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Global Analysis Report

Inside Germany

The Fish and Seafood Trade

September 2014

TRADE SUMMARY

Germany is a major importer of fish and seafood, relying heavily on foreign suppliers to meet internal demand. In 2013, Germany imported C$5.7 billion worth of fish and seafood products.

The main product imported was smoked Pacific, Atlantic and Danube salmon, with a total value of C$582 million. Other main products included skipjack/bonito tuna (C$428 million), frozen Alaska Pollock fillets (C$421 million), frozen shrimp and prawns (C$336 million), and fresh or chilled Atlantic and Danube salmon (C$320 million). The top suppliers of these products were Poland (16%), Norway (10%), the Netherlands (9%), China (9%), and Denmark (8%).

In 2013, Germany exported just over C$2.9 billion of fish and seafood products, mostly within the frozen fish category. Main destinations included the Netherlands (C$456 million), France (C$347 million), United Kingdom (C$315 million), Austria (C$287 million), and Denmark (C$234 million).

In addition to directives set by the European Union (E.U.), Germany has imposed its own requirements on imported fish. All imported fish products must comply with both sets of regulations with regard to ingredients, packaging, labelling, and applicable veterinary requirements*.

***Note:** *More information on exports to Germany and the E.U. can be found at www.inspection.gc.ca.*

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CANADIAN PERFORMANCE

According to Global Trade Atlas, Canada was the 28th-largest supplier of fish and seafood products to Germany in 2013 with C$38.6 million (based on German import data). German imports from Canada decreased marginally by less than one percent in value from 2012 to 2013.

Germany's top fish and seafood imports from Canada in 2013 included live lobster (C$7.2 million), canned shrimp (C$6.8 million), frozen scallops (C$4.6 million), frozen lobster (C$4.5 million), and prepared and preserved shrimp (C$4.2 million).

Among Canada's overall exports to Germany, fish and seafood was the fifth-most important food product category in value terms. In 2013, Canada's main agri-food exports to Germany were soybeans, frozen blueberries, and maple syrup (Global Trade Atlas, 2014).

BY THE NUMBERS

Top Ten Suppliers of Fish and Seafood to Germany and Top Imported Products in 2013 (Based on German Import Data)

Rank	Country	Total Import Value (C$)	Top Product Supplied	Top Product Value (C$)
	World	5,662,843,807	Pacific, Atlantic and Danube salmon, smoked	582,049,755
1	Poland	926,554,516	Pacific, Atlantic and Danube salmon, smoked	464,712,044
2	Norway	578,996,216	Atlantic and Danube Salmon, fresh or chilled	271,434,368
3	Netherlands	513,972,400	Skipjack/bonito tuna, prepared or preserved	41,385,805
4	China	489,223,837	Alaska Pollock fillets, frozen	260,726,502
5	Denmark	464,757,637	Herring, fresh or chilled	36,116,257
6	Vietnam	212,482,422	Shrimp and prawns, frozen	59,223,140
7	United States	195,047,225	Alaska Pollock fillets, frozen	105,208,123
8	Peru	152,918,551	Fish flour, meal, and pellets	125,492,530
9	United Kingdom	145,099,540	Fish fillets, frozen	22,114,595
10	Iceland	143,504,511	Fish flour, meal, and pellets	35,743,622

Source: *Global Trade Atlas, 2014*

Germany imported C$5.7 billion worth of fish and seafood from the world in 2013, a 7.7% increase over 2012. The country's top imported product was smoked Pacific, Atlantic and Danube salmon, accounting for a total of C$582 million. This was followed by skipjack/bonito tuna and frozen Alaska Pollock fillets.

In 2013, Poland was the main supplier to Germany, providing 16% of overall fish and seafood imports. Other top suppliers included Norway and the Netherlands, with market shares of 10% and 9%, respectively.

