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The 2019 Dutch Seafood Industry Report

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Fishery Products

Product Brief

SP1 - Expand International Marketing Opportunities

Approved By:

Susan Phillips

Prepared By:

Marcel Pinckaers

Report Highlights:

The Netherlands is increasingly becoming one of Europe's leading importers and exporters of seafood products. The United States was the Netherlands' 13th largest supplier of seafood in 2018; imports totaled 21,000 MT or three percent of total imports. Trade was dominated by frozen Alaskan pollock (AP) which represented 74 percent of U.S. seafood trade. Seafood consumption in the Netherlands is slowly growing due to a larger assortment in supermarkets and product innovation by seafood companies. Growth opportunities for U.S. exporters of seafood can be found in all three segments: seafood processing industry, food retail sector and foodservice-HRI industry.

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Section I. Production

Dutch Seafood Industry

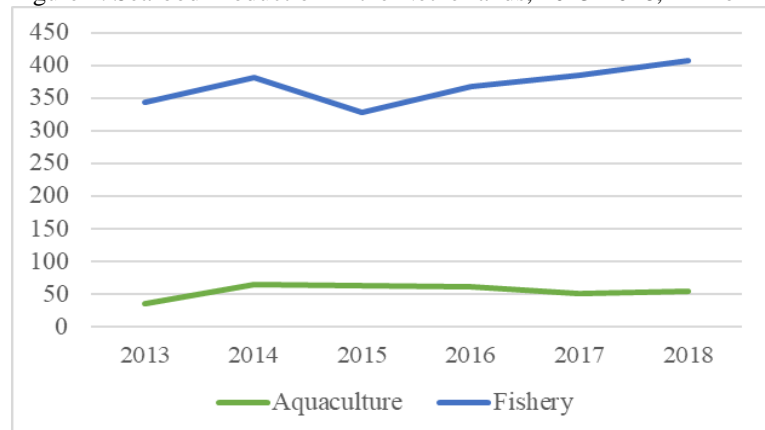
The Netherlands has a long tradition of catching and farming fish. In 2018, seafood production totaled 451 million kg of which 70 percent alone were catch figures of pelagic fish (those that live in the pelagic zone being neither close to the bottom nor near the shore). Due to its location near the North Sea, the Netherlands and its fishery industry have been closely linked for centuries. Today, the Dutch fleet weekly lands a wide variety of fresh fish at the various fish auctions in the Netherlands. The catch of crustaceans and production of other species complete the Dutch supply of fishery production. The assortment of Dutch seafood products is further complemented with imports to supply clients in the Netherlands and abroad with a diverse range of fresh, frozen and processed seafood products. The Netherlands ranks fifth in the EU in terms of fisheries and is the sixth largest EU producer of farmed fish.

Fishery:

Managing Fisheries:

Total Allowable Catches (TACs) are catch limits that are set for most commercial fish stocks by the European Commission's (EC) Council of Ministers of Fisheries. TACs are shared between EU countries in the form of national quotas. For each stock a different allocation percentage per EU country is applied for the sharing out of the quotas. EU countries have to use transparent and objective criteria when they distribute the national quota among their fishermen. They are responsible for ensuring that the quotas are not overfished. More information about EC fishing quotas can be found [here](#).

Figure 1. Seafood Production in the Netherlands, 2013-2018, Million kg.



Source: visserijcijfers.nl, nevevi.nl

Landings of fish caught by Dutch fishermen grew from 385 million kg in 2017 to 407 million kg last year (Figure 1). Catch numbers were up in all subsectors of the Dutch fishery industry.

Pelagic Fishery

The Dutch pelagic fleet consists of eight deep-sea freeze trawlers that fish predominantly pelagic fish in the North East Atlantic but also in West African Seas and near the coast of Chile. After catching the fish, these trawlers have the capability to freeze the fish on board. Last year the Dutch caught 317 million kg fish, up by 15 million kg, mainly due to higher landings of blue whiting, see Appendix I, table 1.

