

Voluntary Report – Voluntary - Public Distribution

Date: May 25, 2022

Report Number: NL2022-0033

Report Name: Dutch Seafood Market Overview

Country: Netherlands

Post: The Hague

Report Category: Product Brief, Fishery Products, Agricultural Situation, Agriculture in the Economy

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Report Highlights:

The Netherlands is increasingly becoming one of Europe's leading importers and exporters of seafood products. The United States was the Netherlands' 15th largest foreign supplier of seafood in 2021. U.S. exports were dominated by frozen Alaskan Pollock (AP) which represented two-thirds of U.S. seafood trade to the Netherlands. Seafood consumption in the Netherlands has remain relatively unchanged, although a larger assortment of seafood products is now available in Dutch supermarkets. Growth opportunities for U.S. exporters of seafood can be found in three market segments: seafood processing, food retail, and HRI-foodservice.

Section I. Production

Dutch Seafood Industry

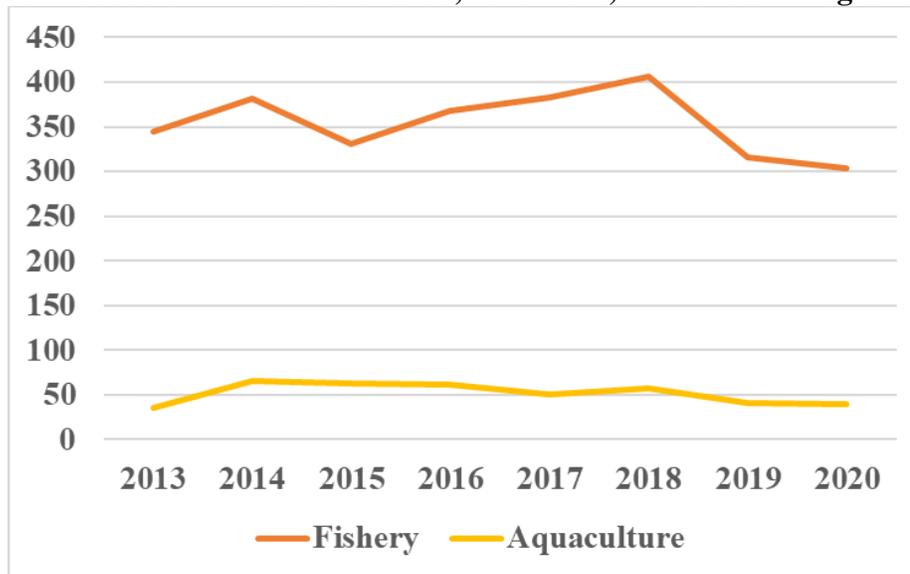
The Netherlands has a long tradition of catching and farming fish. In 2020, seafood production totaled 344 million kg -- of which two-third were small pelagic fish (those that live in the pelagic zone, neither close to the bottom nor near the shore). Due to its location on the North Sea, the Netherlands 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 Dutch supply of fish is supplemented by the local catch of crustaceans and the production of other species. 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.

Fishery:

Managing Fisheries

The Total Allowable Catch (TAC) is a catch limit that is set for most commercial fish stocks by the European Commission's (EC) Council of Ministers of Fisheries. TACs are shared between EU Member States in the form of national quotas. For each stock, a different allocation percentage per EU country is applied for the share of the quota. EU Member States must use transparent and objective criteria when they distribute the national quota among their fishers. 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, 2013-2020, Millions of Kilograms



Source: www.visserijncijfers.nl, www.nevevi.nl

Pelagic Fishery

The Dutch pelagic fleet consists of several deep-sea freeze trawlers that predominantly fish small pelagic fish in the Northeast 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. In 2020, the Dutch

caught 228 million kg fish, down by 13 million kg, mainly due to lower landings of several pelagic species, see Appendix I, table 1.

Cutter Fleet

The cutter fleet consists of 293 cutters and traditionally catches ground fish species such as brown shrimp, plaice, and dover sole. Total landings of the Dutch cutter fleet decreased by approximately 1 million kg in 2020 compared to the previous year. Catch figures for the various species can be found in Appendix I, table 2.

Razor Clams and Small-Scale Fisheries

In 2020, landings of razor clams and small-scale fisheries totaled 12.3 million kg, up by 0.7 million kg compared to total landings in 2019 (11.6 million kg), see Appendix I, table 3. In 2020, the fleet of small-scale fisheries consisted of over 200 relatively small fishing boats.