Top Ten German Fish and Seafood Imports from the World by Value, 2013

Product	Value (C$)	% Value Change 2012-2013
Pacific, Atlantic and Danube salmon, smoked	582,049,755	29%
Skipjack/bonito tuna, prepared/preserved, not minced	428,207,137	25%
Alaska Pollock fillets, frozen	420,724,761	-12%
Frozen shrimp and prawns, not elsewhere specified	335,588,407	7%
Atlantic salmon and Danube salmon, fresh or chilled	320,189,120	48%
Pacific, Atlantic and Danube salmon fillets, frozen	281,866,730	22%
Fish flour, meal, and pellets	259,619,627	-14%
Frozen fish fillets, not elsewhere specified	180,116,484	13%
Prepared/preserved herring, whole or pieces	157,523,171	1%
Prepared/preserved fish, whole or pieces, not elsewhere specified	154,195,531	27%

Source: *Global Trade Atlas, 2014*

MARKET SIZES

Please note that at the time of writing, 2012 is the latest data available for market sizes by segment.

According to Euromonitor International, the overall fish and seafood market in Germany is small, largely due to the relatively limited distribution of fresh fish. Most German supermarkets do not currently have a fresh fish department, which affects overall consumption levels. However, fish and seafood is becoming more popular with Germans, thanks in part to the increasing focus on health issues, particularly obesity and cardiac health. Another contributing factor is the promotional campaigns by “Fisch Informationszentrum,” which seek to convince Germans to consume more fish and other seafood products. These campaigns are targeted at schools to educate children on the benefits of these products, and have already seen results in higher consumption rates of fish and seafood.

According to the Federal Trade Association of the German Fishing Industry, more and more Germans are switching from meat to fish, as meat prices have risen over the past few years while fish prices have fallen. The majority of fish consumers in Germany are located in the northern states – Hamburg, Sachsen, Schleswig-Holstein, Berlin, Brandenburg and Bremen. Fish, particularly herring, features heavily in Northern German cuisine (Germanfoods.org).

Fresh

The German market for fresh fish and seafood reached a total volume of 743,100 tonnes in 2012. While this represented a small decline from the previous year, the volume of fresh fish and seafood has been increasing at a compound annual growth rate (CAGR) of 1.4% since 2007, and is expected to continue recording marginal growth with a CAGR of 0.1% between 2013 and 2017. The fish category made up the largest share of the fresh market in 2012 (83%), followed by molluscs and cephalopods (11%), and crustaceans (6%).

Crustaceans saw the largest growth over the past five years, growing at a CAGR of 4.1% from 2007 to 2012 to reach a total sales volume of 43,300 tonnes. This category is also expected to maintain the largest growth rate over the forecast period although to a lesser degree, with a CAGR of 1.8%.

German Market Sizes – Fresh Fish and Seafood
– Historic/Forecast Volume Sales in '000 Tonnes

Categories	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Fish	585.3	611	645.3	630.1	625.2	619	614.6	612.8	611.6	610.9	610.3
Crustaceans	35.4	35.9	36.2	37.4	42.0	43.3	44.3	45.4	46.3	47.0	47.5
Molluscs and cephalopods	73.7	74.6	75.3	70.8	79.5	80.9	81.9	82.8	83.6	84.2	84.8
Total fresh fish and seafood	694.4	721.5	756.8	738.3	746.7	743.1	740.9	740.9	741.4	742.1	742.7

Source: *Euromonitor International, 2013*

German Market Sizes – Fresh Fish and Seafood
– Historic/Forecast Volume Sales in kg Per Capita*

Categories	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Fish	7.1	7.4	7.9	7.7	7.6	7.6	7.5	7.5	7.5	7.5	7.5
Crustaceans	0.4	0.4	0.4	0.5	0.5	0.5	0.5	0.6	0.6	0.6	0.6
Molluscs and cephalopods	0.9	0.9	0.9	0.9	1.0	1.0	1.0	1.0	1.0	1.0	1.0
Total fresh fish and seafood	8.4	8.8	9.2	9.0	9.1	9.1	9.1	9.1	9.1	9.1	9.1

