

Fisheries in figures 2004

General

The total revenue of the Dutch high sea and coastal fishing industry as a whole decreased by 7% to €111 million in 2004. For the North Sea cutter fleet revenues decreased by 3% to €245 million. The large-scale high sea fishing fleet achieved a total gross revenue of €31 million, a decrease of 8% in relation to 2003. The size of the cutter fleet decreased by 2% to 473 vessels. Employment was 4% lower, while investments decreased by 40% to €23 million.

Both the turnover and the volume of landings of the Dutch fish auctions declined by 7% and 4% respectively. There was a small increase in the volume of sole, other species declined in volume. The turnover was €326 million. The average landing price at the auctions decreased by 3.5% to €3.04 per kg. Notwithstanding a lower volume of landings (-15%) a 5% lower price was paid for shrimp.

Cutter fishing

For the third successive year, the cutter sector ended its financial year with a negative net result. The economic loss amounted to €8 million, double the amount in the two previous years.

The total gross revenue declined by 3% to €245 million. The total effort declined by 8%, nevertheless the costs increased (+2%). The gross revenue of sole decreased marginally, due to a combination of a small increase in landings at a slightly lower price. The gross revenue of plaice decreased by a quarter: landings declined by 14% and the price went down by 10%. The revenues for shrimp decreased likewise: 15% lower landings and 7% lower price. As a result of these developments the total returns on labour from the cutter sector (gross revenue minus operational costs) fell to €62 million. In real terms (after a correction for inflation) the returns to labour over the last seven years have been halved.

The size of the cutter fleet decreased by 3% to 371 ships; the total engine power decreased by 4% to 364.000 HO. The number of crew members also declined, by 7%, especially on board of large ships. The use of oil decreased 8%. Over the last seven years the cutter fleet has been scaled down by 10%. Engine power decreased by 17% and the use of oil by 25%.

The cutters in the group of 261-300 HP (mostly Eurocutters) realised in 2004 a 5% higher gross revenue. The variance in costs and revenues between cutters is high in this group. On average once again there was a net loss, and even a bit bigger than in 2003. The average labour income per crew member remained stable at €42,000. The larger cutters up to 2000 HP are still gaining market share and are now responsible for the nearly 50% of the engine power. In 2004 they realised a slightly lower gross revenue, but due to higher costs also in this group the net result was negative.

In shrimp fishing the total effort declined marginally. The gross revenue in 2004 was not higher than €30 million, 19% lower than the previous year. A volume of landings not in line with the demand by the trading companies, lower prices and higher operational costs were the most important reasons for the negative result.

For cutter fisheries as a whole, the equity capital in early 2004 accounted for approximately 15% of the total balance sheet capital. That is a considerable decline in relation to early 2003 (solvency 28%) when a stark decline was also recorded. Investments decreased and firms had to borrow more due to the disappointing results. The total loans (long term) are now €250 million, or more than €800,000 per firm. The net cash flow was strongly negative (-€11 million) in this accounting year. Firms with a large cutter still realised a positive net cash flow.

Large-scale high seas fisheries

The size and composition of the large-scale high seas fishing fleet did not change in 2004: seventeen ships. The total effort in sea-days remained nearly stable, although there was less fishing in African waters and more in European ones. The total catch increased a bit to 444.000 tons, compared to the year before. Especially herring, blue whiting and horse mackerel increased strongly. The landed quantities of silver smelt and mackerel clearly declined.

The total gross revenue from landings in 2004 amounted to €131 million, decrease of more than 12% in relation to 2003, which in retrospect can be classified as a top year. The fleet ended the year with a net loss of almost €10 million.

Foreign trade

In 2004 the export of fish and fish products exceeded the threshold of 2 billion euro for the first time ever. This was an increase of 8% compared to the previous year. Especially the export of fresh and chilled fish showed a strong increase. In particular close destinations like Germany, Belgium and the UK ordered more products. The import decreased for the third year in a row, in 2004 by 3%, especially due to lower imports from outside the EU.

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