



**MARKET ACCESS SECRETARIAT
Global Analysis Report**

Inside the Netherlands
The Fish and Seafood Trade

September 2015



TRADE SUMMARY*

In 2013, the Netherlands was the 8th-largest importer of fish and seafood products in the European Union and the 13th-largest in the world. The Netherlands imported fish and seafood products from 100 countries (US\$3.2 billion), an increase of 0.8% from 2012. The top five supplying countries were Iceland with a 10.8% share, followed by Germany (10.7%), Belgium (7.3%), Russia (6.0%) and Norway (5.8%).

The Netherlands' top five fish and seafood imports in 2013 were frozen shrimp and prawns (US\$258.8 million), prepared/preserved tunas/skipjack/bonito, not minced (US\$231.8 million), frozen cod fillets (US\$195.0 million), prepared/preserved shrimp and prawns in airtight container (US\$127.3 million) and frozen cod (US\$113.2 million)

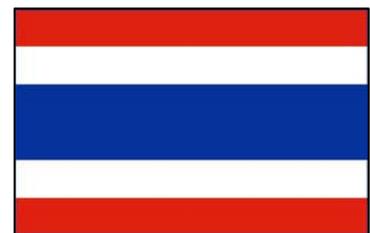
Fish and seafood product exports from the Netherlands totaled US\$3.6 billion in 2013, an increase of 1.8% over 2012. The Netherlands was the European Union's 5th-largest exporter of fish and seafood products for 2013. The top five export markets were Germany with an 18.7% share, Belgium (15.3%), France (12.5%), Italy (9.1%) and Spain (6.5%).

In 2013, the Netherlands' principal exports were cold-water shrimp and prawns, not frozen (US\$203.2 million), frozen shrimp and prawns (US\$168.6 million), frozen jack and horse mackerel (US\$161.3 million), frozen mackerel (US\$148.8 million) and frozen herrings (US\$148.3 million).

*Numbers in the Trade Summary section came from Global Trade Atlas, 2015 unless otherwise specified

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CANADIAN PERFORMANCE

Canada was the 20th-largest supplier of fish and seafood to the Netherlands, with sales of US\$43.3 million in 2013 (based on Netherlandic import data). This represents an increase of 97.6% over 2012 and was driven by significant increases in imports of fish fats and oils (+US\$21.1 million), live lobster (+US\$990,033), and prepared/preserved shrimp and prawns in air tight containers (+US\$2.0 million).

The Netherlands was Canada's 11th most important destination for fish and seafood, receiving US\$42.6 million or 0.9% of Canada's total seafood exports in 2013. Overall, fish and seafood was Canada's second most significant agri-food and seafood export sector to the Netherlands, and represented approximately 5.6% of all Canadian products exported to the Netherlands in 2013 (GTA, 2015).

BY THE NUMBERS

**Top Ten Suppliers of Fish and Seafood to the Netherlands
and Top Imported Products in 2013 (Based on Netherlandic Import Data)**

Rank	Country	Total Import Value (US\$)	Top Import Supplied	Top Import Value (US\$)
	World	3,236,806,834	Frozen shrimp and prawns, NESOI	258,833,463
1	Iceland	348,000,883	Cod salted or in brine, not dried or smoked	85,939,776
2	Germany	346,378,146	Cold-water shrimp and prawns, not frozen	50,040,069
3	Belgium	234,658,835	Frozen shrimp and prawns, NESOI	42,328,585
4	Russia	192,518,487	Frozen cod fillets	98,595,305
5	Norway	188,015,154	Frozen cod	36,790,428
6	Denmark	153,860,158	Fresh/chilled Atlantic and Danube salmon	21,848,868
7	China	137,599,828	Frozen cod fillets	18,023,114
8	United Kingdom	135,292,587	Fresh/chilled plaice, except fillets, livers, and roes	21,453,007
9	Morocco	131,483,313	Prepared/preserved shrimp and prawns in airtight container	106,497,249
10	Vietnam	117,949,770	Frozen catfish fillets,	52,414,830
20	Canada	43,340,267	Fish fats and oils and their fractions (other than liver oils), not modified	21,143,870

Source: Global Trade Atlas, 2015.