Source: *Euromonitor International, 2013*
Please note: *Volume sales for the fresh fish and seafood market include both foodservice and retail sales. Per capita consumption data is calculated using total retail volume sales and population figures. Any slight discrepancies in column totals are due to rounding.*

Fresh Fish and Seafood in Germany by Type
– Historic/Forecast Volume Growth (%)

	2007-2012 CAGR	2013-2017 CAGR
Fish	1.1	-0.2
Crustaceans	4.1	1.8
Molluscs and cephalopods	1.9	0.9
Total fresh fish and seafood	1.4	0.1

Source: *Euromonitor International, 2013*

Packaged

While fresh fish is expected to have marginal, yet positive growth over the 2013-2017 forecast period, it will continue to face competition from chilled and frozen packaged/processed food (Euromonitor, 2013). Canned and processed fish products offer consumers lower prices, while those seeking healthier options will prefer chilled or frozen fish products, despite being generally more expensive.

Over the forecast period, frozen fish is expected to continue growing at a CAGR of 1%, reaching volume sales of 159,700 tonnes in 2017. This is the only category that is expected to record an increase in volume sales over the forecast period.

Canned/preserved and chilled fish have been declining in retail volume sales by CAGRs of -3% and 1.1% respectively. These two categories are expected to continue declining over the 2013-2017 forecasted period.

German Market Sizes – Packaged Fish and Seafood – Historic/Forecast Retail Sales in '000 Tonnes

Categories	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Canned/preserved	229.7	238.8	223.8	214.4	207.3	201.4	198.5	196.2	194.5	193.6	193.8
Chilled	47.3	45.6	45.3	45.1	44.8	44.5	44.0	43.4	42.9	42.1	41.3
Frozen processed	150.0	150.7	151.9	152.5	153.5	154.7	156.1	157.6	159.2	159.8	159.7
Total packaged fish and seafood	427.0	435.1	421.0	412.0	405.6	400.6	398.6	397.2	396.6	395.5	394.8

Source: *Euromonitor International, 2013*

German Market Sizes – Packaged Fish and Seafood – Historic/Forecast Retail Sales in kg Per Capita

Categories	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Canned/preserved	2.8	2.9	2.7	2.6	2.5	2.5	2.5	2.4	2.4	2.4	2.4
Chilled	0.6	0.6	0.6	0.6	0.6	0.5	0.5	0.5	0.5	0.5	0.5
Frozen processed	1.8	1.8	1.9	1.9	1.9	1.9	1.9	2.0	2.0	2.0	2.0
Total packaged fish and seafood	5.2	5.3	5.2	5.1	5.0	4.9	4.9	4.9	4.9	4.9	4.9

Source: *Euromonitor International, 2013*
Please note: *Per capita consumption data is calculated using total retail volume sales and population figures. Any slight discrepancies in column totals are due to rounding.*

