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Germany

Fishery Products

Fishery Products

2006

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Report Highlights:
The total volume of fish and fishery products produced in Germany amounted to 469,903 MT in 2005, valued at U.S.$1.93 billion (1.56 billion Euro). Fish consumption in Germany is growing as consumers associate fishery products with a modern healthy diet. Product innovation by the fish industry, which provides a larger variation in fish dishes, adds to the popularity of seafood. Best prospects for U.S. seafood exports to Germany are for Alaska pollock, salmon, caviar substitutes, hake, cod, and lobster.

Includes PSD Changes: No
Includes Trade Matrix: No
Annual Report
Berlin [GM1]
[GM]

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Executive Summary

The production value of fish and fishery products at the factory level increased by 1.1 percent to U.S.$ 1.93 billion (1.56 billion Euro) in CY 2005, while production volume decreased by 0.9 percent compared to CY 2004 and amounted to 469,903 MT (product weight). Per capita consumption increased to 14.8 kg in CY 2005, from 13.8 kg in CY 2004[1].

Total imports of fish and fishery products into Germany in CY 2005 amounted to 826,888 MT (product weight) valued at U.S. $ 3.04 billion (Euro 2.45 billion). Of this, 42 percent originated from other EU member states, while the remaining 58 percent came from non-EU countries.

The U.S. supplied 63,973 MT (product weight) of fish and fish products in CY 2005 at a value of US$ 172 million (Euro 139 million.) On a volume and value basis, this amounts to eight and six percent of the German import market.

Frozen Alaska pollock fillets, frozen Pacific salmon, caviar substitutes, frozen hake, and preserved salmon were the most successful U.S. seafood exports to the German market in 2005.

Some German fish processors tried to replace Alaska Pollock with other white flesh fish species as a result of its higher price. One company, for example, introduced fish sticks made from giant squid.

Definitions

Note 1: In this report trade data for groundfish fillets includes:

HS Codes		English Name	Scientific name
Fresh or chilled fillets			
0304	1031	Cod	Gadus ssp. + Boreogadus siada
0304	1033	Coalfish	Pollachius virens
0304	1035	Redfish	Sebastes ssp.
0304	1038	Other	
Frozen fillets			
0304	2021-2029	Cod	Gadus ssp.
0304	2031	Coalfish	Pollachius virens
0304	2033	Haddock	Melanogrammus aeglefinus
0304	2035-2037	Redfish	Sebastes ssp.
0304	2041	Whiting	Merlangius merlangus
0304	2055-2059	Hake	Merluccius ssp.
0304	2085	Alaska pollack	Theragra chalcogramma
0304	2091	Blue grenadier	Macrutonus novazealandiae
0304	2094/2095	Other	

Note 2: In recent years the U.S. dollar/Euro exchange rate has been as follows:

2001: US$1 = 1.1165 Euro
2002: US$1 = 1.0575 Euro
2003: US$1 = 0.8840 Euro

[1] As a result of the statistical calculation method, per capita consumption for the years after the 2004 EU enlargement cannot be compared with data for previous years.

2004:	US$1 = 0.8051 Euro
2005:	US$1 = 0.8078 Euro

Further exchange rates (as of September 14, 2006 *Handelsblatt*) are for:

U.S. dollar/ Euro	US$1 = 0.7878 Euro
Euro/U.S. dollar	1 Euro = U.S. dollar 1.2694

Abbreviations:

CY	= calendar year
HS	= harmonized system of tariff codes
Kg	= kilogram (1 kg = 2.2 pounds)
MSC	= Marine Stewardship Council
MT	= metric ton (1 MT = 1000 kg = 2205 pounds)
NMS	= New EU Member States, i.e. Cyprus, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Slovakia, Slovenia
n.a.	= not available or not published
U.K.	= United Kingdom
U.S.	= United States

Production

The total catch of the German fishing fleet (landings in domestic and foreign ports) amounted to 252,588 MT (catch weight[2]) in CY 2005. This is a decrease of approximately 14,000 MT or five percent compared to CY 2004. Landings in domestic ports totaled 112,871 MT, versus 115,023 MT in 2005. Catch of salmon amounted to 38 MT in 2005, compared to 47 MT in 2004.

The major fishing regions for the German fleet are the North Sea (about 40 percent), followed by the Baltic Sea (26 Percent), and North West EU Waters (16 percent.)

On January 1, 2005 (latest available data), the German ocean fishing fleet consisted of 2,162 ships, including 11 deep-sea fishing vessels. Total tonnage amounted to 65,882 gross register tons; engine power totaled 161,243 kW. This is a reduction of 49 ships and 965 gross registered tons, while total engine power increased by 965 kW compared to the previous year. In CY 2005 a total of 8,547 workers were employed by 87 fishing and fish processing companies, 460 workers less than in CY 2004. (Note: Only companies with more than ten employees were counted).

Aquaculture in Germany mainly consists of pond raised trout and carp. Only a few closed aquaculture systems for selected species[3] exist, but their production is marginal (688 MT). In 2004 (latest available data) total German aquaculture production amounted to 62,661 MT.

