



## THE NETHERLANDS IN THE WORLD AND IN THE EU

2017, sources: Eurostat and FAO

In 2017, the Netherlands ranked 5<sup>th</sup> in the EU in terms of fishery production and 6<sup>th</sup> for farmed production.

(1.000 tonnes)	World	EU-28	Netherlands	% world	% EU-28
Catches	93.204	5.253	362	0,39%	6,89%
Aquaculture	111.966	1.372	51	0,05%	3,72%
<b>Total</b>	<b>205.170</b>	<b>6.625</b>	<b>413</b>	<b>0,20%</b>	<b>6,23%</b>

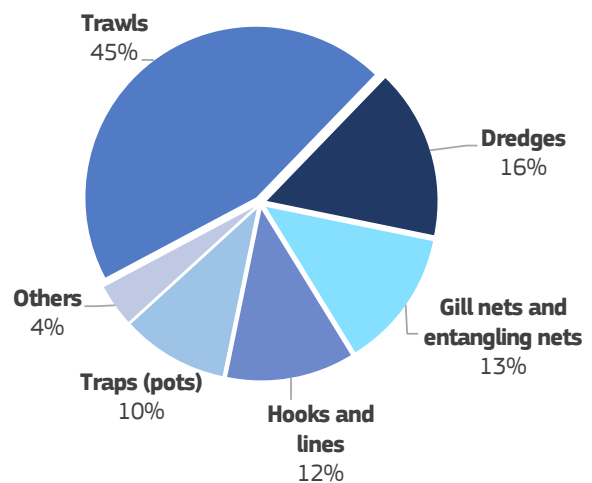
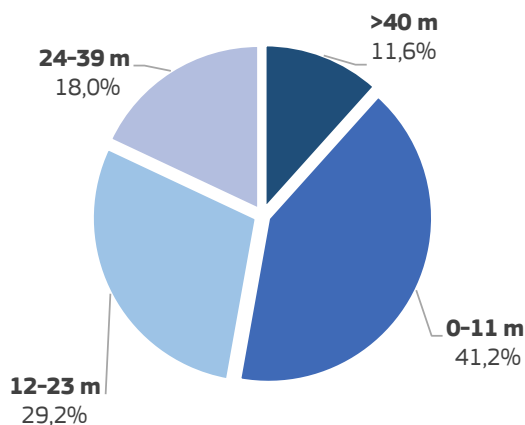
## FISHING FLEET

Fleet: 2018, source: EU fishing fleet register - Eurostat    Employment: 2017, source: JRC

Vessels (2018)	Capacity (2018)	Power (2018)	
Number: 833	Gross Tonnage: 120.509	Kilowatt: 304.200	
TOTAL FULL TIME EQUIVALENT (FTE), 2017: 1.723			
0-11 m	12-23 m	24-39 m	>40 m
Jobs (FTE): 4%	Jobs (FTE): 31%	Jobs (FTE): 16%	Jobs (FTE): 49%

### The Dutch fishing fleet by length and gear

(% of total number of vessels)







## AQUACULTURE

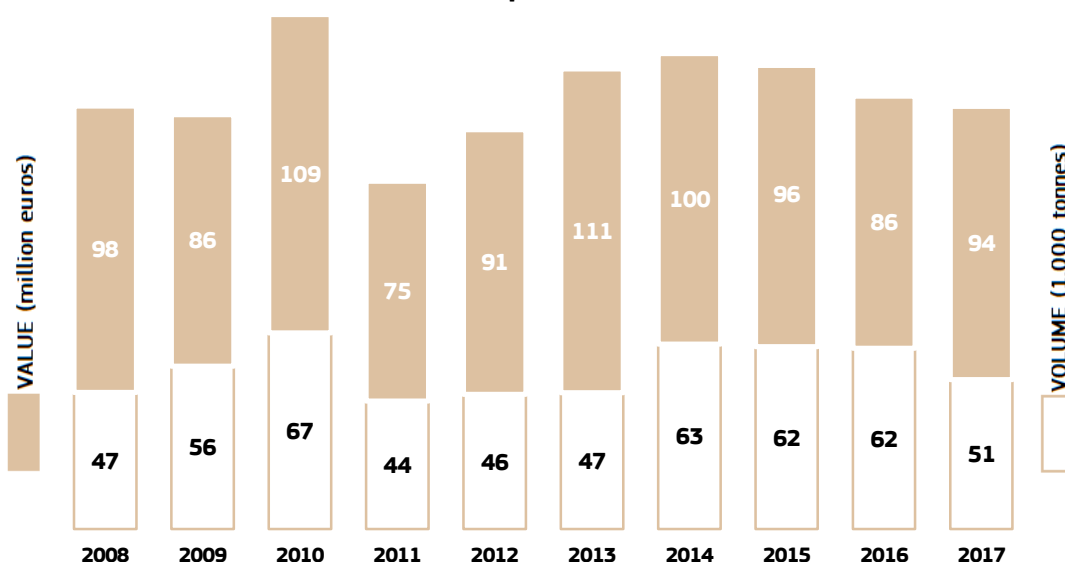
Source: EUMOFA, based on Eurostat and FAO data

