

Voluntary Report – Voluntary - Public Distribution

Date: September 19, 2022

Report Number: NL2022-0049

Report Name: The Dutch Oyster Market

Country: Netherlands

Post: The Hague

Report Category: Exporter Guide, Food Service - Hotel Restaurant Institutional, Product Brief, Promotion Opportunities, Fishery Products

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Report Highlights:

There are new export opportunities for oysters grown in Massachusetts and Washington since the EU lifted its import ban on live, chilled, frozen, and processed bivalve mollusks from the United States. As part of the equivalency arrangement between the EU and the United States, the U.S. market will now also be open for Dutch oysters, creating a win-win. Additionally, the Dutch are important traders of oysters, making it an interesting market for U.S. oysters. While a small market, the consumption of oysters in the Netherlands is growing, creating additional opportunities for U.S. oysters. There are several trade shows and events in Northwest Europe, where U.S. growers can meet new importers and distributors of oysters.

Why Report Now on Opportunities for U.S. Oysters On the Dutch Market?

On February 2, 2022, the U.S. Food and Drug Administration (FDA) announced that the European Union (EU) and the United States had agreed to an oyster equivalence arrangement, meaning that the U.S. safety controls would be recognized as equivalent to those in the EU. The new agreement means that the EU's import ban on live, chilled, frozen, and processed bivalve mollusks from the United States is lifted. Additionally, as part of the equivalence arrangement, the U.S. market will now also be open for Dutch oysters, creating a win-win situation. Additional information about this agreement can be found on the FDA's website, <https://www.fda.gov/food/international-cooperation-food-safety/questions-and-answers-shellfish-traded-between-united-states-and-certain-member-states-european>.

Since 2006, while the U.S. Seafood Inspection System for fishery products had been recognized by the EU as an equivalent to that of the European Seafood Inspection System, this status had not applied to the export of U.S. bivalve mollusks. U.S. oysters and other bivalve mollusks have not therefore been available on the EU market for more than ten years due to this dispute on the safety controls.

The Dutch Also Produce Oysters

About 150 years ago, by making use of so-called *collecteurs*, the production of oysters was introduced in the Netherlands. Until then, the Dutch only knew the tradition of oyster fishing in two inland seas, the *Waddenzee* and the former *Zuiderzee*. Nowadays, the vast majority (an estimated 95 percent) of Dutch oysters are being farmed (or produced). Young Pacific oysters grow on oyster cultivation parcels, on which mussel-shell have been dropped and on which the wild oyster-larvae can settle. The young oysters then grow up there under natural conditions.

The Dutch government owns the cultivation parcels, which are leased to oyster producers, almost all based in a village called Yerseke in the Dutch province of Zeeland. As a result, oyster production is concentrated in this part of Zeeland (located in the south-west of the Netherlands, bordering with Belgium) and is concentrated in two areas: the *Eastern Scheldt* (3,830 acres) and *Lake Grevelingen* (1,359 acres).

At first, the Dutch farmed the Flat oyster (in Dutch: *platte oester*). The Pacific oyster (in Dutch: *Zeeuwse creuse*) was introduced to the Netherlands in the 1980s in the Eastern Scheldt and a decade later in Lake Grevelingen.

Table 1: Main Differences Between Pacific and Flat Oysters

Name:	Pacific Oyster (In Dutch: Zeeuwse creuse or Giga)	Flat Oyster (In Dutch: Platte oester or Edulis)
-Latin name:	-Crassostrea gigas (Latin)	-Ostrea edulis (Latin)
-HS code:	-HS 0307.1190	-HS 0307.1110
Shape:	Oval shape and erratic shaped shell	Round shape and flat upper shell
Production:	Eastern Scheldt and Lake Grevelingen	Lake Grevelingen
Ready for consumption:	After two-and-a-half up to three years	After five up to six years
Price:	More affordable, good	More expensive, high-end

	quality oysters	exclusive oysters
Packaging:	Oyster basket: 12/25/50/100 pieces MAP ¹ : 6/12/25 pieces	Oyster basket: 12/25/50/100 pieces MAP: 6/12/25 pieces
Grading:	No. 1 Extra >150 g No. 1 130-150 g No. 2 100-130 g No. 3 85-100 g No. 4 <85 g	1/0 40-50 g 2/0 50-60 g 3/0 60-70 g 4/0 70-80 g 5/0 80-90 g 6/0 90-110 g 6/0 Extra >110 g
Picture:		

Dutch Oyster Production Numbers

The Dutch produce two species: *Pacific* and *Flat oysters*. According to industry sources, the current supply of Pacific and Flat oysters totals around 26 million units, of which an estimated 80-85 percent are Pacific oysters, and the remainder are Flat oysters. Since the beginning of the century, the annual production of Pacific oysters fluctuated between 20 and 35 million units. More recently, production has decreased due to the combined impact of the herpes virus and the Pacific oyster drill.

