

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 controllable catches

Quantities, sizes and hygiene

Transparent catch information

Control on landings

Scientific research and reports



MSC

www.msc.org



TM

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°C in 21 kg blocks

-Packed and stored

PELAGIC FISH



Blue Whiting



Mackerel



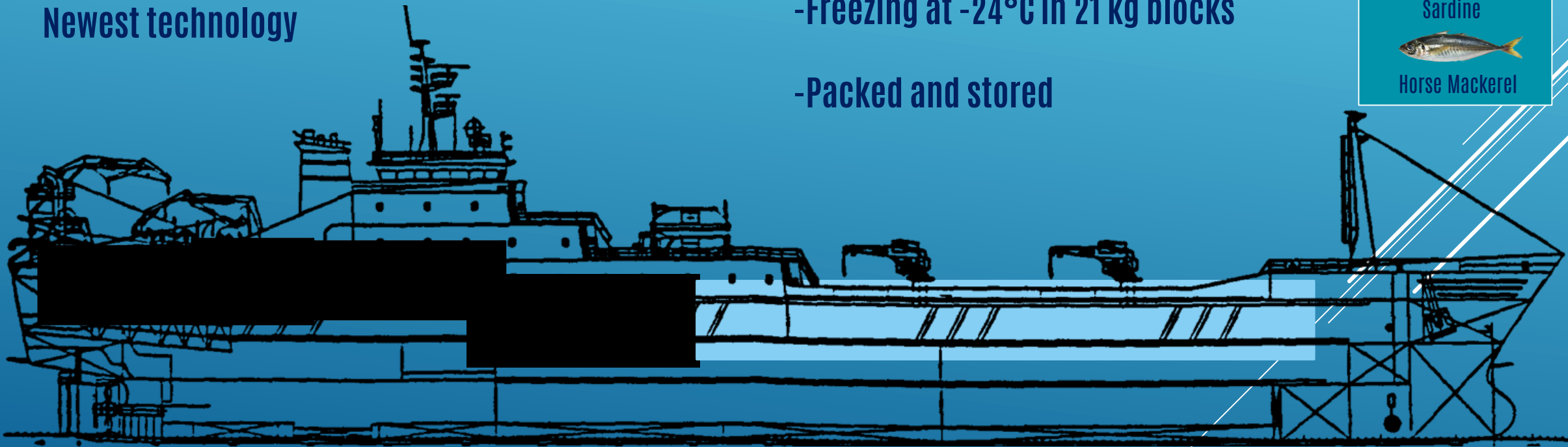
Herring



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

-Turbot



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**

**Atlantic Ocean
and Northsea**

80% UK Waters



MARKETS

**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
Total		597	2.100

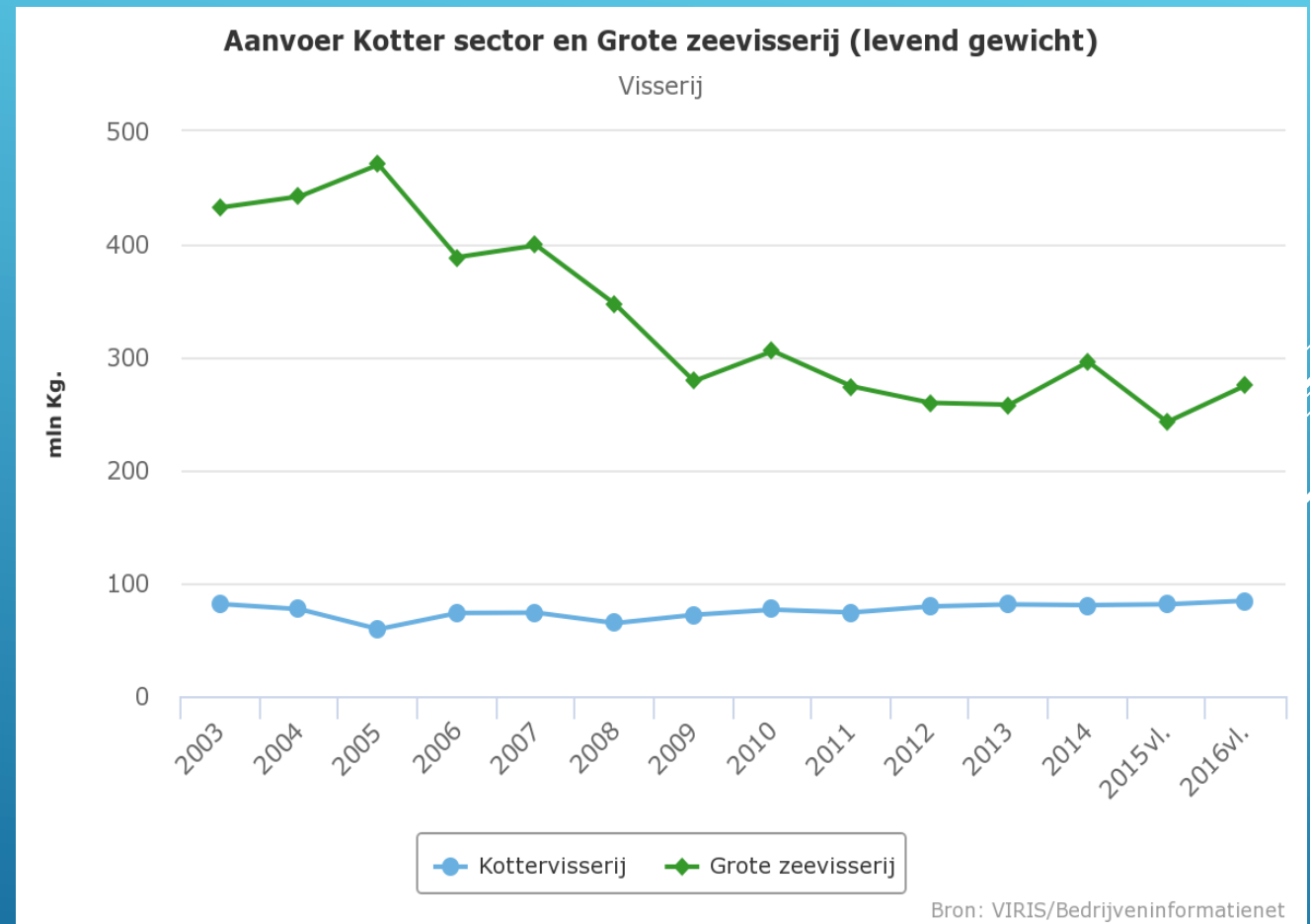
But.....vessels are more than 35 years old (on average).....

