

**Study Tour by
UK Fish Industry
Representatives to
Ijmuiden and Urk
26-27th September 1991**

Seafish Report No. 394

December 1991

SEA FISH INDUSTRY AUTHORITY
Seafish Technology

**STUDY TOUR BY U.K. FISH INDUSTRY REPRESENTATIVES TO IJMUIDEN
AND URK. 26 - 27TH SEPTEMBER 1991**

Report No:394

A G Hopper
M A Myers
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SUMMARY

There are considerable traditional links between the Dutch and British Fishing and processing industries and in many areas the two countries are competing in the same markets. Today there is investment by Dutch companies in U.K. processing firms and similarly investment by U.K. firms in the Netherlands Fish Industry.

Both countries are having to face changes brought about by the new health and hygiene standards based on the EC Directives.

The purpose of the Study Tour was mainly to see how the two countries were making progress towards putting into place these standards.

Two centres were visited. Ijmuiden is one of the most important Dutch ports handling fresh and frozen fish, pelagic fish and white fish and there are extensive processing and cold storage facilities. Many of the port facilities were built or reconstructed in the post World War II period and today are in need of renovation to meet the new standards. The port has been privatised and there are ambitious but realistic plans in place to bring the port up to a very high standard and operational efficiency. Much of the capital for this development has been generated from the sale of land to the established port users.

Urk is a unique centre in Europe having a major fresh fish auction almost entirely based on white flat fish and a very well organised processing industry with a range of export products for Italy, Spain, Germany and the U.K. The town's economy is predominantly based on Fish and Fishing. The uniqueness is that today it is virtually land-locked and all fish for the auction is brought overland from the North Sea ports, principally IJmuiden and Harlingen. The Urk fleet operates from these ports and only rarely do vessels use the facilities at Urk.

The overall impression gained from the two centre visit was for an industry with a sense of optimism for the future and with a willingness to invest and try to secure a major slice of the E.C. fish trade in the future. On matters of health and hygiene, standards were good but generally the practices in the U.K. which have developed in the last few years are to an equal standard and in some cases are ahead of our Dutch neighbours.

It was felt that the Dutch industry was well organised but at the same time it dealt only in a limited range of products almost entirely for the export market and fishing, landings, distribution auction and processing were all geared to this sequential operation.

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1. INTRODUCTION AND BACKGROUND

This report records the findings and observations made by representatives of the U.K. Fish Industry during a study tour of Ijmuiden and Urk, Holland. The tour was organised by Seafish and follows a similar tour in 1990 to French and Belgian ports. The leader of the study group was Lord MacKay of Ardbrecknish, Chairman of the Sea Fish Industry Authority. A full list of group members is contained in Appendix I and an itinerary of the visits in Appendix II.

The principal purpose of the visit was to enable representatives of a cross-section of the U.K. industry examine and compare current trends in Holland in the operation of ports infrastructure and processing establishments, and the way in which they are managed. Of particular interest to the study party was the attitude and progress of the Dutch industry toward upgrading of facilities to meet E.C. standards of fish hygiene.

The two ports chosen are of particular interest because of parallels to some U.K. ports. Ijmuiden was owned until 1989 by the National Fishing Harbour Company a government agency. The port users, at this time became concerned of plans to privatise the harbour, and formed a group to purchase the estate and began a programme of investment and improvement. Urk up to the 1930's

was an island fishing community on the Zuider Zee until land reclamation meant the loss of traditional fishing grounds and the virtual land-locking of the port. Beam-trawlers can now only access the harbour in the unloaded condition and fish supplies are trucked to Urk from other ports for sales at the auction. The manner in which a small community of only 13,000 population has responded to the challenge of the change of circumstances is impressive when it is considered that the first-sale value of fish in 1990 was in the order of £75 million and added-value sales worth £335 million.

The Netherlands are one of the few countries in the European Community with a favourable balance of trade in fish and fish products with the rest of the Community and with the World markets. This trade has largely been established on the basis of a limited range of basic raw material:- flat fish, herring and molluscan shellfish. Accordingly because of the importance of the trade in the Dutch economy rigid controls and licensing of premises for export are in place.

Another feature of the Dutch industry is that it consists mainly of large high powered beam trawlers or factory trawlers and there are a few fishing ports by contrast with the U.K.

Previous visits by Seafish staff have shown the importance attached by the Dutch of remaining a leading processing and exporting nation of fish and fish products and how many of their North Sea ports are investing in modern facilities and actively seeking new trade from other Member States.

