

# THE DUTCH FISHING SECTOR

Profit, prices and costs  
of an innovative and sustainable fishery chain



# INTRODUCTION

- Fishing company W. van der Zwan en Zonen BV
- Dutch fleet, employment and landings
- Costs and profit in the Dutch fishing sector
- Prices of fish
- Future: challenges and constraints

# Fishing company W. Van der Zwan en Zonen BV



**FROM  
LOCAL  
FISHERMAN  
TO  
WORLDPLAYER**

## **HISTORY**

**Founded in 1888 by owner Willem van der Zwan**

**Homeport Scheveningen**

**Northsea and Atlantic Ocean**

**2 pelagic (freezer-) and 7 demersal (fresh fish-) trawlers**

**Healthy, nutritious and good quality fish**

**Efficiënt, sustainable and responsible**

**Integrated activities, from catch to market**

**African and Asian market**

# **OPERATION ACCORDING:**

**European law and regulations**

**Traceable and controlable catches**

**Quantities, sizes and hygiene**



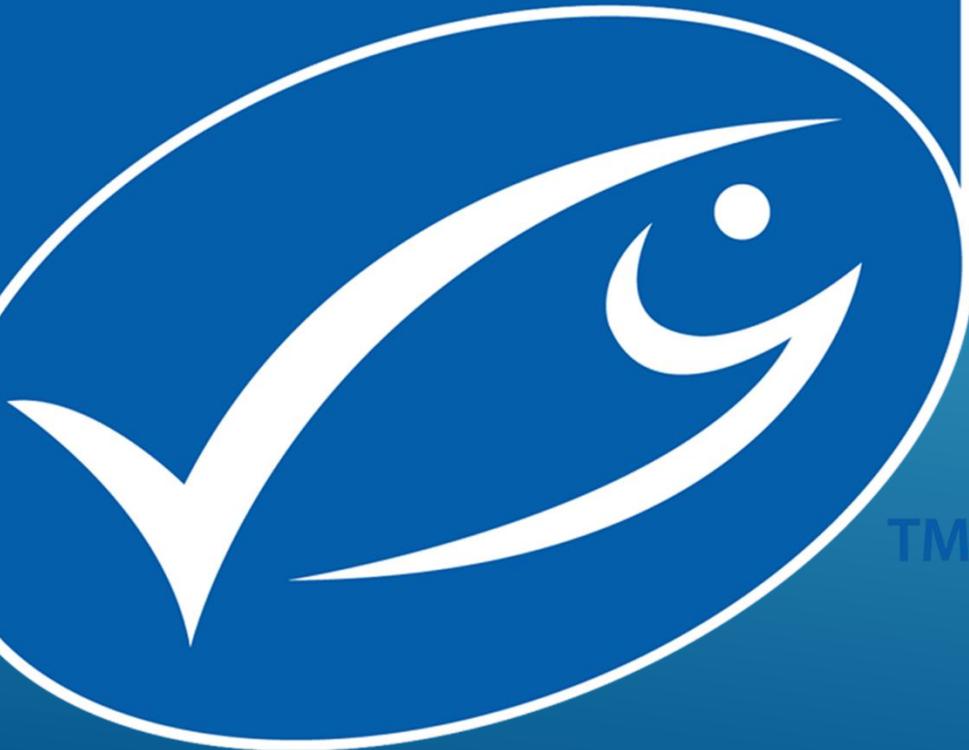
**Transparent catch information**

**Control on landings**

**Scientific research and reports**

# MSC

[www.msc.org](http://www.msc.org)



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## SUSTAINABLE CAUGHT FISH

European fishing grounds

Quota fish

Sustainable catch

Advanced equipment

Just target species by innovative fisheries

Daily more than 1 million consumers, enjoying  
healthy, affordable, high quality pelagic fish

# PELAGIC CATCH AND PROCESSING

Minimum of bycatch

Quality of pelagic specie is crucial

Storage of fish in cold sea water tanks before freezing

Newest technology

On board:

