



## BELGIUM IN THE WORLD AND IN THE EU

(2015, source: FAO and Eurostat)

Belgium is a minor EU producer, both in terms of aquaculture and fisheries.

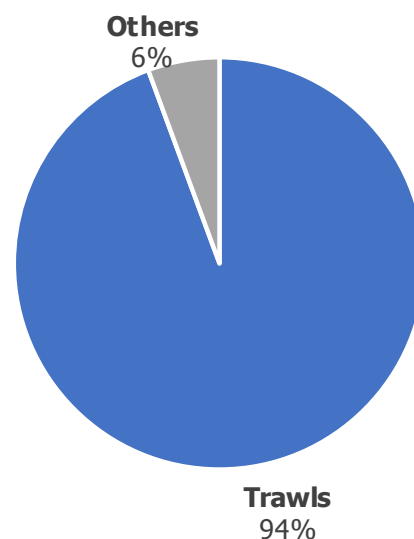
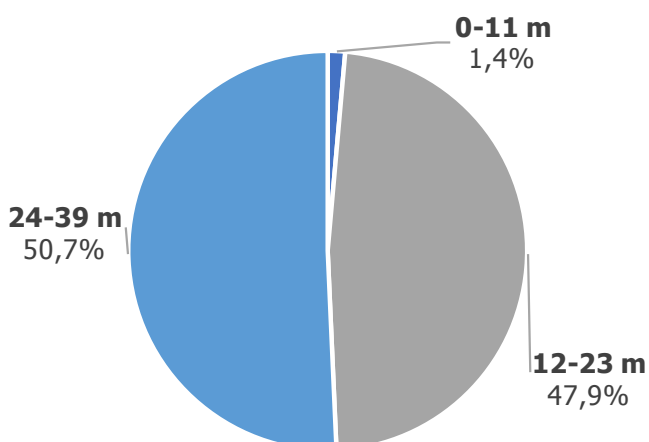
(1.000 tonnes)	World	EU-28	Belgium	% world	% EU-28
Catches	104.635	5.144	24	0,02%	0,47%
Aquaculture	106.094	1.307	0,1	0,00%	0,01%
Total	211.511	6.451	24,1	0,01%	0,37%

## FISHING FLEET

(fleet - 2017, source: EU fishing fleet register; employment - 2015, source: JRC)

Vessels	Capacity	Power	
Number: <b>71</b>	GT: <b>13.712</b>	KW: <b>45.051</b>	
TOTAL FTE: <b>406</b>			
0-11 m	12-23 m	24-39 m	>40 m
Jobs (FTE): -	Jobs (FTE): <b>28%</b>	Jobs (FTE): <b>72%</b>	Jobs (FTE): -

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



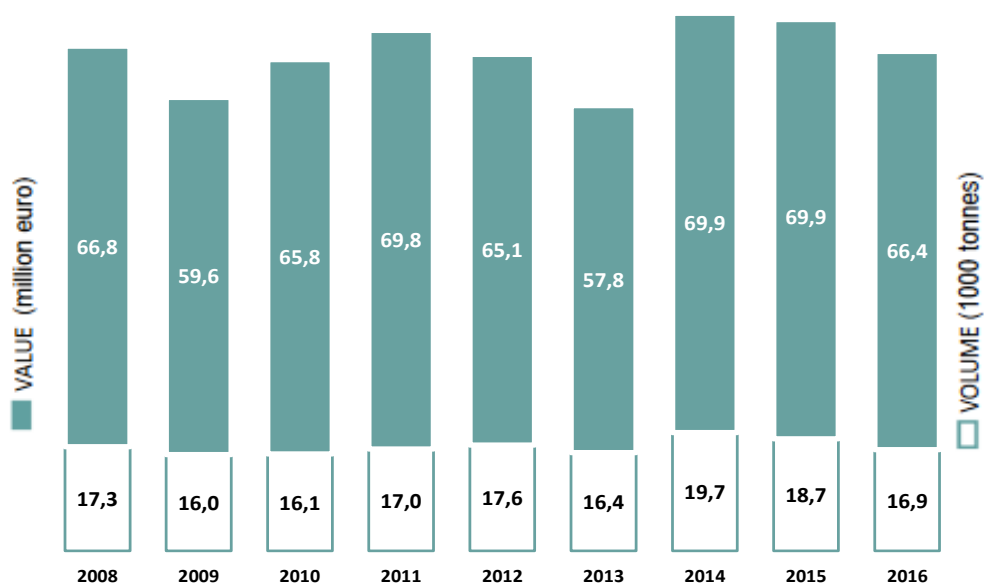


## LANDINGS

Landings comprise 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 Belgium, 95% of the species are landed fresh, the rest consisting of cooked products. Almost 100% of landings are destined to human consumption.

