

# Dangerously Efficient Industrial Fishing: The Threat of Multinational Dutch Fishing Companies to European Small-Scale Fisheries

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# Table of contents

<b>Introduction</b>	<b>4</b>
Cornelis Vrolijk and Parlevliet & Van der Plas: From family business to global conglomerate	7
<b>Securing fishing rights</b>	<b>8</b>
Pushing the catch limits - lobbying work behind closed doors	8
Influencing the rules - a Dutch quota system favouring large-scale fishing companies	9
Gaining access to fish abroad: Quota-Hopping	11
<b>Capturing public funds</b>	<b>12</b>
<b>Pushing Technological Levels</b>	<b>13</b>
<b>Fishy practices</b>	<b>14</b>
Illegal, unreported & unregulated fishing?	14
Flawed statistics: data and monitoring gaps	15
Who gains? Ownership of P&P and Cornelis Vrolijk	16
<b>Conclusion</b>	<b>16</b>
<b>Endnotes</b>	<b>18</b>

# Introduction

Within the European fishing fleet new generations of technologically advanced, hyper efficient industrial vessels, have gotten too good at fishing. This limited number of vessels has a massive impact on the ocean. Fish stocks have largely declined since the 1980s,<sup>1</sup> but not all fishers contribute to the problem to the same extent, nor are all fishing livelihoods impacted to the same degree. The crisis of overfishing, fuelled in large part by a small number of vessels, is threatening the livelihoods of coastal communities and small-scale fisheries around the world who depend on the ocean as a source of food and income.<sup>2</sup>

The Common Fisheries Policy (CFP) is the primary framework for European Union (EU) member states to collectively manage their waters. Established in 1970, its objectives are to foster the conservation of fish stocks and the economic viability of European fisheries. It has been implemented through top-down measures, large amounts of public subsidies, and catch-based management rules (TACs) established on commercial species at EU level and distributed through quotas at the national level.<sup>3</sup> In this process, fishery policies have facilitated the industrialization of the fleet and the development of large, automated supertrawlers.<sup>4</sup> Moreover, these policies have not prevented large profit-driven fishing companies from grabbing a majority of the quotas.<sup>5</sup> To stay competitive, companies have accumulated capital and fishing rights by acquiring or merging with less competitive fishing enterprises. These companies have also expanded vertically across the supply chain and now make vast profits from the catching, processing, trading and export of fish.<sup>6</sup> Centralisation of capital in the fishery sector existed long before the 1970s,<sup>7</sup> but as we explain below, new market-pressures, technological change and incentives created by the CFP have accelerated the process.

As a result, small-scale and artisanal fishers throughout Europe have been squeezed between declining fish stocks and unfavourable policies. From 2000 to 2010, the small-scale fishery sector's employment dropped by 20-30%.<sup>8</sup> In the same period, the industrial fleet achieved record profits and shareholders of the large fishing companies made millions.<sup>9</sup>

Europe's fleet lost 5505 vessels between 2013 and 2019, however, the overall catch capacity remained almost at the same level.<sup>10</sup> In other words, there are fewer ships, but those that remain, are larger and have higher catch rates. Indeed, the large capital-intensive industrial ships can capture larger quantities of fish at a much higher speed than smaller boats. This kind of efficiency, however, is not ecologically sustainable, given the declining fish stocks across much of the ocean. It also does not value the ways that smaller scale fishers provide a diversity of services to Europe's food systems and communities that the large companies do not.

In its European Green Deal, the EU stresses that it is not enough to have efficient food systems but that food production should yield fair returns, be resilient in times of crisis, have a positive/neutral environmental impact and improve the livelihood of primary producers.<sup>11</sup> Small-scale fisheries across Europe do exactly this. With their knowledge about local ecosystems, they can help ensure sustainable methods of fishing.<sup>12</sup> They provide fish for human consumption rather than industrial uses,<sup>13</sup> which makes their efforts central to ensuring resilience in the face of food insecurity. Overall, these fishers contribute to rural development and local economies and play a role in the culture and heritage of communities that goes far beyond employment.<sup>14</sup>

## BOX 1

# Small-scale fishers vs large scale industrial fishers

According to the EU small-scale fishers operate on ships that are below 12 meters and mostly use passive fishing gear.<sup>15</sup> This minimal definition, however, does not capture the diversity of fishing practices, technical contexts and cultures within EU member states' fisheries.<sup>16</sup> Indeed if we think of fisheries as more of a spectrum, in general, beyond the size of the boat, small-scale fishing crews tend to be smaller and the fishing trips shorter and closer to the coast.<sup>17</sup> They often extract fish at a lower rate, using a mix of methods that targets various species, which does not mean that they only use passive gear.<sup>18</sup> Normally, they are less capital- and fuel intensive and make smaller turnover.<sup>19</sup> The catch is mostly destined for local or regional human consumption rather than industrial products such as frozen fish, fishmeal or oil.<sup>20</sup> Moreover, they are often owned by families or have historically close links to their local communities offering employment and local services.<sup>21</sup>

However, many of these characteristics also apply to mid-sized vessels measuring closer to 16 or 20 meters, which makes it difficult to draw a clear line. Plus, there are vessels below 12 meters that use destructive fishing gear and large engines that put significant pressure on the environment, but still cannot be qualified as "industrial".<sup>22</sup> At the same time, a mid-sized vessel that uses low-impact methods such as long- or handlines does not really fit the industrial category either. Further complicating things, some of the largest companies are family-owned but lack ties with local communities and instead operate multi-nationally.



