USDA Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Template Version 2.09

Required Report - public distribution

Date: 9/30/2005

GAIN Report Number: GM5036

Germany

Fishery Products

Annual

2005

Approved by:
William W. Westman
U.S. Embassy, Berlin

Prepared by:
Sabine M Lieberz

Report Highlights:
The total volume of fish and fishery products produced in Germany amounted to 474,428 MT in 2004, valued at U.S.$ 1.91 billion (1.54 billion Euro.) This is an increase of 7.9 percent in volume but only 0.6 percent in value compared to 2003. Best prospects for U.S. fish products are for Alaska pollock, salmon, caviar substitutes, and lobster. In 2004, the U.S. increased fish and fish products exports to Germany by 61 percent in volume to 65,565 MT, and by 49 percent in value to U.S.$ 155 million.

Includes PSD Changes: Yes
Includes Trade Matrix: Yes
Annual Report
Berlin [GM1]
[GM]

Table of Contents

Executive Summary

Germany is the fourth largest fish processor in the EU-15, after the U.K., France, and Spain. However, only 25 percent of the raw fish is sourced domestically.

The production value of fish and fishery products at the factory level increased by 0.6 percent to U.S.$ 1.91 billion (1.54 billion Euro) in CY 2004, while production volume increased by 7.9 percent compared to CY 2003 and amounted to 474,428 MT (product weight).

Based on information from industry contacts, per capita consumption increased to 14.5 kg in CY 2004, from 14.3 kg in CY 2003[1].

Total imports of fish and fishery products into Germany in CY 2004 amounted to 774,095 MT (product weight) valued at U.S. $ 2.63 billion (Euro 2.12 billion). Of these imports, 40 percent originated from other EU member states, while the remaining 60 percent came from countries outside the EU.

The U.S. supplied 65,565 MT (product weight) of fish and fish products in CY 2004 at a value of US$ 155 million (Euro 124 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 live lobsters were the most successful U.S. fish products on the German market in 2004.

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	2095	other	

[1] Official figures show per capita consumption at 13.5 kg only. However this is a reflection of statistical changes associated with EU enlargement. For better comparison with previous years FAS Berlin decided to use the industry assessment.

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

2001:	US$1 = Euro 1.1165
2002:	US$1 = Euro 1.0575
2003:	US$1 = Euro 0.8840
2004:	US$1 = Euro 0.8051

Further exchange rates (as of September 23, 2005, *Handelsblatt*) are for:

U.S. dollar/ Euro	US$1 = Euro 0.8231
Euro/U.S. dollar	Euro 1 = U.S. dollar 1.2149

Abbreviations:

CY = calendar year
HS = harmonized system of tariff codes
Kg = kilogram (1 kg = 2.2 pounds)
MT = metric ton (1 MT = 1000 kg = 2205 pounds)
MY = marketing year
NMS = New EU Member States, i.e. Cyprus, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Slovakia, Slovenia
n.a. = not available
PSD = production, supply, and demand balance sheet
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 288,000 MT (catch weight) in CY 2004, this is an decrease of 13,000 MT or four percent compared to CY 2003. Landings in domestic ports totaled 125,000 MT, versus 108,400 MT in 2003. Catch of salmon amounted to 47.1 MT in 2004, compared to 34.6 MT in 2003, and 41.3 MT in 2002.

The major fishing regions for the German fleet are the North Sea (about 53 percent), followed by the Baltic Sea (25 Percent), and North West EU Waters (19 percent.)