*NESOI: Not Elsewhere Specified or Indicated



Top Ten Netherlandic Fish and Seafood Imports from the World in 2013

Rank	Top Imports	Import Value (US\$)
1	Frozen shrimp and prawns, NESOI	258,833,463
2	Prepared/preserved tunas/skipjack/bonito, not minced	231,817,403
3	Frozen cod fillets	195,015,810
4	Prepared/preserved shrimp and prawns in airtight container	127,267,535
5	Frozen cod	113,220,350
6	Prepared/preserved shrimp and prawns not in airtight container	103,772,795
7	Fresh/chilled fish fillets, NESOI	95,603,739
8	Cod salted or in brine, not dried or smoked	84,729,232
9	Frozen mackerel	74,225,099
10	Fresh/chilled Atlantic and Danube salmon	73,022,250

*Source: Global Trade Atlas, 2015. *NESOI: Not Elsewhere Specified or Indicated*

RETAIL SALES

In 2014, the Netherlands' per capita expenditure on fish and seafood products was US\$79.30, one of the lowest rates in the European Union, which on average had a per capita expenditure of US\$145.7. Since 2009, consumers in the Netherlands increased spending on fish and seafood products by 3.1% (CAGR), while consumers in the European Union increased expenditures on fish and seafood products by 0.9% (CAGR) (Euromonitor International, 2015).

For dinner, 60% of households still eat a traditional Dutch meal at least three times a week, which features a large quantity of potatoes, vegetables (mainly root vegetables), a small amount of meat and milk-based desserts. On average, Dutch consumers dine with meat on 4.7 days a week, followed by fish on 0.9 days, meat substitutes on 0.5 days and something else on 0.9 days (Euromonitor International, 2014).

Retail sales of chilled coated fish/seafood are expected to remain strong as more Dutch consumers search for convenient alternatives to red meats. However, Dutch consumers are still intimidated by the prospect of preparing fish at home due to the perception that it is more difficult to prepare than traditional red meats. Coated fish products are regarded as obviating any such concerns as they are generally quick and easy to prepare (Euromonitor International, 2014).

Retail sales of canned/preserved fish/seafood had one of the highest growth rates in 2014. One of the main reasons for the strong performance is the increasing numbers of Dutch consumers who are recognizing that eating fish and seafood can be a healthy dietary choice. Additionally, Dutch consumers are attracted to canned/preserved fish/seafood as these products offer good value for money (Euromonitor International, 2014).

Another reason for the increase in retail sales of canned/preserved fish/seafood is the popularity of various Mediterranean dishes which contain fish or seafood. Many Dutch consumers are experimenting with pasta dishes, for instance, which use canned/preserved anchovies or recipes that use canned tuna. For this reason, manufacturers are developing new ranges of canned tuna in sauces with a Mediterranean twist. Mediterranean cuisine is by no means part of traditional Dutch cuisine, although as



interest in other types of food grows in the Netherlands, canned/preserved fish and seafood is benefiting (Euromonitor International, 2014).

**Netherland's Processed Fish and Seafood* Retail Value Sales (Historic/Forecast)
in US\$ Millions and Period Growth (%)**

Categories	2009	2013	2014 ^F	2018 ^F	CAGR % 2009-13	CAGR % 2014-18 ^F
Total Fish and Seafood	981.8	1073.3	1136.7	1115.9	2.3	-0.6
Chilled fish/seafood	588.7	662.3	660.7	636.3	3.0	-0.9
Raw fish	370.7	412.3	413.1	406.9	2.7	-0.4
Raw seafood	198.3	229.6	227.1	208.9	3.7	-2.1
Coated Fish/Seafood	19.7	20.4	20.4	20.5	0.9	0.1
Canned fish/seafood	273.3	285.9	288	292.6	1.1	0.4
Tuna	119.6	117	116.1	112.8	-0.6	-0.7
Mackerel	94.3	108.8	111.7	118.9	3.6	1.6
Salmon	36.2	36.3	36.3	36.5	0.1	0.1
Other canned fish/seafood	23.1	23.7	23.9	24.3	0.6	0.4
Frozen fish/seafood	119.9	125.2	123.6	117.9	1.1	-1.2
Coated Fish/Seafood	95.3	99.8	98.7	94.4	1.2	-1.1
Raw seafood	11.8	12.2	12.1	12.1	0.8	0.0
Raw fish	11.7	12.2	11.7	10.4	1.1	-2.9
Other fish/seafood	1	1	1	1	0.0	0.0

Source: Datamonitor, 2015

**Note: Fish-based ready meals have been excluded from this analysis, given the fact that they represent a small market*

In 2014, an innovative new entrant into the Netherland's canned/preserved fish/seafood category, Fish Tales BV launched a full range of canned/preserved fish and seafood products. This brand carries the Marine Stewardship Counsel (MSC) certification which recognizes businesses that employ sustainable fishing practices. The brand is mainly distributed through leading grocery retailer chain Albert Heijn (Euromonitor International, 2014).



TOP TEN FISH AND SEAFOOD SUPPLIERS TO THE NETHERLANDS IN 2013

The figures listed below are in United States dollars.