2. IJMUIDEN

2.1 Zeehaven Ijmuiden N.V.

Prior to April 1989 the port of Ijmuiden was owned by the National Fishing Harbour Company (SVHB). Plans at the time to privatise the port and sell it to a group of entrepreneurs were resisted by port users who formed their own group (B.O.S.) who were concerned that their interests would be side lined in any re-organisation. Fishing the core activity in Ijmuiden. B.O.S. successfully negotiated the purchase of 450,000 m² harbour estate for the equivalent of £4.7 million (£10.4m²). At this time trade was declining and port facilities in a run-down state. The B.O.S. group raised capital by selling the leasehold of existing sites to the leaseholders at £30/m². In total 300,000m² were sold to raise £9 million, which left sufficient capital in reserve for development plans. The company is now known as Zeehaven Ijmuiden n.v.

Within five years the new owners had, with assistance from the European Regional Development Fund and the Provincial Council, undertaken investment projects of £9 million. This included the widening of the harbour entrance, increasing quay space and deepening the harbour to take large stern trawlers, pursers and reefer vessels.

The existing fish market buildings C,D and E are brick-built of traditional design (See Figures 1 & 2) with merchants premises immediately to the rear (in part). The market is not insulated or refrigerated and standards of finish and hygiene are accepted as inadequate. Plans are in hand, however, to demolish and rebuild hall C, and to renovate halls D and E. The new market which would replace hall C would be 22.5 metres wide with no internal pillars and would be linked at the rear by a corridor to recently constructed new fish merchants premises. The new market would not be mechanically refrigerated although high standards of insulation should hold temperatures to below 14°C. Hall E would also be linked by the corridor and developed as an expedition centre that would serve both road and rail links. The

new building and renovation work is targeted to be complete by late 1992/early 1993. Costs were not disclosed.

Fresh fish landings through the auction in 1990 were 35,000 tonnes worth £31 million at first sale, with much larger tonnages of frozen fish and non-food traffic. A further 45,000 tonnes of fresh fish comes to Ijmuiden via other ports.

Zeehaven Ijmuiden n.v. is a private company run by a five-man board and owned 70% by local companies and 30% by Local Government (in preference shares). It is organised into four divisions; Harbour Division, responsible for cleaning, general upkeep and security; Technical Division, responsible for dredging, maintenance and consultancy services; Auction Division, responsible for fish sales (the dock company directly employs five Auctioneers) and box washing services; and an Administration Division. Charges of 3% are made to the dock company for sales and 3% to private companies involved in grading and transport. Principle species are sole and plaice from beam trawlers. There are no port dues for fishing boats.

The port has recently come under the control of a new General Manager, Mr Gerard Van Houweninge, a graduate of civil engineering under whom a strategy for development has been expounded, based on the perceived strengths and weaknesses of the port. Besides the development plans for the new fish market complex, major plans are being considered for a third harbour basin to service Ro-Ro, Short Sea traffic and Passenger Ferry Services.

To the rear of hall E an electronic fish grader has been installed at a cost of approximately £½ million, capable of grading up to 300 boxes per hour. The grader occupies an area of approximately 18m x 18m and was designed to meet the requirements of E.C. hygiene directives. It can handle flat and round fish. The machine involves a workforce of 7-10 persons where previously 25 persons would have been required. The

machine works on a principle of electronic measurement of the length of each fish and a conveyor/flipper system that delivers fish in certain size-grades into boxes up to a set weight. The equipment is manufactured by Afak Holland of Katwijk, telephone 010-31-171-26664.

2.2. Merchants Premises

The small merchants units situated to the rear of the existing market are due for demolition, and the merchants will be relocated to recently constructed new purpose-designed premises, built behind the existing ones (Figures 3 and 4). The existing units are of the immediate post war (1946) period and are inadequate to meet the E.C. hygiene directives. There is a lack of chilling space, personal hygiene facilities and raw material and products are inadequately separated. Eventually the new units will be directly linked to the rebuilt market by a marginal corridor which will also link to the expedition centre. The new merchants units are two storey with processing on the ground floor, with offices and staff facilities above. They will be leased to the merchants by Zeehaven Ijmuiden n.v. but the outfitting and practices will be the responsibility of each tenant. Obviously the new units represent a step forward from the existing units but there were a few features which could be improved. For example there were flat-topped upstands in the chill, and the tiling used on the walls will be difficult to clean as will the drains. The units seemed to provide large open areas but it is not clear how they intend to provide for dry storage, handling of offal and waste, and how to segregate clean and dirty work areas. This is a matter for the tenant.