Image 1: IJmuiden, Netherlands. Photo: Z.W. Brent

Despite the debates about the definition of small-scale fishing (see box 1), all of these small *and* mid-sized boats pale in comparison to the size of the super trawler vessels of the industrial fleets. Most striking are the pelagic and demersal (box 2) giant industrial trawlers owned by

multimillion dollar enterprises.<sup>23</sup> Two of the largest ones in Europe are the Cornelis Vrolijk B.V. and Parlevliet & Van der Plas group, which are both based in the Netherlands. Their super-trawlers reflect a significant jump in size – measuring more than 80 meters – and capacity, such as

the 144m *Annalies Ilena*, but more notable still is the strong influence these companies have had over the years on European fishing regulations. Their ascension has been made possible by a policy environment that prioritized the growth of the large-scale industrial fishing sector.<sup>24</sup>

In this brief, we focus on the case of these two Dutch multinational fishing companies, exploring how they have consolidated their dominant position and the ways that these are undermining European small-scale fisheries and fuelling overfishing. First, these companies have accumulated fishing rights through lobbying and quota grabbing. Secondly, they capture public funding in order to increase efficiency to dangerous levels, via what we call harmful subsidies. Third, they have pushed technological limits in

the name of efficiency. And fourth, transparency issues and a lack of monitoring have facilitated fraudulent and illegal fishing practices in the name of increasing profits.<sup>25</sup> We then take a step back to evaluate who wins and loses when this kind of efficiency is prioritized and note that a future of dangerously efficient fishing practices is far from set in stone. There are numerous examples of mobilization against super trawlers and emerging alternatives such as Community-Supported Fisheries (CSF), that can provide the consumer with locally-sourced fish with low environmental impact and serve as the foundation for collective organizing between small-scale fishers and consumers envisioning a different, less efficient, more ecologically sustainable and socially just future.

## BOX 2

### Demersal vs. Pelagic fishing

**Demersal fish** are found near or on the bottom of the ocean. Cod, haddock, flatfish, and hake are some of the demersal species.

**Pelagic fish** occupy the midwater and higher layers of the sea. Some examples of pelagic species include sardines, anchovy, tuna and herring.<sup>26</sup>

Some methods of fishing are called passive (lines and nets) and some are called active, which means that they are pulled through the water as the vessel moves (trawls and dredges). Passive methods have limited impact on the seabed.

Among active fishing there is a wide variety of trawling methods. Beam trawls, or bottom trawls target demersal species and come into direct contact with the seabed.<sup>27</sup> Midwater trawling (also called pelagic trawling) is the most common method to capture pelagic species, and in this case the trawl doesn't touch the seabed.<sup>28</sup>

**Environmental impact:** The size of trawlers varies significantly, and thus so does the environmental impact. Nonetheless, different gear can be ranked based on their impact on habitats/seabed, bycatch, species selectivity, and damage on mammals, birds and vulnerable species.<sup>29</sup>

**Demersal trawling:** larger boats in particular can inflict serious environmental damage.<sup>30</sup> It is a relatively indiscriminate method that catches large quantities of nontarget species as bycatch.<sup>31</sup> With the high discard of nontarget species, this fishing method contributes most to the global discarding problem.<sup>32</sup> Discarded fish have high mortality rates which can negatively affect the sustainability of stocks. Furthermore, the direct contact with the seabed often creates irreversible habitat damage, especially when large vessels employ heavy gear.<sup>33</sup> Lastly, the method is very fuel-intensive.<sup>34</sup>

**Pelagic trawling**, especially by large vessels can catch large quantities of under-size fish and it is also known to impact vulnerable species such as dolphins, turtles and seabirds.<sup>35</sup> Moreover, discarded bycatch in this case has a high mortality rate.<sup>36</sup> Midwater trawling creates very little damage to the seabed.<sup>37</sup> Due to the trawling of heavy and large nets, the method is also relatively fuel-intensive.<sup>38</sup>

## Cornelis Vrolijk and Parlevliet & Van der Plas: From family business to global conglomerate

In their mission statements, Cornelis Vrolijk and Parlevliet & Van der Plas (P&P) describe themselves as traditional family businesses committed to future generations and healthy fish stocks.<sup>39</sup> Both companies are proud of their origins as local Dutch herring merchants. This self-presentation has little to do with the companies' actual model of fishing. Nowadays, both businesses are among the largest fishing companies in Europe, operate in different sectors and send their vessels all around the world.<sup>40</sup>

In the 1940s, more than 100 pelagic fishing companies operated in the Netherlands.<sup>41</sup> Most of them were family-owned herring businesses. But with the shift towards freezer-trawling, a 6-year closure due to collapsing herring stocks in the 1970s, changes in the quota allocation, and the introduction of Individual Transferable Quotas<sup>42</sup> (see box 3), the pelagic markets became dominated by fewer

and fewer companies.<sup>43</sup> Today, only three companies are left – W. van der Zwan, P&P and Cornelis Vrolijk – the latter two being the biggest. Technological progress has also resulted in a lower demand for labour on the larger scale boats.<sup>44</sup>

P&P and Cornelis Vrolijk have expanded horizontally, which means that the companies acquired vessels and fishing rights domestically and abroad.<sup>45</sup> In 2018, P&P owned 170 subsidiaries in 19 countries,<sup>46</sup> with firm segments in Suriname, Guyana, Morocco and India.<sup>47</sup> In 2018, P&P ranked among the 25 largest seafood companies worldwide.<sup>48</sup> Cornelis Vrolijk has 20 direct subsidiaries, some of which have their own subsidiaries (up to 5 levels), in the Netherlands, the UK, France and Spain. Cornelis Vrolijk Holding B.V.'s revenue in 2019 was US\$479.32 million.<sup>49</sup>



