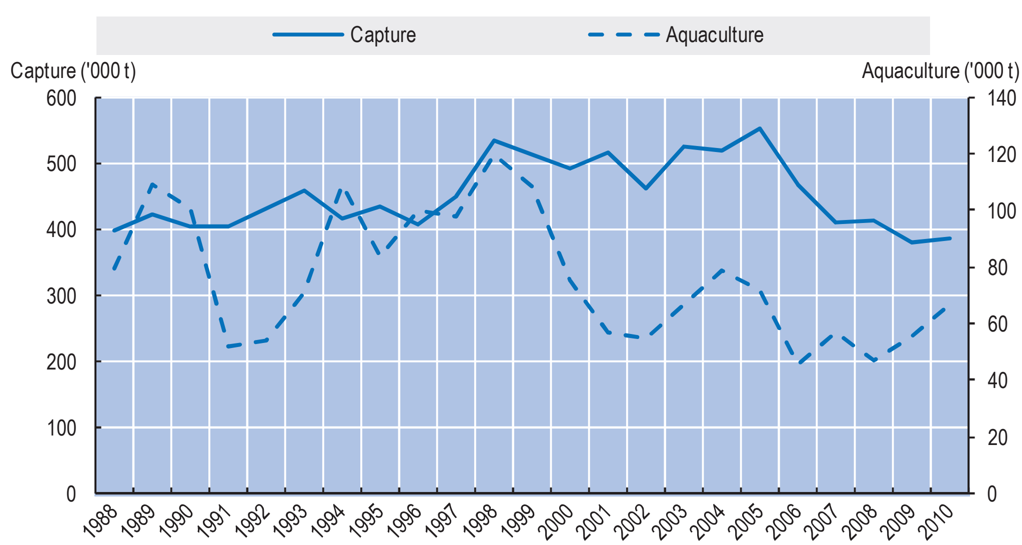
Chapter 16

NETHERLANDS

Summary of recent developments

- In the fall of 2010, the responsibility of management of capture fisheries and aquaculture switched from the ministry of Agriculture, Nature and Food Safety to the then new-formed ministry of Economic Affairs, Agriculture and Innovation.
- Despite a global trend, fish farming is declining in the Netherlands, which made the government commission two research institutes to draw up an action plan in 2010. The conclusion was that three issues needs better organization: market position, efficiency and cost savings and the capacity for innovation. Specific actions taken by the government are research into possible partnership forms and providing support for a Knowledge Network. Other action points are facilitating the acquisition of insight into markets and access to market data; supporting existing initiatives to increase production and chain co-operation; supporting initiatives and research into improvements to production under recirculation aquaculture systems technology and supporting initiatives into waste recycling and reuse.
- A new type of fishing gear for bottom fishing was allowed in 2010. It uses weak electric pulses to scare flatfish from or out of the seafloor so the fishing net no longer needs be pulled through the sand to catch the flatfish. This reduces not only the negative impact of fishing on the surface of the seafloor and thereby its impact on biodiversity but also wear of the nets and the use of fuel. The experience and data of 2010-2011 were used to prepare a request in 2012 for official recognition of this method by the European Union.

Figure 16.1. Harvesting and aquaculture production



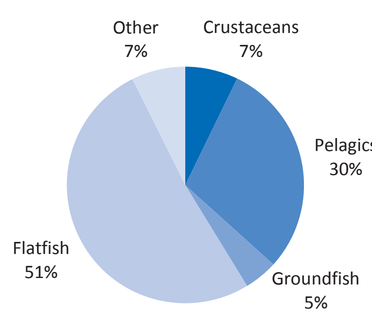
Source: FAO FishStat Database.