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.

1 MILJARD 1800

2 MILJARD
1930

3 MILJARD
1960

4 MILJARD
1974

5 MILJARD
1987

6 MILJARD
1999

7 MILJARD
2011

8 MILJARD
2024

9 MILJARD
2050

10 MILJARD
2070

11 MILJARD
2100

ADVANTAGE: FOOTPRINT FISH

Selective fishing methods

Less bycatch

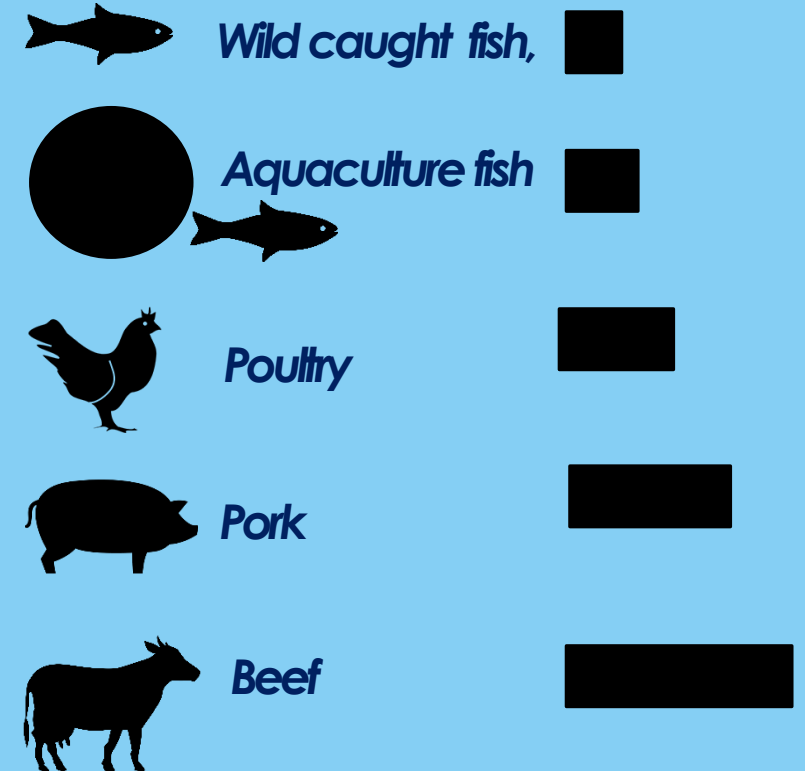
Lower Carbon dioxide (CO₂-) footprint

Lowest of all produced animal proteins

No extra attention (no culture) needed



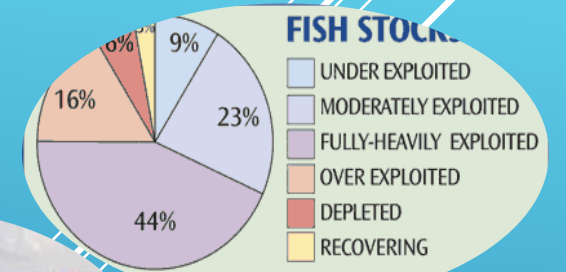
ECOLOGICAL FOOTPRINT



FUTURE CHALLENGES

Challenges:

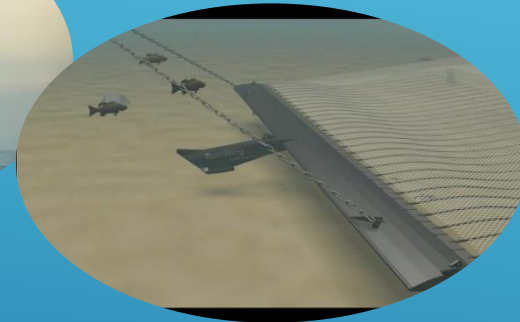
- Sustainability of fisheries (fish stocks/used gear/responsibility)
- Innovation and renewal/modernisation of the fleet
- Cost price of fish and profitability
- Attention to animal welfare



FUTURE CONSTRAINTS

Constraints:

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



A BRIGHT FUTURE FOR FISHERIES

THANK YOU FOR YOUR ATTENTION