Total fishing ports recorded in Belgium are 7 (source: EU Master Data Register).



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



SOLE	28,3	43%	5,4	32%	PLAICE
PLAICE	8,8	13%	2,8	17%	SOLE
MONK	4,4	7%	1,3	8%	GURNARD
TURBOT	3,8	6%	1	6%	RAY
SHRIMP CRANGON SPP.	3,2	5%	0,9	5%	CUTTLEFISH
CUTTLEFISH	2,8	4%	0,5	3%	OTHER SHARKS
OTHERS	15,1	22%	4,9	29%	OTHERS

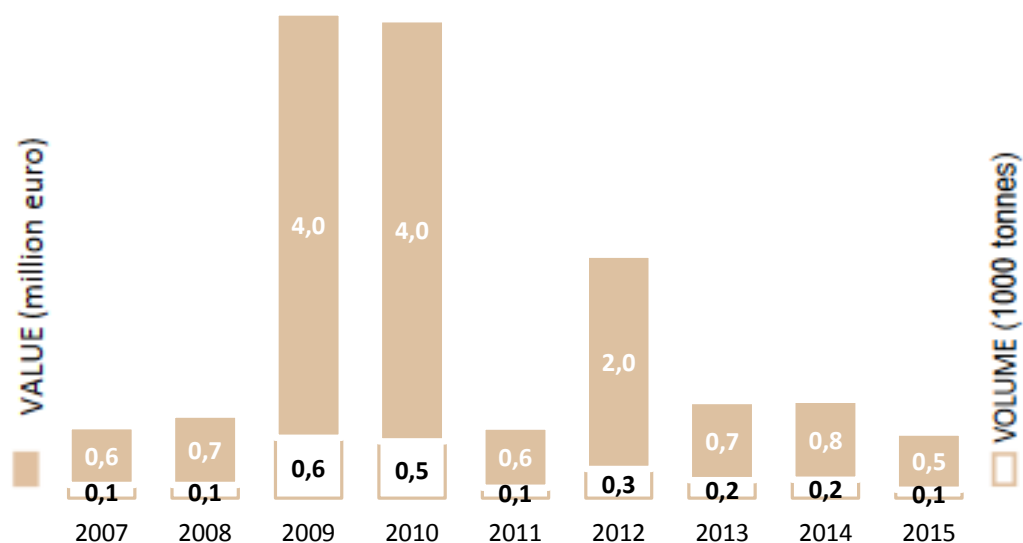
(source: Eurostat)



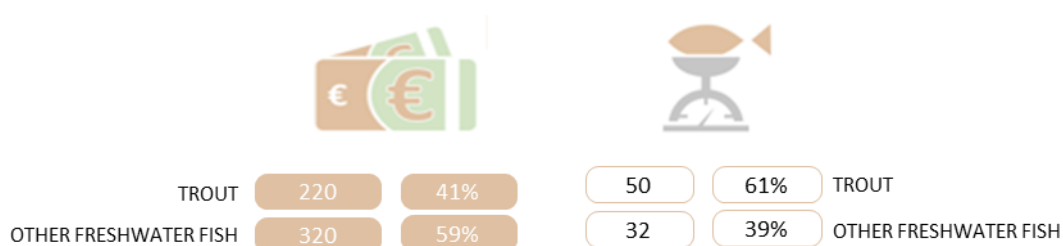
## AQUACULTURE

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.

Only freshwater production exists in Belgium, mainly consisting in trout farming.



### Main commercial species farmed and % of total (2015, 1.000 EUR and tonnes)



(source: Eurostat)



## PRODUCER ORGANISATIONS (2018, source: DG MARE, [link](#))

In Belgium, **1 producer organisation (PO)** is formally recognised, operating in the fishery sector.