While Flat oyster production varied between half to two million units annually up to 2013, since then production has increased and reached a record production of 7.5 million units in 2017. Even though production fell the following year to 4.1 million units, there are clear signs of recovery of the Flat oyster stock since 2013 due to the increased resistance of the Flat oysters against the parasite *Bonamia ostreae*. Higher Flat oyster yields are not only noticeable in Lake Grevelingen, but the Flat oyster is also recovering in the Eastern Scheldt, where it may be possible to cultivate flat oysters again in the future.

Table 2. Production Figures Oysters, Million kg

	2013	2014	2015	2016	2017	2018	*2019	*2020	*2021
oysters, number**	30.2	32.5	28.3	31.2	28.2	26.4	28.0	26.0	26.0
oyster, million kg	2.6	2.8	2.4	2.7	2.4	2.3	2.4	2.3	2.3

*FAS The Hague estimates

**Sum of the Flat and Pacific oysters

Source: www.visserijncijfers.nl

The Dutch Are Also Traders of Oysters

¹ MAP = Modified Atmosphere Packaging

An estimated half to three-quarter of Dutch oyster production is exported annually. The Dutch are also importers of oysters. In 2021, oyster imports totaled 1.525 million kg, of which 1,294 million kg alone, or 82 percent of total imports, originated from France and 146,000 kg, or ten percent, from Ireland. Imported oysters, of which more than 90 percent are Pacific oysters, are immediately re-exported to serve their clients abroad. Importing oysters takes place year-round with somewhat higher volumes being imported around the end of the year.

Dutch exports of oyster grew annually up to a record of 4,431,000 kg in 2019. Due to the closure of restaurants for many weeks and a temporary ban on events, measures taken by the Government to combat the outbreak of the COVID-19 virus, the market for oysters dropped dramatically, both domestically and abroad throughout most of 2020. Dutch oyster exports, however, rebounded in 2021, and 2022 exports are looking very promising. Belgium continues to be the largest market for oyster exports, followed by Italy and Germany. Other export markets include Spain, France, Ukraine, Sweden, Poland, and Denmark.

The Distribution of Oysters Is Consolidated

The import and (international) distribution of oysters is dominated by a dozen players. Most of them have been in this business for many years and some even for generations. They are not only experienced international buyers, but also have an excellent distribution network as well as tight relationships with buyers of oysters, both domestically and internationally. In the Dutch market, they often even work directly with chefs and restaurant owners. They also join forces internationally and, due to their great logistic networks, can distribute daily fresh oysters to most European cities within 24 hours.

Oyster Consumption Is Up and Changing

Demand for oysters is growing throughout Europe and the willingness to pay for tasty quality products is on the rise. Consumers in the 18-45 age group are interested in trying and eating oysters, fueled by international travel, social media, and desire for new experiences. Consumers that regularly eat oysters are familiar with Flat and Pacific oysters. With the market now open for oysters from the United States, they are interested in and are willing to pay for U.S. oysters. Industry contacts believe that Dutch consumers are ready and interested in adding a new type of oysters to their oyster dish.

Dutch consumers are increasingly interested to increase their knowledge about the products they are buying. Provenance about food products is gaining popularity as consumers are curious to learn about the oyster variety, the bay where the oyster was grown, and the story the producer has to say. Dutch consumers love story telling.

Additionally, oysters have become more widely available and are no longer only served at high-end establishments. They are expanding to new and different sorts of Hotel Restaurants and Institutional catering (HRI) outlets, such as seafood or (pop-up) oyster bars, mainly in larger cities in the Netherlands or at lifestyle or luxury (trade) events. Oysters are also no longer only served in its traditional way (raw); oysters are now offered *au gratin*, with a hollandaise sauce, and served with a spicy dressing.

What Are the EU Import Regulations and Standards?