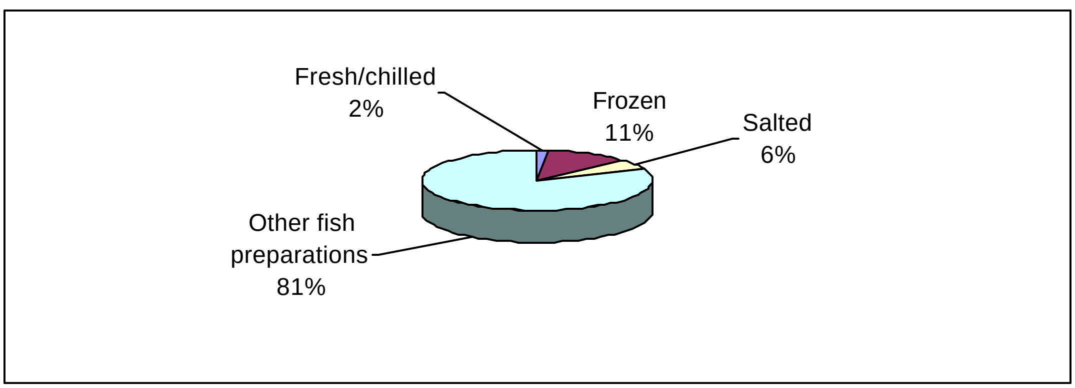
On January 1, 2004 the German ocean fishing fleet consisted of 2,214 ships, 12 deep sea fishing vessels plus 2,269 cutter and coastal fisheries vessels. Total tonnage amounted to 66,008 gross register tons, engine power totaled 160,278 kW. That is a reduction of 35 ships, 3,221 gross registered tons and 3,584 kW compared to the previous year. In CY 2004 a total of 9,004 workers were employed by 88 fishing and fish processing companies, 245 workers less than in CY 2003. (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[2] exist, but their production is marginal. In 2003 (latest available data) total production in German aquaculture amounted to 60,418 MT. This includes 23,256 MT of trout, 16,221 of carp, and 509 MT of various species from closed systems. Additional 16,966 MT were caught by anglers and 3,466 MT by lake fisheries.

Germany is the fourth largest fish processor in the EU-15, after the U.K., France, and Spain. Production value of fish and fishery products at the factory level increased by 0.6 percent to U.S.$ 1.91 billion (1.54 billion Euro) in CY 2004, while production volume increased by 7.9 percent compared to CY 2003 and amounted to 474,428 MT (product weight). The reduced average per unit price is a reflection of strong competition in the German market and the extreme price consciousness of German consumers.

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 share of the different categories is illustrated in figure 1, details are shown in table 1.

Figure 1: Production share of different product categories in 2004



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

[2] These species include eel, European catfish, Koi-carp, sturgeon, turbot, and bass.

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

	MT		Euro 1,000		US $ 1,000	
Product	2003	2004	2003	2004	2003	2004
Fresh or chilled	6,247	7,855	37,672	32,262	42,615	46,792
Frozen						
- Saltwaterfish	3,599	6,102	15,853	17,399	17,933	19,691
- Freshwater	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
- Filets	34,707	44,103	129,504	151,984	146,498	160,855
- Fish meat	2,361	1,854	11,602	8,246	13,124	14,411
Subtotal frozen	40,667	52,059	156,959	177,629	177,555	194,956
Salted						
- Smoked Salmon	18,628	17,794	186,307	165,949	210,755	231,409
- Smoked Herring	911	1,355	3,546	6,436	4,011	4,404
- Oth smoked Fish	8,593	7,044	69,116	61,396	78,186	85,848
Subtotal salted	28,132	26,193	258,969	233,781	292,951	321,661
Other fish preparations						
- Salmon	14,216	11,905	63,443	47,196	71,768	78,801
- Herring	78,354	90,684	239,453	249,260	270,874	297,420
- Sardines, sprat	607	578	n.a.			
- Mackerels	1,232	1,165	5,716	5,395	6,466	7,100
- Baked filets/sticks	136,725	156,303	336,741	357,080	380,929	418,260
- Other fish	28,887	26,995	86,285	75,391	97,607	107,173
- Fish salad	37,318	32,852	124,555	119,625	140,899	154,707
- Otherwise prepared	37,947	39,943	117,114	117,352	132,482	145,465
- Caviar substitutes	802	1,456	17,224	26,885	19,484	21,394
- Frozen crayfish	401	446	5,063	5,747	5,727	6,289
- Crayfish preparations	3,629	3,938	39,119	38,949	44,252	48,589
- Preserved Crayfish	2,704	2,462	18,970	18,894	21,459	23,562
Subtotal preparations	342,822	368,727	1,053,683	1,061,774	1,191,949	1,308,760
Total Production	439,637	474,428	1,531,401	1,540,497	1,732,354	1,902,125

n.a. = not published because of limited number of companies involved
* = including unpublished values and volumes
exchange rate: 2003: 1 Euro = U.S.$ 1.1312 / 2004: 1 Euro = U.S.$ 1.2421
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 of the market supply of groundfish fillets are produced from fresh fish. Most groundfish fillets produced in Germany are manufactured from imported fillets and further processed into smaller pieces or convenience foods and repackaged. To avoid double counting, "production" in the PSD for groundfish fillets only reflects production from fresh fish.