Aquaculture consists in 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 2017, 91% of Dutch production occurred in sea and brackish waters (almost entirely in marine waters) and 9% in freshwater. The following main production methods were used:

- 82% of production: on bottom in sea and brackish waters;
- 9% of production: in recirculation systems, almost entirely in freshwater;
- 9% of production: off bottom in sea and brackish waters.

### Total production



### Main commercial species farmed and % of total

(2017, million euros and 1.000 tonnes)



Species	Value (million euros)	% of total value	Volume (1,000 tonnes)	% of total volume
MUSSEL MYTILUS SPP.	47	50%	44	86%
EEL	21	22%	2	4%
OYSTER	17	18%	2	4%
FRESHWATER CATFISH	4	4%	2	4%
OTHERS	5	6%	1	2%



## PRODUCER ORGANISATIONS

2019, source: DG MARE, [link](#)

In the Netherlands, **10 producer organisations (POs)** and **1 association of POs** are formally recognized. Their role is to contribute to the achievement of the objectives of the Common Fisheries Policy (CFP) and of the Common organisation of the markets (CMO) through the collective management of their members' activities.

Of the 10 POs, 9 operate in the fishery sector and 1 in aquaculture. The association of POs operates in the fishery sector.

## FIRST SALES

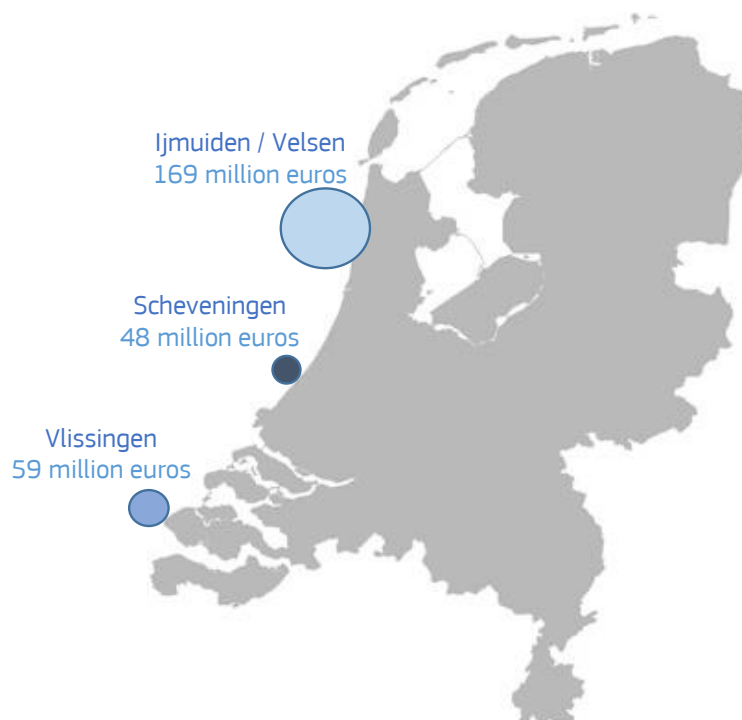
2019, source: EUMOFA

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.

Twelve auctions exist in the Netherlands, covering demersal species and mussels. Seven of them are PEFA-auctions (PEFA is an electronic fresh fish auction for the European market). 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, and 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.

In 2019, total first sales in Dutch auctions amounted to 248.158 tonnes and 387 million euros.

The top-3 auctions covered 88% and 71% of total first sales, respectively in volume and value.