Box 16.1. Key characteristics of Dutch fisheries

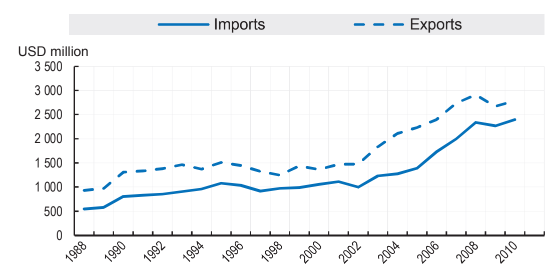
- In 2010, flatfish accounted for the highest value in terms of value of landings, followed by pelagics, crustaceans and groundfish. (Panel A)
- In 2009, the total value of fish exports was just under EUR 2 200 million. The value of exported frozen fish fell by approximately EUR 150 million to EUR 859 million, equivalent to 40% of the total export value. The value of imports was around EUR 1 800 million, a little higher than the previous year. Imports from France fell the sharpest, whilst those from Italy and Poland increased the most. (Panel B)
- In 2009, the total value of fish exports was just under EUR 2 200 million. The value of exported frozen fish fell by approximately EUR 150 million to EUR 859 million, equivalent to 40% of the total export value. The value of imports was around EUR 1 800 million, a little higher than previous year. Imports from France fell the sharpest, whilst those from Italy and Poland increased the most. (Panel C)
- In 2009, the total value of fish exports was just under EUR 2 200 million. The value of exported frozen fish fell by approximately EUR 150 million to EUR 859 million, equivalent to 40% of the total export value. The value of imports was around EUR 1 800 million, a little higher than previous year. Imports from France fell the sharpest, whilst those from Italy and Poland increased the most. (Panel D)

Figure 16.2. Key fisheries indicators

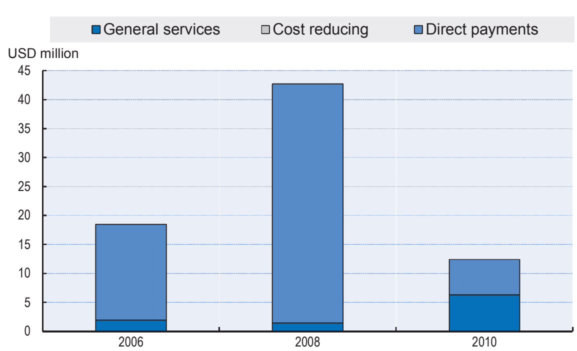
Panel A. Key species landed by value in 2010



Panel B. Trade evolution



Panel C. Evolution of government financial transfers



Panel D. Capacity

	2006	2008	2010
General services	2	1	6
Cost reducing	0	0	0
Direct payments	17	41	6

Legal and institutional framework

Management of capture fisheries and aquaculture is the responsibility of the state government. In the fall of 2010 this responsibility switched from the ministry of Agriculture, Nature and Food Safety to the then new-formed ministry of Economic Affairs, Agriculture and Innovation.

Policies for marine fisheries are implemented within the context of the EU Common Fisheries Policy (CFP).

In addition, the Dutch Fishery Act of 1963 (*Visserijwet 1963*) provides for regulations regarding national formulation and implementation policies for coastal fisheries, aquaculture, inland fisheries and recreational fisheries.

There are three government websites to inform fishery professionals:

- www.rijksoverheid.nl/themas/landbouw-natuur-en-voedsel.
- www.drloket.nl/onderwerpen/visserij.
- www.antwoordvoorbedrijven.nl/branche/visserij.

Capture fisheries

The Netherlands has four types of capture fisheries.

- North Sea fishery is the largest and economically most important fishery sector. It mostly makes use of cutters to fish the North Sea and the Channel for sole, plaice and other fish by beam trawling.
- Sea fishery is the fishery beyond the North Sea with (freezer) trawlers (14 vessels) that catch herring, mackerel and other pelagic fish in European and West African waters and if profitable even in the Pacific Ocean.
- Coastal fishery is in the zone within 12 nautical miles of the beach. They mostly catch shrimp and mussels.
- Inland waters fishing takes place on the *IJsselmeer*, the lakes around it and on the large rivers. Eel, pike (perch) and smelt are the most caught fish.

In 2010, the fleet was composed of 730 vessels (0.9% of EU-27), of which 539 were trawlers (74%) and 191 were other vessels (26%). Their tonnage was 142 066 GT (8.4% of EU-27) with 305 955 kW (4.8% of EU-27). The active fleet, however, was smaller in 2010 than in 2008: 14 trawlers (14), 283 cutters (308) and 60 dredgers (70).

Performance

Dutch fisheries caught some 450 000 tonnes of fish (mostly horse mackerel, herring and sardinella). Revenue from the Dutch fishing industry at year-end 2009 dropped steeply to EUR 386 million, a fall of 18% from 2008.