Consumption
Total human consumption of fishery products added up to 1.540 million MT in CY 2004, up 0.6 percent compared to the previous year (1.531 million MT). Based on information from industry contacts, per capita consumption increased to 14.5 kg[3] in CY 2004, from 14.3 kg in CY 2003. For 2005, a further increase of about 0.3 kg is expected, as consumers associate fish products with a modern healthy diet.

German consumers' favorite fish include Alaska pollock, herring and tuna followed by Atlantic and Pacific salmon (see table 2).

Table 2: Favorite Fish Varieties in Germany, as a Percentage

	2000	2001	2002	2003	2004 p
Total Seafood Use	100	100	100	100	100
Thereof Saltwater Fish (incl Herring)	78.5	75.6	75.1	74.1	72.7
Sweet Water Fish	11.2	15.5	15.8	17.1	18.3
Crayfish, Mollusks	10.3	8.9	8.7	8.8	9.0

Type of Fish			2002 r	2003 r	2004 p
Alaska/Pacific Pollack			25.2	22.3	24.7
Herring			16.0	18.8	15.0
Tuna			12.2	13.3	12.6
Salmon			8.1	9.8	10.3
Redfish/Perch			5.0	5.6	5.8
Trout			4.0	3.6	4.0
Hake			4.4	2.5	3.8
Coalfish			4.4	4.0	3.4
Cod			2.9	2.9	2.5
Mackerel			2.1	1.5	1.8
Carp			1.5	1.4	1.4
Plaice			1.1	1.1	1.1
New Zealand Hoki			1.5	1.6	0.8
Sardines/Pilchards			0.9	0.7	0.8
Other			10.7	10.9	12.0

Source: Fish Information Center: *Daten und Fakten 2005*
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.

[3] The official German Government figure for per capita consumption, in contrast, shows a decrease of 0.8 kg to 13.5 kg in CY 2004. 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.

The importance of convenience products is increasing in the fish industry, as in other parts of the food sector. The share of single households is increasing, more women are working, and more people are eating their main meal (lunch) away from home. In CY 2004, frozen fish products held the largest market share (33 percent), followed by canned fish preparations (30 percent). Fresh fish decreased to nine percent. Crayfish and mollusk accounted for 12 percent, smoked fish for six percent, and fish salads for three percent (see table 3).

Table 3: Fish Consumption by Product Group, in Percent

	1997	1998	1999	2000	2001	2002	2003 r	2004 p
Frozen Fish	21	26	25	25	31	34	32	33
Preservations and Marinades	31	29	29	30	26	29	30	30
- Herring	21	18	17	16	15	16	17	18
- Thuna	7	8	10	11	9	11	12	11
- Sardines	2	2	1	2	1	2	1	1
Fresh Fish	14	13	14	14	12	10	10	9
Crayfish and Mollusks	14	14	15	13	13	12	11	12
Smoked Fish	5	3	5	7	7	6	6	6
Fish Salads	4	5	4	4	4	3	4	3
Other Fish Products	11	10	8	7	7	7	7	7

Trade

Total Imports

Total imports of fish and fishery products into Germany in CY 2004 amounted to 774,095 MT (product weight) valued at U.S. $ 2.63 billion (Euro 2.12 billion). Of this, roughly 40 percent originated from other EU countries[4] (281,293 MT at U.S.$ 1.05 billion or Euro 842 million). Imports from third countries accounted for about 60 percent of total imports (492,802 MT at U.S.$ 1.59 billion or Euro 1.28 billion). In terms of value, Denmark was the most important EU supplier of fishery products at U.S. $ 375 million (Euro 302 million), Norway was Germany's biggest non-EU supplier at U.S. $ 280 million (Euro 225 million).

In 2004, German imports from the United States increased by 61 percent on a volume basis but only 49 percent in value. The discrepancy between the import volume and value development is a result of a reduced average unit price and a reflection of the extreme price consciousness of the German market. Price is the main factor when retailers compete for consumers. As a result, they actively seek the lowest cost suppliers.