Challenges

The Dutch fishery industry is currently facing several challenges. 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 ban on the use of pulse fishing has had an impact on the Dutch fishing sector. Industry contacts have claimed that pulse fishing enabled fishers to not only have lower fuel costs but also to specifically fish for high-value species like sole. High fuel prices due to the war in Ukraine has forced dozens of cutter vessels to stay on shore. Furthermore, the EU landing obligation, which requires all EU catches of regulated commercial species on-board to be landed and counted against the quota, resulted in increased costs both at ship and on land.

Aquaculture:

The Netherlands also has a long tradition of farming fish. The Dutch aquaculture sector is known for its mussels and, to a lesser extent, its oyster production. In 2020 aquaculture production totaled 40 million kg (Figure 1) down by almost 1 million kg compared to 2019.

Mussels

The production of mussels is concentrated in the coastal waters the *Wadden Sea* and the *Eastern Scheldt*. Mussel producers predominantly use 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 (e.g., France and Belgium). In 2020 the production of mussels totaled 32 million kg, see Appendix II, table 4.

Oysters

In the Netherlands, the 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. In 2020, the supply of oysters is estimated at 26 million oysters, with 80 percent attributable to Pacific oysters. When ready for consumption, an oyster weighs, on average, 85 grams. In 2020, Dutch oyster production was estimated at 2.3 million kg, see Appendix II, table 5.

Other

Aquaculture production, other than mussels and oysters, totaled 5.3 million kg in 2020, see Appendix II, table 6.

Section II. Processing

There are roughly 175-225 Dutch companies that process and trade fish. The majority process Dutch-caught flatfish into fillets and peal (brown) shrimp for further distribution to consumers. In the past decade, most processing plants have diversified and are no longer only processing North Sea species. For example, some are processing fresh salmon into fillets, steaks, and smoked products.

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

Section III. Consumption

There are no publicly available consumption figures for seafood products in the Netherlands. According to a [study](#) by European Market Observatory for Fisheries and Aquaculture Products (EUMOFA), Dutch per capita consumption is estimated at almost 21 kg per year. The most popular fish product was salmon followed by tuna, herring, and fish fingers.

Table 1. The Most Popular Fish Products in the Netherlands, by Volume*

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

* FAS/The Hague estimates

Per capita consumption of fish in the Netherlands has not changed much in recent years. What has changed is that consumers are eating less fresh and unprocessed seafood and consuming more value-added products. Supermarkets have embraced seafood as an important source of animal protein which has resulted in a larger assortment 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 1). The assortment of salads with seafood has increased rapidly in recent years. All these products appeal to consumers, especially those that are on the look-out for convenience and healthy food options. The popularity of sushi has further contributed to an increase in seafood consumption. According to the EUMOFA study, regular fish buyers tend to be those aged 40 years and older. Young consumers are the least frequent buyers of seafood.

Picture 1. Examples of Ready-To-Cook Meal and Meal Components in the Netherlands



Source: Albert Heijn Supermarket

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](#) for the sourcing of 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-HRI companies. The Dutch retail sector is consolidated with the two largest retailers now controlling 56 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 1 and 2). Additional information about this industry can be found in the GAIN Report [The Dutch Food Retail Market](#).

Picture 2. Examples of Shrimp Salad and Frozen Alaska Pollock for Sale at Albert Heijn Supermarkets in the Netherlands



Source: Albert Heijn Supermarket

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

Someone who has visited Dutch cities, has probably seen fish stalls (Picture 3). These street vendors typically sell salted herring, deep fried 'lekkerbek'¹, 'kibbeling,' and white buns with a seafood spread made of salmon, tuna, or shrimp.

Picture 3. Dutch Fish Stall and Kibbeling



Source: Street Fish Stall Hofvijver

The Foodservice – HRI industry has also traditionally been an important distributor of seafood products, selling products ranging from fish burgers and kibbeling to sushi, lobsters, and scallops. During COVID-19, many restaurants offered “take-away” and “home-delivery” meals. Some seafood traders tried to capitalize on growing seafood sales through retail channel, while others invested in ways to sell seafood products directly to end-consumers. Some traders have even been successful in selling traditional restaurant seafood products such as lobsters, scallops, and oysters to end-consumers. As many consumers were unable to dine at restaurants during the height of the pandemic, consumers spent more time and money, especially on the weekends, to create a restaurant-like experience at home.