Cutter Fleet Fishery

The cutter fleet consists of 289 cutters and traditionally catches ground fish species such as brown shrimp, plaice and dover sole. Total landings of the Dutch cutter fleet increased by approximately six million kg in 2018 compared to previous year, but still four million kg less than the peak year of 2016. The supply of plaice fell from 30.5 million kg in 2017 to 24.5 million kg last year. The supply of dover sole fell slightly by 0.7 million kg. Catch figures of tub gurnard (a bottom-dwelling coastal fish) fell sharply by 1 million kg (almost 30 percent). These lower figures were compensated by record high catch figures for brown shrimp last year with 27.7 million kg, almost double the amount compared to the year before, see Appendix I, table 2.

Razor Clams and Small Scale Fishery

Last year, landings of razor clams and small scale fisheries and, totaled 8.9 million kg up by 17 percent compared to total landings in 2017 (7.6 million kg), see Appendix I, table 3. In 2018, the fleet of small scale fisheries consisted of 225 relatively small boats, down by nine boats compared to the year before.

Challenges:

The Dutch fishery industry is facing several challenges at the moment. The traditional fishing areas in the North Sea are under pressure due to the multipurpose use of these waters, e.g. windmill parks and marine protected areas. The EC has recently adopted legislation to introduce a ban on the use of pulse fishing from 2021. This will have an impact on the Dutch fishing sector. Industry contacts claim that pulse fishing enabled fishermen to not only lower fuel costs but also to specifically fish for high-value species like sole. Finally, the landing obligation resulted in increased costs both at ship and land. The EU landing obligation requires all EU catches of regulated commercial species on-board to be landed and counted against quota. .

Aquaculture:

The Netherlands has a long tradition of farming fish. The Dutch aquaculture sector is especially known for its mussels and oyster production. Last year aquaculture production totaled 54.1 million kg (Figure 1) up by five percent compared to 51.3 million kg in 2017.

Mussels:

The production of mussels is concentrated in the coastal waters the Wadden Sea and the Eastern Scheldt. Mussel producers predominantly use the bottom culture as a production method. Dutch mussels are farmed for the fresh consumer market and consumers of Dutch mussels can be found in the Netherlands and in important export markets France and Belgium. Last year the production of mussels totaled 46 million kg, see Appendix II, table 4. The growing prices of mussel seed and increased competition from mussels produced abroad have negatively impacted the profitability of the sector in recent years.

Oysters:

In the Netherlands, production of oysters is concentrated in the province of Zeeland. There, the Dutch government owns cultivation areas which are leased to oyster producers. The two species cultivated in the Netherlands are Pacific and Flat oysters. For 2018, the supply of oysters is estimated at 31 million oysters, of which over 80 percent are Pacific oysters. When ready for consumption, an oyster weighs, on average, 85 grams. In 2018, Dutch oyster production is estimated at 2.6 million kg, see Appendix II, table 5.

Other:

Aquaculture production, other than mussels and oysters, totaled almost 5.5 million kg in 2018. Production decreased from 6.5 million kg in 2013 to 4.9 million kg in 2017 primarily due to lower production volumes of European eel. Last year figures showed that production is on the rebound mainly because of higher production volumes of yellowtail in the Netherlands, see Appendix II, table 6.

Section II. Processing

Picture 1. Dutch Delicacy ‘Kibbeling’



There are about 300 Dutch companies that process fish. The majority process Dutch-caught flatfish into fillets or peal (brown) shrimp for further distribution to consumers. In the past decade several processing plants have diversified and are no longer only processing North Sea species but also, for example, fresh salmon into fillets, steaks and smoked products.

Traditional Dutch delicacies are herring and ‘kibbeling’ (Picture 1). The latter product is deep fried pieces of breaded white fish. Traditionally, these products were made from cod. Nowadays often cod is being replaced by Alaska Pollack (AP) because it is easier to source and cheaper. The industry is faced with strict catching regulations within the EU. In order to fully use the existing processing capacity, access to seafood products from outside the EU is of growing importance.

Section III. Consumption

There are no exact consumption figures of seafood products for the Netherlands. According to industry sources, Dutch per capita consumption is between 20 and 25 kg per year. The most popular fish product was canned tuna followed by herring, fish fingers and salmon.