The U.S. supplied 65,565 MT (product weight) of fish and fish products in CY 2004 at a value of approximately US$ 155 million (Euro 124 million). This amounts to eight percent of the German import market by volume or six percent by value. In CY 2003 only five percent or 40,764 MT of German imports had originated in the U.S. The largest absolute increase of approximately 21,500 MT or U.S. $ 38 million was achieved by Alaska pollock, a result of less competition from Russia. Hake shipments rebounded to previous levels and increased by 2,000 MT and U.S.$ 3 million. The largest relative increase by value was recorded for scallops (630 percent increase) and hake (133 percent increase.)

[4] For this paragraph, NMS are counted as non-EU supplier from January through April and as EU supplier from May through September, 2005.

In the first half year of 2005, U.S. exports to Germany remained fairly stable in total. However, viewed by product segment there are interesting developments. Exports of Alaska pollock decreased, while shipments of hake and Pacific salmon further increased. The most notable change is the increase of frozen cod shipments (HS code 0303 60 90.) In the first half year of 2005, 1,437 MT worth U.S. $ 4.2 million were imported, while no imports at all occurred during the same period in 2004. This development might be a result of lower availability of cod from the Baltic Sea.

Frozen Alaska-pollock fillets, frozen Pacific salmon, caviar substitutes, frozen hake, and live lobsters are the most successful U.S. fish products on the German market.

Table 4a: German imports of fish and fishery products from the United States by calendar year and product

		2003		2004	
Product	HS Code	MT	1000-$	MT	1000-$
Total frozen Alaska Pollack		**34,016**	**78,526**	**55,590**	**116,584**
Frozen Pacific pollack fillet	0304 20 850	31,461	75,219	51,173	111,029
Frozen meat of Alaska Pollack	0304 90 610	2,555	3,307	4,417	5,555
Total frozen Pacific salmon		**3,142**	**7,273**	**3,974**	**12,544**
Sockeye salmon (red salmon),	0303 11 000	230	716	326	1,881
Other frozen Pacific salmon	0303 19 000	2,672	5,477	3,486	9,996
Frozen Pacific salmon fillets	0304 20 130	240	1,080	162	667
Caviar substitutes	**1604 30 900**	**386**	**5,813**	**489**	**7,187**
Total frozen hake		**1,441**	**2,316**	**3,494**	**5,387**
Frozen hake fillets	0304 20 560	154	250	19	44
Other frozen hake fillets	0304 20 580	1,227	2,012	2,503	4,369
Frozen meat of hake	0304 90 470	60	54	60	54
Frozen meat of hake	0304 90 480	0	0	912	920
Live lobsters, not frozen	**0306 22 100**	**225**	**3,379**	**342**	**5,338**
Frozen monkfish fillets	**0304 20 830**	**148**	**1,066**	**162**	**1,209**
Total scallops		**15**	**152**	**78**	**1110**
Scallops live/fresh	0307 21 000	2	12	45	737
Other scallops	0307 29 900	13	140	33	373
Frozen meat of other saltwater fish	**0304 90 970**	**266**	**1,175**	**146**	**949**
Preserved Salmon	**1604 11 000**	**95**	**881**	**103**	**884**
Total frozen dogfish		**137**	**358**	**173**	**638**
Frozen dogfish 'squalus acant	0303 75 200	122	281	96	279
Frozen dogfish fillets 'squal	0304 20 610	15	77	77	359
Frozen mackarel	**0303 74 300**	**249**	**208**	**408**	**304**
Shrimps in packagings =<2 kg	**1605 20 910**	**18**	**174**	**42**	**298**
Oth.freshwater fish fillets,	**0304 20 190**	**39**	**253**	**37**	**230**
Other frozen fish fillets	**1604 19 910**	**218**	**256**	**178**	**224**
Frozen crabs 'paralith.camcha	**0306 14 100**	**4**	**129**	**6**	**167**
Other molluscs	**0307 91 000**	**12**	**232**	**6**	**144**
Surimi preparations	**1604 20 050**	**42**	**124**	**28**	**76**
Frozen cod	**0303 60 900**	**0**	**0**	**23**	**34**
other		313	1,382	354	2,281
Grand-total		**40,764**	**103,685**	**65,565**	**154,817**

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

Table 4b: German imports of fish and fishery products from the United States by year and product (January through June)

