



NETHERLANDS IN THE WORLD AND IN THE EU

(2015, source: FAO and Eurostat)

The Netherlands is the EU's 5th largest producer of fishery and 6th largest of aquaculture products.

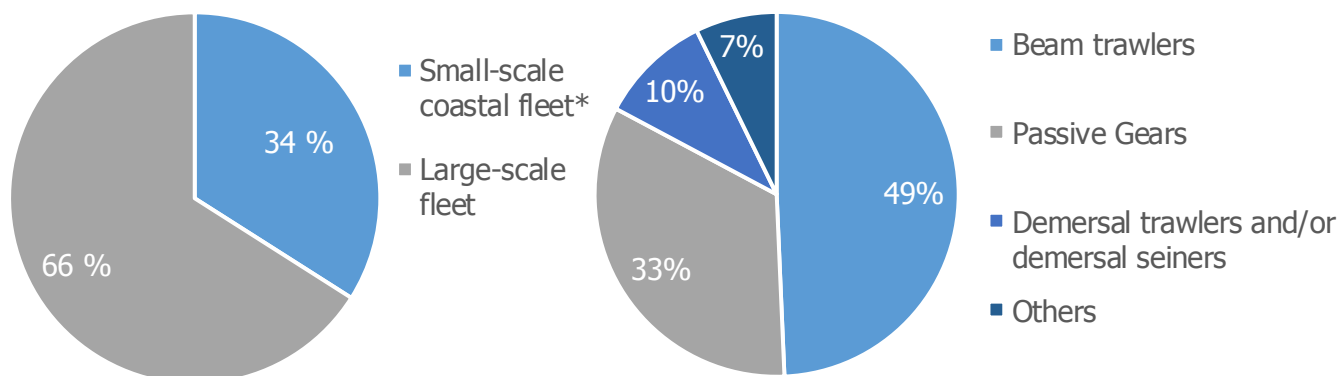
(1000 tonnes)	World	EU-28	Netherlands	% World	% EU-28
Catches	104 635	5 144	365	0,3%	7,1%
Aquaculture	106 094	1 307	62	0,1%	4,7%
Total	211 511	6 451	427	0,2%	6,6%

FISHING FLEET

(2015, source: [JRC and Annual Economic Report](#))

Vessels	Capacity	Power
Number: 718 (including 203 inactive)	GT: 110	KW: 248
TOTAL FTE: 1.619		
Small scale	Large scale	Distant fleet
Jobs (FTE): 6%	Jobs (FTE): 94%	Jobs (FTE): 0%

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



* Vessels less than 12m using passive gears

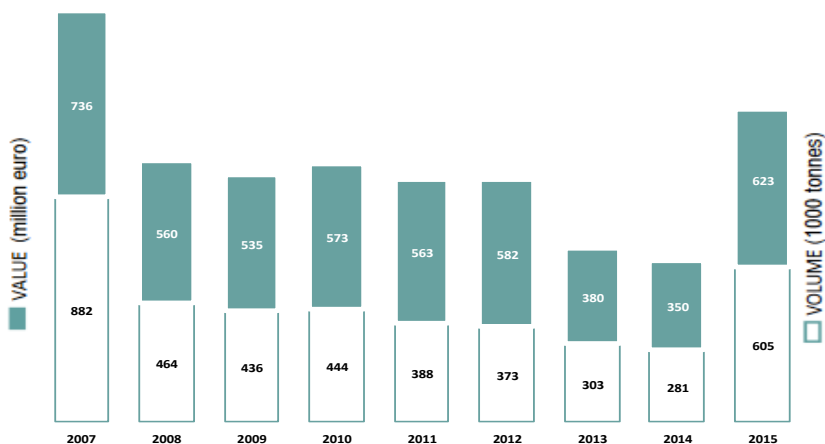


LANDINGS

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. Landings are recorded in net weight.

In 2015, 100% of the landings in the Netherlands originated from EU vessels, with the Dutch fleet accounting for 99%. Approximately 45% of the landings were frozen whole, 35% fresh gutted, 10% cooked and 7% were fresh whole. All the landings were for human consumption.