Table 1: Total catch from inland fisheries and aquaculture in Germany in 2004

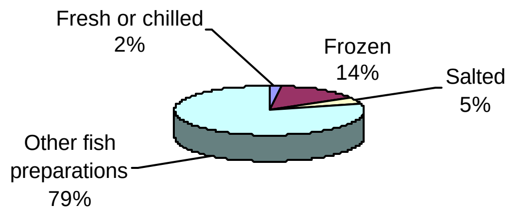
	Production in MT
Trout	22,005
Carp	16,832
Other	2,808
Subtotal aquaculture	41,645
Anglers	17,391
Lake fisheries	3,625
Subtotal other inland fisheries	21,016
Grand total	62,661

Production value of fish and fishery products at the factory level increased by 1.1 percent to U.S.$ 1.93 billion (1.56 billion Euro) in CY 2005, while production volume decreased by 0.9 percent compared to CY 2004 and amounted to 469,903 MT (product weight). The average per unit price increased in 2005 as a reflection of a higher percentage of value added products, as well as of higher prices for raw material.

Fish preparations, such as canned fish, baked fillets or fish sticks, make up the majority of production followed by frozen and salted fish. Fresh fish production is already the smallest segment and is expected to be less significant in the future because of the prevailing trend towards convenience food. Production shares of the different categories are illustrated in figure 1, details are shown in table 2.

[2] While the figures in this paragraph are given in catch weight, figures in the rest of the report relate to product weight.
[3] These species include eel, European catfish, Koi-carp, sturgeon, turbot, and bass.

Figure 1: Production share of different product categories in 2005



Source: FAS/Berlin based on data from the Association of the German Fish Industry and Fish Wholesale

Table 2: German Production of Fish Products (in MT, Euro 1,000, U.S. $ 1,000)

	MT		Euro 1,000		US $ 1,000	
Product	2004	2005	2004	2005	2004	2005
Fresh or chilled	7,855	8,060	32,262	51,418	40,072	63,652
Frozen						
- Saltwater fish	6,102	5,276	17,399	18,922	21,611	23,424
- Freshwater	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
- Filets	44,103	54,490	151,984	158,370	188,777	196,051
- Fish meat	1,855	2,013	8,246	8,873	10,242	10,984
Subtotal frozen	52,060	61,779	177,629	186,165	220,630	230,459
Salted						
- Smoked Salmon	17,794	13,785	165,949	134,378	206,122	166,351
- Smoked Herring	1,355	1,670	6,436	8,587	7,994	10,630
- Other smoked Fish	7,044	5,379	61,396	49,479	76,259	61,252
Subtotal salted	26,193	20,834	233,781	192,444	290,375	238,232
Other fish preparations						
- Salmon	11,905	2,989	47,196	18,017	58,621	22,304
- Herring	90,684	90,340	249,260	255,151	309,601	315,859
- Sardines, sprat	578	483	n.a.	n.a.	n.a.	n.a.
- Mackerels	1,165	418	5,395	2,394	6,701	2,964
- Baked filets/sticks	156,303	155,908	357,080	394,800	443,523	488,735
- Other fish	26,995	27,586	75,391	78,347	93,642	96,988
- Fish salad	32,852	20,416	119,625	120,439	148,584	149,095
- Otherwise prepared	39,943	38,322	117,352	111,464	145,761	137,985
- Caviar substitutes	1,456	1,252	26,885	17,939	33,393	22,207
- Frozen crayfish	446	568	5,747	6,891	7,138	8,531
- Crayfish preparations	3,938	7,631	38,949	67,841	48,378	83,982
- Preserved Crayfish	2,462	1,971	18,894	14,327	23,468	17,736
Subtotal preparations	368,727	347,884	1,061,774	1,087,610	1,318,810	1,346,385
Total Production	474,404	469,903	1,539,759	1,555,987	1,912,507	1,926,203

n.a. = not published because of limited number of companies involved

* = including unpublished values and volumes
exchange rate: 2004: 1 Euro = U.S.$ 1.2421 / 2005: 1 Euro = U.S.$ 1.2379
Source: FAS/Berlin based on data from the Association of the German Fish Industry and Fish Wholesale

Almost the entire German catch of groundfish goes straight into the fresh market. Less than one percent is used for further processing into fillets. Most groundfish fillets produced in Germany are manufactured from imported fillets and further processed into smaller pieces or convenience foods and repackaged.

Consumption

Due to changes in trade reporting requirements associated with EU enlargement, the following consumption data should be compared with data before 2004[4].

Overall consumption of seafood totaled 1.222 million MT in CY 2005, up seven percent compared to the previous year (1.138 million MT). According to official figures, per capita consumption increased to 14.8 kg in CY 2005, from 13.8 kg in CY 2004. However, the association of the German fish industry and fish wholesale believes the official figure underestimates total consumption in 2004. They estimate per capita consumption in 2004 at 14.2 kg. This would mean a year-to-year increase of 0.6 kg or four percent. For 2006, a further increase of about 0.3 kg is expected, as consumers associate fish products with a modern healthy diet. Seafood is considered a trendy product in certain circles of society and this image has help increase consumption.

The most popular fishes on the German market include Alaska pollock, herring, and Atlantic and Pacific salmon and tuna (see table 3). 2005 is the first year that salmon ranks higher in popularity than tuna. The majority of tuna is used as ingredients in other dishes such as salads and pizzas. In contrast, salmon is used as a main dish or as a topping on sandwiches. Because of its color, consumers can easily recognize salmon, even if they only have limited experience with eating fish. Also, salmon still has a high-end image, which makes it an appealing choice for restaurants.