Image 2: IJmuiden, Netherlands. Photo: Z.W. Brent

These companies own huge fleets that operate around the world. As of 2018, P&P owned 43 vessels while Cornelis Vrolijk had 93 ships.<sup>50</sup> Their fleets include some of the largest fishing vessels on earth, gigantic freeze-trawlers that are unparalleled in scale. P&P, for instance, owns the 144m-long *Annalies Ilena* (formerly Atlantic Dawn), which can make up to \$2 million in a single fishing trip.<sup>51</sup> The trawl nets of these ships can reach up to 600 metres.<sup>52</sup> Their onboard machines can process up to 400 tons of fish a day and store up to 7000 tons.<sup>53</sup> This dwarfs the landings of vessels below 12m and with non-towed gears that have daily averages of 104 kgs.<sup>54</sup> These ships go on trips that can last two months, often capturing fish in distant waters that are then landed in Dutch ports. The companies also operate a fleet of large (40-60m) demersal vessels.<sup>55</sup> The trawler's hydraulic machinery, huge nets and advanced fishing methods allow them to operate extremely efficiently.<sup>56</sup> As a result, they capture a lot of fish while employing few people.<sup>57</sup> In a 2014 report, Greenpeace

created a list of fishing vessels that cause the most pressure on the environment while generating the least social, economic or cultural benefits for coastal communities. Six out of twenty vessels were owned or operated by P&P and Cornelis Vrolijk.<sup>58</sup>

Both companies also have vertically expanded along the supply chain by acquiring processing plants, freezing units, transport companies, retail and distribution networks.<sup>59</sup> These 'ship to shelf' operations are very profitable as they allow control over the whole supply chain. Cornelis Vrolijk, for instance, has expanded into shrimp processing and trading in Nigeria through its Subsidiary Primestar.<sup>60</sup> Recent acquisitions – such as the food processor Neptunus Seafood BV in Belgium, a shrimp processor business in the Netherlands or a storage plant in Mauritania<sup>61</sup> – show how the companies have expanded and captured more and more market-power by absorbing smaller businesses along the value-chain.

## Securing fishing rights

### Pushing the catch limits - lobbying work behind closed doors

By winning the support of the authorities, P&P and Cornelis Vrolijk have secured more and more fishing quotas and pushed for higher total allowable catch, even at the expense of the environment. Large-scale industrial European fishing companies lobby for higher catch rates through producer organisations such as the Pelagic-Freezer Trawler Association (PFA), VisNed or Europêche.<sup>62</sup> The purpose of these organisations is to push the interest of their members vis-à-vis the EU and national authorities. At the time of writing VisNed is the largest Dutch producer organisation, while Europêche is an umbrella organisation focusing on EU authorities.

In the EU, fishing quotas are distributed in a two-stage process: first, the total allowable catch (TAC) is set by the European Commission according to the scientific advice of the International Council for The Exploration of the Sea (ICES). The TAC is determined and distributed between member states during the two-day ministerial meeting of the Agriculture and Fisheries Council.<sup>63</sup> Second, the member states subdivide the quotas on a national level according to domestic frameworks.<sup>64</sup> Both stages are subject to intense lobbying by producer organisations pushing TACs beyond ecological limits.<sup>65</sup> Indeed, a recent study shows that the EU set an average of 6 out of 10 total allowable catch (TACs) for commercial fish stocks above the scientific

advice between 2001-2019.<sup>66</sup> This has direct consequences on overfishing: According to Didier Gascuel, member of the Scientific, Technical and Economic Committee for Fisheries of the European Commission, in 2019 43% of known fish stocks in Europe are overexploited.<sup>67</sup>

The annual meeting of the Agriculture and Fisheries Council at the EU level is often criticized for a lack of transparency. The meetings take place behind closed doors and little information has been made available to the public.<sup>68</sup> A recent recommendation by the European Ombudsman has urged the council to publish minutes, legislative documents and the positions of the member states,<sup>69</sup> a recommendation the Council chose not to follow.<sup>70</sup> Furthermore, a 2021 open letter by a coalition of NGOs demanded greater transparency around EU fisheries control rules, noting key issues such as: the member states' fisheries control reporting not being openly available, and the possibility for member states to veto the Commission's request to share information on the implementation of the control rules.<sup>71</sup>

P&P and Cornelis Vrolijk, however, have managed to permeate these closed-door decision-making spaces. An investigation by Corporate Europe Observatory revealed that members of the PFA, Europêche and VisNed had access to the negotiations of the council in 2017.<sup>72</sup>



They were in close contact with the fisheries minister of the Netherlands, advocating for higher quotas.<sup>73</sup> Subsequently, the Netherlands (along with Belgium and Ireland) ranked top among the member states with the highest percentage of their TAC (10%) exceeding scientific recommendations.<sup>74</sup> Moreover, Diek Parlevliet, the CEO of P&P was regularly part of the EU delegation on bilateral talks about quota-setting with Norway. During the talks, he had an advisory function that gave him exclusive access to confidential information.<sup>75</sup> The fishing quotas that resulted from those negotiations enabled P&P to gain an extra €2.6 million in revenues in 2017 in Germany alone from excess quotas set above scientific recommendations.<sup>76</sup>

Finally, a recent article in the *Groene Amsterdamer* revealed how P&P officials have lobbied Dutch politicians to defend the company's interests in the Faroe Islands.<sup>77</sup> There, P&P is the largest owner of fishing rights, closely followed by the Icelandic company Samherji.<sup>78</sup> In 2017, the Faroe Islands fisheries minister intended to reform the country's fisheries law by reversing the privatization of access rights. After extensive pressure from the Dutch fishing industry, Dutch prime minister Mark Rutte threatened that such a reform would have consequences for the free trade agreement between the European Union and the Faroe Islands.<sup>79</sup> In response, the new government stopped the fisheries reform law and permitted foreign ownership of fishing rights for at least 12 more years.<sup>80</sup>

## Influencing the rules - a Dutch quota system favouring large-scale fishing companies

P&P and Cornelis Vrolijk have not only influenced the way TACs are set at the level of EU politics, they also exert their influence on quota allocation rules within their national

institutions. While the TAC is set by the European Union, each member state has their own way of distributing the quotas (See Box 3).