In 2009, Dutch fish auctions (supplied also by vessels sailing under foreign flags) generated a total revenue of EUR 273 million, down EUR 27 million or -9% on the previous year. The quantity of fish supplied increased, but the prices for a number of important types (especially plaice and shrimps) dropped considerably resulting in less revenue. In 2010, auctions generated a total revenue of EUR 294 million, an increase of EUR 21 million or +8.1% on the previous year.

In 2010/11, the fisheries sector employed around 20 000 people (full- and part-time). The employment level in 2010 by sector was: 2 075 in the catch sector; 5 540 in trade and processing; and 6 000 in retail.

Status of fish stocks

Total allowable catches (TAC's) are fixed yearly by the European fisheries ministers. They receive advice based on the status of fish stocks from the fisheries biologists of the International Council for the Exploration of the Sea (ICES), the Scientific Technical Economical Committee on Fisheries (STECF) and the Regional Advisory Committees (RAC). The TAC is divided between EU-countries according to allocation formulas.

The most important stocks for Dutch fisheries are sole and plaice. In 2010-2011, their status improved, resulting in higher TAC's c.q. NL-quotas. The status of cod is very poor and slowly reaching the point where fishing should be stopped. The management plan for herring had a positive effect and the stock is more or less stabilised and gradually improving. The stock of mackerel and horse mackerel has declined. The 2011 quota for blue whiting was reduced by 93%.

Table 16.1. Netherland quotas in 2009, 2010 and 2011
Unit: tonnes

	2009	2010	2011
Sole	10 466	10 571	10 571
Plaice	20 237	22 907	26 485
Cod	2 762	3 219	2 575
Herring	31 069	29 774	36 671
Mackerel	28 905	27 405	24 002
Horse mackerel	57 415	49 123	48 719
Blue whiting	13 787	12 350	1 869

Management of commercial fisheries

Management instruments

No major changes were implemented in the general management regime. The co-management system introduced in 1993 is still in operation. A very large share of the fishers in the cutter sector voluntarily joined this system, enabling them to optimise the economic use of their transferable quota (ITQ's). In 2005 government and industry agreed to extend the co-management system to control and enforcement of engine power.

Access arrangements for foreign fleets

This is arranged by and according to the agreements and rules of the European Union.

Management of recreational fisheries

Recreational fisheries are regulated by restrictions on the amount and kind of gear used, closed seasons and minimum size limits for specific species. It is prohibited to sell fish caught in recreational fisheries. No major changes were introduced in the management of recreational fisheries.

Monitoring and enforcement

On 1/1/2010 a new European fishery control system entered into force stepwise. Many provisions entered into force on 1/1/2011. The details can be found on the EU website (ec.europa.eu/fisheries).

For the Dutch fleet, the most important provision was the provisional use of an electronic registration and reporting system (e-log). To stimulate the purchase and use of an electronic log one could ask for a subsidy with a maximum of EUR 4 500 for each vessel.

On 1/1/2010 an EU-regulation on illegal, unreported and unregulated fishery entered into force. It had many consequences for importers and traders of fishery products. For Dutch fishermen, however, the consequences were small.

In late 2009, the European Court decided in favour of the European Commission in a court case against The Netherlands on the monitoring of the maximum allowed engine power. Authorities no longer allow a 12.5% tolerance margin when measuring engine power. Once a vessel engine is sealed, the engine power will never be higher than the value laid down in the permit.

In 2010, the professional use of passive gear (set nets) in coastal waters became better regulated in order to freeze the then current usage. The main goal was to prevent monitoring and enforcement problems in the future.

Multilateral agreements and arrangements

The Netherlands has only multilateral agreements and arrangements as an EU-member. The most relevant agreements for the Netherlands are those of the European Union with the non-EU countries surrounding the North East Atlantic: Greenland, Iceland, Faeroe Islands and Norway. For the Dutch pelagic freezer trawlers, agreements between the European Union and, respectively, Morocco and Mauritania are also relevant.

Aquaculture

Policy changes

Despite a global perspective, fish farming is hardly increasing in the European Union and is even declining in the Netherlands. Because of this decline in recent years, the government commissioned two research institutes to draw up an action plan in 2010. From this study the conclusion was that three issues needs better organization: market position, efficiency and cost savings and the capacity for innovation. Specific actions taken by the government are research into possible partnership forms and providing support for a Knowledge Network. Other action points are facilitating the acquisition of insight into markets and access to market data; supporting existing initiatives to increase production and chain co-operation; supporting initiatives and research into improvements to production under recirculation aquaculture systems technology and supporting initiatives into waste recycling and reuse.