[4] As a result of the statistical calculation method, per capita consumption for the years after the 2004 EU enlargement cannot be compared with data for previous years. This discrepancy is a result of changes in the trade reporting requirements following EU enlargement. Companies must report to German customs all trade with non-EU countries irrespective of volume or value of the trade. In contrast, trade with other EU member states only is reported if a company's trade exceeded the value of 200,000 Euro per year up to 2004 and 300,000 Euro starting January 1, 2005. As a consequence trade with new EU member states is underreported following EU accession. In the case of fish, where imports exceed exports, this lowers theoretical supply and domestic disappearance that is used to calculate per capita consumption.

Table 3: Favorite Fish Varieties in Germany, as a Percentage of Total Consumption

	2001	2002	2003	2004	2005 p
Total Seafood Use	100	100	100	100	100
Thereof Saltwater Fish (incl. Herring)	75.6	75.5	74.1	70.8	69.8
Sweet Water Fish	15.5	15.8	17.1	19.9	21.0
Crayfish, Mollusks	8.9	8.7	8.8	9.3	9.2

Type of Fish		2002	2003	2004 r	2005 p
Alaska/Pacific Pollack		25.2	22.3	23.8	18.3
Herring		16.0	18.8	15.0	18.2
Salmon		8.1	9.8	11.8	12.7
Tuna		12.2	13.3	12.2	11.4
Coalfish		4.4	4.0	3.1	4.7
Redfish/Perch		5.0	5.6	5.5	4.5
Hake		4.4	2.5	3.8	4.4
Trout		4.0	3.6	4.2	3.8
Cod		2.9	2.9	2.4	3.6
Mackerel		2.1	1.5	1.9	1.6
Carp		1.5	1.4	1.4	1.3
Plaice		1.1	1.1	1.1	0.9
Sardines		0.9	0.7	0.9	0.9
Monkfish		n.a.	0.4	0.4	0.6
Other		12.2	12.1	12.5	13.1
Total		100.0	100.0	100.0	100.0

Source: Fish Information Center: *Daten und Fakten 2006*
R = revised, P = provisional
Note: The statistical method to derive the figures above was altered in 2005, therefore, these figures cannot be compared to the figures given in our previous reports.

The share of single households is increasing, more women are working, and more people are eating their main meal (lunch) away from home. As a result, the importance of convenience products is increasing in the fish industry, as in other parts of the food sector. Also, within the convenience sector, there is a trend towards value-added products such as fillets with toppings, mixtures of fish and vegetables, and TV dinners. In CY 2005, frozen fish products held the largest market share (32 percent) in this market segment, followed by canned fish preparations (30 percent). Crayfish and mollusk also increased their market share to 14 percent. Fresh fish accounted for 11 percent, smoked fish for six percent, and fish salads for two percent (see table 4).

Table 4: Fish Consumption by Product Group, in Percent

	1997	1998	1999	2000	2001	2002	2003	2004 r	2005 p
Frozen Fish	21	26	25	25	31	34	32	30	32
Preservations and Marinades	31	29	29	30	26	29	30	31	30
- Herring	21	18	17	16	15	16	17	19	18
- Thuna	7	8	10	11	9	11	12	10	10
- Sardines	2	2	1	2	1	2	1	2	2
Fresh Fish	14	13	14	14	12	10	10	11	11
Crayfish and Mollusks	14	14	15	13	13	12	11	12	14
Smoked Fish	5	3	5	7	7	6	6	6	6
Fish Salads	4	5	4	4	4	3	4	3	2
Other Fish Products	11	10	8	7	7	7	7	7	5

Source: Fish Information Center: *Daten und Fakten 2006*
R = revised, P = provisional

Trade

Total Imports

Total German fish and fishery imports in CY 2005 amounted to 826,888 MT (product weight) valued at U.S. $ 3.04 billion (2.45 billion Euro). Of this, 42 percent originated from other EU countries (323,099 MT at U.S.$ 1.28 billion or 1.037 billion Euro). Imports from third countries accounted for about 58 percent of total imports (503,789 MT at U.S.$ 1.76 billion or 1.42 billion Euro). In terms of value, Denmark was the most important EU supplier of fishery products at U.S. $ 359 million (290 million Euro), Norway was Germany's biggest non-EU supplier at U.S. $ 343 million (277 million Euro).

In 2005, German seafood imports from the United States decreased by 2.4 percent on a volume basis but increased by 12 percent in value. The discrepancy in the development between import volume and value is a result of the increased price for Alaska pollock (for details see section on groundfish fillets). The U.S. supplied 63,973 MT (product weight) of fish and fish products in CY 2005 at a value of approximately US$ 172 million (Euro 139 million). This amounts to eight percent of the German import market by volume or six percent by value. Frozen cod (HS code 0303 60 90) generated the largest increase in shipments. This development might be a result of lower availability of cod from the Baltic Sea. Details about U.S. shipments of fishery products to Germany are summarized in tables 5a and 5b.

Frozen Alaska pollock fillets, frozen Pacific salmon, caviar substitutes, frozen hake, preserved salmon, frozen cod, and live lobsters were the most successful U.S. seafood exports to the German market in 2005.