### BOX 3

## Different Types of Quotas Setting and their bias

Most commercial species are managed through quota-setting. Fishers and companies can gain access to a certain share of the Total Allowable Catch (TAC) through quotas. These quotas, however, do not confer property rights of these resources.<sup>81</sup> Instead, the state normally remains the ultimate owner of the fish.

**Individual Quotas:** The most common type of distributing access to quota-species are 'individual quotas' (IQs). A vessel receives a quota-share based on how much that vessel fished in the past during a reference period.<sup>82</sup> This has created a bias towards larger and more productive boats with higher fishing records.<sup>83</sup> The catch of small-scale fisheries is often not properly recorded or excluded from official statistics, thus further reducing their access to individual quotas.<sup>84</sup>

**Individual Transferable Quotas (ITQ):** The authorities give catch permits to fishers and companies on a permanent basis (based on varying criteria e.g., historical catch or storage power). These fishing rights can be purchased, leased and traded freely on a created market.<sup>85</sup> In other words, fishing rights become quasi-private. The size and financial power of highly efficient multinational fishing companies have allowed them to outbid artisanal fisheries in the sale of transferable quotas in these markets.<sup>86</sup>

**Community Quota & Producer Organisations:** The same as individual quotas with the difference that a producer organisation or fisheries association allocates the quotas among its members.<sup>87</sup>

**Rationed Quotas:** Vessels are grouped according to certain characteristics (e.g., length, gear type, capacity). All the vessels in the same category receive the same catch limit.<sup>88</sup>

**National Quotas:** Quotas are not distributed among individuals but the fish can be exploited by the whole fleet until the national quota is exhausted.<sup>89</sup>

There are many other ways of distributing fishing quotas. Most countries employ a mix of the above and the regulatory landscape varies greatly across Europe.<sup>90</sup> Additionally, there are also some fish species that fall under the non-quota category. Regional and local authorities loosely regulate (sometimes very little)<sup>91</sup> these non-quota species in diverse ways, for instance through licencing (e.g., oysters, mussels).<sup>92</sup>

To the frustration of small-scale fishers, the majority of EU fishing quotas have consistently been granted to big fishing companies and their vessels.<sup>93</sup> Three main factors have favoured large fishing companies: the devolution of quota-management to producer organisations; the expansion of Individual Transferable Quotas under a free-market system; and the establishment of fleet segments.<sup>94</sup>

**Quota management by producer organisations:** Dutch producer organisations have an important role in managing fishing rights, which they distribute among their members.<sup>95</sup> Yet they are not representative of the fishery sector as a whole and are biased towards industrial interests.<sup>96</sup> For instance, there is only one producer organisation for pelagic fish – the PFA. The PFA has nine boat members, out of which seven are owned by Cornelis Vrolijk or P&P.<sup>97</sup> Small-scale fisheries are thus regularly underrepresented during national and EU-level distribution of fishing access. Large producer organisations have on occasion even rejected the entry of fishers that lack sufficient quotas.<sup>98</sup> Underrepresentation of small-scale fishers in producer organisations is also an issue in other countries such as France.<sup>99</sup>

**Individual Transferable Quotas:** The inequalities in the Dutch fishery system are exacerbated by the current ITQ system. Recently, large companies have started to accumulate fishing quotas on the created free market by taking advantage of the weak financial position of smaller vessels.<sup>100</sup> In these markets, despite the noted vast differences between the actors, they are formally equal

and small-scale operators are not protected in any way. As a result, since small-scale fishers often cannot afford new quotas or find it difficult to find a successor for their vessels, the large pelagic companies step in to buy their fishing enterprise – including vessels, licences and ITQs.<sup>101</sup> Consequently, only 0.05% of ITQs are currently held by small vessels in the Netherlands.<sup>102</sup> Similar dynamics took place in other countries that adopted the ITQ system such as Iceland,<sup>103</sup> Canada<sup>104</sup> and Denmark.<sup>105</sup>

**Fleet segments:** The Dutch fishing fleet is categorized into two segments. Larger vessels owned by organisations such as P&P are part of the Main fleet 1 (MFL1). This gives them the right to access commercial species that are managed under the quota system.<sup>106</sup> However, most smaller vessels are part of the Main fleet 2 (MFL2) segment, which only allows them to target non-quota species.<sup>107</sup>

Together, the bias of producer organisations, the distinction between fleet segments and the unregulated ITQ-markets have made the Netherlands the lowest-ranked European country for equity and fairness of the distribution of fishing rights, according to a recent study by Carpenter & Kleinjans.<sup>108</sup> Pelagic companies, such as Cornelis Vrolijk and P&P are the beneficiaries of this system. Small-scale fishers have to rely on non-quota species that tend to fetch lower prices on the market.<sup>109</sup> Meanwhile, profitable commercial fish stocks are reserved for the industrial vessels of a few industrial seafood companies.

## Gaining access to fish abroad: Quota-Hopping

In line with the foundational principles of the EU, the reforms in the EU Common Fishery Policy (CFP) have enabled capital in the fishing industry to move more freely across states.<sup>110</sup> In practice, P&P and Cornelis Vrolijk accumulate quotas abroad, mostly by reflagging or buying vessels and opening subsidiary branches. British fishers dubbed this process 'quota-hopping' when they suddenly saw their fishing rights being bought-away by foreign companies.<sup>111</sup> Germany, Belgium, France and the UK are particularly affected by the quota-hopping of Cornelis Vrolijk and P&P.