Total fishing ports reported in the Netherlands are 53 of which 22 (12 auctions) are covered by EUMOFA.



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



SOLE	114	18%	173	29%	HERRING
MACKEREL	107	17%	119	20%	MACKEREL
HERRING	77	12%	101	17%	BLUE WHITING
PLAICE	76	12%	60	10%	HORSE MACKEREL
SHRIMP	60	10%	50	8%	PLAICE
CRANGON SPP.	60	10%	19	3%	MISCELLANEOUS
HORSE MACKEREL	47	8%	83	14%	SMALL PELAGIC
OTHERS	142	23%			OTHERS

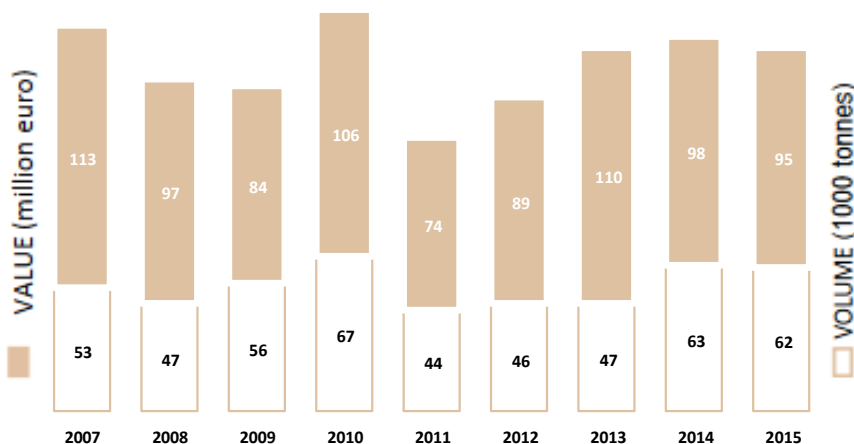
(source: EUROSTAT)



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. Aquaculture products are sold both at auctions and directly from producers to processors, wholesalers or retailers (source: <https://www.pefa.com/auctions/yerseke/>).

In 2015, Dutch aquaculture production was 8% in freshwater and 92% in sea and brackish waters. Of the total volume produced (62.204 tonnes), 87% was blue mussels while various types of finfishes accounted for 9%. Dutch aquaculture utilises mainly on-bottom mussel production (83%), but also off-bottom mussel production (9%) and recirculation systems (8%).



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



Species	Value (million euro)	% over total	Volume (1000 tonnes)	% over total
MUSSEL MYTILUS SPP.	57	61%	54	87%
EEL	17	18%	3	5%
OYSTER	13	14%	3	4%
OTHERS	7	8%	2	4%

(source: EUROSTAT)



PRODUCER ORGANISATIONS (2016, source: DG MARE, [link](#))

11 producers organisations (POs) and **1 association of POs** are recognised for the management of fishery activities of their associated members.

Out of the 12 POs, all are involved in fisheries (coastal fishing, local small-scale fishing, deep-sea fishing, high-sea fishing or other types of fishing).

FIRST SALES (2016, source: EUMOFA)

First sale concerns 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.

In the Netherlands, 12 auctions exist that cover the demersal species and mussels. The main auctions are the Urk/Harlingen auctions. The PO mussel auction in Yerseke is the sole auction for mussels in the Netherlands.

All 11 auctions dealing with demersal species are connected electronically through either PEFA (6 auctions) or the Electronic Fish Information Center Europe (EFICE) (5 auctions). The mussels auction in Yerseke operates with sealed-bids.

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 were 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 does not seem to be many pure wholesalers in the Netherlands, as many of the processing companies especially dealing with pelagic species, have ownership in the boats that land the fish and the wholesalers who purchase the first sales. A large part of the seafood sold at auctions or imports 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 (source: EUROSTAT-SBS)

In 2015, 3.072 persons were employed in the Dutch fish processing industry.

In the Netherlands, the fish processing industry recorded a value added of EUR 915 million, covering 1% of the value added of total manufacture of food products.

The main productions were frozen fillets, fresh or chilled fillets, frozen whole and frozen dried/salted/in brine crustaceans.