Frozen Alaska Pollock and frozen hake are imported for further processing. Generally, live lobsters are sold in wholesale markets and fish specialty shops and eventually to restaurants. They are imported year round with a strong peak in December for the holiday season. Caviar substitutes and preserved salmon are mostly sold in food retail stores.

Table 5a: German imports of fish and fishery products from the United States by calendar year and product

		2004		2005	
Product	HS Code	MT	1000-$	MT	1000-$
Total frozen Alaska pollock		**55,590**	**116,180**	**49,827**	**114,920**
Frozen Pacific pollack fillet	0304 20 850	51,173	110,647	47,059	111,102
Frozen meat of Alaska pollock	0304 90 610	4,417	5,533	2,768	3,818
Total frozen Pacific salmon		**3,974**	**12,396**	**5,237**	**17,622**
Sockeye salmon (red salmon),	0303 11 000	326	1,844	685	4,000
Other frozen Pacific salmon	0303 19 000	3,486	9,901	4,069	11,140
Frozen Pacific salmon fillets	0304 20 130	162	651	483	2,482
Caviar substitutes	**1604 30 900**	**489**	**7,115**	**604**	**9,410**
Total frozen hake		**3,494**	**5,262**	**4,701**	**7,560**
Frozen hake fillets	0304 20 560	19	44	0	0
Other frozen hake fillets	0304 20 580	2,503	4,250	3,570	6,307
Frozen meat of hake	0304 90 470	60	54	0	0
Frozen meat of hake	0304 90 480	912	914	1,131	1,253
Preserved Salmon	**1604 11 000**	**103**	**896**	**644**	**4,434**
Frozen cod	**0303 60 900**	**23**	**32**	**1,437**	**4,215**
Live lobsters, not frozen	**0306 22 100**	**342**	**5,289**	**232**	**4,177**
Total scallops		**78**	**1,103**	**98**	**1,919**
Scallops live/fresh	0307 21 000	45	725	61	1,281
Other scallops	0307 29 900	33	378	37	638
Fresh Pacific salmon fillets	**0304 10 130**	**0**	**4**	**257**	**1,593**
Frozen meat of other saltwater fish	**0304 90 970**	**146**	**948**	**117**	**1,364**
Frozen monkfish fillets	**0304 20 830**	**162**	**1,222**	**97**	**972**
Whole lobster, frozen	**0306 12 100**	**0**	**2**	**22**	**436**
Other freshwater fish fillets,	**0304 20 190**	**37**	**226**	**80**	**432**
Total frozen dogfish		**135**	**640**	**82**	**367**
Frozen dogfish 'squalus acanthias'	0303 75 200	96	281	70	227
Frozen dogfish fillets	0304 20 610	39	359	12	140
Frozen mackerel	**0303 74 300**	**408**	**313**	**224**	**347**
other		594	2,421	314	2,028
Grand-total		**65,575**	**154,049**	**63,973**	**171,796**

Source: FAS/Berlin based on German Federal Office of Statistics, Wiesbaden
Grouped in descending order by value in 2005

Table 5b: German imports of fish and fishery products from the United States by year and product (January through June)

Product	HS Code	January/June 2005 MT	January/June 2005 1000-$	January/June 2006 MT	January/June 2006 1000-$
Total frozen Alaska pollock		**24,820**	**53,808**	**18,560**	**50,758**
Frozen Pacific pollack fillet	0304 20 850	23,505	52,115	17,302	48,403
Frozen meat of Alaska pollock	0304 90 610	1,315	1,693	1,258	2,355
Total frozen Pacific salmon		**1,276**	**4,794**	**1,560**	**6,489**
Sockeye salmon (red salmon),	0303 11 000	135	809	293	1,681
Other frozen Pacific salmon	0303 19 000	1,073	3,715	878	2,886
Frozen Pacific salmon fillets	0304 20 130	68	270	389	1,922
Caviar substitutes	**1604 30 900**	**217**	**3,297**	**280**	**3,828**
Total frozen hake		**2,794**	**4,225**	**1,698**	**3,237**
Frozen hake fillets	0304 20 560	0	0	0	0
Other frozen hake fillets	0304 20 580	1,847	3,176	1,442	2,898
Frozen meat of hake	0304 90 480	947	1,049	256	339
Frozen cod	**0303 60 900**	**1,437**	**4,236**	**785**	**3,115**
Live lobsters, not frozen	**0306 22 100**	**87**	**1,540**	**111**	**1,939**
Preserved Salmon	**1604 11 000**	**232**	**1,635**	**288**	**1,916**
Total scallops		**31**	**604**	**51**	**1,050**
Scallops live/fresh	0307 21 000	25	501	35	735
Other scallops	0307 29 900	6	103	16	315
Other frozen fish fillets	**1604 19 910**	**0**	**0**	**190**	**933**
Frozen mackerel	**0303 74 300**	**204**	**347**	**555**	**776**
Frozen meat of other saltwater fish	**0304 90 970**	**44**	**511**	**30**	**175**
Surimi preparations	**1604 20 050**	**18**	**44**	**15**	**43**
Frozen crabs 'paralith.camcha	**0306 14 100**	**1**	**43**	**1**	**35**
Other mollusks	**0307 91 000**	**1**	**23**	**1**	**33**
Frozen monkfish fillets	**0304 20 830**	**50**	**493**	**3**	**28**
Total frozen dogfish		**34**	**106**	**8**	**25**
Frozen dogfish 'squalus acanthias'	0303 75 200	34	106	8	25
Frozen dogfish fillets	0304 20 610	0	0	0	0
other		195	1,125	236	880
Grand-total		**31,441**	**76,831**	**24,372**	**75,260**