**Germany:** P&P gained a virtual monopoly over the pelagic high-seas fleet and large parts of demersal fishing.<sup>112</sup> Five out of seven large German trawlers are owned by P&P.<sup>113</sup> Subsidiaries include the German fishing companies 'Mecklenburger Hochseefischerei GmbH' and the 'Doggerbank Seefischerei GmbH.'<sup>114</sup> Moreover, P&P took control of the largest German fish processing companies 'Deutsche See', the Büsumer Krabbenhandel and the Ocean Food GmbH.<sup>115</sup> With this acquisition, P&P now controls the majority of the German fish processing industry.<sup>116</sup> Through the acquisition of subsidiaries and vessels, the company acquired 100% of the German quota for mackerel and blue whiting and 64% of Germany's herring quota.<sup>117</sup> And a striking 40% of German fish revenues are landed by vessels owned by P&P.<sup>118</sup>

**United Kingdom:** More than half of England's quotas are owned by foreign companies,<sup>119</sup> through large trawlers registered in the UK but owned by Dutch, Spanish or Icelandic capital.<sup>120</sup> Cornelis Vrolijk secured 23% of the total English quota, mostly through the *Frank Bonefaas*, a trawler operated by its local subsidiary the North Atlantic Fishing Company.<sup>121</sup> As in the case of the Netherlands, the liberalised trade in fishing rights has enabled the pelagic companies to buy off quotas from local inland fisheries.<sup>122</sup> Through this, Cornelis Vrolijk turned into the largest holder of pelagic mid-water species quotas within the UK.<sup>123</sup> Most of the fish caught is not landed in the UK, but at the Dutch port of IJmuiden.<sup>124</sup>

**France:** In order to acquire quotas in France, P&P has created the UK Fisheries Ltd, a joint-venture with Samherji. UK Fisheries Ltd then acquired the French 'Euronor' and 'Compagnie des Pêches de Saint Malo',<sup>125</sup> which together own 9 large trawlers.<sup>126</sup> Plus, P&P has purchased the 'Compagnie Française du Thon Océanique', the biggest tuna fishing company in France.<sup>127</sup> Cornelis Vrolijk, meanwhile, has bought the company 'France Pélagique' that operates the *Scombrus* and *Prins Bernhard* trawlers.<sup>128</sup> The *Scombrus* was inaugurated in 2020 to replace the *Sandettie*, and is one of the most modern trawlers in Europe.<sup>129</sup> Its "christening" in Concarneau, where it is registered, was accompanied by large protests of local



Image 3 Press conference in protest against the *Scombrus*. Concarneau, France. Sept. 2020. Photo: Pleine Mer

small-scale fishers who responded by organizing a symbolic funeral of the artisanal fishing sector outside the office of 'France Pélagique' in September 2020.<sup>130</sup>

The *Scombrus*' inauguration is especially infuriating for small-scale fishers because it comes at a time when the EU has attempted to address overfishing by providing funding for the scrapping of vessels in order to reduce the overcapacity of the fleet. However, from 2000-2006,

## Capturing public funds

EU policy makers have idealized the large-scale fleet as a more innovative, profitable and technologically superior alternative to small-scale fisheries.<sup>134</sup> As a result and in line with global trends, large scale fishing companies receive more subsidies, which in turn deepens the inequalities between large-scale producers and small-scale fisheries even further.<sup>135</sup> Harmful subsidies, such as capacity-enhancing subsidies and indirect fuel support, contribute to the over-exploitation of fishery resources, and help environmentally harmful vessels to stay in business.<sup>136</sup>

**Capacity-Enhancing subsidies:** The extent of the subsidy imbalance is striking: for example, in 2009 only 7% of subsidies in Europe went to small-scale fisheries.<sup>137</sup> Globally, 90% of capacity-enhancing subsidies supported large-scale vessels.<sup>138</sup> P&P, for example, received €37 million in subsidies between 1994 and 2006 from Germany and the EU.<sup>139</sup> Despite the decreasing number of vessels, the subsidies for larger ships resulted in an overall increase in the fishing capacities of the EU fleet.<sup>140</sup>

The EU member states now promise to provide subsidies only to help the companies reduce their environmental impacts.<sup>141</sup> But even this new direction has been exploited by Dutch companies. Through lobbying efforts, the Dutch trawler industry secured €20.8 million since 2007 in subsidies to finance the transition from beam trawling towards electric pulse fishing, forcing a transition towards this destructive method despite the fact that fishing with electric current has been prohibited in EU waters since 1998.<sup>142</sup>

**Indirect subsidies/fuel-tax exemption:** Fuel subsidies are often criticized for sustaining harmful, high-emission fishing practices, mostly for the large- and distant-water fleet that would otherwise not be profitable.<sup>143</sup> Fuel subsidies for the European fishing fleet represented €1.05 billion a year between 2002-2011.<sup>144</sup> According to conservative estimates, P&P alone saved at least €5.9 million per year through fuel tax exemptions for its German fleet in the period of 2006-2018.<sup>145</sup>

"more money went to scrap small boats, of less than 12 metres in length",<sup>131</sup> while in contrast, large vessels above 24m received more funding for modernizing their ships.<sup>132</sup> The case of the 'France Pélagique' ships is emblematic. The 40-year-old trawler *Sandettie*, after being replaced by the *Scombrus*, has not been decommissioned but continues fishing under the new name *Dzintarsaule*, and now operates under the flag of Guinea-Bissau.<sup>133</sup>

**Subsidies for supply chain expansion:** Subsidies and favourable regulations have also helped P&P and Cornelis Vrolijk to gain a foothold in fish processing, marketing, retail and export. The German government, for instance, paid €20 million subsidies to P&P for building the Euro-Baltic processing factory in East Germany.<sup>146</sup> The factory made an estimated annual revenue of \$ 46.1 million in sales in 2019 and mostly processes fish from UK waters.<sup>147</sup> Moreover, it is extremely efficient and highly automated as it can produce 70,000 tons of fish a year while only employing 122 workers.<sup>148</sup> The value-added fish is then sold across Germany. With the acquisition of the German Seafood company 'Deutsche See', P&P now controls 10% of the market share of frozen fish products.<sup>149</sup>

The large pelagic companies supply supermarkets, restaurants and export their fish around the world. In contrast, regulations have made direct sell and traditional marketing of small-scale fisheries increasingly difficult.<sup>150</sup> Small-scale fishers struggle to make their products visible to a wider range of customers. Current certification schemes, for instance, are designed to mostly classify industrial fishing products. Due to their high costs, only 20% of Marine Stewardship Council (MSC) certifications were assigned to fisheries with small-scale vessels between 2009-2017.<sup>151</sup>

Clearly subsidies helped support large capital-intensive fishing businesses. If, as they claim in their Farm to Fork strategy, EU member states actually want subsidies to contribute to fair, environmentally friendly and healthy food systems,<sup>152</sup> their allocations would need to rely on proper social and environmental criteria to allow sustainable small-scale fishers to profit from it. The EU has promised to step up its support for small scale fisheries through the 2021 European Maritime and Fisheries Fund,<sup>153</sup> however, the use of harmful subsidies has thus far done the opposite.