2.3 T.N.O. Fisheries Institute

The Fisheries Institute at Ijmuiden is part of the Netherlands Organisation for Applied Scientific Research (T.N.O.) an independent non-profit applied research organisation specialising in contract R & D across a broad range of interests. Nationally it employs 5,100 persons with a turnover of £200 million.

At Ijmuiden there are 30 persons employed in contract R & D and information services to the fishing sector. It has an annual turnover in excess of £1.0 million of which 70% is generated by contract work. It is active in process development, product development, quality control and process control. The laboratories were well equipped but it was difficult to measure the impact of the Institute on the fishing industry. It is noted that the Institute has facilities and personnel skills which could be useful to the U.K. especially since Torry Research Station in Aberdeen are not always able to supply fisheries expertise to the same extent as in the past.

3. URK

3.1 Port and Market

Urk is a traditional fishing community that was previously on an island in the Zuider Zee until land reclamation restricted access to it by modern fishing vessels. It supports a fleet of 160 beamers which now land to other Dutch ports, including Ijmuiden. Landings from the local fleet, and others, now have to be delivered to the market by road. The market is owned by the local Council and fish related employment accounts for 80% of the total community employment.

There are two sales each week, on a Monday and on a Friday, although on a busy day there may be two, three or even four sales per day. The annual turnover in 1990 was approximately £75 million from 60,000 tonnes, mostly of plaice, sole, turbot, brill and flounder. The market is 'L' shaped with the older section having a double pitched roof supported by two rows of internal columns (See Figure 5). The newer section is flat roofed and provides for car parking above. The joining section between the older and newer parts is largely taken up by chill stores on the ground floor and offices and remote clock auction room above. The market area is 8,830m² and 6 chills provide a capacity for storage of 18,000 boxes. The use of the chills prior to sale is a free service. 'Landings' are charged at 2½% for grading and 3½% for selling. Sale is by the Dutch auction method (See Figure

The plant is well equipped with Grenco Plateomatic and Meyn continuous freezers and 6 x 20 station vertical plate freezers (for freezing of flat) with much of the packing lines automated. The standard of hygiene of the factory fabric and equipment was good and visitors and staff were not allowed into the factory area without protective clothing and hats. Personal washing

the E.C. market.

consist almost entirely of plaice, sole and other flat fish for per week. All finished products are in the frozen form and capacity to process in the order of 200 tonnes of raw material fish burgers and fish based ready meals. The Orca-Vis plant has fish plants specialising in breaded and natural IQF flat fish, In the Netherlands it operates several fish processing and shell

convenience foods.

of high quality frozen foods and ready meals and fresh the Hazelwood Group of Derby well known in the U.K. for its range The Orca-Vis fish processing factory at Urk is wholly owned by

3.2. Orca-Vis B.P. - Fish Processors

would be maintained at 13-14°C and chill storage at 2°C. Industrial estate. The plans incorporate a grading hall that rebuild the market, either on a dock side site or possibly on an standards. It is understood that plans are being considered to market, but even the newer sections fall short of the proposed E.C. hygiene standards, particularly the older section of the The halls themselves, will need much work to bring them up to

time forks to carry 20 boxes at a time (See Figure 8).

There is considerable use of LPG fork lift trucks that have long

aluminium with collapsible legs for storage (See Figure 7). are involved in a manual process of grading. Grading tables are between 80 - 200 persons employed on the market, many of which machine is installed in the old section of the market. There are (6) using an electronic clock. An automated feed box washing

toilet and changing facilities were to a high standard. Points of observation were that the walls were tiled in preference to a smooth impervious finish and there were in use wooden pallets and wooden handled tools both of which would be eliminated within the proposed U.K. interpretation of the legislation.

It should be stressed that these are not criticisms made with the intention of finding faults but to draw a comparison of how the two separate countries are approaching the same legislation.

3.3 School of Seafishery

The School of Seafishery was most impressive. It provided specialist practical training to children at a young age. The school was modern and well equipped with a bridge simulator, net loft, engineering workshops and processing laboratories etc.

The impression was formed that the school was highly regarded in the community and that employment in fishing and its related trades was of a much higher standing than is generally the case in the U.K. The school at Urk gave the impression of activity and enterprise and a close identity with the fishing industry.