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. This mutual recognition facilitates seafood trade between the United States and the EU. Furthermore, it creates a framework under which EU Member States cannot

¹ Like kibbeling, but not cut into smaller pieces.

impose national requirements on U.S. seafood exporters on top of EU harmonized legislation. However, differences in interpretation among Member States can lead to delays at Border Control Posts (BCPs).

In February 2022, the United States and the EU lifted their respective import bans for live bivalve mollusks. As a direct result, the United States became eligible to export bivalve mollusks to the EU -- initially only from approved firms in the States Washington and Massachusetts.

More detailed information about the EU legislation governing trade in edible seafood products, including health certificates, can be requested by contacting the National Oceanographic and Atmospheric Administration's Stephane Vrignaud at the U.S. Mission to the EU by email stephane.vrignaud@trade.gov or phone +32 2811 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](#).

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. In 2021, Dutch seafood imports totaled nearly 1.2 million MT -- of which 60 percent originated from outside the EU. The largest non-EU suppliers, by volume, were Iceland, Norway, the United Kingdom, Russia, Ecuador, Vietnam, China, and the United States. Popular fish imports from countries around the North Atlantic Ocean were small pelagic fish, salmon, and cod. Russia predominantly supplied frozen cod and some Alaska Pollock and plaice. Fish imports from China, although declining, were mainly Alaska Pollock (AP) and frozen fillets of flatfish and salmon. Ecuador was the leading supplier of skipjack tuna and shrimp and prawns to the Netherlands, while Vietnam supplied the Netherlands with catfish and shrimp and prawns.

The United States was the Netherlands' 15th largest supplier of seafood in 2021 and the eighth largest non-EU supplier (i.e., 22,000 MT or two percent of total imports). Trade was dominated by frozen AP which represented two-thirds of the seafood products imports from the USA. Other products imported from the United States were shrimp and prawns, frozen flatfish, wild salmon, and cod.

U.S. AP exports to the Netherlands in 2021 are expected to be even higher than reported since U.S. AP is also imported via neighboring Germany, and then shipped to Dutch food processing companies. AP from the United States competes directly with (processed) AP from China and Russia.

The United States used to be a consistent exporter of cod to the Netherlands. Exports of U.S. cod however dropped from 6,135 MT in 2015 to 86 MT in 2018. In 2019, exports showed a small sign of recovery (383 MT). In 2021, Dutch imports of U.S. cod totaled 570 MT. This is clearly a market which has now been taken over by Norway, among others.

Dutch imports of scallops used to be led by the United States. Pre COVID-19, there was demand from the high-end HRI industry for good quality scallops. Total imports of frozen scallops have dropped and

are increasing coming from Canada. In 2021 Dutch imports of scallops totaled 362 MT of which 37 MT originated from the United States.

Dutch imports of wild salmon, mainly frozen sockeye, continue to be dominated by U.S. salmon (although Russia took roughly 30 percent of the U.S. market share last year).

Export

Because of its tradition of catching fish, its location in Europe, and its 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 fishers, as well as re-exports of imported fish, directly or after adding value through reprocessing or repacking. The EU is increasingly an important market for Dutch exports, with 65 percent of Dutch seafood exports staying within the European Union. The remaining 35 percent was shipped overseas, with Nigeria and Egypt serving as the leading export markets for small pelagic fish species.

Section VII. Opportunities and Entry Strategy

Opportunities

Due to a strong dependence of seafood processing companies on seafood from outside the EU, there continues to be opportunities for U.S. exporters of seafood products to grow their market share in the Netherlands.

With restaurants opening their doors once again, there will hopefully be increased demand for high-quality and sustainable certified fishery products such as lobsters, oysters, and scallops from the United States.

U.S. exporters that have a story to tell about their seafood (Picture 4), especially if the story concerns the health benefits, the freshness, and/or versatility, have a competitive advantage. At the retail level there is demand for tasty, sustainable products in small consumer packaging. Product information, suggested recipes, and preparation tips can persuade consumers to buy certain fish and make them feel good about their purchase.

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. Participating in trade shows, whether live or virtual, and, in particular, seafood trade shows have been an effective tool for U.S. companies to expand their overseas business. Dutch buyers have traveled, and will continue to

Picture 4. Story Telling Adds Value



travel if allowed, around the world to see new seafood products and make new contacts. At traditional in-person trade shows, they will not only meet local buyers, but there is also the opportunity to arrange site visits and do store checks to identify what seafood products are available on the market. The Seafood Expo Global (SEG) is the most important international seafood trade show that attracts international buyers, followed by the Seafood Expo North America (SENA).