144 companies

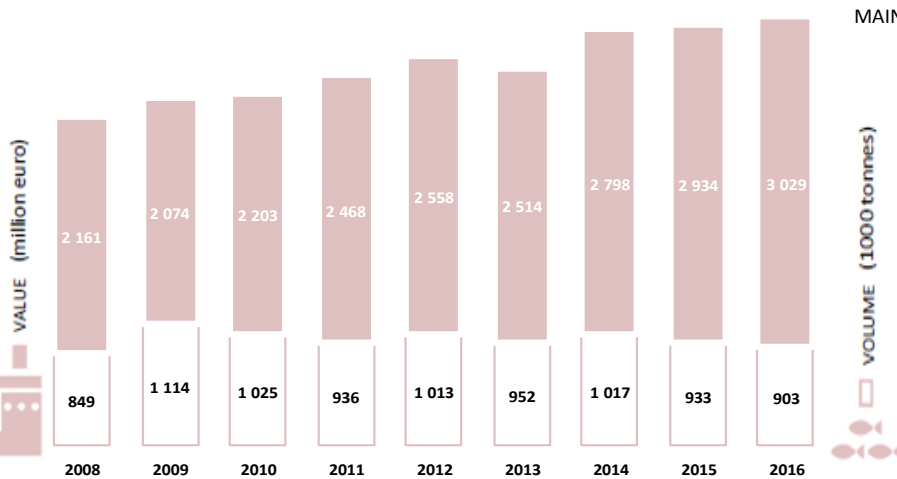
Sales: EUR 915 billion

(2015, source Eurostat - SBS)



TRADE (source: EUROSTAT)

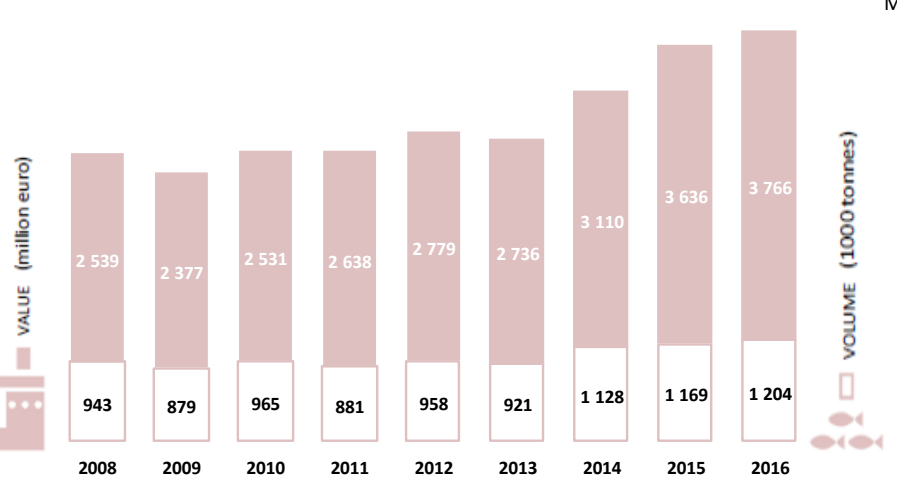
Import



MAIN COMMERCIAL SPECIES IMPORTED AND % OVER TOTAL IMPORTS (2016, million euro)

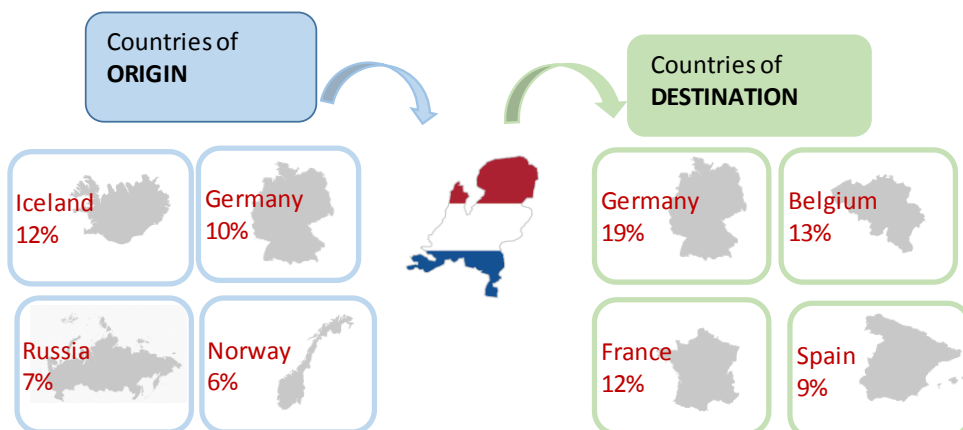
Species	Value (million euro)	%
COD	591	20%
TROPICAL SHRIMP	271	9%
MISCELLANEOUS SHRIMPS	242	8%
OTHER MARINE FISH	195	6%
SALMON	154	5%
SKIPJACK TUNA	142	5%
OTHERS	1 435	47%