# Pushing Technological Levels

Until recently, efficiency, technological-advances and maximum profits were the benchmarks of successful fishery policies.<sup>154</sup> The focus on efficiency, however, has not brought substantial improvements in terms of sustainability, equality and resilience of fisheries. Instead, new technologies have fuelled the crisis of overfishing, as they enabled vessels to expand their patterns of exploitation spatially.<sup>155</sup>

Greater engine power, fuel efficiency and refrigeration technology enable vessels to access remote locations and go further offshore,<sup>156</sup> leaving fish stocks with less space to recover. Their ability to move between distant fishing grounds has reduced the incentive to fish sustainably, which naturally arises from the dependence on fishing now and in the future in one particular place.<sup>157</sup> Moreover, refrigeration has made global transport of fish possible, which has resulted in an explosion of demand and new ecological pressures.<sup>158</sup> According to some estimates, the catchability of fish goes up by 3.2% per year because of technological developments.<sup>159</sup> This “technological creep” is the main reason why fishing efforts remain high even though the number of vessels has fallen.<sup>160</sup> Unfortunately, fishing management often underestimates the hidden capacities and ecological impact of these new technologies.<sup>161</sup> The problem is that the increase is gradual and difficult to perceive due to shifting baselines: while the ecosystem impacts of new technologies do not seem to be much greater in comparison to the preceding years, looking back a decade or two reveals the true magnitude of change.<sup>162</sup>

Subsidies and private investments enable companies such as P&P and Cornelis Vrolijk to build super-trawlers with cutting edge technologies. After the 1960s for instance, it took the Dutch demersal fleet only 10 years to transition from otter trawl to beam trawling, while engine power consistently increased over a period of 40 years.<sup>163</sup> In the

past decade, the Dutch demersal fleet has transitioned to pulse trawling, a method with even higher efficiency, even though fish stocks are still dwindling.<sup>164</sup> Cornelis Vrolijk in particular has experimented with hyper-efficient electric pulse fishing across the North Sea.<sup>165</sup> However, electric pulse fishing was finally banned by the EU in 2019 (implemented as of July 1, 2021) following the powerful struggle led by the French organisation BLOOM and small-scale fishers collectives from France, Belgium and the UK. Moreover, an investigation by the Dutch news outlet NOS revealed that even though the European Commission agreed to bypass the ban of this method for 5% of the EU fishing fleet, Dutch civil servants permitted 12.5% of the fishing fleets to use pulse fishing after coming under intense pressure from members of parliament and the trawler industry.<sup>166</sup>

After the ban on electric pulse fishing was implemented in the EU in 2021, the Dutch fishing organisation VisNed advocated for scaling-up Danish Seine fishing in the English Channel instead.<sup>167</sup> Danish Seine has an 11-times higher catch rate than the gear of inshore fishing vessels.<sup>168</sup> Local fish stocks can be exhausted for up to a fortnight following a single trip by a vessel with such equipment.<sup>169</sup>

P&P and Cornelis Vrolijk have operated their vessels in inshore waters at various times. These activities by foreign owned trawlers in the 12-mile inshore zone leaves many small-scale fishers vulnerable since the competition is highly unequal. Given their hyper-efficient methods, once large trawlers enter coastal areas, fish stocks are rapidly overexploited.<sup>170</sup> This greatly reduces catch opportunities for local fishers. Due to their size and fishing methods, smaller artisanal vessels are often bound to the nearby coastal areas, where they enrich communities and contribute to diverse local livelihoods, while large trawlers move to other waters with abundant fish, once local resources are depleted.<sup>171</sup>

# Fishy practices

## Illegal, unreported & unregulated fishing?

Cornelis Vrolijk and P&P's super trawlers have made headlines with their environmentally harmful and illegal fishing methods.<sup>172</sup> There have been accusations of high-grading made about P&P vessels.<sup>173</sup> High-grading is the practice of dumping edible fish to free up space for fish that can fetch higher prices on the market – a practice that is illegal in the EU.<sup>174</sup> The practice is used when the quota for certain species is almost reached by a vessel. By dumping the smaller and keeping the bigger fish, the vessels can maximize their profits. Practices like this contribute greatly to overfishing and inaccurate fishing statistics. The cases of illegal, unreported or unregulated fishing in order to increase profits are numerous:

- Greenpeace gained access to logbooks from one of the members of the fish trawler *Jan-Maria*, one of P&P's German registered vessels. The logbooks indicate that 1500 tons of herring were discarded during a three-week trip.<sup>175</sup>
- P&P's *Annalies Ilena* was fined €105,000 by the Irish government for logbook infringements and illegal discarding of fish in 2015.<sup>176</sup>

- Its sister ship the *Maartje Theodora* was caught near Le Havre with 1,585 tonnes of illegally caught fish that had a value of €1.2 million.<sup>177</sup> The French government fined the P&P German subsidiary €595,000, the highest fine for illegal fishing in the EU so far.<sup>178</sup>
- The *Saga*, a trawler owned by Atlantex, the Polish subsidiary of P&P became part of a bribe and tax evasion scandal that involved Samherji and P&P, where bribes were paid to the Namibian fisheries minister to secure quotas.<sup>179</sup>
- In a recent study, Greenpeace recorded the fishing hours of 23 non-UK-owned super-trawlers using AIS tracking data from the Lloyd's List Maritime Intelligence.<sup>180</sup> The study shows how super-trawlers spent 2963 hours fishing in the UK's marine protected areas in 2019, a number that increased to 5,590 during the Covid-19 pandemic in 2020.<sup>181</sup>
- In 2015, Cornelis Vrolijk's *Frank Bonefaas* was charged £102,000 for fishing 632,000 kg of mackerel in British marine protected areas.<sup>182</sup>



Image 4: Afrika. 126m supertrawler. photo - B. Logger.