4. DISCUSSION

A major benefit of this type of study tour is the bringing together of thinking people from both countries of wide backgrounds to share experiences of problems and approaches to their solution.

The group were impressed with the professional structure of management at the ports visited compared with many U.K. ports and the way in which the ports were run as businesses with clear objectives and targets encompassed in a business plan.

The ports are run by a strong management team with good representation of all the user groups. Their management is not influenced by sectoral pressure groups as is so often the case in the U.K. Both Urk and Ijmuiden had targeted British vessels

as potential customers. This is in contrast to some U.K. ports attitude toward non British vessels landing to their markets, where the opposition from certain sectors has resulted in the loss of this trade.

The Dutch ports perhaps not surprisingly look much more towards the European Community in their long term plans than do U.K. ports. Urk has a public relations officer fluent in English and both ports have brochures and publicity material in English. There are not many English or Scottish ports which could boast similar material.

The example of Ijmuiden in making the transition from State run to a privately run enterprise is an interesting one, particularly as Grimsby is considering something similar. Both Grimsby and Ijmuiden have limited home fleets but strong processing traditions. A major feature of the purchase of the dock estate by the BOS group was to offer the tenants an opportunity to purchase leasehold land on which their businesses were located at a favourable price. BOS in turn were to reinvest this money in improving the facilities over the 5 year period from 1989. The BOS group also gave assurances to the future of the fishing industry and the personnel formerly employed by the State Enterprise (SVHB). The situation at Grimsby of course is somewhat different as the landlords ABP a limited private company unable to sell land except at the current market value.

The quality and standard of the existing fish markets at both Urk and Ijmuiden indicated a need for improvements although it was interesting to learn of the plans for the rebuilding of both markets to meet E.C. hygiene alternatives and to view the start made at Ijmuiden with the processor units.

It is difficult to draw firm conclusions from a visit to only two fishing ports. It was generally felt by the party that the U.K. shared similar problems to Holland of meeting E.C. hygiene legislation and that they are no more advanced generally than

ourselves. The fact, however, that there are only thirteen designated fishing ports and that fish may only be landed at one of them will probably mean it will be simpler and more cost effective to provide or upgrade facilities compared to the U.K. where there are some 250 places at which fish can be landed. The problem facing the U.K. of upgrading or providing hygienic facilities to which landings and sale may be made is much greater given the far greater number of ports or landing places and the significance in socio-economic terms of maintaining small harbours and piers as a source of employment and income.

Many of the members of the tour group commented on the confidence and pride evident within the Dutch industry, demonstrated in their development plans and commitment to research and training. A significant difference, however, exists with regard to the availability of raw material supplies. The Dutch industry is largely based on flat-fish species and herring which are not under the same pressure and declining levels of TAC as haddock and cod on which much of our industry is based.

The Dutch processing sector so far as was seen by the group had some good and some weak points. The best of practice within the U.K. processing industry is every bit as comparable as those found in the Netherlands.