Top-3 auctions	Volume (tonnes)	Value (million euros)	Top-3 main commercial species (in value)
Ijmuiden / Velsen	140.299	169	Herring, blue whiting, common sole
Vlissingen	47.105	59	Blue whiting, herring, common sole
Scheveningen	30.944	48	Common sole, blue whiting, herring



## WHOLESALE

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 (wholesale markets) either. Information on companies’ volume sold and market shares are not publicly available.

Source: Dutch Fish Marketing Board

## PROCESSING

According to Eurostat-SBS, 3.182 persons were employed in the Dutch fish processing industry in 2017. The sector recorded a value added of 155,4 million euros, covering 1% of the value added of total manufacture of food products.

In 2018, the main products sold were “Fresh or chilled fish fillets and other fish meat without bones” and “Frozen fish fillets” (source: Eurostat-PRODCOM).

**153 companies**

**Sales: 978 million euros**

(2017, source: Eurostat - SBS)

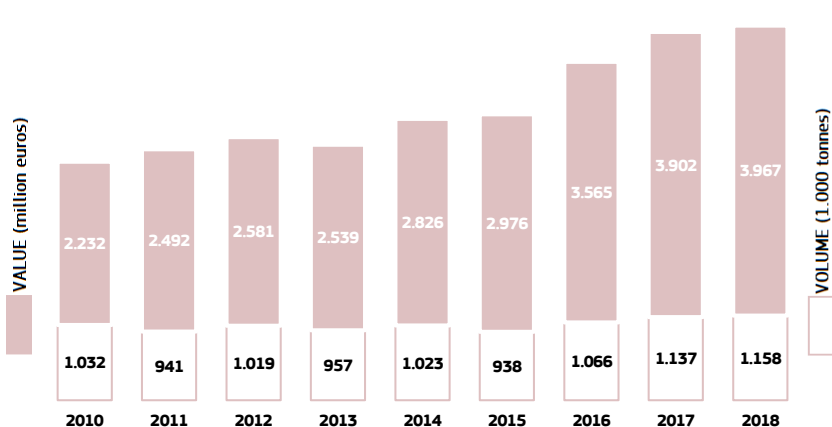


Last update: 03/04/20

## IMPORT – EXPORT

Source: EUMOFA, based on Eurostat-COMEXT data

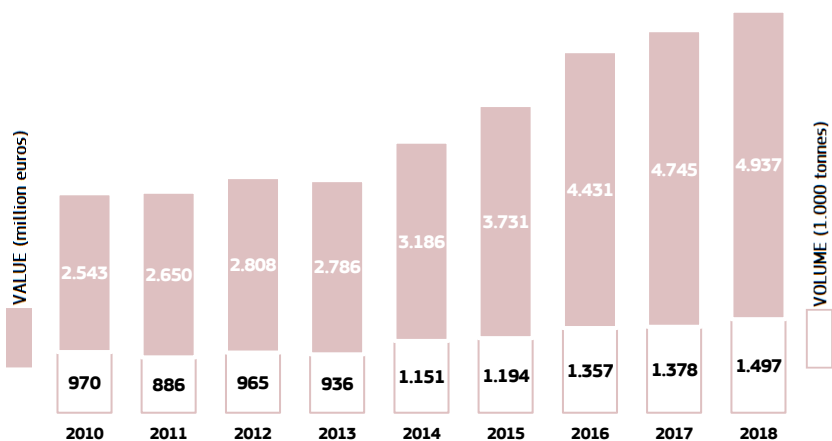
### IMPORT



#### Main commercial species imported and % of total imports (2018, million euros)

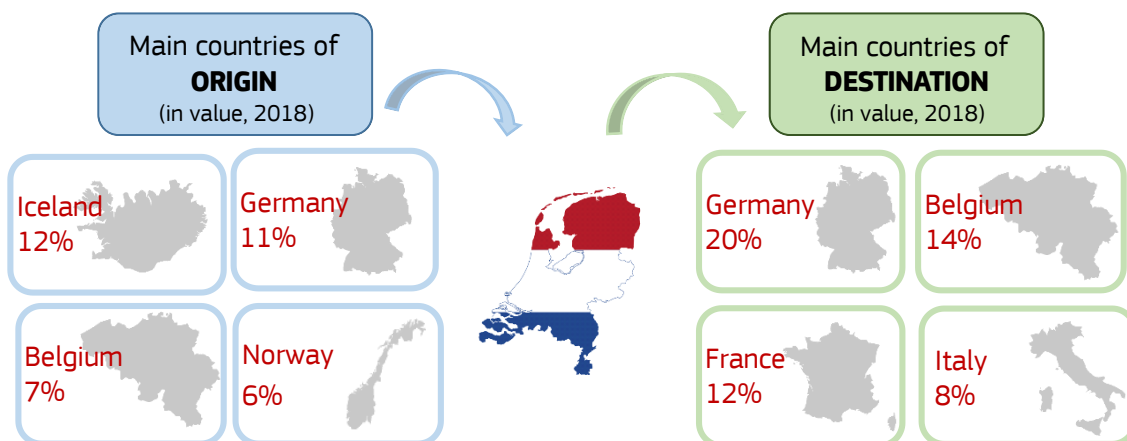
COD	709	18%
MISCELLANEOUS SHRIMPS	347	9%
SALMON	308	8%
WARMWATER SHRIMPS	286	7%
OTHER MARINE FISH	258	6%
OTHERS	2.059	52%

### EXPORT



#### Main commercial species exported and % of total exports (2018, million euros)

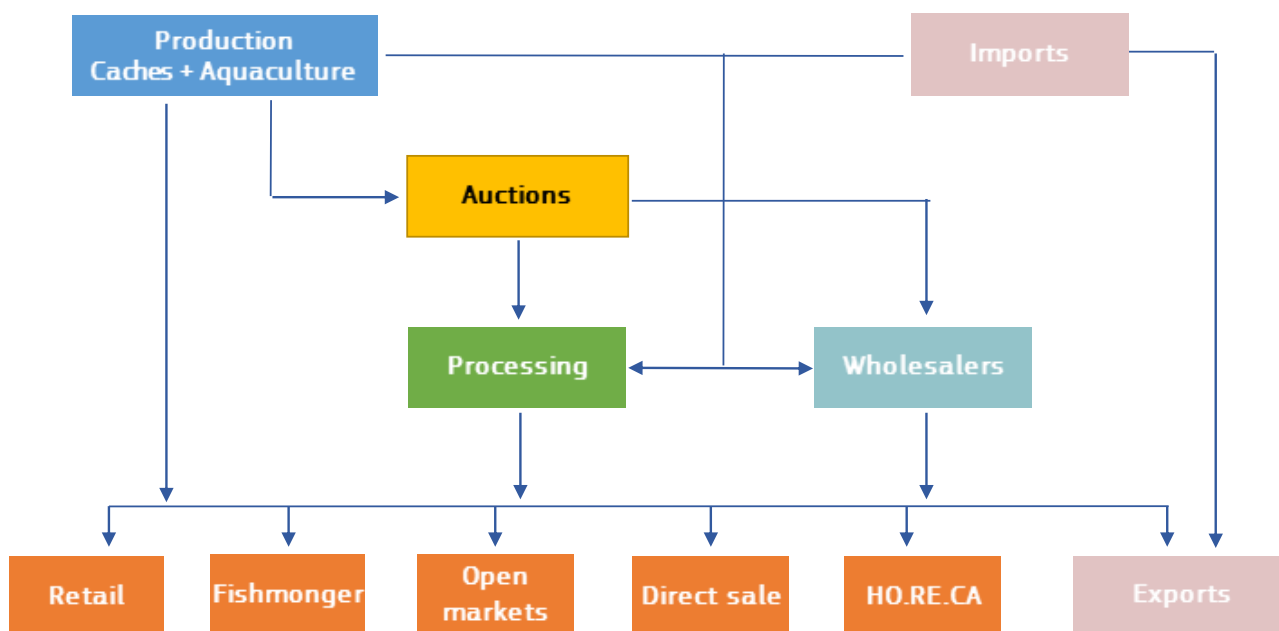
COD	707	14%
OTHER MARINE FISH	371	8%
SALMON	370	8%
MISCELLANEOUS SHRIMPS	360	7%
SKIPJACK TUNA	249	6%
OTHERS	2.880	57%