Table 1. Top 10 most Popular Fish Products by Volume

1. Tuna (canned)	6. Herring (jar)
2. Herring (fresh)	7. Alaska Pollack (frozen)
3. Fish fingers (frozen)	8. Mackerel (smoked)
4. Salmon (smoked)	9. Pangasius (frozen)
5. Salmon (fresh)	10. Salmon (frozen)

Source: Dutchfish.nl

Overall consumption of fish in the Netherlands is slowly growing, both in volume and value. Supermarkets have embraced seafood as an important source of animal protein which has resulted in a larger assortment available for consumers. Dutch consumers are increasingly seeing fish as a healthy, fresh and natural alternative to red meat and poultry products. Food companies have also developed and introduced innovative frozen and fresh meals and meal components containing fish (Picture 2). The assortment of salads with seafood has grown rapidly over the past years. All these products appeal to consumers, especially those that are on the look-out for convenience and healthy food options. The growing popularity of sushi has further contributed to an increase in seafood consumption.

Picture 2. Ready-To-Cook Meal, Frozen Fish Fillets and Ready-To-Eat Salads



According to a study done by the European Market Observatory for Fisheries and Aquaculture Products EUMOFA, regular fish buyers tend to be those in the age group of 40 years and older. Young consumers seem to be the lowest frequent buyers of seafood. More information is available at <http://www.eumofa.eu/netherlands>.

Certified seafood:

An important development in recent years has been the increased interest in sustainably caught fishery products and responsibly farmed seafood. Sustainability labels are becoming increasingly important for all food products, but one of the most popular sustainability labels in the Netherlands for both retailers and consumers are Marine Stewardship Council (MSC) and Aquaculture Stewardship Council (ASC). If MSC or ASC certified products are not available to retailers, they will turn to the [VISWijzer](http://www.viswijzer.nl) for sourcing sustainable seafood. Several Dutch fish species are certified, including, herring, mussels and oysters.

Section IV. Distribution

Traditional vendors of seafood in the Netherlands are food retailers, fish mongers, fish specialty shops, street stalls and foodservice companies. The Dutch retail sector is rather consolidated with the two largest retailers controlling over 50 percent of the market. Supermarkets on average sell, depending on their size, a variety of fresh, frozen, convenience and ready-to-eat seafood products (Picture 3). Additional information about this industry can be found in the GAIN Report [The Dutch Food Retail Market – July 26, 2018](http://www.gain.gov.nl).

Picture 3. Pick&Mix and Ready-To-Heat Products in Dutch Supermarkets



In larger Dutch cities you will find fish mongers who traditionally who sells raw fish. Fishmongers are trained at selecting and purchasing, gutting, filleting, displaying, and selling seafood. Some fish mongers have become fish specialty shops where the focus is no longer on selling raw fish but about adding value (Picture 4). These shops sell a full range of convenience products like ready-to-cook seafood, ready-to-eat seafood, luxury quiches, seafood hors d'oeuvres and sushi.

Picture 4. Value Added Products at Fish Specialty shops



Someone who has visited Dutch cities, has probably seen fish stalls (Picture 5). These street vendors typically sell salted herring, deep fried ‘lekkerbek,’ ‘kibbeling’ and white buns with a seafood spread made of salmon, tuna or shrimp.

Picture 5. Fish Stall, Herring and Seafood Spreads



The Foodservice – HRI industry is also a distributor of seafood products, selling products fish burgers, sushi and seafood meals. Specific information about this market as well as consumer trends, entry strategies and business tips can be found in the GAIN Report [The Dutch Foodservice Market – September 27, 2018](#).

Section V. Market Access

Seafood can only be imported into the EU from approved countries and from approved establishments, e.g., processing plants, factory or freezing vessels, cold storage facilities or brokers. Aquaculture products, including live bivalve mollusks, can only be imported into the EU if they are from approved establishments located within approved production zones or areas.

Since 2006, the U.S. Seafood Inspection System has been recognized by the EU as equivalent to the European Seafood Inspection System with the exception of live bivalve mollusks, in whatever form. This mutual recognition facilitates seafood trade between the U.S. and the EU. Furthermore, it creates a framework under which Member States cannot impose national requirements on U.S. seafood exporters on top of EU harmonized legislation. However, differences of interpretation among Member States can lead to delays at border inspection posts.