Seafood Expo Global (SEG)
Fira Gran Via, Barcelona, Spain
www.seafoodexpo.com/global

Seafood Expo North America (SENA)
Boston Convention and Exhibition Center,
Boston, Massachusetts, USA
www.seafoodexpo.com/north-america

SEG is one of the few European shows endorsed by the United States Department of Agriculture (USDA). USDA's Foreign Agricultural Service (FAS) works with the 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
ccoyn@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 previously resulted in numerous export successes for U.S. seafood companies. FAS/The Hague will help you to connect with Dutch buyers. The GAIN Report [The Dutch Exporter Guide](#) offers some hands-on information about how best to enter the Dutch market, how to conduct business, and how supply chains are organized. Other market assistance reports can be found online at: <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
John Adams Park 1, 2244 BZ Wassenaar, the Netherlands
Phone: +31 (0)70 3102299
agthehague@usda.gov
www.fas.usda.gov

If interested, 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 Nordics and has Exporter Guides for the countries in this region. These reports can be downloaded from the following website, <https://gain.fas.usda.gov/#/search>.

Appendix I. Overview of Fishery Production Data

Table 1. Trawler Fishery Catch Figures, Million kg

	2013	2014	2015	2016	2017	2018	2019	2020
herring	88	85	76	103	96	112	84	79
blue whiting	52	39	56	58	82	121	78	62
horse mackerel	80	50	47	30	34	31	32	20
mackerel	22	50	43	41	46	30	23	29
pilchard	5	47	13	35	29	16	15	22
sardinella	8	19	0	1	1	1	0	0
other	4	6	7	7	14	7	9	16
total	259	296	242	275	302	318	241	228

Source: visserijcijfers.nl

Table 2. Cutter Fishery Catch Figures, Million kg

	2013	2014	2015	2016	2017	2018	2019	2020
brown shrimp	19	23	19	19	14	28	16	18
plaice	34	29	32	34	31	25	21	19
dover sole	10	9	9	10	9	9	7	7
tub gurnard	2	2	3	4	4	3	2	2
dab	4	3	3	3	2	2	3	2
turbot	2	2	2	2	2	2	2	2
brill	1	1	1	1	1	1	1	1
cod	1	1	1	1	1	1	1	1
other	9	10	11	13	12	12	12	12
total	81	81	81	85	75	81	65	64

Source: visserijcijfers.nl

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

	2013	2014	2015	2016	2017	2018	2019	2020
razor clams	3.4	4.9	5.6	6.1	6.0	8.1	10.9	11.2
seabass	0.1	0.1	0.1	0.1	0.1	0.1	0.2	0.1
brown shrimp	0.1	0.1	0.1	0.0	0.1	0.1	0.0	0.0
grey mullet	0.1	0.0	0.0	0.1	0.0	0.0	0.0	0.0
dover sole	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
other	0.3	0.4	0.4	1.2	1.5	0.5	0.3	1.0
total	4.0	5.5	6.2	7.5	7.6	8.9	11.6	12.3

Source: visserijcijfers.nl

Appendix II. Overview of Aquaculture Production Data

Table 4. Mussels Production Figures, Million kg

	2013	2014	2015		2016	2017	2018	2019	2020
mussels	26	57	55		53	44	49	33	32

Source: visserijcijfers.nl

Table 5. Oysters Production Figures, Million kg

	2013	2014	2015	2016	2017	2018	*2019	*2020
oysters, number**	30.2	32.5	28.3	31.2	28.2	26.4	28.0	26.0
oyster, million kg	2.6	2.8	2.4	2.7	2.4	2.3	2.4	2.3

*FAS The Hague estimates

** sum of *Flat* and *Pacific* oysters

Source: visserijcijfers.nl

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

	2013	2014	2015	2016	2017	2018	2019	2020
European eel	2,885	2,350	2,000	2,000	2,000	2,150	2,200	2,035
clausse	1,700	1,500	1,500	1,500	1,200	1,200	1,500	1,500
catfish	1,400	1,400	1,400	1,400	1,270	1,270	1,200	950
yellowtail	0	0	0	0	100	500	430	600
pikeperch	150	150	50	50	100	100	100	100
sturgeon	120	120	120	120	150	150	80	80
trout	0	70	70	70	40	40	40	40
turbot	100	100	100	100	60	60	30	30
tilapia	0	50	50	50	1	1	1	1
other	180	0	0	0	0	0	1	1
total	6,535	5,740	5,290	5,290	4,921	5,471	5,582	5,337

Source: nevevi.nl

Attachments:

No Attachments.