The government is continuing the stepwise measurements to improve the sustainability of the culture of mussels.

Production facilities, values and volumes

In 2010 the production volume was 66.945 tonnes with a value of EUR 80 million Eighty per cent of production volume and about two third of the total value in aquaculture comes from mussels. Freshwater fish farming is negligible (58 enterprises in 2010) and is mainly the production of African catfish (13 enterprises) and European eel (18 enterprises).

Fisheries and the environment

Environmental policy changes

On the basis of the EU Natura 2000 scheme, the coastal zone of the North Sea has been appointed as an area that has to be protected against loss of biodiversity. And the effect of European Bird Habitat directive is that in this area the sandbanks have to be protected, because of their role in the marine ecosystem and their habitat for seashells, which some birds feed on. The result is that fishing will be forbidden or restricted in very large areas (no bottom fishing).

In 2011, government, fisheries organisations and nature protection organisations agreed to a scheme that gradually restricts fisheries and allows fishermen to develop and adopt new fishing techniques for these areas. The shrimp fisheries sector — already in crisis because of very low prices and high fuel prices — will be affected the most. Therefore, the government supports them in developing a master plan for a sustainable and profitable shrimp fishery.

The government also has a large impact on the mussel fisheries which have been forced to develop new techniques, including trying to raise mussels in the North Sea rather than in coastal waters. They also receive governmental support.

Expansion of the port of Rotterdam almost two miles into the sea, combined with natural developments in coastal water circulation, has led to changes in the pattern and depth of the seafloor of the coastal waters south of the port. This gave rise to questions about what should be considered sea and what should be considered coastal water. A 2010 regulation resolved this issue by establishing within the disputed area five new resting areas for seabirds and by restricting fishery activities. These actions are based on the EU Integrated Coastal Zone Management and the EU Natura 2000 scheme.

Sustainable development initiatives

The year 2010 was the first year that a new type of fishing gear for bottom fishing was allowed. This new method uses weak electric pulses to scare flatfish from or out of the seafloor so the fishing net no longer needs be pulled through the sand to catch the flatfish. This reduces the negative impact of fishing on the surface of the seafloor and thereby its impact on biodiversity. It also reduces wear of the nets and the use of fuel. In 2010, this method was allowed for 20 vessels, in 2011-2012 for 42 vessels. The experience and data of 2010-2011 were used to prepare a request in 2012 for official recognition of this method by the European Union.

In 2010-2011, the collection of mussel seed (spat) has been made more sustainable by increasing the use of installations (hanging nets, also known as mussel seed capture installations) for collecting the one to two centimetre mussels, instead of scraping these young mussels from the tidal flats by fishing vessels. The latter method was progressively restricted to protect biodiversity and the ecosystem.

Government financial transfers

Transfer policies

The main financial instrument for fisheries is the European Fisheries Fund (EFF). For measures geared to fishermen and fishing vessels, a total of EUR 1.5 million was deployed in 2010-2011. Of the amount attributed to aquaculture, EUR 15 million was spent. There were no specific transfers to the fish processing sector.

The Dutch Operational Programme focuses on innovation and sustainability of the harvesting and aquaculture sectors, with a marginal role for remediation of the fleet.

Technological innovation and the development of new product/market is essential for these sectors. The EFF program therefore supports pilot projects and collaborative projects that (may) lead to sustainable technologies, which (maybe) can be introduced into the market. For these measures, a total of EUR 51.5 million was spent (by EU+NL) in 2010-2011.

The Dutch have also chosen a tender system (which is not obligatory within the EFF) to clearly announce the day and time of opening and to define transparent selection criteria. The purpose of the tender system is to compare the offered projects and to select the best ones with the highest quality. By opening the tenders on a regularly basis for a limited time, only the best projects have access to public funds. A qualitative weighting of the projects is part of the tender procedure, whereby sustainability is an assessment criterion that is always applied. The Supervisory Committee can and should adjust the selection criteria for the following tender on the basis of new insights from the last tender, without having to change the Operational Programme.

Structural adjustment

There were no national policy changes in 2010-2011. There were no measures intended to facilitate reduction of fishing capacity, only the above-mentioned programme for support and promotion of technical innovations and developments that increase sustainability.

