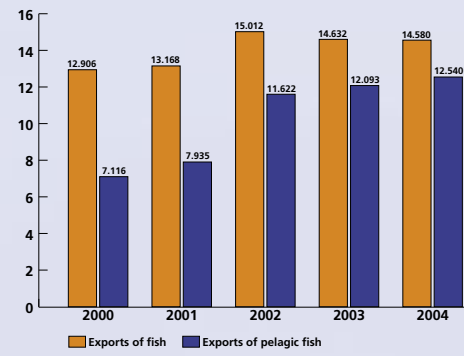


Continued from page 3

After a period of growth, exports of pelagic fish to Poland are now stabilising, which is partly due to increased prices. These price increases are in turn due to increasing demand from new markets like Poland. However, herring and mackerel are traditionally regarded as bulk products. If prices skyrocket, customers drop out and start looking for alternative products. For example, the price of 400-600 grams of mackerel is currently higher than that of frozen cod. This is why the Dutch trading sector is expecting the prices of herring and mackerel to adjust themselves. The price of herring has already gone down: the price of mackerel is expected to follow suit.

Exports of fish from the Netherlands to Poland x ton



Source: Eurostat



Dutch fish-processing company wins Prix d'Elite Best new retail product for 2006

As one of the world's biggest fish exporters, it goes without saying that the Netherlands was extremely well represented at the European Seafood Exposition in Brussels. This international trade fair provides an ideal opportunity for establishing contacts and presenting new products. There were big celebrations in the Holland Pavilion because Bond Seafood won first prize in the 'Best new retail product' category of the prestigious Prix d'Elite professional competition.

The Dutch Fish Marketing Board is of the opinion that winning the Prix d'Elite will act as an incentive for other Dutch companies engaged in devising new fish products. During the trade fair in Brussels, it was evident that whole fresh fish is becoming a scarce commodity. Fish is more and more frequently sold prepared and ready for use: cubed, packaged, breadcrumbed and as meal components. This means that many Dutch fish-processing companies are having to adapt their traditional product range, and are devising new products such as the Wok Dish.

to prepare. The members of the jury evaluated the entries for the Prix d'Elite on their flavour, packaging, market value, convenience, nutritional value and originality. According to the jury, the Wok Dish fits in well with the current European trend of wok cooking.

Convenience

"We were really surprised at winning the Prix d'Elite," says Rick Bond, owner and managing director of Bond Seafood. "In the past, we have always had two lines of business: a smokehouse and a filleting section. We started up a third branch three years ago, for convenience foods. Like many other Dutch fish-processing companies, this move on our part was in reaction to market developments. We found out that fish has to be easier in order to reach consumers. By easier, I mean easier to buy, quick to prepare and sold in smaller portions for the

A total of 122 products from 17 countries were entered for the Prix d'Elite.



increasing number of single and dual households. Other fresh-food sectors have been taking advantage of this trend for much longer, and now we are following. We had a good look at the market first, and used our common sense. And now it seems we did the right thing! The Prix d'Elite is an incentive to carry on developing our line of convenience products. The convenience section will be just as important as our other sections in the long run."

Colophon

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MSC label for North Sea herring fishery

The Pelagic Freezer-Trawler Association (PFA) was awarded the MSC label for the herring fishery in the North Sea last May. Herring trader Jac. den Dulk & Zn. was presented with the MSC Chain of Custody certificate. This is the first time that the MSC label has been awarded to a Dutch fishing company.

According to MSC, the herring fishery in the North Sea is demonstrably well-managed and carried out in a sustainable manner. This conclusion was reached by a team of experts from Moody Marine, who carried out an extensive and independent evaluation: the PFA's fishing and processing methods were monitored for three whole years by Moody Marine, and the organisation also interviewed research institutes and social organisations. The condition of the herring stocks was examined during the survey, as well as the fishery's impact on the marine ecosystem and the effectiveness of the management system.

Sustainable

This is the first time that the Netherlands is able to boast an MSC-certified fishing company. The PFA promotes the (inter)national interests of eight shipping companies engaged in pelagic fishing

Andrew Hough, of the Moody Marine certification organisation, awards the MSC certificate to PFA president Gerard van Balsfoort.

activities. The PFA's policy focuses on responsible entrepreneurship. The association's aim is to make a practical contribution to sustained fisheries by means of concrete activities such as MSC certification. The fishery carried out by PFA trawlers on herring in the North Sea is currently the biggest European fishery bearing the MSC certificate.

One of the buyers of the MSC herring that also sells this product on the European market is Jac. den Dulk & Zn. in Scheveningen. This company has obtained a special certificate to enable it to process and trade in herring bearing

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Visit www.dutchfish.nl for more information on Dutch fish suppliers and their products.

the MSC label; the Chain of Custody certificate has been created for this purpose.