## Flawed statistics: data and monitoring gaps

The industrialization of fishing has led to a global marine biodiversity crisis. A report by the *Sea Around Us project* indicates that, as of 2014, only 15% of the 1,320 fish stocks assessed were “healthy.”<sup>183</sup> This is in contrast to official statistics by the FAO, which suggest that 65.8% (2017) of species are managed sustainably.<sup>184</sup> But, FAO statistics only consider the landings of fish that are officially reported.<sup>185</sup> The country reports do not capture the illegal and unreported catches and the discard of thousands of tons of fish at sea.<sup>186</sup> *Sea Around Us* estimates that the real global catch in the last 65 years was 50% higher than officially reported.<sup>187</sup>

This miscalculation also takes place in the EU. Fishing companies such as P&P and Cornelis Vrolijk fish illegally and underreport their catch so as not to exhaust their quotas (see previous section). As a result, the official fish catch statistics in the EU are grossly underestimated.<sup>188</sup> On paper the fish stocks seem healthy, but in reality, there is a long-term decline.<sup>189</sup> Overfishing threatens small-scale fisheries across Europe. If fish catches dwindle, they find it increasingly difficult to sustain their livelihood. In contrast, larger companies can shift their efforts towards more abundant and far flung fishing grounds—and get extra fuel subsidies to do so.

The inaccuracies of the EU's fishery statistics worsened following a ban on fish discards in 2019.<sup>190</sup> Scientists now assume that the companies land all their fish (landing obligation), since officially they are not allowed to discard non-quota species at sea anymore.<sup>191</sup> To compensate the fishing businesses for the non-quota catch that they cannot sell, the EU has increased the total allowable catch.<sup>192</sup> In reality, however, discarding at sea continues.<sup>193</sup>

The case of the Dutch fishing ports illustrates this issue. According to Dutch media, a confidential report by the European Commission suggests that there are serious gaps in the reporting of landed fish in the Dutch ports of Scheveningen and IJmuiden.<sup>194</sup> As of 2021, the Netherlands food and consumer product safety authority

(NVWA) only employed two inspectors to monitor up to 400 million kilos of pelagic fish.<sup>195</sup> Inspectors only check a few samples of the landed fish. Most of the remaining fish is weighed and reported by the companies themselves.<sup>196</sup> Freezer containers often do not get checked at all.<sup>197</sup> Pelagic companies notoriously underreport their catches during this weighing process.<sup>198</sup> As a response, the EU commission initiated an infringement procedure against the Netherlands for breaking EU fishery control regulations.<sup>199</sup>

The gap in monitoring of the fishing industry is not only a Dutch problem. According to the EU Fisheries Control Coalition, monitoring in the EU is actually getting worse. The NGOs highlight that a new proposal by the EU Agriculture and Fishery Council undermines current monitoring. Some changes include:<sup>200</sup>

- Fishing without a licence is no longer a serious infringement.
- Only limited use of remote electronic monitoring on vessels to check for discards and harmful fishing methods
- No requirement for digital seafood traceability
- Weakened rules on reporting of catches at sea and during landing in the port

Europe's fishery management has a transparency issue. No public report on the control budget, monitoring efforts or the number and type of fishing infringements exists.<sup>201</sup> The Netherlands, France and Germany – the countries where P&P and Cornelis Vrolijk operate most – are especially resistant to sharing information about quota allocation.<sup>202</sup> Indeed there is no comprehensive dataset on the share of quotas in the hands of a particular vessel, company or producer organisation,<sup>203</sup> thus making detailed analyses of the impact of different actors within the EU's industrial fishing fleet challenging.

## Who gains? Ownership of P&P and Cornelis Vrolijk

At a time when large segments of the fishing sector – particularly the small-scale fleet – are in a precarious situation due to dwindling fish stocks and unsupportive regulations, large pelagic trawler companies are growing. In 2018, Cornelis Vrolijk, P&P and W. van der Zwan & Zn BV – the three members of the Dutch producer organisation for pelagic fish, the PFA – had a combined revenue of €1.7 billion.<sup>204</sup> While this also includes revenues from fish trade and processing, the number is substantial, given that the gross value of all European landings amounted to a total of €7.9 billion in 2018.<sup>205</sup> P&P increased their annual revenue from €146 million in 2009 to €1.3 billion in 2018.<sup>206</sup>

The individuals that profit most from the growth of the multinational trawler companies are a relatively small number of shareholders – most notably the Dutch family members of Parlevliet, Van der Plas and the Vrolijk family.<sup>207</sup> Four members of these families feature in the Quote 500-list that nominates the richest individuals in the Netherlands.<sup>208</sup> In 2019 Diek Parlevliet ranked 67<sup>th</sup> and one year later had climbed to 60<sup>th</sup> place with an increase in assets from €540 million to €600 million.<sup>209</sup> Meanwhile, according to a European Parliament study (which uses the definition of under 12m boats for small-scale fishing): employment of small-scale fishers in the EU has fallen by 20-30%, and their incomes also declined by 30-50% between 2000 and 2010.<sup>210</sup>

## Conclusion

Home to such powerful fishing companies as Cornelis Vrolijk and P&P, the Netherlands is one of the only countries that has a greater number of large-scale than small-scale vessels (below 12m, passive gear).<sup>211</sup> What this means for the fishing sector is shown by the numbers: the Netherlands produces 8.2% of all European fish but only makes up 1.8% of the employment in the European fisheries sector.<sup>212</sup> Countries that are less industrialized with smaller-scale fishing fleets – such as Greece, Portugal or Italy – employ almost 40% of total European fisherfolk while only producing 13% of Europe's fish.<sup>213</sup> In other words, fish production is increasingly captured by fewer and fewer people.