A G Hopper

M A Myers

December 1991

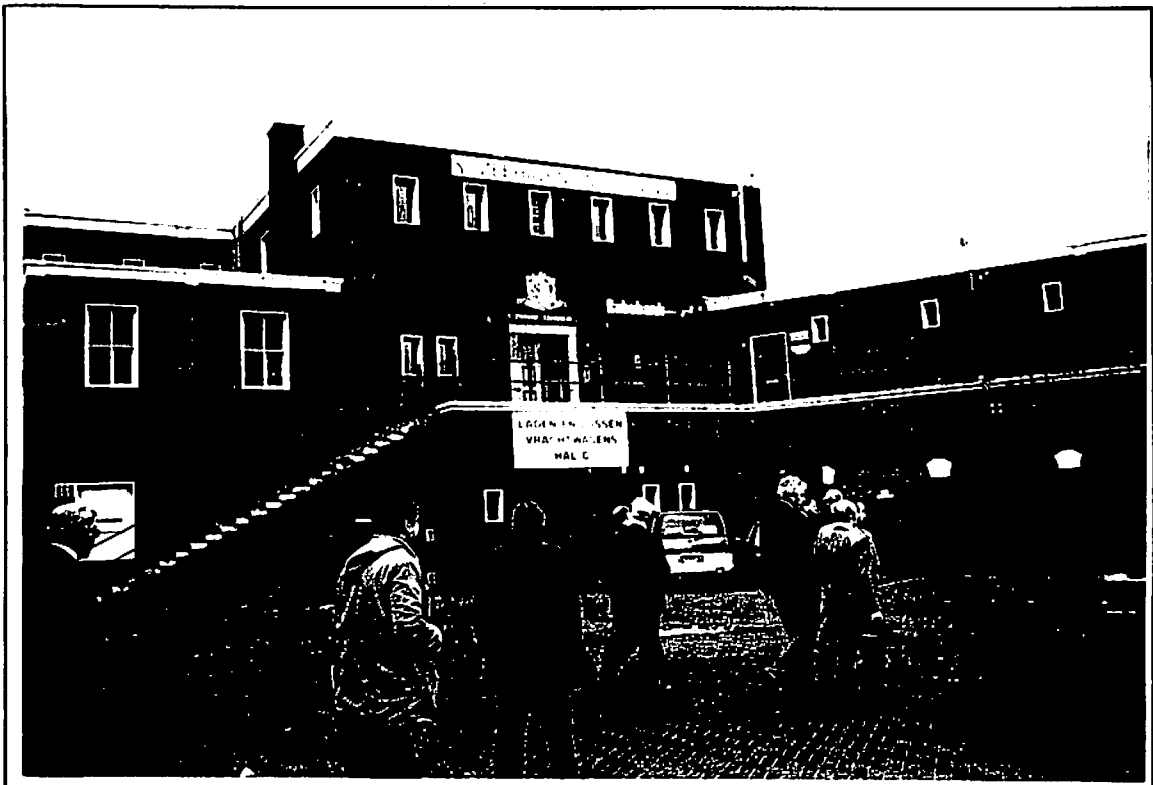


Figure 1 - Zeehaven Ijmuiden Offices



Figure 2 - Ijmuiden - Existing Market Hall B
Processing Units to the right
Quayside to the left