MSC was established in 1997 by the World Wildlife Fund and Unilever, the world's largest buyer of frozen fish products. After a slow start, interest in the label is now increasing: the number of certified fisheries worldwide has now reached 18, while a further 18 fisheries are currently working on obtaining the certificate. One of these is the grey shrimp fishery, including that in the Netherlands.



Proceeds first cask matje herring go to Diabetes Fund

True to tradition, the very first cask of matje herring in Scheveningen has been auctioned for charity, and the proceeds – a record sum of € 75,000 – donated to the Diabetes Fund. This organisation will use the money for research into the positive influence of oily fish (such as herring) on diabetes. The auction took place two weeks later than is customary; due to the cold spring, the herring had not yet developed a sufficient fat content to be processed into matje herring.

The herring season usually starts in the last week of May. However, round about that time this year the quality of the herring was still insufficient for processing into matje herring: herring can only be processed in this way after its fat content has reached a sufficiently high level and providing its stomach contains the right kind of food. The extreme cold this spring was responsible for the fact that the marine food supply was scant and that the herrings' fat content remained too low as a result. The trading sector refused to make any concessions and gave the herring two extra weeks to get into perfect condition for processing into matje herring. The first cask was not auctioned until 14 June.



As in previous years, the proceeds of this auction went to charity. This year, € 75,000 was donated to the Diabetes Fund. This organisation will use the money for various types of research intended to confirm the positive effects of oily fish on diabetes.

Research

The number of people suffering from diabetes mellitus is on the increase. Researchers are trying to find out the causes of this disease and are seeking possible cures. They have discovered that the natural oils contained in fish help to reduce the chances of diabetes. For example, a Dutch survey conducted among elderly people showed that those who ate fish on a regular basis ran less risk of contracting diabetes. This is probably due to the fact that fatty acids contained in fish make the cell walls more flexible, which in turn makes cells more sensitive to insulin and causes the blood sugar level to decrease. But this does not only apply to Dutch people: scientists had already discovered that diabetes rarely occurs amongst the Eskimos, who consume large quantities of fish.

Dutchman wins international cookery contest with creation for matje herring

Martien van Dijck, of Wolfslaar Restaurant in Breda (the Netherlands), can now call himself an international 'maatjes' (matje herring) chef for a whole year. His 'Matje herring' salad with celery and green apples won hands down during the 'Beste Maatjes' international cookery competition in June, where three Belgian, Dutch and German professional chefs competed for first prize. Herring is one of the most popular kinds of fish in all three countries. Steffen Henssler, of Henssler & Henssler Restaurant-Sushibar in Hamburg, won second prize, and Marcin Beaufort, of Maison Vandamme in Zeebrugge, came third. The professional jury also elected the Netherlands as the best country in the creative preparation of matje herring.

The 'Beste Maatjes' (= matje herring) competition was held this year for the first time by the Dutch Fish Marketing Board. This professional competition was intended to encourage chefs to create original dishes with herring. And during the exciting finals in Maastricht, it transpired that matje herring can be used in various surprising combinations.

Martien van Dijck won the competition with his 'Matje herring' salad. The jury was impressed by his combination of pure flavours, and considered that the flavour of matje herring was beautifully set off by combining it with green apple and celery. The professional jury also chose the Netherlands as the winning country because the three Dutch chefs collectively obtained the highest

number of points. The jury evaluated the creations on a number of criteria, including flavour, being able to identify the actual herring in the dish, originality/creativity, and presentation.



Freshness
from
Holland

Farewell



After 16 years' employment at the Dutch Fish Marketing Board – five of which as managing director – I am leaving for pastures new. I will first be going on a sabbatical for a couple of months to help me decide

what my next step will be. By the time you read this newsletter, I will already have left the Dutch Fish Marketing Board. I thoroughly enjoyed working all those years for that superb product fish, as well as for a wonderful sector.

Fish is a truly fantastic product. No other product is so varied and offers so many culinary possibilities. And fish is an exceptionally healthy product as well. The salubrious effects of unsaturated fatty acids are well known, and fish also contains numerous valuable proteins, vitamins and minerals.

The Dutch fish sector is considerably on the move. The sector is continually seeking new opportunities for putting fish on the market. And it has succeeded, as we saw during the recent European Seafood Exposition, where a Dutch fish-processing company won the Prix d'Elite for the best retail product in 2006. A real boost, too, for all the other Dutch fish-processing companies that are devoting themselves to innovation.

The Dutch fish sector is doing its best to contribute to responsible fishing in all kinds of ways: by doing research into new fishing techniques, for instance, or by working together and making satisfactory agreements on the catches. These activities have also been recognized. The herring fishery in the North Sea recently obtained the MSC certificate: this is the first large-scale fishery in Europe to do so. Other fisheries have started proceedings so that they too will be eligible for this internationally-renowned certificate.

All these positive developments make it easier for me to hand over to my successor Mariëtte Vermeer. I shall retain happy memories of my many delightful contacts in the (inter)national fish sector, who were largely responsible for the pleasure I took in my work.

