



The Fishery Value Chain

27/10/2017

What are we talking about?

The fishery value chain in Belgium



Total fisheries in Belgium

Wild Catch landed in Belgian Ports: 16.713 ton

Total Import: 256.247 ton

Total Export: 137.894 ton

- Source: Gfk 2016

The fishery sector in Belgium

- **The Fishing Fleet & Fishing ports**
- The auction
- Wholesale – processing companies
- Retail – Fish markets – Fish specialty stores

The Belgian Fleet in 2016



Large fleet segment

(>221
kw)

33

vessels

Small fleet segment

(<221
kw)

Eurokotter

13

vessels

Coastal fishery

17

vessels

63

Who are the fishermen?

- Family owned businesses
- Dispose of a license to catch Belgian quota
- 1 maximum 2 vessels per shipowner
- Relatively stable catch over the year- very volatile on daily basis
 - Distribution of species
 - Prices
- Dependent on quota, weather, presence of fish at the fishing grounds

The Fishing Ports

- 450 fish auctions along the European coasts
- 3 fishing ports in Belgium
- 2 fish auctions
 - Vlaamse Visveiling (Oostende & Zeebrugge)
 - Nieuwpoortse Visveiling

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The Auctions

1. Platform to bring supply and demand together
 - Keeping the current supply and demand stable
 - Simultaneously developing new supply and sales markets
2. First point of sales
3. Services to shipowners and merchants



Z45		WEST		1	
TONG		(0) + 801		GG	
Laatste prijzen	Kisten	Kg/Kst	Rest	Gewicht	Finaliteit
15,51	Z548	7	40	24	304
15,33	Z198				A7
14,58	Z333				
15,08	Z90				

18.0

1. The Platform

1. The Clock:

- A digital sales system allowing distant buying
- Reliable and fast sales (up to 500 transactions/ hour)
- Transparent sales system with international buyers
- Democratic system, equal opportunities for all parties
- “Countervailing power” by grouping the supply

2. The Bidding Platform

- Developing new markets for the Belgian catch



2. First Point of sales & its legal obligations



- Classification by weight classes
- Objective quality inspection following the QIM method
 - Reliability is extremely important for the 80% distant buyers
- Food safety control by FASFC
(Federal Agency for the Safety of the Food Chain)
- Communication with government – quota control

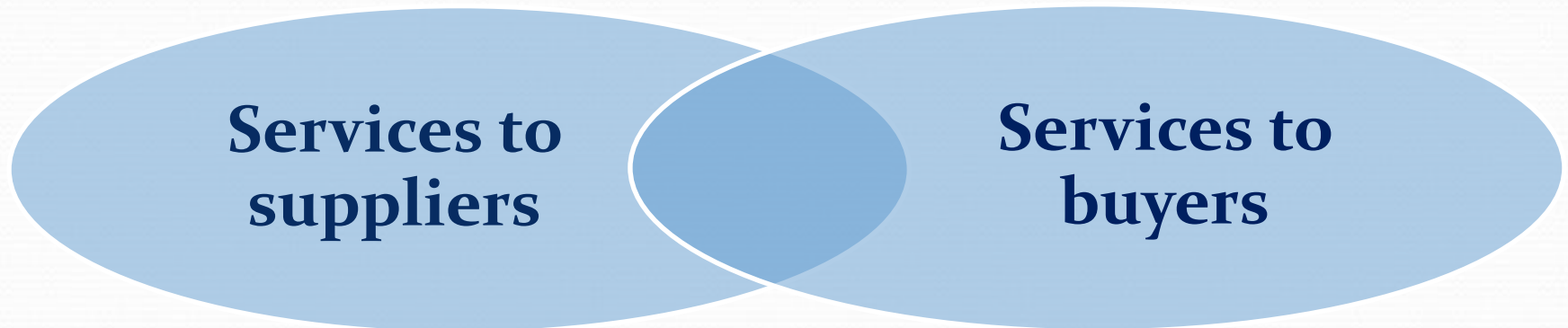


The buyers

Vlaamse Visveiling: 170 buyers

- Wholesalers
 - Export
 - Processing
 - Restaurants
 - Catering
- Supermarkets
 - Carrefour, Auchan,...
- Markets and specialty stores

3. **Services of Vlaamse Visveiling:** **Bringing together & facilitating supply and demand**



- Support for landing in foreign ports
- Bunkering and transportation equipment
- Organization refrigerated transport
- Calibrating the fish
- Fast and reliable payment

- ✓ **Market creation**
- ✓ **Performant software for sales on the clock**
- ✓ **Fair price**
- ✓ **Traceability**
- ✓ **Neutral data**

- Internal logistics / Preparing for export
- Direct distribution to companies in the clusters
- Packaging and labeling tailored to the customer

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European Food Centre

**The Wholesale and Processing Companies
around the Auction**

EFC Cluster

Zeebrugge



- Economic activities sustained by the logistics platform
- 100 companies, total investment of 150 million €:
 - Shipowners: 40
 - Fish trade and processing : 40
 - Ship supplies and maintenance : 20
 - Cold store
 - **Employment: 1500**

EFC Cluster

Oostende



- Economic activities sustained by the logistics platform
- 39 companies: *
 - Shipowners: 6
 - Fish trade and processing : 25
 - Ship supplies and maintenance : 8
 - Employment: 200

*Will expand significantly with new auction and workplaces

The Fisheries Sector in Belgium

- The Fishing Fleet & Fishing Ports
- The auctions
- Wholesale – processing companies
- **Retail – Fish markets – Fish specialty stores**



Consumption in Belgium

- 66% of Fresh Seafood consumption is at home
 - 40% is bought in specialty stores or market
 - 10% in hard discount with no Belgian catch in assortment
 - 50% is bought in retail
- Especially Mussels and Dover Sole are restaurant products
- Seafood consumption is increasing
 - Salmon and Cod have the biggest market share
 - The Northsea species are increasing
 - Exotic species are decreasing