Since 2010, the United States has been prohibited from exporting live bivalve mollusks to the European Union (EU) and the EU has been prohibited from selling these products to the United States. In order to break down this trade barrier and ensure the safety of imported clams, mussels, oysters, scallops, etc. in both markets, the United States and the EU have been actively working to move an equivalence determination process forward. Technical experts on both sides of the Atlantic have conducted a multi-year, in-depth and cooperative review of shellfish safety systems in the United States and the EU and when the determination becomes final, Massachusetts and Washington State will once again be able to send bivalve mollusks to the EU. FDA is committed to continuing to work with the EU on procedures to add more states after these first two are allowed to export.

Certificates:

Since January 1, 2010, each shipment of seafood must be accompanied by a Sanitary Certificate and also a Catch Certificate. Since June 2009, the U.S. Department of Commerce (USDC), NOAA/National Marine Fisheries Service, is the U.S. agency responsible for the certification of fishery and aquaculture products intended for the EU. U.S. exporters should pay specific attention to the fact that health certificates must be issued and signed by USDC-NOAA before the shipment leaves the United States. Bills of lading should always be dated the day of or after issuance of the health certificate.

More detailed information about the EU legislation governing trade in edible seafood products can be requested by contacting Stephane Vrignaud at the U.S. Mission to the EU by email stephane.vrignaud@trade.gov or phone +32(2)811.5831.

Import tariffs for seafood products exported to the EU range from zero to 22 percent depending on the species and level of processing. Seafood products packed for retail sale must comply with EU labeling regulations, more information on specific Dutch import requirements and import tariffs can be found in the GAIN Report [The Dutch FAIRS Annual Country Report – March 21, 2019](#).

Section VI. Trade

Import:

The Netherlands is one of the larger importers of seafood and seafood products within the EU and provides an essential processing and logistics center for seafood in Europe. Last year Dutch total seafood imports totaled around 1 million MT of which one third originated from outside the EU. The largest non-EU suppliers, in volume, were Iceland, Norway, Russia, Faroe Islands, Vietnam, China, Turkey and the United States. Popular fish imports from countries around the North Atlantic were small pelagic fish, salmon, and cod. Russia predominantly supplied cod while fish imports from Vietnam were mainly catfish and shrimp.

The United States was the Netherlands' 13th largest supplier of seafood in 2018; imports totaled 21,000 MT or three percent of total imports. Trade was dominated by frozen Alaska Pollock (AP) which represented 74 percent of the seafood trade. Other products imported from the United States were scallops, squid, salmon and hake. Importers seem to be slowly sourcing more high-value seafood products from the United States.

Exact numbers for U.S. AP exports to the Netherlands in 2018 could be even higher due to the fact that some product is imported via neighboring countries, like Germany, and then shipped to Dutch food processing companies. AP from the United States competes with (processed) AP from China.

The United States used to be a steady supplier of cod to the Netherlands. Exports of U.S. cod however dropped from 6,135 MT in 2015 to 86 MT last year. This is clearly a market which has now been taken over by Russia and Norway.

Netherlands' imports of scallops are led by imports from the United States. Imports have varied between a low of 701 MT in 2013 to a high of 1,647 MT in 2015. During the past few years, demand from high-end HRI industry continues to be strong for good quality scallops. Competing suppliers of scallops are Japan and Peru. In 2018 total Dutch total imports of scallops totaled 3,277 MT of which 1,065 MT (33 percent) originated from the United States.

Dutch imports of squid have also been rather stable and strong for the past five years despite fierce competition from China, India, Vietnam and Spain. In 2018, squid imports from the United States (813 MT) represented ten percent of total imports (7,778 MT).

Demand for wild salmon, especially sockeye, has more than doubled in the past five years. In 2013, imports from the United States totals 652 MT, or 54 percent of total imports (1,214 MT). Last year, U.S. exports more than doubled (1,548 MT) and maintained its market share. Dutch total wild salmon totaled 2,832 MT with some competition from Russian wild salmon.