<u>1. Imports from Iceland</u>		<u>2 Imports from Germany</u>	
Salted or in brine, not dried or smoked cod	\$85.9M	Cold-water shrimp and prawns, not frozen	\$50.0M
Dried/salted/brined, not smoked fish fillets family of Bregmacerotidae, etc	\$64.2M	Frozen jack and horse mackerel	\$27.7M
Frozen cod fillets	\$41.9M	Frozen mackerel	\$27.5M
Frozen coalfish fillets	\$27.9M	Flours, meals and pellets of fish, crustaceans, molluscs or other aquatic invertebrates, not fit for human consumption	\$24.1M
Fresh/chilled fish fillets family of Bregmacerotidae, etc	\$25.1M	Smoked Pacific, Atlantic and Danube salmon	\$21.9M
<u>3. Imports from Belgium</u>		<u>4. Imports from Russia</u>	
Frozen shrimp and prawns, NESOI	\$42.3M	Frozen cod fillets	\$98.6M
Fresh/chilled Pacific, Atlantic and Danube salmon fillets	\$26.2M	Frozen cod	\$62.1M
Prepared/preserved fish, NESOI	\$21.1M	Frozen haddock fillets	\$18.0M
Prepared/preserved shrimp and prawns not in airtight container	\$15.7M	Frozen haddock	\$3.3M
Fresh/chilled sole, except fillets, livers, and roes	\$12.1M	Frozen Pacific salmon, NESOI	\$3.0M
<u>5. Imports from Norway</u>		<u>6. Imports from Denmark</u>	
Frozen cod	\$36.8M	Fresh/chilled Atlantic and Danube salmon	\$21.8M
Fresh/chilled Atlantic and Danube salmon	\$25.6M	Fresh/chilled cod	\$13.6M
Frozen cod fillets	\$22.6M	Cold-water shrimp and prawns, not frozen	\$12.7M
Fish fats and oils and their fractions (other than liver oils), not modified	\$16.2M	Salted or in brine, not dried or smoked herring	\$6.6M
Frozen herring fillets	\$13.9M	Frozen fish fillets, NESOI	\$6.3M
<u>7. Imports from China</u>		<u>8. Imports from the United Kingdom</u>	
Frozen cod fillets	\$18.0M	Fresh/chilled plaice, except fillets, livers, and roes	\$21.5M
Frozen Pacific, Atlantic and Danube salmon fillets	\$17.4M	Frozen mackerel	\$13.8M
Frozen flat fish fillets	\$17.1M	Frozen jack and horse mackerel	\$11.4M
Frozen shrimp and prawns, NESOI	\$13.3M	Live, fresh/chilled mussels	\$9.5M
Prepared/preserved crustaceans, NESOI	\$13.1M	Frozen herring	\$7.1M
<u>9. Imports from Morocco</u>		<u>10. Imports from Vietnam</u>	
Prepared/preserved shrimp and prawns in airtight container	\$106.5M	Frozen catfish fillets,	\$52.4M
Prepared/preserved sardines/sardinella/brisling, not minced	\$22.3M	Frozen shrimp and prawns, NESOI	\$18.8M
Frozen, dried, salted or in brine octopus	\$1.5M	Prepared/preserved shrimp and prawns not in airtight container	\$14.6M
Frozen fish, NESOI	\$0.4M	Frozen fish meat, NESOI	\$4.2M
Frozen fish fillets, NESOI	\$0.2M	Prepared/preserved fish, whole or pieces, NESOI	\$4.06M

Source: Global Trade Atlas, 2014.

*NESOI: Not Elsewhere Specified or Indicated



FOR MORE INFORMATION

International Trade Commissioners can provide Canadian industry with on-the-ground expertise regarding market potential, current conditions and local business contacts, and are an excellent point of contact for export advice.

- **Overview of Trade Commissioner Services in the Netherlands**
http://www.canadainternational.gc.ca/netherlands-pays_bas/
- **Find a Trade Commissioner**
www.tradecommissioner.gc.ca/eng/find-trade-contacts.jsp

For additional intelligence on this and other markets, the complete library of Global Analysis reports can be found under *Statistics and Market Information* at the following link, arranged by sector and region of interest:

- ats-sea.agr.gc.ca

For additional information on Seafood Expo Global 2015, please contact:

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RESOURCES

Datamonitor, 2015

Euromonitor International, 2014

- *Consumer Lifestyles in the Netherlands, January 2014*
- *Chilled Processed Foods in the Netherlands, December 2014*
- *Canned/Processed Food in Netherlands, December 2014*

Euromonitor International, 2015

Global Trade Atlas, 2015



Inside the Netherlands: The Fish and Seafood Trade

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