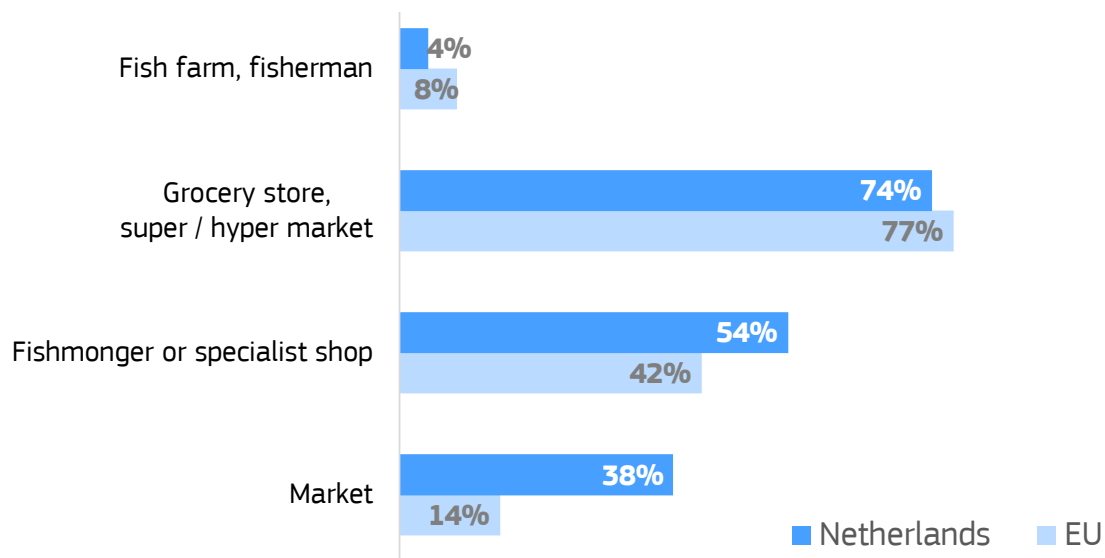


## DISTRIBUTION

The supply chain of fisheries and aquaculture products in the Netherlands (source: Dutch Fish Marketing Board):



Consumer preferences on purchasing channels (source: Eurobarometer, 2018):