-Testing and sampling

-Sorting

-Freezing at  $-24^{\circ}\text{C}$  in 21 kg blocks

-Packed and stored

## PELAGIC FISH



Blue Whiting



Mackerel



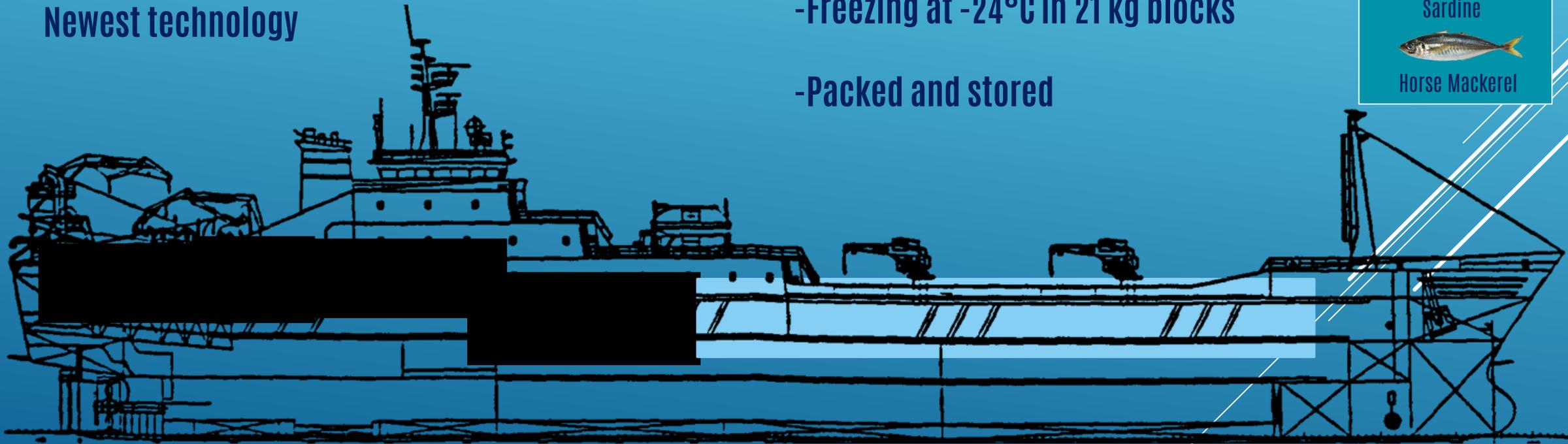
Herring



Sardine



Horse Mackerel



a state-of-the-art deep-sea stern freezer trawler



## FACTS

Total crew 70

Fleet: 7 Vessels

Size vessels: 30-40 mtr

Crew: 5 - 7 per vessel

Shift: Weekly

Species:

-Plaice

-Sole

-Turbut



# DEMERSAL CATCH

Quotter BV

Partnership started in 2013

Headquarters: Scheveningen/Urk, NL

Flatfish mainly (80 %)