Post-harvesting policies and practices

Policy changes

Food safety

There were no significant policy changes or practices in 2010-2011. The food safety policy is carried out in accordance with European rules. The current food safety policy is based on a series of principles established or updated at the beginning of the 2000s. These principles, applied in line with the integrated approach "From the Farm to the Fork" specifically include transparency, risk analysis and prevention, the protection of consumer interests, and the free circulation of safe and high-quality products within the internal market and with third countries. This approach involves both food products produced within the European Union and those imported from third countries.

A certain number of bodies, in particular the European Food Safety Authority and the Netherlands Food and Consumer Product Safety Authority, are responsible for helping to guarantee food safety. Research is also an important element of the food safety policy. RIKILT-Institute of Food Safety is the independent national research institute regarding food and feed safety.

Information and labelling

The obligatory information and labelling of fish and fish products is governed by European rules and underwent no significant changes in 2010-2011.

The new EU Regulation 1169/2011 on the provision of food information to consumers considerably changes existing legislation on food labelling (2000/13/EC and 90/496/EEC); the new rules will apply from 13 December 2014.

Voluntary information and labelling is mainly MSC-certification. In 2010-2011, Dutch fisheries were certified for North Sea herring (since 2006) and Atlanto-Scandian herring pelagic trawl (2010), Mackerel (since 2009), North Sea twin-rigged otter trawl plaice (since 2009), gill net sole (2009) and North Sea twin-rigged plaice (2010). There were also many requests for Dutch rod and line fishery for sea bass (2011), and Netherlands blue shell mussel

(2011). Netherlands suspended culture mussel (2011). All auctions for seafish and shrimps have been MSC-certified since 2009.

Structure

There are about 600 enterprises that trade and process fish and fish products. And there are around 1 700 specialized fish sellers with at least one point of sale. There are no special governmental policies aimed at increasing the efficiency of distribution and marketing of fish and fish products. The sector organisations debate on these matters themselves and try to reach consensus on proposed actions. For actions that reduce food losses or food waste, or improve sustainability, they can request financial support when a support programme for these areas exists.

Processing and handling facilities

There have been no significant changes in the structure of processing (including preservation, processing and handling onboard ships), handling and distribution industries, although all have continued to be modernised. It should be noted that the financial crises has made it more difficult to obtain bank loans in this sector for investments.

Markets and trade

Markets

Trend in domestic consumption

In 2009 domestic consumption was 19.6 kg per capita per year (EU-27, 23.0 kg). In the Netherlands, the three most consumed fish species are salmon, herring and pangasius.

Promotional efforts

Promotional efforts were mainly directed to supermarkets in order to increase the sale of MSC-certified fish and to slow down the increase in sales of fish from aquaculture imported into the European Union. Consumers were also informed which fish should be favoured with respect to promoting sustainability of fisheries.

Trade

Volumes and values

The export value of fish and fish products fell in 2009 by more than 4%. The total value of fish exports was just under EUR 2 200 million. The value of exported frozen fish fell by approximately EUR 150 million to EUR 859 million, equivalent to 40% of the total export value. Exports to important trading countries – such as Germany, Belgium, Italy and Spain – fell, whilst exports to France and the United Kingdom rose slightly. The six most important trading countries within the European Union accounted for over 72% of the total value of exports. Outside the European Union, important trading countries were Nigeria, China, Japan and Egypt.

The value of imports was around EUR 1 800 million, a little higher than last year. Imports from countries outside the European Union rose by 6% to EUR 938 million. Imports from France fell the sharpest, whilst those from Italy and Poland increased the most. The value of imports of frozen fish, shellfish and crustaceans increased sharply, whilst those of fresh fish fell sharply.

Policy changes

There are no trade restrictions within the European Union and trade or tariff arrangements with non-EU countries are made by the EU. In 2010-2011, there were no changes with respect to trade regimes for fish and fisheries products between EU and non-EU countries that were of significance for trade with the Netherlands. New arrangements made in earlier years had their effects in 2010/11, e.g. the 2009-2012 agreement with Mauritania on pelagic fishery.

Outlook

The revision of the Common Fisheries Policy, including the regulation on the Common Market Organisation for fishery and fisheries products, and the revision of the European Maritime and Fisheries Fund will take place over 2012-13. There will be more focus on the sustainable use of our ecological capital, a bigger role for the market (less support mechanisms), and a different method for decision-making and implementation.