aquatic plants. Aquaculture data are reported in live weight equivalent and value.

In 2015, Dutch aquaculture production was 8% in freshwater and 92% in sea and brackish waters. The main aquaculture production methods are:

- 82% on bottom, entirely farmed in sea and brackish water;
- 9% off bottom, entirely farmed in sea and brackish water;
- 9% in recirculation systems, mainly farmed in freshwater.




**Main commercial species farmed and % over total**
**(2015, million euro and 1.000 tonnes)**

| Species (value) | Value (million euro) | % | Volume (1.000 tonnes) | % | Species (volume) |
|---|---|---|---|---|---|
| MUSSEL MYTILUS SPP | 57 | 61% | 54 | 87% | MUSSEL *MYTILUS SPP.* |
| EEL | 17 | 18% | 3 | 5% | FRESHWATER CATFISH |
| OYSTER | 13 | 14% | 3 | 4% | OYSTER |
| OTHERS | 7 | 7% | 2 | 3% | OTHERS |

(source: EUROSTAT)

# PRODUCER ORGANISATIONS

(2018, source: DG MARE, link)

**11 producers organisations (POs)** and **1 association of POs** are formally recognised, all of them involved in the fishery sector.

Their role is to contribute to the achievement of the objectives of the CFP and of the CMO through the collective management of their members' activities.

# FIRST SALES

**First sales** concern the fish that is sold or registered at an auction center or to registered buyers or to producer organizations (PO). First sales may differ from landings since the former do not cover fish that is landed by vessels owned by processing companies or direct sales to processors.

12 auctions exist in the Netherlands, covering demersal species and mussels. 7 of them are PEFA-auctions. The action in Yerseke covers mussels only and is the only auction of its kind in the world.

The sellers at the demersal auctions are the fishermen, where the members of the Urk/Harlingen auctions are organised into a cooperative. In the pelagic sector, the seller (the owner of the vessel) is often the buyer as well, meaning that the value may only reflect payment to the fishermen or a set price.

**All places of sale** in the Netherlands are operating in the **North Sea**.

# WHOLESALE

(source: Dutch Fish Marketing Board)

**Wholesale** is an intermediary stage in the distribution channel that buys in bulk and sells to resellers (e.g. retailers) rather than to consumers.

There are not many "pure wholesalers" in the Netherlands, as many of the processing companies, especially dealing with pelagic species, have ownership in the boats landing the fish and in the wholesalers purchasing the first sales. A large part of the seafood sold at auctions or imported go straight to the processing plants, situated mostly in and around the auctions.

There are no mixed or redistribution markets in the Netherlands (wholesale markets). Information on companies' volume and market shares are difficult to collect as this is not publicly available.

# PROCESSING

According to Eurostat-SBS, 3.072 persons were employed in 2015 in the Dutch fish processing industry. It recorded a value added of EUR 170 million, covering 2% of the value added of total manufacture of food products.

In 2016, the main products sold were frozen and fresh fish fillets as well as frozen whole salt water fish (source: Eurostat-PRODCOM).

**144 companies**

**Sales: EUR 915 million**

(2015, source Eurostat - SBS)

# Netherlands

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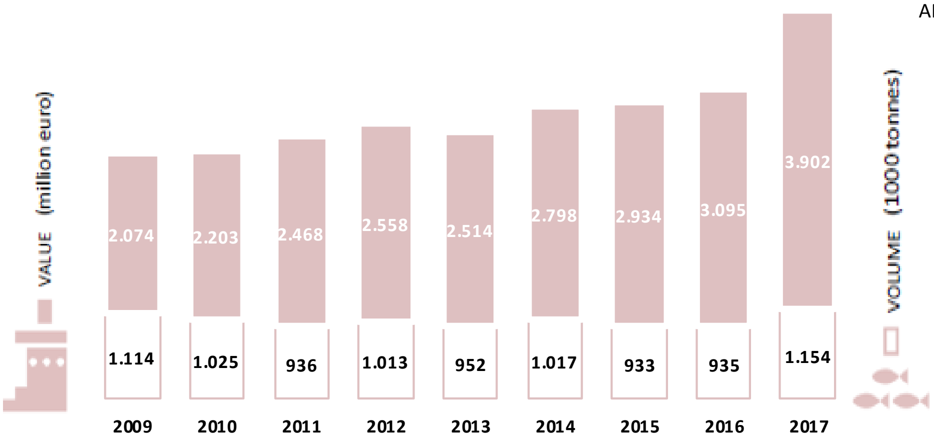
## TRADE (source: EUROSTAT)