Product	HS Code	January/June 2004 MT	January/June 2004 1000-$	January/June 2005 MT	January/June 2005 1000-$
Total frozen Alaska Pollack		**28,022**	**57,674**	**24,820**	**53,808**
Frozen Pacific pollack fillet	0304 20 850	25,955	55,097	23,505	52,115
Frozen meat of Alaska Pollack	0304 90 610	2,067	2,577	1,315	1,693
Total frozen Pacific salmon		**1,099**	**2,789**	**1,276**	**4,794**
Sockeye salmon (red salmon),	0303 11 000	46	250	135	809
Other frozen Pacific salmon	0303 19 000	985	2,291	1,073	3,715
Frozen Pacific salmon fillets	0304 20 130	68	248	68	270
Caviar substitutes	**1604 30 900**	**188**	**2,632**	**217**	**3,297**
Total frozen hake		**675**	**1,006**	**2,794**	**4,225**
Frozen hake fillets	0304 20 560	19	44	0	0
Other frozen hake fillets	0304 20 580	493	815	1,847	3,176
Frozen meat of hake	0304 90 470	0	0	0	0
Frozen meat of hake	0304 90 480	163	147	947	1,049
Live lobsters, not frozen	**0306 22 100**	**131**	**1,996**	**87**	**1,540**
Frozen monkfish fillets	**0304 20 830**	**82**	**617**	**50**	**493**
Total scallops		**33**	**430**	**31**	**604**
Scallops live/fresh	0307 21 000	15	228	25	501
Other scallops	0307 29 900	18	202	6	103
Frozen meat of other saltwater fish	**0304 90 970**	**111**	**631**	**44**	**511**
Preserved Salmon	**1604 11 000**	**72**	**776**	**232**	**1,635**
Total frozen dogfish		**33**	**94**	**34**	**106**
Frozen dogfish 'squalus acant	0303 75 200	33	94	34	106
Frozen dogfish fillets 'squal	0304 20 610	0	0	0	0
Frozen mackarel	**0303 74 300**	**408**	**304**	**204**	**347**
Shrimps in packagings =<2 kg	**1605 20 910**	**19**	**175**	**0**	**0**
Oth.freshwater fish fillets,	**0304 20 190**	**13**	**87**	**70**	**405**
Other frozen fish fillets	**1604 19 910**	**178**	**224**	**0**	**0**
Frozen crabs 'paralith.camcha	**0306 14 100**	**2**	**67**	**1**	**43**
Other molluscs	**0307 91 000**	**4**	**88**	**1**	**23**
Surimi preparations	**1604 20 050**	**16**	**43**	**18**	**44**
Frozen cod	**0303 60 900**	**0**	**0**	**1,437**	**4,236**
other		101	784	1,587	5,457
Grand-total		**31,172**	**70,189**	**31,441**	**76,831**

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

Salmon (Whole/Eviscerated) Imports

Traditionally, Norway is by far the main supplier of salmon to the German market followed by Denmark, the U.K., and the United States with market shares of 62, 19, 7, and 6 percent, respectively (based on live weight for whole or eviscerated salmon in CY 2004.) Total imports of this category amounted to 65,268 MT in 2004, up six percent from the previous year. Imports from the United States amounted to 4,385 MT, up 30 percent from the previous year (3,369 MT). In the first half year of 2005 total salmon imports increased by 2.7 percent compared to the same period in 2004. However, there has be a substantial shift in origins, with Norway gaining import share at the expense of Denmark and the U.K. 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 five percent in 2004, compared to the previous year and amounted to 749,085 MT. China was the number one supplier to the German market with a market share of 35 percent followed by the U.S. (26 percent), and Russia (13 percent.)

Alaska pollock is the single most important groundfish species that the U.S. exports to Germany and the one with the highest export potential.

In 2002, for the first time, the U.S. managed to become the most important supplier of groundfish fillets (mainly Alaska-pollock) to the German market and broke the traditional predominance of Russia and China in this market. The U.S. market share exploded from 0.6 percent in 2000 to 11 percent in 2001 and 23 percent in 2002. The big increase in 2002 was largely a result of import restrictions for animal products originating in China (see section on total imports). These restrictions were lifted later in 2002, which resulted in a resumption of 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 by 30 percent in volume. German industry sources cite problems with the quota management and overfishing as reason for the decline in Russian exports to Germany.