Export:

Because of its tradition of catching fish, location in Europe and distribution function, the Netherlands is a leading exporter of fish. Last year, Dutch fish exports totaled 1.4 million MT. Dutch exports include fish that was caught or farmed by Dutch fishermen but also re-exports of imported fish, directly or after adding value through reprocessing or repacking. Dutch exports grew between 2013 and 2018 by 68 percent while imports only grew by 25 percent. As a result, net exports grew from 5,702 MT in 2013 to 367,721 MT in 2018. Today, three-quarter of all Dutch fish products are exported of which roughly 80 percent stays within the European Union. Exports to non-EU countries account for 20 percent of total export figures. Important export markets are countries in Africa, and in particular Nigeria and Egypt, mainly for pelagic fish species.

Section VII. Opportunities and Entry Strategy

Opportunities:

Picture 6. Story Telling Adds Value



Due to the growing dependence of seafood processing companies on seafood from outside the EU, there continues to be opportunities for U.S. exporters of AP, squid, cod and hake to grow their market in the Netherlands. In addition, there is growing demand from the high-end HRI industry for high-quality and sustainable certified fishery products such as lobster, oysters and scallops from the United States. U.S. exporters that have a story to tell about their seafood (Picture 6), especially if the story concerns the health benefits, the freshness and versatility, have a competitive advantage. At retail level there is demand for tasty, sustainable products in small consumer packaging. Product information, suggested recipes and preparation tips can persuade consumer to buy fish

and have a good experience.

Entry Strategy:

The first step for U.S. companies that would like to start exporting seafood to the Netherlands is to determine whether there is a potential market for your product. It is important to gain a good understanding of who the clients and end-users could be. Trade statistics can help to indicate whether Dutch companies need to import this product, whether it is locally or regionally available, how much is currently being imported, and from which competing supplying country. If the product is new to the market, then it is recommended you reach out to Dutch traders or distributors for their input. Either way, FAS The Hague can help you find the right path for your product.

There are several options on how to best connect with Dutch buyers of seafood products. Visiting and exhibiting at trade shows and in particular seafood trade shows have demonstrated to be an effective tool for U.S. companies to expand their overseas business. Dutch buyers regularly travel around the world to see new seafood products and make new contacts. At trade show, they will not only meet local buyers, but there is also the opportunity to arrange site visits and do store checks in order to see what seafood products are available on the market. The Seafood Expo Global (SEG) is the most important international seafood trade shows attracting international buyers followed by the Seafood Expo North America (SENA).

Seafood Expo Global (SEG)
Parc Des Expositions,
Brussels, Belgium

Seafood Expo North America (SENA)
Boston Convention and Exhibition Center,
Boston, Massachusetts, USA

www.seafoodexpo.com/global www.seafoodexpo.com/north-america

SEG, annually held in Belgium, is one of the few European shows endorsed by the United States Department of Agriculture (USDA). USDA's Foreign Agricultural Service (FAS) works with show organizer Diversified to create a U.S. pavilion. The U.S. seafood cooperators groups listed below have been exhibiting at past editions of SEG.

Alaska Seafood Marketing Institute (ASMI)
311 N. Franklin Street - Suite 200
Juneau, Alaska 99801-1147, USA
Phone: +1 800 478-2903
Info@AlaskaSeafood.org
www.alaskaseafood.org

Intertribal Agriculture Council (IAC)
100 North 27th Street – Suite 500
Billings, Montana 59101, USA
Phone: +1 406 259 3525
www.indianag.org

Food Export USA - Seafood Program
One Penn Center
1617 JFK Boulevard, Suite 420
Philadelphia, PA 19103, USA
Phone: +1 215.829.9111
ccooyne@foodexportusa.org
www.foodexportusa.org

Southern U.S. Trade Association (SUSTA)
701 Pydras Street, Suite 3845
New Orleans, Louisiana 70139, USA
Phone: +1 504 568 5986
susta@susta.org
www.susta.org

Western U.S. Agricultural Trade Association (WUSATA)
4601 NE 77th Ave., Suite 120
Vancouver, Washington 98662, USA
Phone: +1 360 693 3373
export@wusata.org
www.wusata.org

Participation in seafood specific (reverse) trade missions, organized around SENA by seafood cooperator groups or State Regional Trade Groups (SRTGs) have resulted in numerous export successes for U.S. seafood companies. Contact FAS The Hague and we will help you connect with Dutch buyers. The GAIN Report [The Dutch Exporter Guide – February 13, 2019](#) offers some hands-on information about how to best enter the Dutch market, how to conduct business and how supply chains are organized. Other market assistance reports can be found on <http://fas-europe.org/countries/netherlands/>.