Source: FAS/Berlin based on German Federal Office of Statistics, Wiesbaden
Grouped in descending order by value in 2005

Salmon (Whole/Eviscerated) Imports

The apparent drop in salmon (w/e) imports is offset by an equally high drop in exports. As a result, availability on the German market did not change in 2005. On the other hand, net imports of salmon fillets increased by 8,072 MT, reflecting the increasing popularity of salmon in Germany.

Traditionally, Norway is by far the main supplier of salmon to the German market. In 2005, Norway's a market share was 78 percent. The United States surpassed Denmark and the U.K. and became the second most important exporter of salmon to Germany. Respective market shares for the U.S., Denmark and the U.K. are 8, 6, and 3 percent (based on live weight for whole or eviscerated salmon in CY 2005.) The apparent shift in origins from Denmark to Norway might be a result of a change in product flow. In the past, substantial quantities of Norwegian salmon had been imported into Denmark and re-exported to Germany. The current trade data suggests that more salmon is coming directly to Germany from Norway.

Groundfish Fillets Imports

Total imports of groundfish fillets decreased by four percent in 2005, compared to the previous year and amounted to 776,768 MT. China was the number one supplier to the German market with a market share of 35 percent followed by the U.S. (24 percent), and Russia (11 percent.)

Alaska pollock is the single most important groundfish species that the U.S. exports to Germany and has the highest export potential. Alaska pollock was 16 percent of Germany's total imports of groundfish fillets in 2005. China and Russia are the biggest competitors for the U.S. in this species.

In 2002, the U.S. managed to become the most important supplier of Alaska pollock to the German market and broke the traditional predominance of Russia and China for this product. This was largely a result of import restrictions for animal products originating in China. These restrictions related to findings of the illegal antibiotic chloramphenicol in Chinese animal product exports. They were lifted later in 2002, which resulted in a resumption of German imports from China. In 2003, China reclaimed its position as number one supplier to the German market followed by Russia and the U.S. In 2004, both China and the U.S. further increased their shipments to Germany, while German imports from Russia declined. German industry sources cite problems with the quota management and overfishing as reasons for the decline in Russian exports to Germany.

In 2005, German Alaska pollock imports decreased by ten percent compared to the previous year. This was largely a result of the higher import prices. Industry sources cite higher demand from South-East Asia for surimi production as one of the reason for the overall price increase[5]. Also, with the completion of the Marine Stewardship Council (MSC)[6] certification for Alaska Pollock, U.S. exporters reportedly are demanding a higher price for their product. Average import price for Alaska Pollock increased by 9.0 percent while the import price for U.S. shipments increased by 9.3 percent. Despite its higher price, the U.S. product remains popular with German importers as they value sustainable sources and stable supply. In

[5] There was a shortage of fish that is traditionally used for surimi production due to the Christmas 2004 Tsunami. As a result, more Alaska Pollock was directed into this market segment.

[6] The Marine Stewardship Council (MSC) is an international nonprofit organization that promotes sustainable fisheries. For further information please visit: www.msc.org

addition, while the German industry considers the quality of on-land processed Alaska Pollock to be as good in China as in the U.S., the U.S. still has a competitive advantage in open-seas processing.

The German fish industry primarily uses Alaska Pollock as an ingredient for value-added products such as fish sticks and fillets with topping. While some companies (for example: Iglo) only use Alaska pollock fillets for their fish sticks, other companies vary the species depending on the season, availability, and price of the raw product. Traditionally, other fish used for fish sticks include coalfish and hake. In an attempt to broaden their choice of raw material one company recently introduced fish sticks made from giant squid. If these so called “pirate sticks” become popular with the consumers, this could reduce the demand for Alaska pollock.

Table 6: German Alaska Pollock Imports

	2000	2001	2002	2003	2004	2005	Jan/Jun05	Jan/Jun06
	MT	MT	MT	MT	MT	MT	MT	MT
U.S.	1,178	25,943	49,915	31,461	51,173	47,059	23,505	17,302
PR CHINA	45,078	64,458	39,066	58,043	59,321	58,113	25,814	41,956
RUSSIA	70,809	60,375	46,278	34,823	22,005	15,514	10,271	13,309
NETHERLANDS	412	833	97	91	183	1,058	593	321
DENMARK	451	327	228	297	1,532	801	499	690
POLAND	3,767	2,022	249	6	-	420	38	1,675
BELGIUM	15	23	25	47	179	247	171	115
UNITED KINGDOM	108	66	355	1,005	2,287	190	190	160
SOUTH KOREA	7	47	127	160	88	91	91	2
LITHUANIA	17	-	-	-	-	66	-	249
SPAIN		-	-	-	-	20	20	-
VIETNAM	-	-	-	-	-	11	11	-
FRANCE	-	43	536	386	42	7	2	2
Other	104	374	427	28	56	1	2	0
INTRA EU-15	1,136	1,293	1,242	1,826	4,224	2,325	1,477	1,288
NMS	3,803	2,025	249	6	-	486	38	1,924
EXTRA EU-25	117,088	151,178	135,812	124,515	132,643	120,787	59,692	72,569
WORLD	122,027	154,511	137,303	126,347	136,866	123,598	61,207	75,781