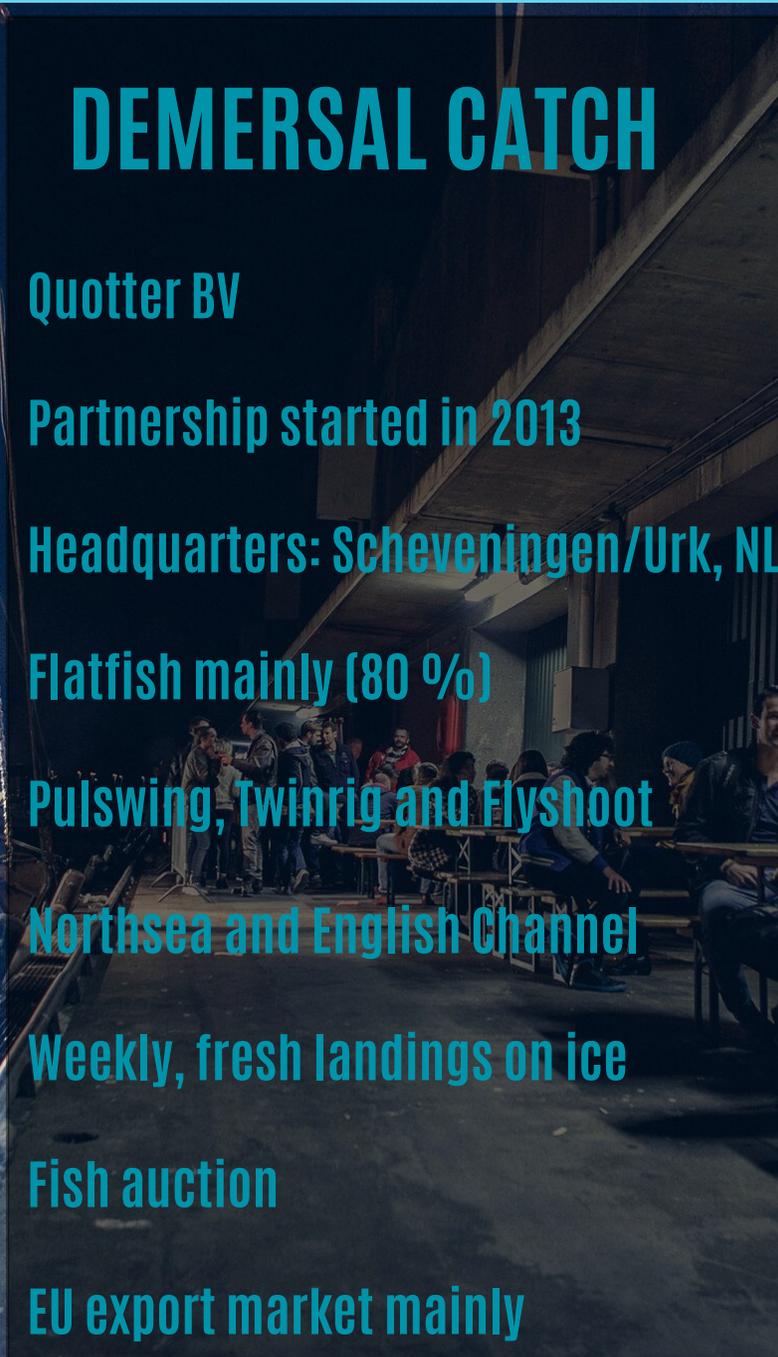
Pulswing, Twinrig and Flyshoot

Northsea and English Channel

Weekly, fresh landings on ice

Fish auction

EU export market mainly





## FACTS

Total 80 employees

Processing:

- Filletting
- Freezing
- Packing and branding

Mainly plaice

Clients:

- Wholesale
- Supermarkets



## PROCESSING

Northseafood BV

Founded in 1980

Participation started in 2017

Headquarter: Urk, NL

Mainly plaice

Sourcing fish from Quotter  
and through fish auction Urk

Products: filets and breaded fish

Export market: Mainly EU





## FISHING AREAS

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Atlantic Ocean  
and Northsea

80% UK Waters



## MARKETS

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More than 45  
countries

100,000 mT/year



# DUTCH FLEET AND EMPLOYMENT

		Vessels	Fishermen
Northsea	Demersal fleet	280	1.050
Atlantic Ocean	High Seas fleet	7	500
Coastal	Small fleet multi purpose	240	400
Mussel culture	Dredges	51	120
Oyster culture	Dredges	19	30
<b>Total</b>		<b>597</b>	<b>2.100</b>