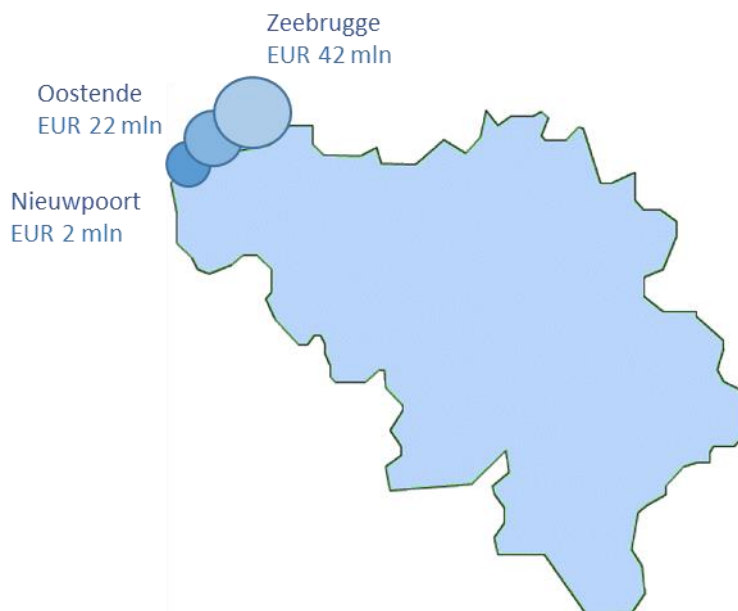
Its role is to contribute to the achievement of the objectives of the CFP and of the CMO through the collective management of its members' activities.

## FIRST SALES (2017, 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).

In Belgium, there are 3 auctions, all located in the North Sea:

- Oostende (Ostend);
- Zeebrugge;
- Nieuwpoort.



The 3 auctions cover 100% of landings volume and value.

Auctions	Volume (tonnes)	Value (million EUR)	Top-3 main commercial species (in value)
Zeebrugge	10.569	42	Sole, plaice, monk
Oostende	5.564	22	Sole, plaice, shrimp Crangon spp
Nieuwpoort	293	2	Shrimp Crangon spp., sole, cuttlefish



## WHOLESALE (source: Vlaamse Visveiling)

**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 no wholesale markets in Belgium. The 3 Belgian auctions play an important role in the FAP supply chain. There are two auction management companies in Belgium:

- **Vlaamse Visveiling** (the most important): management company of the two auctions of Oostende and Zeebrugge. It gathers 170 buyers: wholesalers, supermarkets, markets and speciality stores.
- **Nieuwpoortse Visveiling**: management company of the Nieuwpoort auction.

## PROCESSING

According to Eurostat-SBS, in 2015 1.082 persons were employed in the Belgian fish processing industry. It recorded a value added of EUR 89,6 million, covering only 1% of the value added of total manufacture of food products.

The main products sold in 2016 were fresh or chilled fish fillets/meat, processed crustaceans and molluscs, processed fish, and prepared meals and dishes (source: Eurostat-PRODCOM).

**32 companies**  
**Sales: EUR 571 million**  
(2015, source: Eurostat - SBS)



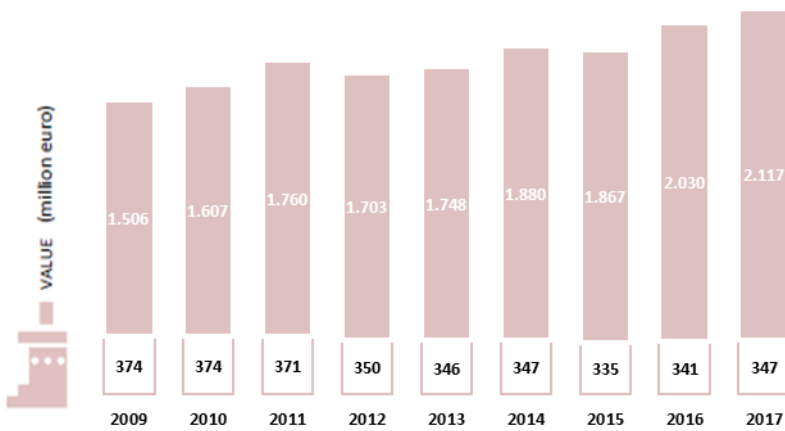
# TRADE (source: Eurostat)

## Import

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



SALMON	370	17%
TROPICAL SHRIMP	312	15%
MISCELLANEOUS SHRIMPS	196	9%
COD	112	5%
OTHER PRODUCTS	106	5%
OTHER MARINE FISH	95	4%
OTHERS	926	45%