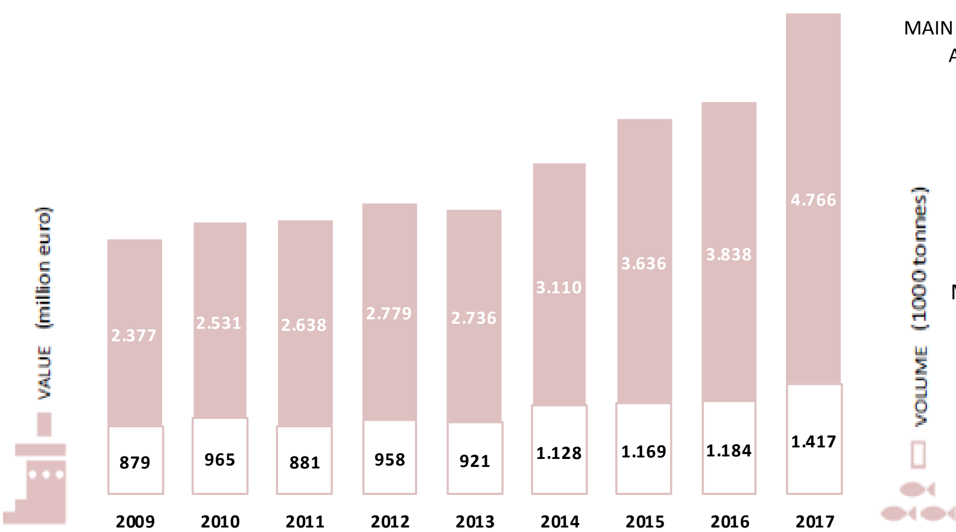
### Import




MAIN COMMERCIAL SPECIES IMPORTED AND % OVER TOTAL IMPORTS
**(2017, million euro)**

| | | |
|---|---|---|
| COD | 730 | 19% |
| TROPICAL SHRIMP | 334 | 9% |
| MISCELLANEOUS SHRIMPS | 268 | 7% |
| OTHER MARINE FISH | 236 | 6% |
| SALMON | 234 | 6% |
| SKIPJACK TUNA | 186 | 5% |
| OTHERS | 1.914 | 48% |

### Export




MAIN COMMERCIAL SPECIES EXPORTED AND % OVER TOTAL EXPORTS
**(2017, million euro)**

| | | |
|---|---|---|
| COD | 662 | 14% |
| OTHER MARINE FISH | 340 | 7% |
| MISCELLANEOUS SHRIMPS | 333 | 7% |
| SALMON | 282 | 6% |
| SKIPJACK TUNA | 224 | 5% |
| MACKEREL | 218 | 5% |
| OTHERS | 2.707 | 56% |

Main countries of **ORIGIN** (in value, 2017)