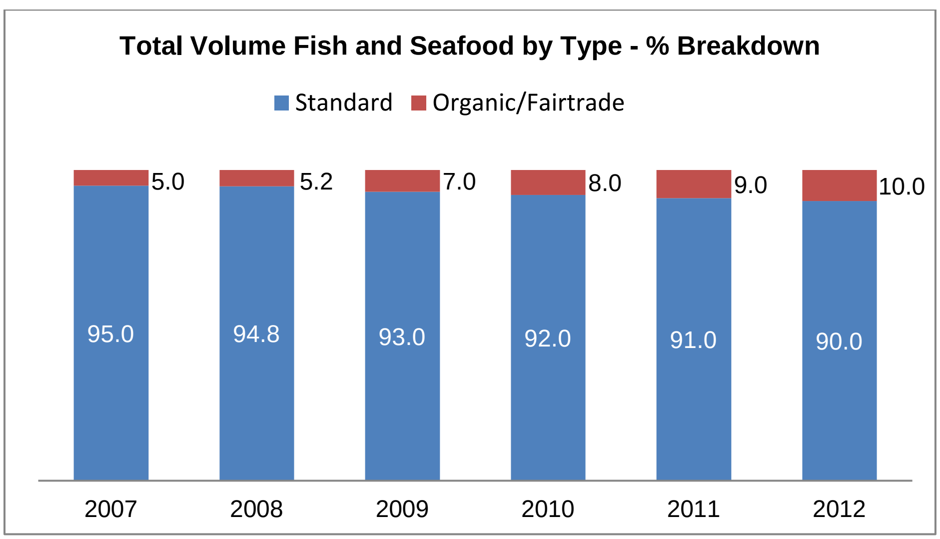
Packaged Fish and Seafood in Germany by Type
– Historic/Forecast Volume Growth (%)

	2007-2012 CAGR	2013-2017 CAGR
Canned/preserved	-2.6	-0.6
Chilled	-1.2	-1.6
Frozen processed	0.6	0.6
Total packaged fish and seafood	-1.3	-0.2

Source: *Euromonitor International, 2013*

More and more, consumers are becoming interested in the origin and breed of fish products, which also influences their buying decisions. As a result, organic and fairtrade fish and seafood products have been gaining popularity amongst German consumers. Volume sales of organic fish and seafood have increased from 5% of total fish and seafood purchases to 10% in only five years. This trend is expected to continue due to popular demand.

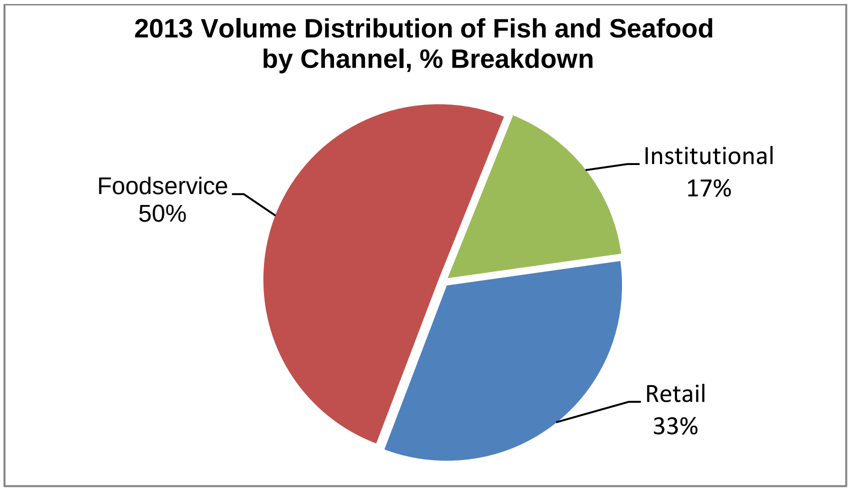
It is also worth noting that most retailers have adopted sustainability programs that are shaping fish-sourcing policies, such as the Marine Stewardship Council (MSC) certification, an unofficial "must-have" for fish products looking to be stocked by retailers. Animal welfare is also a prime consideration for consumers in Germany, and plays a key role in their decision-making with regard to purchasing fish and seafood. This can be seen in sales of live lobsters over the past few years, as animal welfare concerns have curtailed consumer demand and the resulting retail supply. Local state governments are currently working with industry to address these concerns.



Source: *Mintel, 2013*

DISTRIBUTION CHANNELS

In 2013, the main selling point of fish and seafood in Germany was the foodservice industry, representing 50% of total volume sales. However, sales through the retail channel have also been growing at a fast pace; retail currently holds a 33% market share.