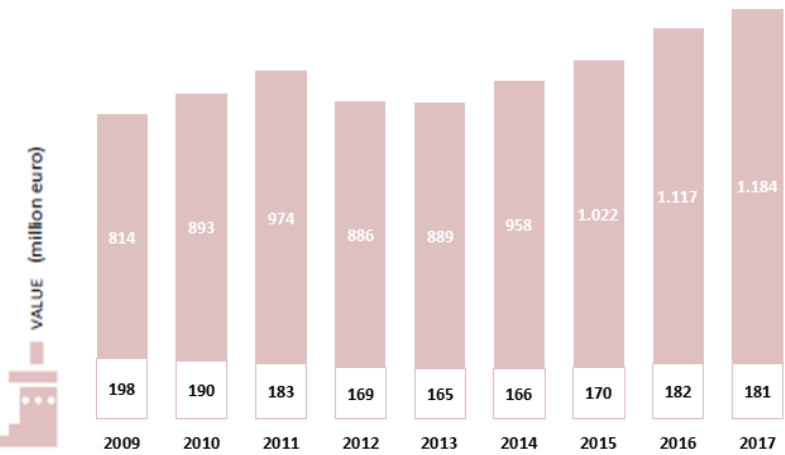


## Export

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



TROPICAL SHRIMPS	213	18%
MISCELLANEOUS SHRIMPS	179	15%
SALMON	133	11%
OTHER PRODUCTS	75	6%
OTHER MARINE FISH	64	5%
COD	34	3%
OTHERS	486	42%