Source: FAS/Berlin based on data from German Federal Office of Statistics, Wiesbaden

Exports

In 2005, German seafood exports decreased by 14 percent in volume but only three percent in value compared to the previous year. Exports reached 335,315 MT, valued at U.S.$ 1.18 billion (955 million Euro), including U.S.$ 1.1 billion (866 million Euro) to other EU countries and U.S. $ 109 million (88 million Euro) to third countries. Major export destinations within the EU were France, the Netherlands, Austria, Italy, and the U.K. Switzerland, Russia, and Nigeria were major non-EU destinations. Exports to the United States were marginal and are expected to remain at a low level. In CY 2005 they reached 815 MT, valued at U.S. $ 4.87 million. This translates into 0.2 and 0.4 percent of total German seafood exports, by volume and value, respectively.

By value, the top three seafood products exported from Germany were frozen fish fillets covered with batter or breadcrumbs, smoked salmon, and frozen Alaska Pollock fillets. The majority of German exports to the U.S. consisted of herring (57 percent by value). With a 20 percent share (by value), caviar is another important German export item to the U.S.

Marketing

German Activities

Direct sales promotions and other marketing campaigns aimed at increasing sales are entirely the responsibility of individual companies.

Generic fish promotions are carried out by the Fish Information Center (Fisch-Informationszentrum, FIZ, www.fischinfo.de) in Hamburg. It was founded in 1997 and is part of the Federal Association of the German Fish Industry and the Fish Wholesalers (Bundesverband der deutschen Fischindustrie und des Fischgrosshandels e.V.). It is open to private industry and associations and is funded through membership contributions.

The FIZ does not take part in or fund sales promotion events, instead it focuses on public relations campaigns and on initiatives to create a positive image for fish and fish products and fishing practices in Germany. FIZ addresses questions relating to quality and health aspects, animal welfare and fish harvesting practices, resource protection, and the impact of fishing on the environment and on third world countries.

The FIZ is interested in joint promotion projects with foreign institutions and would be willing to conduct a joint marketing program in Germany for Alaska Pollock with U.S. fishery products organizations.

U.S. Activities

The Alaska Seafood Marketing Institute (ASMI) has an excellent program in place to promote seafood exports from Alaska and the West Coast. Activities in Germany are coordinated through the ASMI office in France. We strongly encourage all interested U.S. seafood companies to contact ASMI or similar organizations if interested in exporting to Europe. A list of cooperators is available on the FAS website:

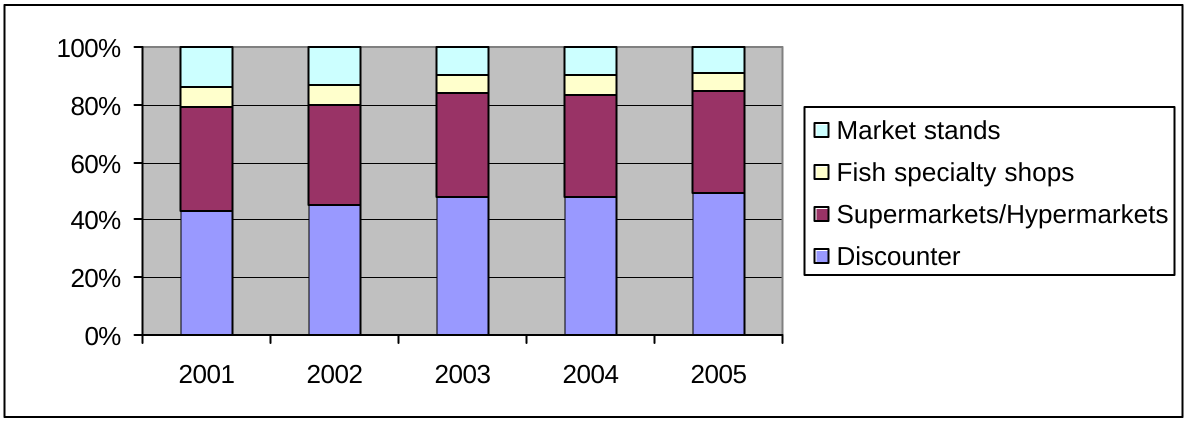
http://www.fas.usda.gov/ffpd/Fishery_Products_Presentations/U.S._Supplier_References_Fishery_Seafood.pdf

Trends in fish sales by retail type

Over the past five years, consumers increasingly purchased their seafood products at retail chains at the expense of fish specialty shops, roadside stands, and weekly market stands. On a volume basis, 85 percent of fishery products were purchased at retail chains (including super/hypermarkets and discount stores) in 2005, compared to 79 percent in 2001. Fish specialty stores accounted for 6 percent of the sales volume (7 percent in 2001) and other outlets such as farmers markets comprised 9 percent, down from 14 percent in 2001. The market share of discount stores (by volume) increased from 36 percent in 2001 to 49 percent in 2005.