Source: *Euromonitor International, 2014*

Food retailing in Germany is dominated by five major chains: Metro Group, Edeka/AVA Group, Rewe Group, Aldi Group and Schwarz Group. Usually, the import and distribution of fish products from countries outside the E.U. are handled by specialized importers.

Market Shares by Company for Processed Fish and Seafood in Germany – % Breakdown Based on Retail Volume Sales, 2012

Company Name	Market Share
Iglo Foods Group Ltd.	2.7
Nadler Vertriebs GmbH (Unternehmensgruppe Theo Müller S.e.c.s.)	1.5
Ostsee Fisch GmbH & Co. Produktions- und Vertriebs KG	1.5
B. Paulus GmbH	1.4
Homann Feinkost GmbH (Unternehmensgruppe Theo Müller S.e.c.s.)	1.4
Gottfried Friedrichs KG	0.6
Popp Feinkost GmbH	0.6
Bofrost Dienstleistungs GmbH & Co. KG	0.5
Stührk Delikatessen Import GmbH & Co. KG	0.3
Own Label	67.7
Others	21.8

Source: *Mintel, 2014*

NEW PRODUCT LAUNCHES

According to the Mintel Global New Products Database (GNPD) there were 334 new processed fish products launched in Germany between March 2013 and March 2014. Of these, 224 were launched in 2013 and 110 in 2014.

"Ethical-environmentally friendly product" led the claims category and was used on 180 of the 334 products that were launched within the year. The most popular storage type with 132 products is frozen, followed closely by chilled with 131 products.

New Launches of Processed Fish Products in Germany, March 2013 to March 2014, by Subcategories

Feature	Launch Count
Top five claims*	
Ethical - Environmentally Friendly Product	180
Premium	44
Ease of Use	37
No Additives/Preservatives	36
Ethical - Environmentally Friendly Package	26
Storage	
Frozen	132
Chilled	131
Shelf stable	71
Top five package types	
Flexible	77
Tray	71
Can	59
Carton	36
Tub	30
Top ten companies	
Lidl	35
Aldi Nord	24
Aldi Süd	21
NORMA	19
Netto Marken-Discount	18
real,-	14
Larsen Danish Seafood	9
Gottfried Friedrichs	9
Appel Feinkost	8
Iglo	8
Manufacturer Type	
Private Label	167
Branded	167

Source: *Mintel GNPD, 2014.*
** Please note that the totals for the count and percentage of products launched by claim will add to more than 334 (100%), as products can use multiple claims.*

New Product Examples

Ticino Style Gourmet Winter Cod Fillet

Company: Lidl
Brand: Deluxe
Date published: February 2014
Price: US$3.07
Package: Tray
Size: 380g

Description: Deluxe Winterkabeljau-Schlemmerfilet Tessiner Art (Ticino Style Gourmet Winter Cod Fillet) is made from Norwegian winter cod. This MSC-certified product has a spicy tomato cheese topping and is nearly bone free. This premium product retails in a 380g pack including a tin tray for the oven.

Claims: Ethical-environmentally friendly package, premium

Smoked Salmon
Company: Aldi Nord
Brand: Rookus
Date published: May 2013
Price: US$3.72
Package: Tray
Size: 200g

Description: Rookhus Räucherlachs (Smoked Salmon) has been relaunched under a new brand name. This premium quality product was previously available under the Delicato brand and consists of fresh Scandinavian smoked salmon, which has been sliced and salted in the traditional style. It retails in a 200g pack.

Claims: Premium

Miller's Style Alaska Pollack Fillet Portions

Company: real,-
Brand: real,- Quality
Date published: May 2013
Price: US$5.58
Package: Flexible
Size: 800g

Description: Real,- Quality Alaska-Seelachs Portionsfilet Müllerin Art (Miller's Style Alaska Pollack Fillet Portions) are made with fish from MSC certified fisheries and refined with parsley. This bone-free product is cut from blocks, has a light flour coating and retails in an 800g pack.