In the first half of 2005, U.S. Alaska pollock exports to Germany decreased by 11 percent in volume and by seven percent in value compared to the same period a year ago. This reduction is in line with reduced German Alaska Pollock imports from all origins due a 10 percent increase in average import price for this product. Industry sources cite higher demand from South-East Asia for surimi production as one of the reason for the overall price increase. Also, reportedly, with the completion of the Marine Stewardship Council[5] certification for Alaska Pollock, U.S. exporters are demanding a higher price for their product. Nevertheless U.S. product is popular as German importers value sustainable sources and stable supply. The U.S. market share by volume rose to 38 percent, while the Chinese market share dropped slightly to 42 percent, and the Russian market share remained stable at 17 percent.

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

Exports

German exports of fish and fish products in CY 2004 increased in volume by eight percent but decreased in value by 3.5 percent compared to the previous year. Exports reached 370,508 MT, valued at U.S.$ 1.14 billion (Euro 919 million), including U.S.$ 1 billion (Euro 820 million) to other EU countries and U.S. $ 124 million (Euro 100 million) to third countries. Major export destinations within the EU were France, the Netherlands, Austria, Italy, and the U.K. Switzerland, Poland (January through May), Russia, and Nigeria were major non-EU destinations. Exports to the United States are marginal. In CY 2004 they reached 709 MT, valued at U.S. $ 3.754 million. The majority of German exports to the U.S. consisted of herring.

Policy

In August 2004, the EU introduced provisional safeguard measures against imports of farmed Atlantic salmon. These measures consisted of tariff quotas for imports from Norway, the Faeroes, and other origins, excluding developing countries. They were replaced by a provisional minimum import price in February 2005. On April 22, 2005, the measures were revoked[6]. Instead, a provisional ad-valorem anti-dumping duty was imposed on imports from Norway[7]. On June 30, 2005, the ad-valorem duty was again changed to the minimum entry price[8].

The driving force behind the imposition of safeguard measures in the EU were the U.K. and Ireland, as the major producers. Germany, on the other hand is a big consumer and processor of farmed salmon and had different interests. The German processing industry feels that interests of member states other than the two mentioned above were not sufficiently included in the negotiations. However, they prefer the minimum entry price over the ad-valorem duty.

Marketing

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 like 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.

[6] Regulation 627/2005: http://europa.eu.int/eur-lex/lex/LexUriServ/LexUriServ.do?uri=CELEX:32005R0627:EN:HTML

[7] Regulation 628/2005: http://europa.eu.int/eur-lex/lex/LexUriServ/LexUriServ.do?uri=CELEX:32005R0628:EN:HTML

[8] Regulation 1010/2005: http://europa.eu.int/eur-lex/lex/LexUriServ/LexUriServ.do?uri=CELEX:32005R1010:EN:HTML

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

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 May 9-11, 2006. In 2005, about 22,000 trade visitors attended the show. 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 9 –12, 2006. For more information about the show and how to participate please visit: http://www.fishinternational.com/

Section II: Statistical Tables

Table 5: PSD and Import Price Table for Salmon, Whole/Eviscerated (in MT, U.S. $)

PSD Table

Country Germany
Commodity Salmon, Whole/Eviscerated (MT)

	2004	Revised	2005	Estimate	2006	Forecast	UOM
	USDA Official [	Estimate[NA	Official [	Estimate[NA	Official [	Estimate[New]	
Market Year Begin		01/2004		01/2004		01/2004	MM/YYYY
Beginning Stocks	0	0	0	0	0	0	(MT)
Total Production	0	47	0	45	0	45	(MT)
Intra-EC Imports	0	19559	0	11000	0	10000	(MT)
Other Imports	0	45709	0	55000	0	57000	(MT)
TOTAL Imports	0	65268	0	66000	0	67000	(MT)
TOTAL SUPPLY	0	65315	0	66045	0	67045	(MT)
Intra-EC Exports	0	27585	0	30000	0	30000	(MT)
Other Exports	0	131	0	200	0	200	(MT)
TOTAL Exports	0	27716	0	30200	0	30200	(MT)
Domestic Consumption	0	37599	0	35845	0	36845	(MT)
Other Use/Loss	0	0	0	0	0	0	(MT)
TOTAL Utilization	0	37599	0	35845	0	36845	(MT)
Ending Stocks	0	0	0	0	0	0	(MT)
TOTAL DISTRIBUTION	0	65315	0	66045	0	67045	(MT)

Note: Intra-EC = EU-25

Source: FAS/Berlin based on data from German Ministry of Consumer Protection, Food, and Agriculture (BMVEL), Annual Report on German Fisheries 2004; Bundesanstalt fuer Landwirtschaft, Bonn; Federal Association of the German Fish Industry and Fish Wholesale, Hamburg; German Federal Office of Statistics, Wiesbaden.