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

Netherlands  
25%

France  
10%

Germany  
7%

Vietnam  
6%

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

France  
31%

Netherlands  
27%

Germany  
14%

Spain  
4%

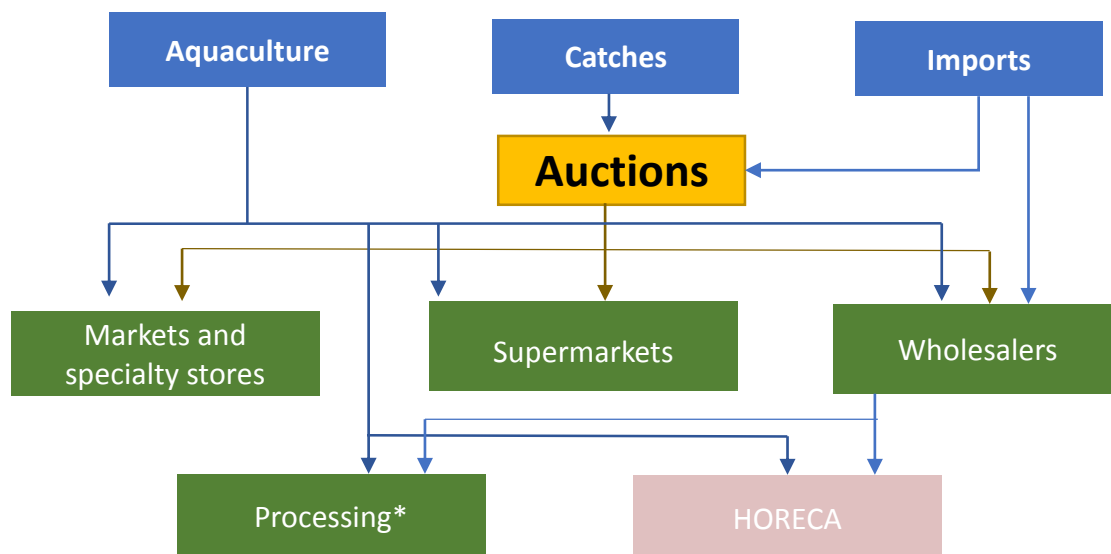




# DISTRIBUTION

## The supply chain of fisheries and aquaculture products in Belgium

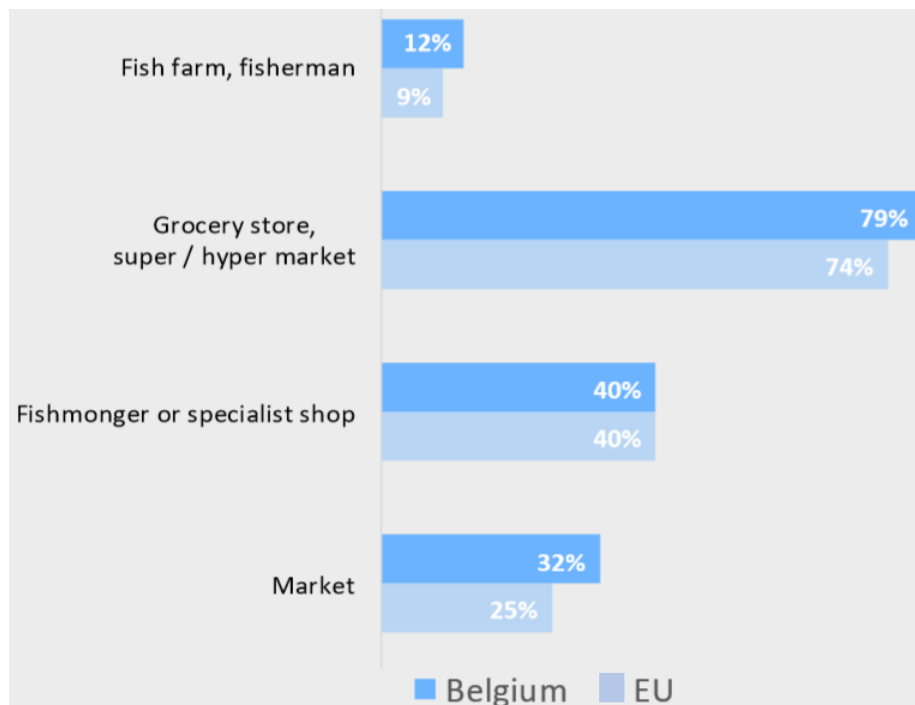
(source: Based on the operational programme for the EMFF of Belgium)



\* Processing depends heavily on imports. the majority of processed products are exported

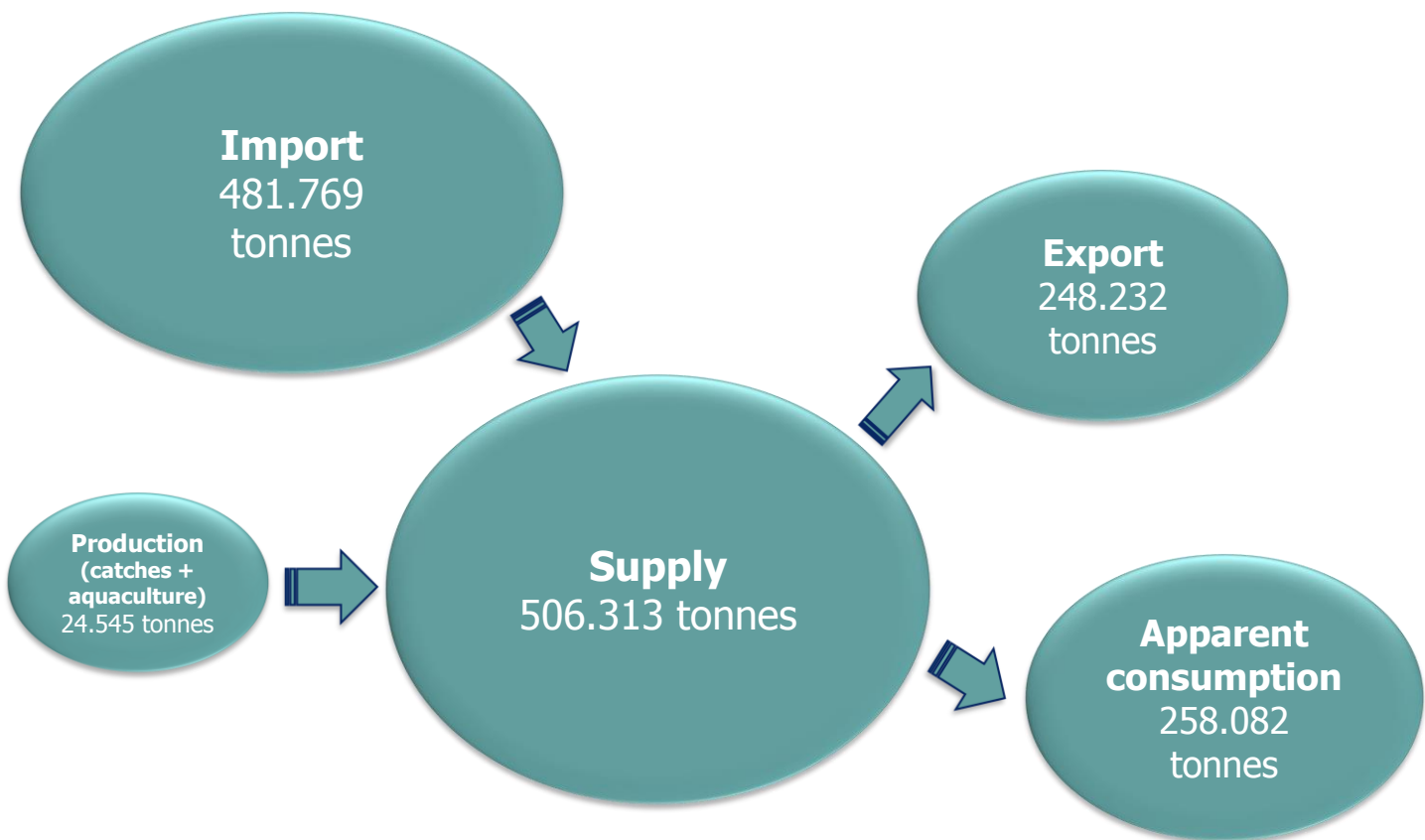
## Consumer preferences on purchasing channels