One might argue that these numbers suggest that the Dutch fishing fleet is more efficient. But so much efficiency is precisely the problem. Our oceans can't keep up. In fact it is the ecological and social consequences of the model of fishing that Cornelis Vrolijk and P&P represent which are most concerning.

The industrial mode of production of these large companies leads to an unjust and inequitable distribution of Europe's marine resources. A couple of hundred distant water trawlers have made as much money as the entire small-scale fleet. Just a couple of families and a relatively small number of company employees are benefiting while Europe's coastal fishing communities are struggling and fish stocks are dwindling.

Small-scale fishers have been harvesting fish for centuries, from the Lofoten to Galicia, even in the face of hostile policies and an absence of fair quotas, they keep catching all-year around, providing fresh fish directly to the consumer at a fair price. Their methods might not be the most efficient, but their products support the local economy, are unparalleled in quality and have been a core of the cultural identity of communities across Europe. These fisherfolk cannot move when local stocks are exploited. They have an interest in managing their stocks sustainably, to ensure that they are still able to catch tomorrow.

Companies like Cornelis Vrolijk and their subsidiary companies like 'France Pélagique' claim to be traditional herring fishers. Their current vision for the sector, proposes to provide frozen herring from the 'France Pélagique' fleet to a warehouse owned by Cornelis Vrolijk, which will then be transported to Fécamp in northern France, where they will be processed by the workers of the Sepoa-Delgove company. Their marketing video uses language associated with small-scale fishers and community supported fisheries like: "local fishing", "traditional know-how", "sustainability", "traceability".<sup>214</sup>

However, behind these sustainable buzzwords, remains a dangerously efficient model of fishing which is undermining the small-scale herring fishers who are keeping the cultural traditions alive. In the north of France, a region especially impacted by Dutch trawlers, it has become





Image 5: "What do we have left?" Fishers protest the inauguration of the *Scombrus*, Concarneau, France. Sept. 2020. Photo: Pleine Mer

incredibly difficult for a small-scale boat to access quotas for herring, and the local stocks are declining. In an open letter to the director of France Pêlagique, published by Pleine Mer, fishers denounced the practice of quota grabbing organized by P&P and Cornelis Vrolijk.<sup>215</sup> And the negative impact of trawlers on fish stocks in general helps explain why French small-scale fishers reacted so strongly in November 2020, when a dozen super-trawlers were found working in the Channel, right in the middle of herring season.<sup>216</sup>

Indeed, this can be seen as part of an ongoing resistance by small and mid-scale fishers to the intrusion of super trawlers in the inshore waters. The demonstration against the *Scombrus* in Concarneau, mentioned above, was an especially notable confrontation of visions for the future of the EU's fisheries, where small-scale and artisanal fishers warned that if the celebration and capacity enhancement of dangerously efficient super-trawlers like the *Scombrus* continue, their livelihoods will be sacrificed as a consequence.

Advocates claim a ban on super-trawlers from inshore waters would be a game-changer for small scale fishers across Europe.<sup>217</sup> It would allow commercial fish and coastal ecosystems to recover from years of industrial exploitation.<sup>218</sup> More healthy marine ecosystems, then, could be a source of income and work for low-impact

inshore vessels. This could revitalize local seafood businesses and help coastal communities to supply fresh fish through sustainable supply chains.<sup>219</sup> However, if such a ban is not accompanied by broader structural changes, these dangerously efficient boats will grab quota shares elsewhere, simply displacing the problem to other parts of the globe.

Small-scale fishing jobs are not only important for many coastal communities, they are also most impacted by overfishing and the exhausting of fish resources. Supporting these fishers is key to ensuring healthy fish stocks and marine environments into the future. This means dismantling the European fisheries policy structure that incentivises a dangerously efficient model of fishing and fuels ecological destruction and economic inequality. Further, support can also be built through connections between small-scale fishers and consumers,<sup>220</sup> through *Community Supported Fisheries (CSF)*, which serve as the backbone of collective organizing against the large corporate actors that currently dominate the sector, to build a future beyond dangerously efficient industrial fishing.<sup>221</sup>

\*\*\*\* The next article in this series will explore the transformative roles of CSF and how consumers can support a fair and sustainable fishing sector.

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- 220 Consumers who decide to support local small-scale fishers in France can connect to the direct selling map of Pleine Mer, in order to find the fishers who sell herring, and other species directly to the consumer.
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URGENCI is the international grassroots network of all forms of regional and Local Solidarity-based Partnerships for Agroecology (LSPAs), of which Community-Supported Agriculture (CSA) is the best-known iteration. As a social movement, URGENCI brings together citizens, small-scale food producers, consumers, activists and researchers representing LSPA networks and initiatives in over 40 countries. This practical work to build, develop, and empower LSPAs is motivated by our involvement in the international movements for food sovereignty and solidarity economy.



Pleine Mer is an organization which fights for more social and environmental justice in the fishing sector and on the coast. Pleine Mer brings together fish eaters, fishermen, scientists, activists who are collectively committed to more sustainable fishing, socially and environmentally speaking. The organization promotes direct sales and community supported fisheries through digital tools, in order to support local fishing and fight against overfishing. Pleine Mer members also organize events and campaigns to alert people to the dangers of industrial fishing.

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