Claims: Ethical - environmentally friendly product

King Prawns
Company: Aldi Nord
Brand: Gourmet Fruits De Mer
Date published: March 2014
Price: US$4.67
Package: Flexible
Size: 250g

Description: Gourmet Fruits De Mer Riesengarnelenschwänze (King Prawns) has been repackaged and is now available in a newly designed 250g pack. These ready-to-cook prawns are raw, peeled and can be individually defrosted.

Claims: Ease of Use

TOP TEN FISH AND SEAFOOD SUPPLIERS TO GERMANY IN 2013

All of the figures listed below are in Canadian dollars.

1. Imports from Poland		**2 Imports from Norway**	
Smoked Pacific, Atlantic and Danube salmon	$464.7M	Atlantic and Danube Salmon, fresh or chilled	$271.4M
Prepared/preserved herring, whole or pieces	$102.7M	Dried cod, whether or not salted	$69.2M
Fish fillets dried, not smoked	$85.4M	Frozen salmon fillets, Pacific, Atlantic and Danube	$50.4M
Fish, prepared or preserved, whole or pieces	$50.3M	Fresh salmon fillets, Pacific, Atlantic and Danube	$38.9M
Trout fillets, smoked	$45.9M	Frozen fish meat, except steaks and fillets	$22.8M
3. Imports from the Netherlands		**4. Imports from China**	
Skipjack/bonito tuna, prepared or preserved	$41.4M	Alaska Pollock fillets, frozen	$260.7M
Fish, prepared or preserved, whole or pieces	$33.0M	Frozen salmon fillets, Pacific, Atlantic and Danube	$72.7M
Shrimp and prawns, frozen	$27.9M	Cod fillets, frozen	$55.3M
Flat fish fillets, frozen	$21.3M	Fish fillets, frozen	$10.9M
Shrimp and prawns, prepared or preserved	$17.8M	Shrimp and prawns, frozen	$8.5M
5. Imports from Denmark		**6. Imports from Vietnam**	
Herring, fresh or chilled	$36.1M	Shrimp and prawns, frozen	$59.2M
Frozen salmon fillets, Pacific, Atlantic and Danube	$30.7M	Catfish fillets, frozen	$42.6M
Atlantic and Danube Salmon, fresh or chilled	$30.4M	Skipjack/bonito tuna, prepared or preserved	$38.5M
Fish flour, meal, and pellets	$26.0M	Shrimp and prawns, frozen	$20.4M
Fish, prepared or preserved, whole or pieces	$25.5M	Shrimp and prawns, prepared or preserved	$11.7M
7. Imports from the United States		**8. Imports from Peru**	
Alaska Pollock fillets, frozen	$105.2M	Fish flour, meal and pellets	$125.5M
Sockeye salmon, except fillets, frozen	$23.5M	Hake fillets, frozen	$10.0M
Caviar substitutes prepared from fish eggs	$18.5M	Skipjack/bonito tuna, prepared or preserved	$9.0M
Pacific salmon, frozen	$11.3M	Sardines, prepared or preserved	$4.2M
Cod, frozen	$6.6M	Cuttle fish and squid, prepared or preserved	$1.4M
9. Imports from the United Kingdom		**10. Imports from Iceland**	
Fish fillets, frozen	$22.1M	Fish flour, meal and pellets	$35.7M
Shrimp and prawns, frozen	$19.4M	Coalfish fillets, frozen	$21.5M
Atlantic and Danube salmon, fresh or chilled	$11.1M	Fish fillets, frozen	$15.9M
Smoked Pacific, Atlantic and Danube salmon	$9.6M	Fish fillets, fresh or chilled	$12.7M
Fish, prepared or preserved, whole or pieces	$7.0M	Fish, fresh or chilled	$9.7M

***Source**: Global Trade Atlas, 2014*

RESOURCES

Euromonitor International (2014).

World Bank (2014).

Global Trade Atlas (2014).

Mintel (2014).

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