(source: EUROBAROMETER)





## SUPPLY BALANCE (2015, source: EUMOFA)







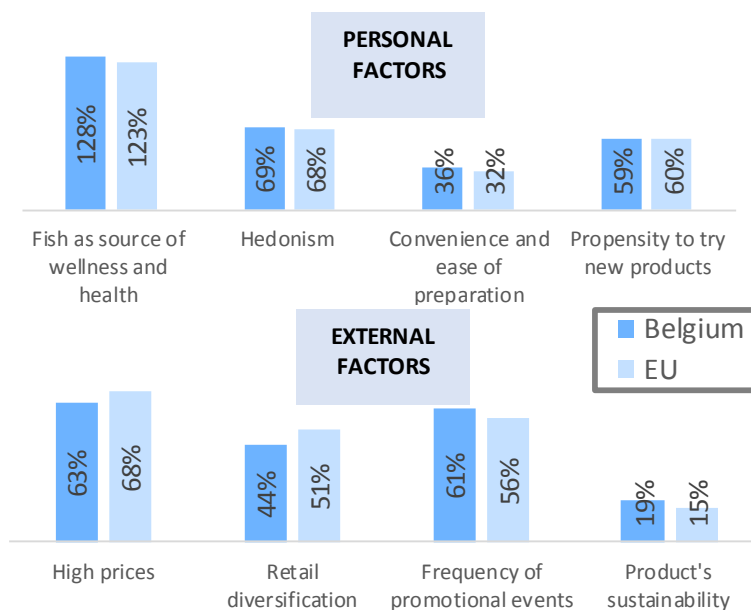
# CONSUMPTION

Apparent consumption of fishery and aquaculture products in Belgium amounted to **23,7 kg per capita in 2015**, slightly decreasing (-2%) compared to the previous year. Specifically, consumption of exotic species is decreasing. However, consumption is increasing of **salmon** and **cod** (the species with the biggest market share) and for the North sea species. **Mussels** are also among main species consumed.

Belgians consume especially fresh and frozen products, while loose fish is more rarely consumed (54%) than the EU average (68%). From a socio-demographic point of view, regular fish consumers mainly belong to the age groups 40-54 and over 55. Young people also tend to eat fish frequently in Belgium. This age group has the lowest number of regular consumers across the EU. While this is also the case in Belgium, the percentage of regular consumers in this age group is higher (69%) than the EU average (67%) (source: "EU consumer habits regarding fishery and aquaculture products").

## Purchasing factors

(source: EUROBAROMETER)



**23,7 Kg per capita**  
(source: EUMOFA)





## LANDINGS

Volumes and values are collected by EUMOFA from **Eurostat – Fishery**. Data concern all species landed in Belgium 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 the **Department of Agriculture and Fisheries of the Government of Flanders** 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 20 species and 3 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 (3 auctions). Click [here](#) for the list of auctions.

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 available for this supply chain stage

## PROCESSING

Volumes and values are collected from **Eurostat – PRODCOM**. Data concern 11 processed products as recorded through the PRODCOM nomenclature.

Data are available on a yearly basis and are accessible through simple tables.

## CONSUMPTION

No data available for this supply chain stage