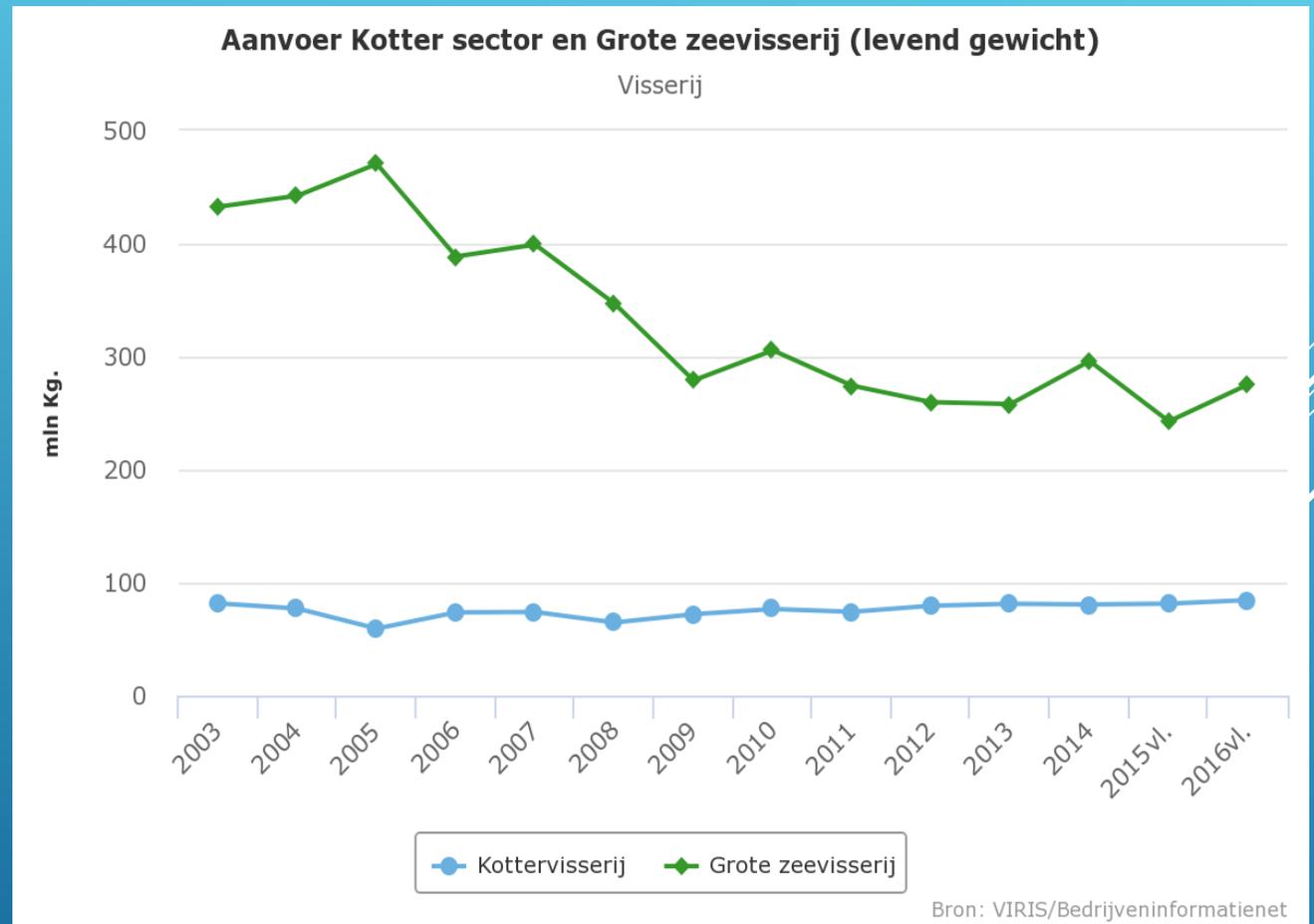
But.....vessels are more than 35 years old (on average).....

# LANDINGS

Average tonnes of fish yearly:

Pelagic fish 300,000-500,000 tonnes

Demersal fish 80,000-100,000 tonnes



# COSTS AND PROFIT DUTCH FISHING SECTOR

Most important costs:	in % of total:
-Labor	35
-Fuel	30
-Vessel costs	20
-Insurance/gear/administration	10
-Other	1
Total	96

So, profit is only 4%.....should be at least 5-10%.

Investment to decrease the fuel costs is needed!