- Germany 12%
- Iceland 11%
- Belgium 7%
- Russian Federation 7%

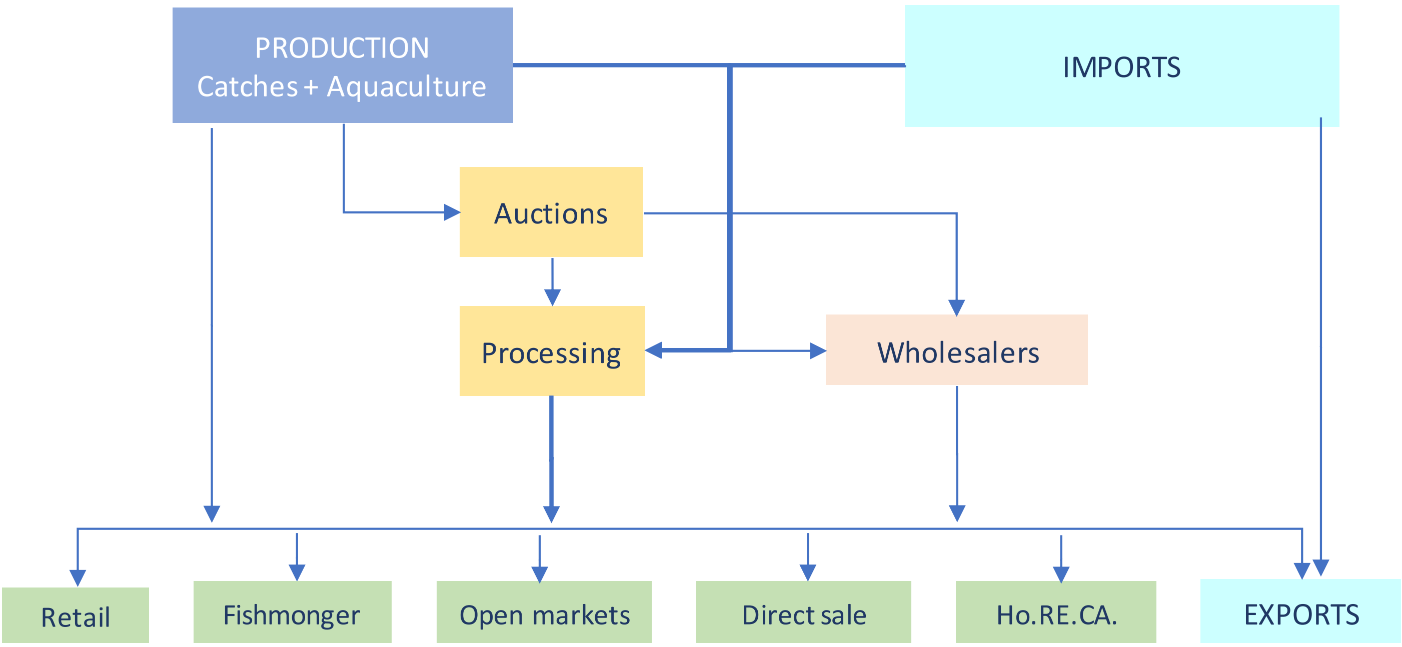
Main countries of **DESTINATION** (in value, 2017)

- Germany 20%
- Belgium 14%
- France 12%
- Italy 9%

# DISTRIBUTION

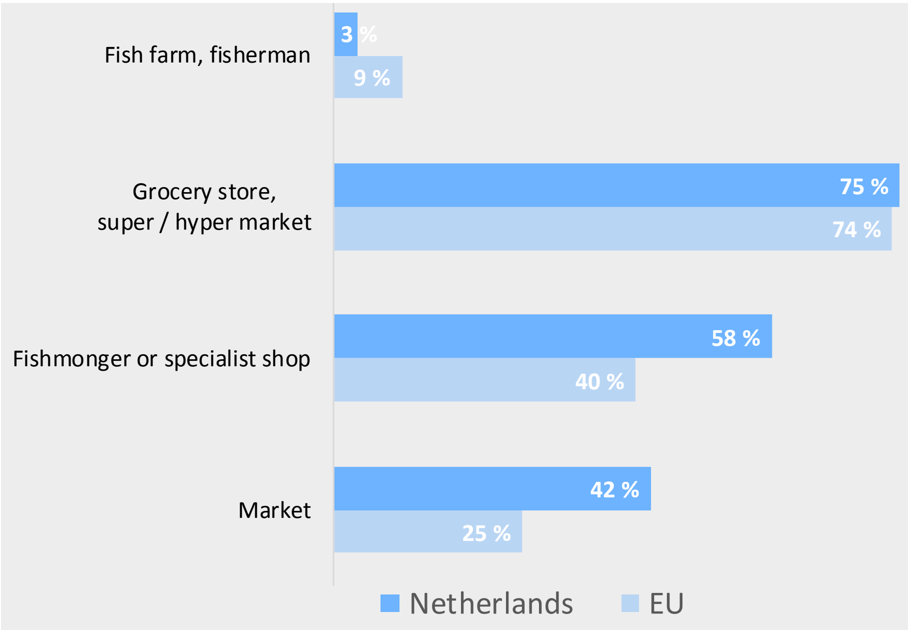
## The supply chain of fishery and aquaculture products in the Netherlands