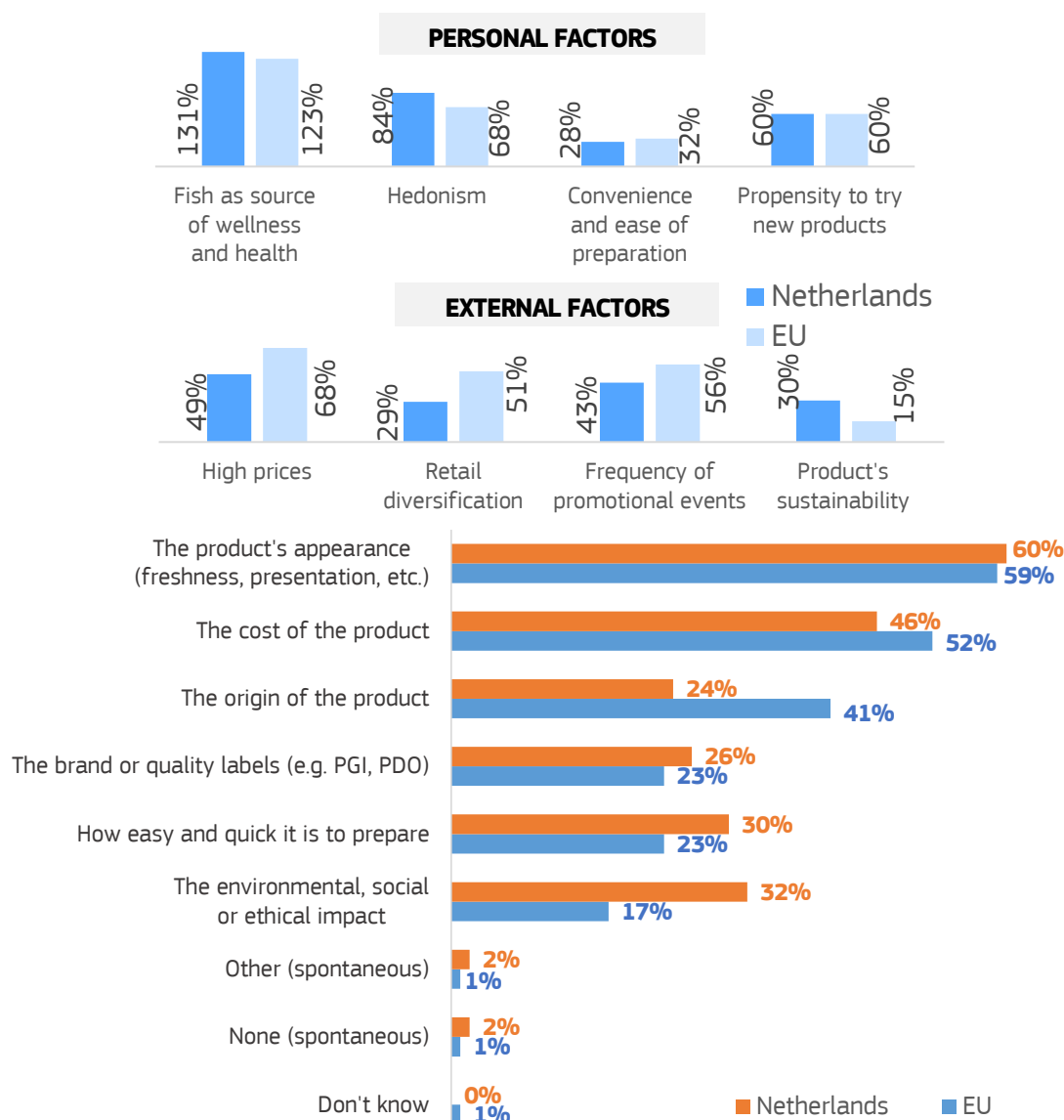
## CONSUMPTION

In 2017, apparent consumption was estimated at 21,1 kg per capita, a slight increase compared with 2016 (+0,5%). The most consumed species were sardine, tuna, freshwater catfish and warmwater shrimps (source: EUMOFA).

Regular consumers, namely those who eat fishery and aquaculture products at least once a month, mainly belong to age groups 40-54 and over 55. Young people (15-24) are less inclined to consume fish in the Netherlands and at EU level. However, in this category, regular consumers cover 75% of the total, which is much higher than at EU level (67%). Dutch consume especially fresh and frozen products; loose fish (71%) is more frequently consumed than at EU level (68%) (source: EUMOFA, "EU consumer habits regarding fishery and aquaculture products", 2017).

**21,1 kg**  
**per capita**  
(2017, source: EUMOFA)

**Purchasing factors** (sources: up chart: EUMOFA, 2017; down chart: Eurobarometer, 2018)







## THE COUNTRY IN EUMOFA



### LANDINGS

Volumes and values are collected from Eurostat – Fishery.

They are available on a yearly basis and accessible through simple and advanced tables, as well as through the bulk download facility.

### FIRST SALES

Volumes and values are collected from the Dutch Ministry of Economic Affairs, Agriculture and Innovation on a monthly basis.

Data cover all species sold in the 12 Dutch auctions.

They are accessible through simple and advanced tables, as well as through the bulk download facility. Data at disaggregated level are also accessible, through a dedicated advanced table and the bulk download facility.

### IMPORT - EXPORT

Volumes and values are collected from Eurostat – COMEXT. Data concern trade flows of all fisheries and aquaculture products as recorded by national customs.

They are available on a monthly and yearly basis and accessible through simple and advanced tables, as well as through the bulk download facility.

### AQUACULTURE

Volumes and values are collected from Eurostat – Fishery and integrated with FAO data.

They are available on a yearly basis and accessible through simple and advanced tables, as well as through the bulk download facility.

### WHOLESALE

No data available

### PROCESSING

Data are collected from Eurostat – PRODCOM. They concern ex-farm quantities and values of fisheries and aquaculture products sold in the country after being transformed from raw material into final products.

They are available on a yearly basis and accessible through simple tables, as well as through the bulk download facility.

### CONSUMPTION

Volumes and values of household consumption of fresh fisheries and aquaculture products are collected from Europanel based on panel reporting. Data are monitored for 10 main commercial species + the item “Others”, aggregating all other species (click [here](#) for the full list).

Data are available on a monthly and yearly basis and accessible through simple tables and the bulk download facility. Moreover, average weekly prices are accessible through simple and advanced tables, and through the bulk download facility.