Figure 3 - Ijmuiden New Processing Units
- external view of rear

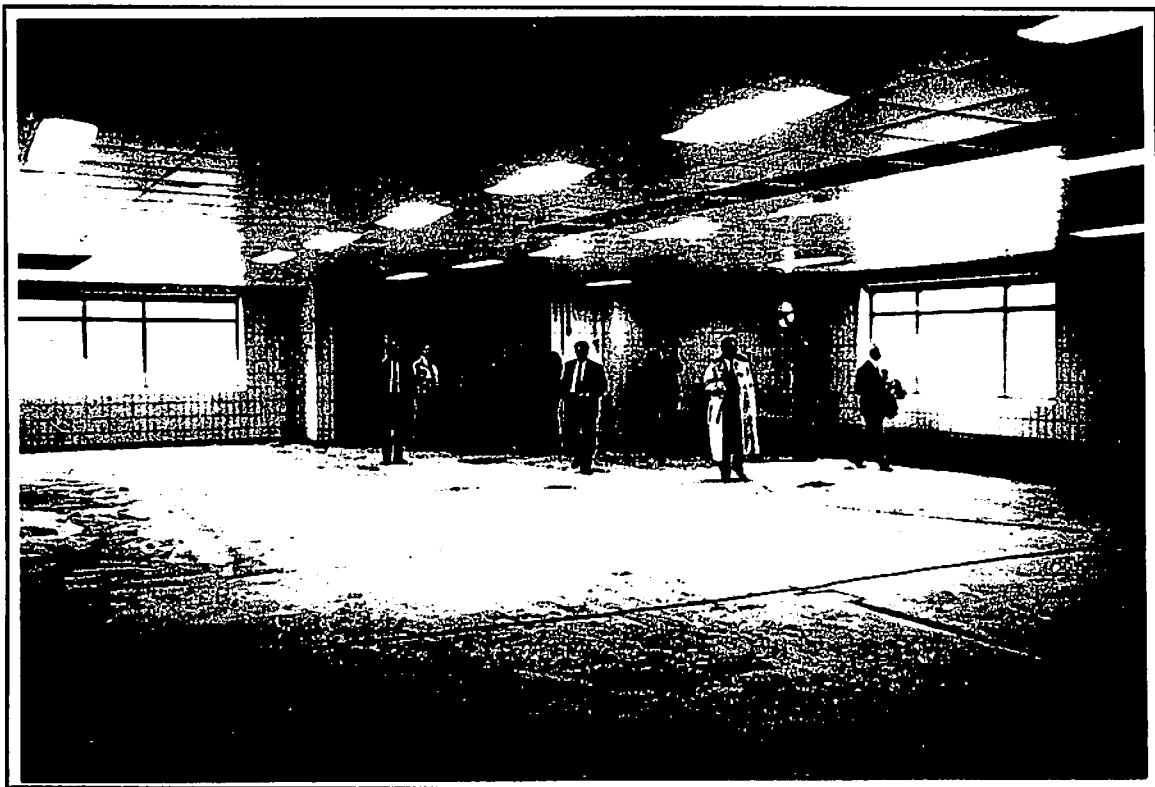


Figure 4 - Ijmuiden - Internal view of groundfloor of new
pricing unit



Figure 5 - Urk, Fish market

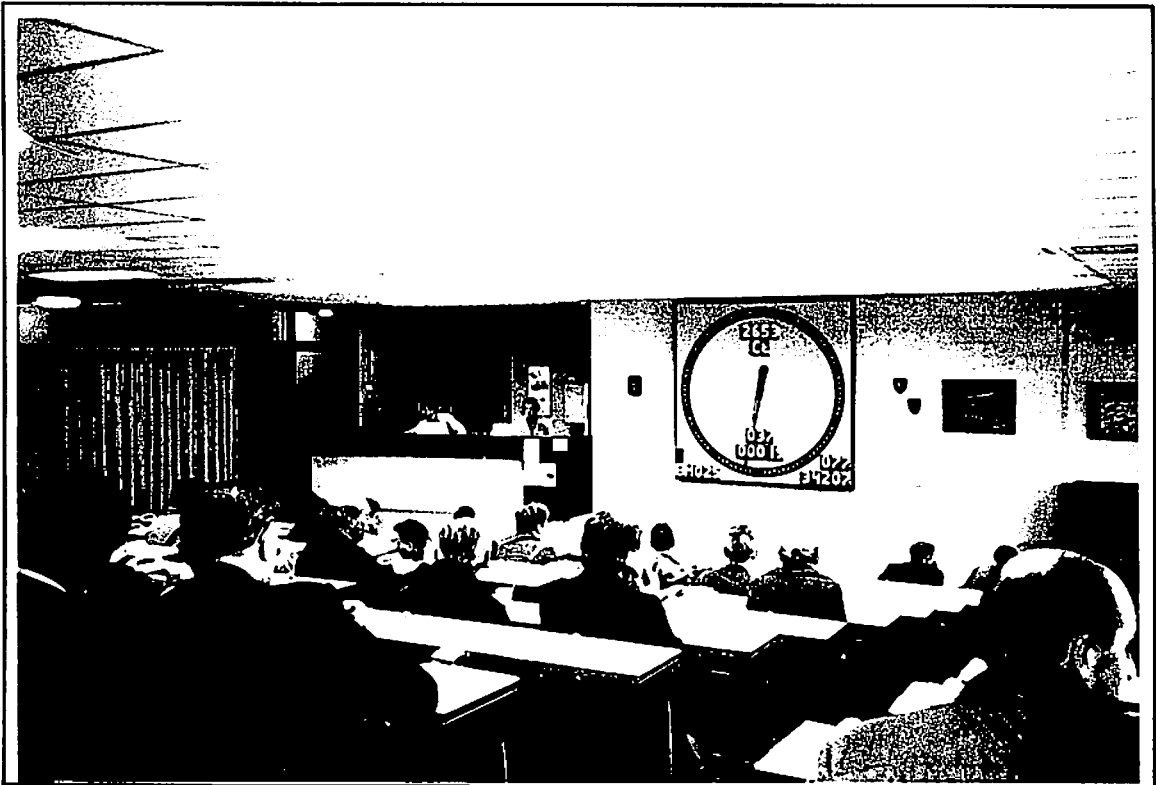


Figure 6 - Urk Electronic Auction Clock and Auction Room



Figure 7 - Urk - sorting and weighing on the market

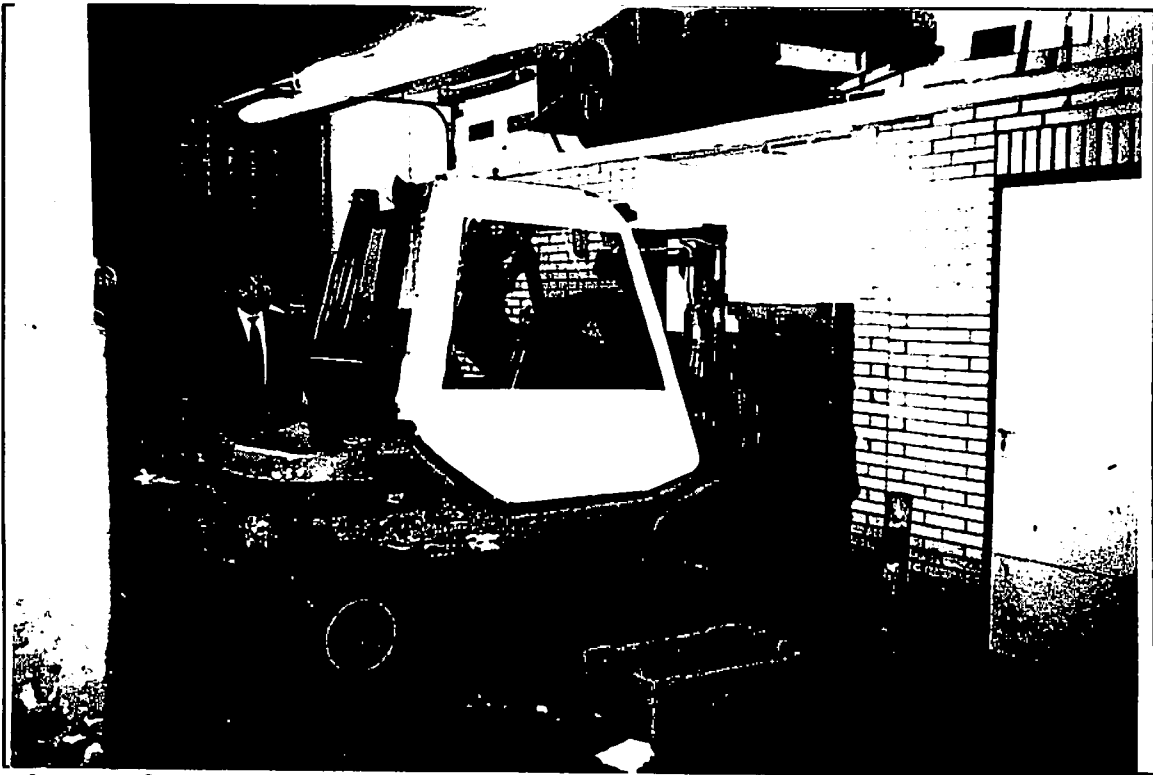


Figure 8 - LPG Fork Lift truck and automatic weigh station

APPENDIX 1

Visit by UK Industry Representatives to Holland
26th/28th September 1991

1 David P.D. Jolley Chief Executive London Fish Merchants' Ass. (Billingsgate) Ltd Office No 36 Billingsgate Market Trafalgar Way LONDON E14 5TD	071-515-2655	6 Craig Anderson Aberdeen Seafood Project Suite 4B Riverside Business Centre Aberdeen AB1 8ST	0224-210076
2 Richard Coulbeck Richard Coulbeck Ltd North Wall Fish Docks Grimsby South Humberside	0472-348391	7 John Paterson Chief Executive Peterhead Harbour Trustees West Pier Peterhead AB42 6DZ	0779-74281
3 John Cox Scottish Fish Merchants' Federation Ltd South Esplanade West Aberdeen AB9 2FJ	0224-897744	8 Andrew Munsen Harbourmaster Newlyn Harbour Office Newlyn Penzance Cornwall TR18 5HW	0736-62523