Export



MAIN COMMERCIAL SPECIES EXPORTED AND % OVER TOTAL EXPORTS (2016, million euro)

Species	Value (million euro)	%
COD	558	15%
MISCELLANEOUS SHRIMPS	320	8%
OTHER MARINE FISH	286	8%
SHRIMP	191	5%
CRANGON	188	5%
MACKEREL	188	5%
SALMON	187	5%
OTHERS	2 037	54%

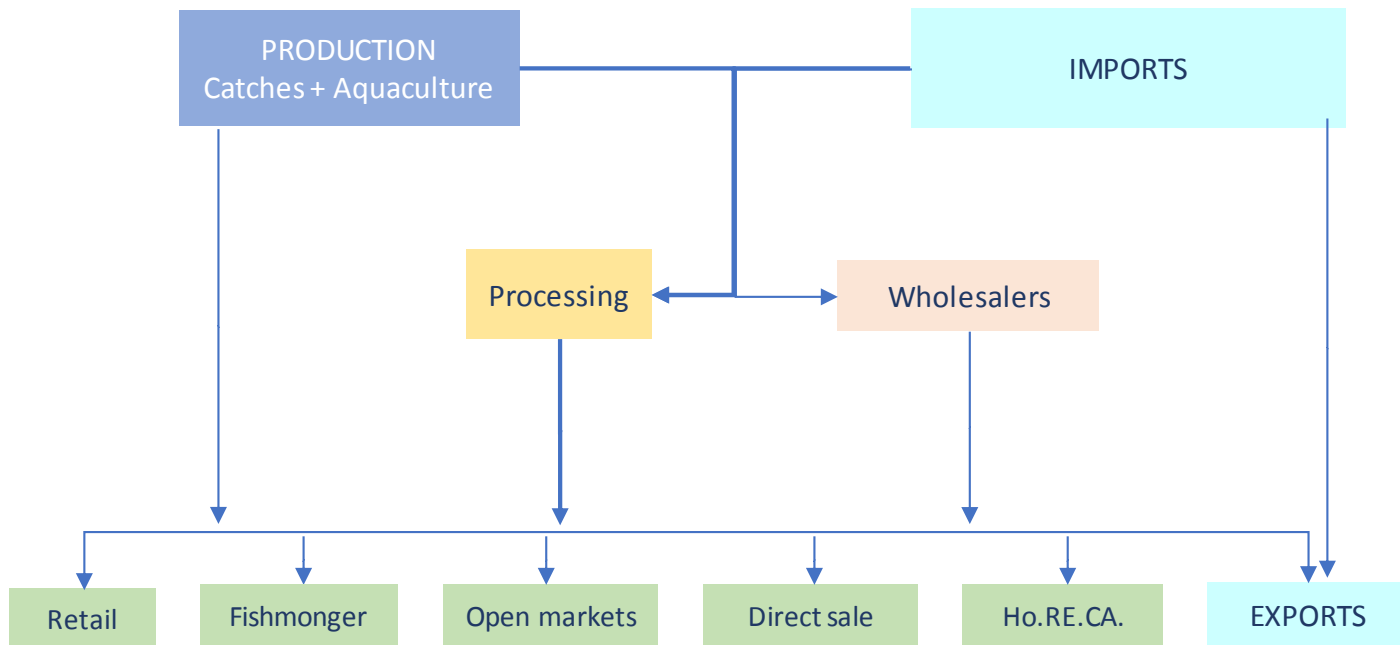




DISTRIBUTION

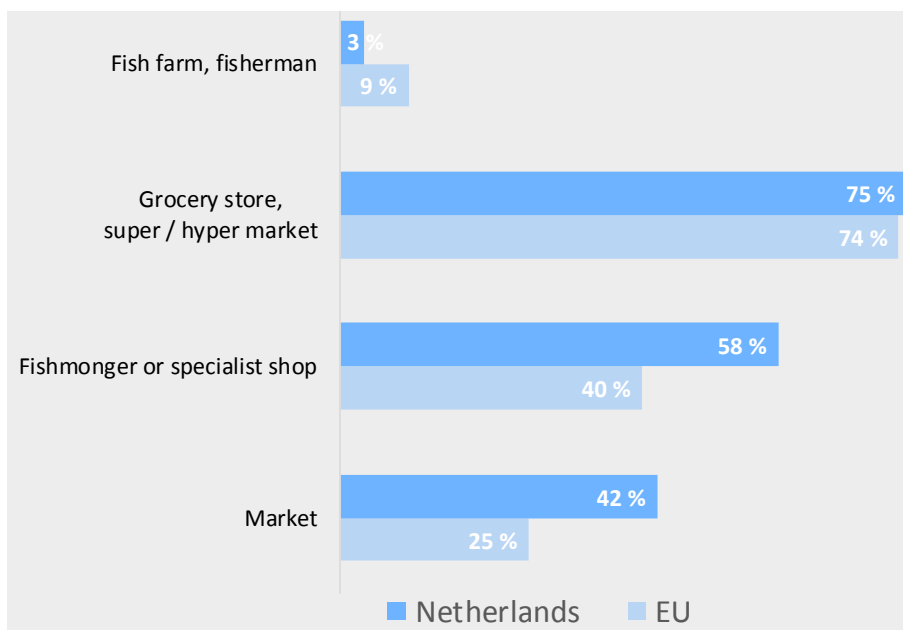
The supply chain of fishery and aquaculture products in the Netherlands

(source: Dutch Fish Marketing Board)



Consumers preferences on purchasing channels

(source: EUROBAROMETER)





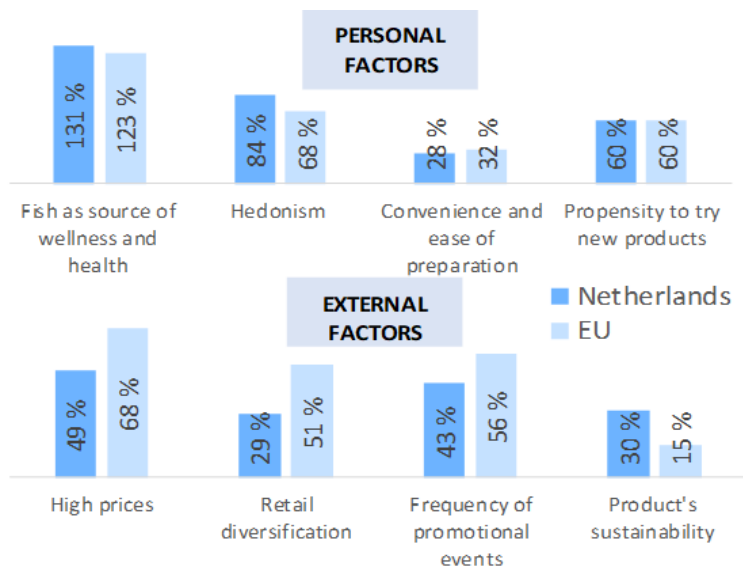
CONSUMPTION

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**.

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

Purchasing factors

(source: EUROBAROMETER)



22,2 Kg
per capita
(source: EUMOFA)





NETHERLANDS IN EUMOFA



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 and monthly 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.

Monthly data are collected and disseminated for all species sold in all auctions included in the data transmission (22 places of sale). Click [here](#) for the list of places of sale.

Both types of 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 for this supply chain are available.

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.