(source: Dutch Fish Marketing Board)




## Consumers preferences on purchasing channels

(source: EUROBAROMETER)



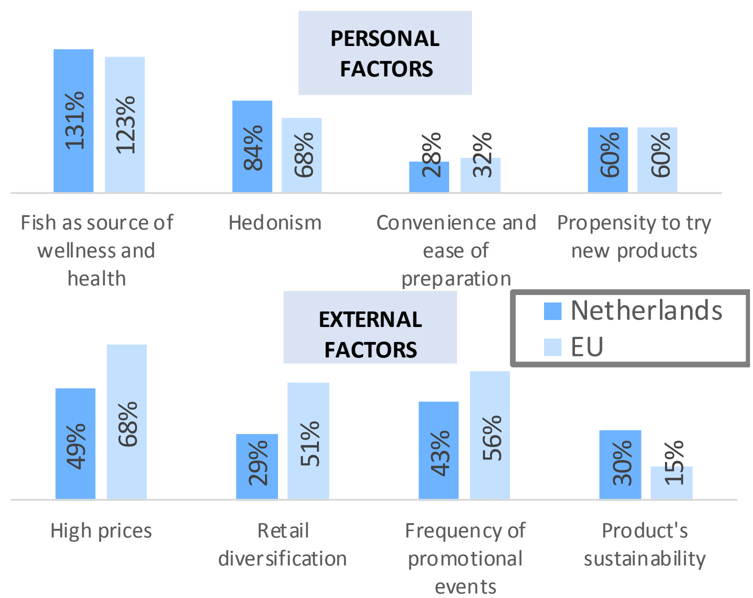
# CONSUMPTION

Apparent consumption of fishery and aquaculture products in the Netherlands amounted to 22,2 kg per capita in 2015, a 4% decrease compared to the previous year. The main consumed species were pangasius, salmon and canned tuna.

The Dutch consume especially fresh and frozen products; loose fish (71%) is more frequently consumed than the EU average (68%). From a socio-demographic point of view, regular fish consumers mainly belong to the age classes 40-54 and over 55. Young people group has the lowest number of regular consumers across the EU: while this is also the case in the Netherlands, the number is higher than the EU average. (source: "EU consumer habits regarding fishery and aquaculture products").

## Purchasing factors

(source: EUROBAROMETER)




**22,2 Kg per capita**

**(source: EUMOFA)**

# NETHERLANDS IN EUMOFA

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## LANDINGS

Volumes and values are collected by EUMOFA from **EUROSTAT – Fishery**. Data concern all species landed in France by vessels of all nationalities.
Data are available on a yearly basis, accessible through simple and advanced tables.

## FIRST SALES

Volumes and values are collected from **Pan European Fishing Auctions (PEFA)** on a weekly basis. Data include all sales occurred through auctions and do not include other sales occurred out of auctions (e.g. direct sales).

**Weekly data** are collected and disseminated for 13 species and 6 places of sale. Click here for the list of species and places of sale.
Data are accessible through simple and advanced tables.

## TRADE

Volumes and values are collected from **EUROSTAT – COMEXT.** Data concern trade of all fisheries and aquaculture products as recorded by national customs, available on a monthly and yearly basis.
Data are accessible through simple and advanced tables.

## AQUACULTURE

Volumes and values are collected by EUMOFA from **EUROSTAT – Fishery**. Data are available on a yearly basis, accessible through simple and advanced tables.

## WHOLESALE

No data available for this supply chain stage

## PROCESSING

Volumes and values are collected from **EUROSTAT – PRODCOM.** Data concern 5 processed products as recorded through the PRODCOM nomenclature.
Data are available on a yearly basis and are accessible through simple tables.

## CONSUMPTION

Household consumption of fresh fishery and aquaculture products is collected from a **private provider** by EUMOFA on a monthly basis for 10 products based on panel reporting. Click here for the products per each Member State.
Data (volumes and values) are accessible through simple queries on a monthly and yearly basis.