4 Chris P Leftwich Fisheries Inspector The Worshipful Company of Fishmongers Fishmongers' Hall London Bridge London EC4R 9EL	071-626-3531	9 Adrian Robertson Herring Buyers' Association Ltd 56 Moray Place Edinburgh EH3 6BQ	225-4548
5 Mike Davies Hull Fish Landing Co Ltd Humberside Chambers Albert Dock Hull HU1 2DY	0482-20501	10 Tim Silverthorne President National Federation of Fishmongers Silverthornes 145 Montague Street Worthing, West Sussex	0903-200854

11
Malcolm Fraser
Deputy Superintendent
Billingsgate Market
Trafalgar Way
London
E14 5TD 071-987-1118

Seafish

12
Lord MacKay of Ardbrecknish
Chairman

13
C.H. Davies
Chief Executive

14
A.G. Hopper
Technical Director

15
M.A. Myers
Industry Development Officer

APPENDIX II

Visit by UK Fishing Representatives To Ijmuiden and URK 25th to 28th September 1991

Wednesday
25th Sept. 1800 Hrs Depart Hull via North Sea Ferries.
Briefing on board as to the aims and
purpose of the visit and an
opportunity to meet the members of
the group. Mr Jolley joins the group
at Rotterdam. Messrs. Patterson and
Couper will make their own way to
Ijmuiden.