Discount markets are stores with a limited number of products, usually one per category and less than 1,000 in total. They compete on price and do not offer much customer service. The most successful discount chains in Germany are Aldi and Lidl. Due to their low prices these discount stores are extremely popular in Germany, particularly because it's a very price sensitive market. However, the slow but gradual recovery of the economy as well as food scandals at the end of 2005 and in 2006, have curbed the extreme price focus of German consumers. This could lead to a slower increase in market shares for discount stores in the future.

Figure 2: Fish sales by retail types and value



Source: FAS/Berlin based on data from the Association of the German Fish Industry and Fish Wholesale

Seafood Trade Shows

The *European Seafood Exposition* (ESE) in Brussels is the most important trade show for the German fish market. ESE is an annual event and the next show will be held from April 24-27, 2007. For more information about the show and how to participate please visit: http://www.euroseafood.com

Fish International is the leading international seafood show held in Germany, and includes the following four areas: trading, technology, logistics, and point of sale. It is held bi-annually in Bremen. The next show is scheduled from February 10 –12, 2008. For more information about the show and how to participate please visit: http://www.fishinternational.com/

Section II: Statistical Tables

Table 6: German Import Trade Data for Salmon (Whole/Eviscerated)

	2003 MT	2004 MT	2005 MT	Jan/June 2005 MT	Jan/June 2006 MT
U.S.	3,369	4,387	5,468	1,389	1,346
NORWAY	35,972	47,936	56,703	25,906	26,681
DENMARK	10,810	18,213	3,952	1,988	1,905
UNITED KINGDOM	5,484	4,477	2,465	1,698	324
SWEDEN	1,576	2,454	1,162	643	354
FRANCE	143	282	582	353	173
IRELAND	1,771	1,255	572	357	539
NETHERLANDS	370	473	465	164	224
CANADA	663	796	284	110	233
SPAIN	1	8	202	6	118
CHILE	24	6	184	37	59
BELGIUM	124	517	138	64	366
CHINA	629	113	115	87	191
POLAND	26	176	62	44	1
BULGARIA	-	-	35	-	-
OMAN	-	-	27	-	-
SWITZERLAND	30	35	20	1	17
ITALY	8	15	12	9	2
CZECH REPUBLIC	-	2	10	6	-
LITHUANIA	-	-	4	-	-
ICELAND	311	13	1	-	1
Other	69	55	5	1	1
INTRA EU-15	20,289	27,695	9,552	5,283	4,005
NMS	26	178	76	50	1
EXTRA EU-25	41,065	53,341	62,840	27,531	28,530
WORLD Total	61,380	81,213	72,468	32,863	32,535

Source: FAS/Berlin based on data from German Federal Office of Statistics, Wiesbaden

Table 7: German Import Prices for Samon, Whole/Eviscerated

Prices Table

Country Germany

Commodity Salmon, Whole/Eviscerated

Prices in U.S.$ per uom MT

Year	2004	2005	% Change	2006	% Change
Jan	3690.85	4178.18	13%	4347.51	4%
Feb	3682.39	4215.23	14%	4212.14	0%
Mar	3686.23	4251.33	15%	4738.46	11%
Apr	3733.83	4206.17	13%	5300.83	26%
May	3780.21	4275.34	13%	6502.34	52%
Jun	3609.65	4486.37	24%	6728.24	50%
Jul	3517.34	4850.24	38%		
Aug	4066.79	4488.51	10%		
Sep	3705.19	4133.18	12%		
Oct	3730.97	3977.68	7%		
Nov	3589.09	4096.94	14%		
Dec	4142.71	4412.11	7%		

Source: FAS/Berlin based on data from German Federal Office of Statistics, Wiesbaden

Table 8: German Export Trade Data for Salmon (Whole/Eviscerated)

Export	2003	2004	2005	Jan/June 2005	Jan/June 2006
	MT	MT	MT	MT	MT
U.S.	1	-	-	-	-
FRANCE	7,921	12,517	9,133	7,748	9,446
SPAIN	3,088	6,301	3,556	3,137	2,688
ITALY	1,847	1,596	2,244	994	736
NETHERLANDS	3,855	4,331	1,896	1,755	1,366
BELGIUM	644	659	812	577	563
DENMARK	579	657	446	258	332
PORTUGAL	188	1,161	408	408	312
AUSTRIA	430	732	402	222	179
UNITED KINGDOM	351	174	214	143	113
POLAND	31	150	205	173	50
CZECH REPUBLIC	14	19	99	50	40
SWITZERLAND	9	36	86	55	67
HUNGARY	1	-	68	-	12
IRELAND	7	1	52	-	20
MACEDONIA	-	-	24	24	-
SLOVAKIA	3	4	23	9	9
MOROCCO	15	26	23	10	17
SERBIA/MONTENEGRO	51	49	15	15	-
other	71	31	24	7	31
INTRA EU-15	18,919	28,135	19,174	15,246	15,772
NMS	50	175	406	233	114
EXTRA EU-25	136	131	150	105	94
WORLD Total	19,106	28,444	19,730	15,585	15,981

Source: FAS/Berlin based on data from German Federal Office of Statistics, Wiesbaden