# PRICES OF FISH - MOST IMPORTANT CURRENT DUTCH FISH LANDINGS AND PRICES

<u>Fresh demersal fish, whole/gutted</u>	<u>Auction price euro/kg</u>	<u>Volume a year/tonnes</u>
-Sole	11.50	9,000
-Turbut	10.00	3,000
-Brill	9.00	1,000
-Plaice	2.00	30,000
-Red Gurnard	2.00	2,000
-Squid	6.00	1,000
-Other	2.00	40,000
Average price and total	3.36	86,000 (approximately)
<u>Frozen fish</u>	<u>First sale</u>	<u>Volume a year/tonnes</u>
All pelagic species/av.	0.40-0.60	300.000 (approximately)

# VISION AND INITIATIVES

## Fishing for Food:

- Affordable animal proteins
- Efficient, sustainable and responsible catch

## Investment in :

- Innovation and renewal
- Cooperation in research

(Wageningen University & Research)



“WITHOUT SUSTAINABILITY, CONTINUITY AND PROFITABILITY IS AN ILLUSION.”

## GROWTH OF WORLD POPULATION

Wereldbevolking, 200 MILJOEN, 1 n, Chr.



# ADVANTAGE: FOOTPRINT FISH

Selective fishing methods

Less bycatch

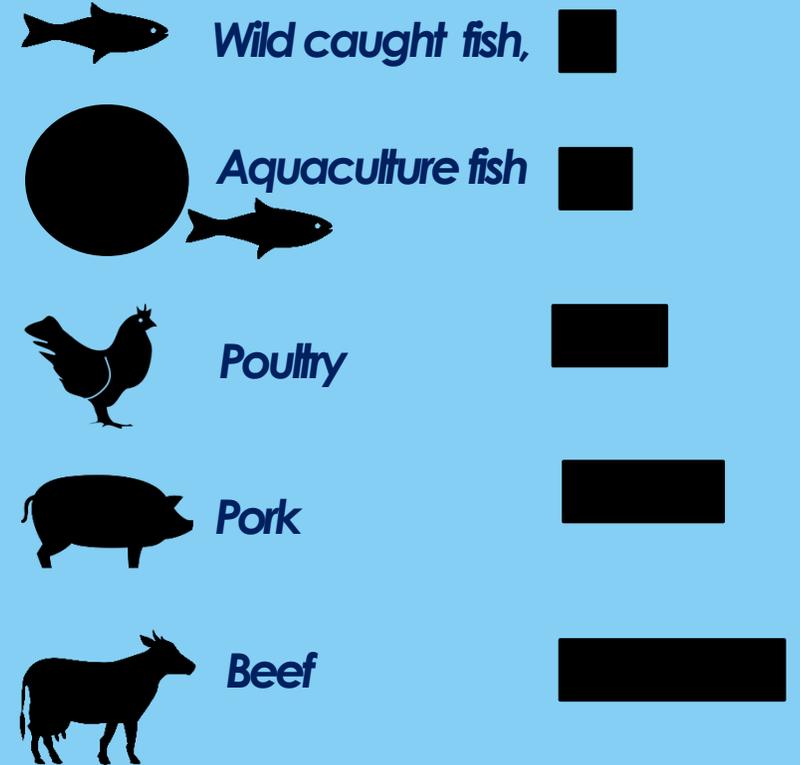
Lower Carbon dioxide (CO<sub>2</sub>-) footprint

Lowest of all produced animal proteins

No extra attention (no culture) needed



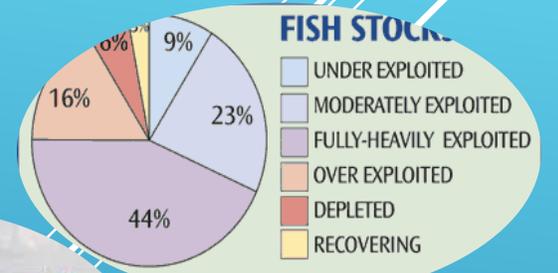
## ECOLOGICAL FOOTPRINT



# FUTURE CHALLENGES

## Challenges:

- Sustainability of fisheries (fish stocks/used gear/responsibility)
- Innovation and renewal/modernisation of the fleet
- Cost price of fish and profitability
- Attention to animal welfare



# FUTURE CONSTRAINTS

## Constraints:

- Brexit
- Landing obligation
- Wind energy at sea
- Hold back of innovation and development of fishing gear



# A BRIGHT FUTURE FOR FISHERIES

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THANK YOU FOR YOUR ATTENTION