I am convinced that a glowing future awaits the Dutch Fish Marketing Board, thanks to its fantastic team of co-workers.

Tilly Sintnicolaas
Managing Director

Netherlands second oyster-exporting country in EU

The Netherlands is second on the list of oyster-exporting countries in the EU (France is number 1). Sixty per cent of the Dutch oyster harvest is exported to Belgium, although France, Italy and Germany are also major importers of this delicacy from Zeeland.

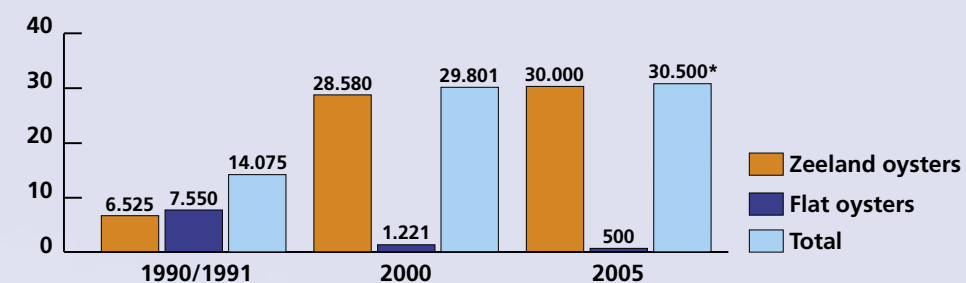
Oysters are indigenous to the Netherlands, and the cultivation of oysters mainly takes place in the southern province of Zeeland. Thanks to their favourable climatic situation, the Zeeland waters of Oosterschelde and Grevelingen are especially suitable for oyster farming. Experience, know-how and careful handling during the entire production process guarantee top-quality oysters highly prized both in the Netherlands and overseas.

Oysters used to be a product that was chiefly available in restaurants. During the past few years, however, oysters have been more and more frequently sold at fishmongers' and in supermarkets: this is partly due to the introduction of leakproof packaging. This makes it easy for consumers to take oysters home with them, which in turn means that an increasing number of people are getting acquainted with the flavour of oysters and able to enjoy them as a result.

Two species of oyster are farmed in the Netherlands: the Zeeland oyster (*Crassostrea gigas*) and the European flat oyster (*Ostrea edulis*). Although both species are farmed in Zeeland, they differ considerably in a number of ways.

Flat oysters are not only much scarcer than Zeeland oysters, but they are also much more vulnerable to the Bonamiasis disease. This disease, which attacks oysters, has decimated the flat oyster stocks, and farming is only possible on a limited scale in Lake Grevelingen. These vulnerable populations require extra attention from oyster farmers, which results in higher prices for flat oysters.

Overview of oyster supply x 1000



Source: Dutch Fish Product Board
* estimated by oyster sector spokesperson



Freshness
from
Holland

The Zeeland oyster stocks, on the other hand, are doing extremely well. When the flat oyster stocks all froze to death during the exceptionally severe winter of 1963, the Zeeland oyster was imported into the Netherlands from France. Contrary to all expectations, this oyster is thriving in the Netherlands. As one proud spokesperson from the oyster sector says, "The quality of our oysters is just as good as those in France."



	Zeeland oyster	Flat oyster
Shape	Irregular-shaped oval shell	Smooth round shell
Ready for consumption	After three years	After 5 or 6 years
Price	Reasonably-priced high-quality oyster	Top segment, exclusive
Packaging	Rectangular baskets	Round baskets
Sizes	Stated in Roman numerals	Stated in zeros
Season	Available all year round	Available from September to April; not for sale in the spawning season (from May to August inclusive)

Dutch mackerel and herring exported to Poland

The Netherlands is among the world's biggest exporters of fish. Poland is one of our customers. Due to a decreasing domestic supply and an expanding fish-processing industry, Poland is becoming more dependent on imports from third countries like the Netherlands.

In the past, Poland used to have a large trawler fleet that fished all over the world for the domestic market. Due to fishing quotas, economic developments in Poland and sheer old age, this fleet has drastically declined. The number of ships has been steadily decreasing since the 1990s.

At the same time, the fish-processing industry in Poland is increasing. At the present moment,

there are about 400 fish-processing companies engaged in smoking, marinating, canning and salting fish and fish fillets. Due to its decreasing domestic fish supply, the Polish fish industry is becoming increasingly dependent on imports for its raw produce. This is why about 70 per cent of all fish processed by the Polish industry consists of imports.

One of the purveyors of fish to Poland is the Netherlands, which mainly exports pelagic fish such as frozen mackerel and herring to that country. The fish in question is round-bodied unprocessed fish. Traditionally, Poland used to import the bigger specimens, but due to the fact that the price for these fish has increased during the past few years, the Polish fish-processing industry has switched over to smaller sizes for mackerel and herring.

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