Table 9: German Import Trade Data for Groundfish fillets

	2003 MT	2004 MT	2005 MT	Jan/June 2005 MT	Jan/June 2006 MT
U.S.	119,194	194,542	182,248	103,808	79,684
CHINA	243,256	267,131	275,114	141,320	214,998
RUSSIA	133,623	94,288	81,245	57,494	64,401
DENMARK	36,821	45,155	36,545	19,554	20,372
ICELAND	44,814	27,202	35,657	18,100	16,276
ARGENTINA	20,256	23,287	24,041	14,954	12,987
NORWAY	26,967	20,243	20,094	13,768	9,120
NETHERLANDS	12,646	16,443	19,511	9,913	10,094
URUGUAY	10,398	15,405	11,410	6,652	4,958
PERU	2,906	5,696	11,374	7,423	5,811
POLAND	29,173	13,539	11,082	6,129	10,596
NEW ZEALAND	29,104	12,575	10,164	6,132	5,018
CHILE	27,533	15,137	8,952	5,902	5,375
NAMIBIA	6,124	7,643	8,292	3,222	5,379
FAROE ISLANDS	574	1,095	4,329	2,361	4,110
LATVIA	4,352	5,407	3,772	2,326	2,278
FRANCE	3,937	1,805	3,728	2,700	1,367
VIETNAM	1,241	1,858	2,556	1,288	2,236
SOUTH AFRICA	502	585	2,427	1,016	138
BELGIUM	1,736	2,375	2,250	1,402	1,125
UNITED KINGDOM	6,093	10,089	2,227	1,805	1,038
SRI LANKA	676	1,326	2,223	1,230	2,085
THAILAND	1,301	1,804	2,213	1,129	1,328
ECUADOR	249	1,684	2,096	1,103	620
INDONESIA	1,678	1,987	2,015	1,029	534
SENEGAL	1,978	1,765	1,235	632	828
LITHUANIA	5,549	5,333	1,156	195	2,339
Other	12,640	11,287	8,812	4,645	5,292
INTRA EU-15	66,701	81,148	67,904	37,316	35,982
NMS	39,080	24,287	16,278	8,655	15,586
EXTRA EU-25	679,470	701,249	692,586	391,261	438,819
WORLD Total	785,321	806,686	776,768	437,232	490,387

Source: FAS/Berlin based on data from German Federal Office of Statistics, Wiesbaden

Table 10: Import Prices for Groundfish Fillets

Prices Table

Country Germany

Commodity Groundfish, Fillets

Prices in U.S.$ per uom MT

Year	2004	2005	% Change	2006	% Change
Jan	2885.43	2873.12	0%	3011.9	5%
Feb	2800.75	2881.15	3%	3137.38	9%
Mar	2764.25	2976.54	8%	3244.55	9%
Apr	2833.11	2891.19	2%	3305.25	14%
May	2530.45	2913.68	15%	3430.74	18%
Jun	2633.21	2871.17	9%	3351.28	17%
Jul	2648.91	2900.27	9%		
Aug	2668.97	2873.36	8%		
Sep	2647.53	2974.53	12%		
Oct	2837.56	3084.27	9%		
Nov	2813.04	3079.52	9%		
Dec	3046.69	3107.89	2%		

Source: FAS/Berlin based on data from German Federal Office of Statistics, Wiesbaden

Table 11: German Export Trade Data for Groundfish fillets

	2003 MT	2004 MT	2005 MT	Jan/June 2005 MT	Jan/June 2006 MT
U.S.	69	221	86	28	100
FRANCE	49,486	52,860	38,779	26,962	25,911
NETHERLANDS	18,978	18,927	25,720	13,261	17,079
POLAND	969	14,371	22,965	15,532	10,368
UNITED KINGDOM	40,877	25,412	21,114	14,162	10,989
AUSTRIA	12,318	14,596	13,961	7,531	8,819
BELGIUM	14,593	13,914	10,387	7,114	5,812
ITALY	8,892	10,899	9,038	5,370	5,116
SWEDEN	5,739	5,334	5,434	3,281	4,115
DENMARK	6,046	6,211	5,404	3,498	13,130
SPAIN	4,587	4,340	3,695	2,124	2,913
CZECH REPUBLIC	991	2,125	2,542	1,622	987
SLOVAKIA	682	2,242	2,286	1,386	1,018
PORTUGAL	1,425	2,433	2,112	1,278	1,005
LATVIA	323	205	1,412	1,411	67
GREECE	1,688	2,297	1,340	891	742
RUSSIA	930	933	1,164	644	578
HUNGARY	608	1,007	1,094	240	359
FINLAND	1,331	2,603	1,086	345	602
LITHUANIA	69	426	830	657	728
ESTONIA	1	534	699	544	192
SWITZERLAND	678	800	672	411	896
NORWAY	506	662	563	322	332
IRELAND	180	132	332	252	206
CROATIA	64	248	233	214	52
Other	1,032	1,091	1,370	805	618
INTRA EU-15	166,322	160,113	138,581	86,183	96,564
NMS	3,728	21,145	32,055	21,537	13,916
EXTRA EU-25	3,001	3,684	4,466	2,715	2,975
WORLD Total	173,082	184,971	175,123	110,455	113,455

Source: FAS/Berlin based on data from German Federal Office of Statistics, Wiesbaden