Thursday
26th September 0800 Hrs Arrive Rotterdam.
Coach travel to Ijmuiden.

 0110 Hrs Arrive Zeehaven Ijmuiden n.v. office.
Visit Primary processor units and
market in the company of Mr. van
Houweninge, Port Manager.

 1230 Hrs Lunch at the Ijmond Restaurant.
Guests: Mr van Houweninge &
colleague. Mr P van LLeeuwen, TNO.

 1400 Hrs Briefing by Mr Houweninge on Zeehaven
Ijmuiden nv and its plans for the
future.

 1500 Hrs Products Lab: TNO

 1700 Hrs Depart Ijmuiden for Hotel Wildeman at
Lemmer (north of Urk)

 2000 Hrs Dinner with invited guests at hotel.
Guests: Evert Bos, BV Ymuiden Stores.
W.J. De Bois, Visafslag Urk.(2)
2 Directos & Buyer, Orca-Vis BP.

Friday
27th Sept. 0900 Hrs Visit Visafslag Urk
General Manager, Mr W J de Bois,
Fishing Training School.

 1100 Hrs Visit to Urk processing plant Orca-
Vis BP. Managing Director: Mr Willem
Pasterkamp
Financial Director: Mr Jacob Kraamer
Buyer for the Orca-Vis (Hazlewood)
Group: Mr Andre Sterk

continued

continued

Friday
27th Sept

1230 Hrs Lunch at the Zeebodem Restaurant.
Guests: 2 Directors & Buyer, Orca-Vis
BP. (optional)

1400 Hrs Return to Rotterdam by coach or
independent car travel.

1800 Hrs Depart Rotterdam via North Sea
Ferries

Saturday
28th Sept.

0800 Hrs Arrive Hull

Final Version 17.9.91

APPENDIX III

STUDY TOUR TO IJMUIDEN & URK SUMMARY OF THE GROUPS VIEWS

1. There did not seem to be a preoccupation with availability of future supplies. This was partly due to species processed (largely flat fish), partly to the fleet not requiring substantial rationalisation, and partly to effective measures limiting fishing, days at sea (154), and enforcement. As a result, the industry did not feel that it was in crisis.
2. The industry is based on a narrower range of products and raw material supply than in the UK. The integration of fish landings, auction and processing is well organised and more predictable than in the UK, mainly because of the arrangements of the working week.
3. In matter of health and hygiene the UK is very much on equal terms with the Dutch. In port markets both countries have a need to improve. In factory operations some good points and some weak points were seen, but on average the best of UK practice is certainly not inferior to that in Holland.
4. The electronic auction is well established and the old system of verbal bidding could no longer be reintroduced. The advantages are recognised by fishing, selling and processing sectors. It is possible that the more analytical and systematic approach of the Dutch industry renders such innovations less problematic.
5. The UK is seen to be very innovative in product development and in the diversity of products for the international market. However, there are advantages in trading over a much more limited range of products in routine factory planning and operation.

6. Standards of training of fishermen in Urk are high and there is a genuine desire for training. This creates a good environment and willingness to invest in the excellent facilities seen at Urk. This also reflects the greater confidence in the future.
7. The Group were also impressed by the facilities offered at TNO in Ijmuiden (research laboratory), although it was not clear to what extent these were being utilised by the Industry.
8. There is obvious confidence in Ijmuiden and Urk in the future and this is reflected in the willingness to invest in port facilities and markets and in the processing sector. Projects seem to be bold, pragmatic and realistic with the objective of attracting future supplies and in serving export customers.
9. The UK has much to be proud of but is failing to sell its good points well. The Press too often projects the dissent in the industry and magnifies the problems rather than encouraging the confidence which does exist in some sectors.
10. A major benefit of this type of study tour is to bring thinking people from both countries around a common theme away from daily pressures. The variety of experience is invaluable in viewing common problems. If each member takes home one new idea to put into place then the benefits of the trip are greatly multiplied.