Section VIII. Key Contacts and Further Information

If you have questions or comments regarding this report, need assistance exporting to the Netherlands, or if you are looking for a list of Dutch wholesalers and distributors, please contact the Foreign Agricultural Service in The Hague, the Netherlands:

U.S. Department of Agriculture's Foreign Agricultural Service
Marcel Pinckaers
Embassy of the United States
John Adams Park 1, 2244 BZ Wassenaar, the Netherlands
Phone: +31 (0)70 3102 305
marcel.pinckaers@fas.usda.gov
www.fas.usda.gov

The Dutch Fish Marketing Board maintains a database of seafood importers. Their website <https://dutchfish.nl/en> offers a search engine. By selecting a *fish species* and a *country*, a list of importers can be easily compiled.

This FAS office also covers the countries in the Nordic market and has Exporter Guides on the following countries: [Denmark](#), [Finland](#), [Norway](#), [Iceland](#) and [Sweden](#).

Appendix I. Overview of Fishery Production Figures

Table 1. Catch Figures Trawler Fishery, Million kg

	2013	2014	2015	2016	2017	2018
herring	88	85	76	103	96	104
blue whiting	52	39	56	58	82	128
horse mackerel	80	50	47	30	34	31
mackerel	22	50	43	41	46	30
pilchard	5	47	13	35	29	16
sardinella	8	19	0	1	1	1
other	4	6	7	7	14	7
total	259	296	242	275	302	317

Source: visserijncijfers.nl

Table 2. Catch Figures Cutter Fishery, Million kg

	2013	2014	2015	2016	2017	2018
brown shrimp	19	23	19	19	14	28
plaice	34	29	32	34	31	25
dover sole	10	9	9	10	9	9
tub gurnard	2	2	3	4	4	3
dab	4	3	3	3	2	2
turbot	2	2	2	2	2	2
brill	1	1	1	1	1	1
cod	1	1	1	1	1	1
other	9	10	11	13	12	12
total	81	81	81	85	75	81

Source: visserijncijfers.nl

Table 3. Catch Figures Razor Clams and Small Scale Fishery, Million kg

	2013	2014	2015	2016	2017	2018
razor clams	3.4	4.9	5.6	6.1	6.0	5.9
seabass	0.1	0.1	0.1	0.1	0.1	0.1
brown shrimp	0.1	0.1	0.1	0.0	0.1	0.1
grey mullet	0.1	0.0	0.0	0.1	0.0	0.0
dover sole	0.0	0.0	0.0	0.0	0.0	0.0
other	0.3	0.4	0.4	1.2	1.5	2.7
total	4.0	5.5	6.2	7.5	7.6	8.9

Source: visserijncijfers.nl

Appendix II. Overview of Aquaculture Production Figures

Table 4. Production Figures Mussels, Million kg

	2013	2014	2015	2016	2017	2018
mussels	26	57	55	53	44	46

Source: visserijncijfers.nl

Table 5. Production Figures Oysters, Million kg

	2013	2014	2015	2016	2017	*2018
oysters, number	30.2	32.5	28.3	31.2	28.2	31.0
oyster, million kg	2.6	2.8	2.4	2.7	2.4	2.6

*FAS The Hague estimates

Source: visserijncijfers.nl

Table 6. Production Figures Other Aquaculture Species, 1,000 kg

	2013	2014	2015	2016	2017	2018
European eel	2,885	2,350	2,000	2,000	2,000	2,150
catfish	1,400	1,400	1,400	1,400	1,270	1,270
clausse	1,700	1,500	1,500	1,500	1,200	1,200
yellowtail	0	0	0	0	100	500
sturgeon	120	120	120	120	150	150
pikeperch	150	150	50	50	100	100
turbot	100	100	100	100	60	60
trout	0	70	70	70	40	40
tilapia	0	50	50	50	1	1
other	180	0	0	0	0	0
total	6,535	5,740	5,290	5,290	4,921	5,471

Source: nevevi.nl