On February 4, 2022, the U.S. Department of Commerce's National Oceanic and Atmospheric Administration (NOAA Fisheries) announced the release of the [Health Certificate](#) for U.S. live, frozen, chilled, or processed bivalve mollusks, echinoderms, tunicates, and marine gastropods intended for

human consumption in the EU market. Washington State and Massachusetts are the only two states that have EU-approved growing areas for these products. Exporting to the EU has been possible since February 27, 2022.

The EU imposes a nine percent import duty on Pacific oysters (HS 0307.1190) from the United States, while there is no import duties assessed on Flat oysters (HS 0307.1110), http://ec.europa.eu/taxation_customs/dds2/taric/taric_consultation.jsp?Lang=en. More detailed information about the EU legislation governing trade in edible seafood products as well as how to comply with the EU import regulations and standards (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 and can be found on the [NOAA website](#).

Detailed information about the Dutch food retail and HRI-foodservice market, can be found in the following reports: [The Dutch Food Retail Market – June 6, 2022](#) and [The Dutch Foodservice Market – August 15, 2022](#) U.S. oyster exporters that are ready to begin exporting to the Dutch market are also advised to read the following two reports: [The Exporter Guide – December 6, 2021](#) and [The FAIRS-Country Guide – December 13, 2021](#). Other reports can be found at <https://gain.fas.usda.gov>.

Road Map for Market Entry

The first step for U.S. growers who would like to start exporting oysters to the Netherlands is to determine the potential market for their specific oysters. It is important to gain a better understanding of who the buyers and distributors of oysters are.

Table 3. Advantages and Challenges U.S. Oyster Exporters Face on the Dutch Consumer Market

Advantages	Challenges
There is demand for a different type of oyster, with a different taste and from a new region.	Shipping U.S. oysters by airfreight makes them more expensive.
Education and promotion help Dutch consumers to understand the difference between oysters currently available on the Dutch market and U.S. oysters.	The Netherlands is a relatively small consumer market within the EU.
Consumers are increasingly interested in how oysters are grown in the United States and by whom and where. Provenance is gaining importance.	While interested in value-added products, the Dutch overall are on the lookout for value for money.

It helps to understand the supply chain and the role its various players play. The main reasons distributors prefer to buy oysters from specialized importers rather than sourcing directly include not wanting to deal with price volatility, documentation, and other import requirements. These specialized importers are also experienced in importing live shellfish by airfreight from overseas markets. Oysters from the United States have a good quality image. However, after duties and taxes, the product may no longer be price competitive. Transportation costs (freight costs) are a disadvantage for U.S. exporters compared to other suppliers, particularly those from the Netherlands, France, and Ireland. More than ever, U.S. exporters should focus on the unique selling points of U.S. oysters.

There are several options for U.S. oyster growers to best enter the Dutch market. For example, consider exhibiting at a specialized trade show in the United States, like the Seafood Expo North America in Boston. Dutch shellfish buyers regularly travel to the United States to see new products and make new contacts. Exporters should also consider visiting or even exhibiting at a European trade show. Local trade shows can serve as an excellent springboard into the market, helping U.S. producers establish new trade contacts and gauge product interests. Dutch buyers visit these shows and often have an exhibitor booth as well. There is one European trade show where exhibitors showcase seafood products only, see below. In addition to the Seafood Expo Global, U.S. oyster producers could consider exhibiting at smaller and more regional HRI-Foodservice focused trade shows and/or events.

Seafood Expo Global:

Europe's leading show for the seafood industry and USDA Endorsed

Contact: agmadrid@usda.gov

April 25-27, 2023

U.S. oyster growers can also contact their respective U.S. State Regional Trade Groups (SRTG), their commodity cooperator group, and/or their state Department of Agriculture to obtain additional market entry support. U.S. industry groups (commonly known as Cooperators) often organize (reverse) trade missions, which are often arranged around trade shows or other events. These missions have proven to be an effective platform for U.S. suppliers of seafood products to meet and do business with local buyers. In particular, the Western United States Agricultural Trade Association (WUSATA), Food Export USA Northeast, and the Washington State Department of Agriculture, have a wealth of information and experience in helping U.S. producers of oysters expand their business overseas.

Contact

If you have questions or comments regarding this report, need assistance exporting to the Netherlands, a list of Dutch wholesalers and distributors, or are you looking for a list of foreign buyers of oysters, please contact FAS in the Netherlands:

Embassy of the United States

U.S. Department of Agriculture - Foreign Agricultural Service (FAS)

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Attachments:

No Attachments.