Prices Table

Country Germany
Commodity Salmon, Whole/Eviscerated

Prices in U.S.$ per uom MT

Year	2003	2004	% Change	2005	% Change
Jan	3732.62	3690.85	-1%	4178.18	13%
Feb	3523.78	3682.39	5%	4215.23	14%
Mar	3629.17	3686.23	2%	4251.33	15%
Apr	3338.21	3733.83	12%	4206.17	13%
May	3777.38	3780.21	0%	4275.34	13%
Jun	3334.69	3609.65	8%	4486.37	24%
Jul	3179.14	3517.34	11%		
Aug	2794.42	4066.79	46%		
Sep	2861.6	3705.19	29%		
Oct	3504.94	3730.97	6%		
Nov	3246.64	3589.09	11%		
Dec	3516.07	4142.71	18%		

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

Table 6: German Imports of Salmon Whole/Eviscerated (in MT)

Import Trade Matrix

Country Germany

Commodity Salmon, Whole/Eviscerated

Time Period	Jan/Dec	Units:	MT
Imports for:	2003		**2004**
U.S.	3369	U.S.	4385
Others		Others	
NORWAY	35972	NORWAY	40306
DENMARK	10810	DENMARK	12281
UNITED KINGDOM	5484	UNITED KINGDOM	3847
IRELAND	1771	SWEDEN	1609
SWEDEN	1576	CANADA	795
CANADA	663	IRELAND	787
PR CHINA	629	NETHERLANDS	417
NETHERLANDS	370	FRANCE	267
ICELAND	311	POLAND	176
FRANCE	143	BELGIUM	151
Total for Others	57729		60636
Others not Listed	282		247
Grand Total	61380		65268

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

Table 7: German Exports of Salmon Whole/Eviscerated (in MT)

Export Trade Matrix

Country	Germany		
Commodity	Salmon, Whole/Eviscerated		
Time Period	Jan/Dec	Units:	MT
Exports for:	2003		**2004**
U.S.	1	U.S.	0
Others		Others	
FRANCE	7921	FRANCE	12473
NETHERLANDS	3855	SPAIN	6299
SPAIN	3088	NETHERLANDS	4270
ITALY	1847	ITALY	1596
BELGIUM	644	PORTUGAL	1161
DENMARK	579	BELGIUM	636
AUSTRIA	430	DENMARK	509
UNITED KINGDOM	351	AUSTRIA	326
PORTUGAL	188	POLAND	150
SERBIA/MONTENEGRO	51	UNITED KINGDOM	134
Total for Others	18954		27554
Others not Listed	151		1162
Grand Total	19106		28716

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

Table 8: PSD and Import Price Table for Groundfish Fillets (in MT, $)

PSD Table

Country Germany
Commodity Groundfish, Fillets (MT)

	2004	Revised	2005	Estimate	2006	Forecast	UOM
	USDA Official [	Estimate[N	DA Official [	Estimate[N	DA Official [	Estimate[New]	
Market Year Begin		01/2004		01/2004		01/2004	MM/YYYY
Beginning Stocks	0	0	0	0	0	0	(MT)
Total Production	0	6500	0	6500	0	6500	(MT)
Intra-EC Imports	0	88436	0	82000	0	83000	(MT)
Other Imports	0	660649	0	650000	0	650000	(MT)
TOTAL Imports	0	749085	0	732000	0	733000	(MT)
TOTAL SUPPLY	0	755585	0	738500	0	739500	(MT)
Intra-EC Exports	0	148115	0	169000	0	169000	(MT)
Other Exports	0	2981	0	4500	0	4500	(MT)
TOTAL Exports	0	151096	0	173500	0	173500	(MT)
Domestic Consumption	0	604489	0	565000	0	566000	(MT)
Other Use/Loss	0	0	0	0	0	0	(MT)
TOTAL Utilization	0	604489	0	565000	0	566000	(MT)
Ending Stocks	0	0	0	0	0	0	(MT)
TOTAL DISTRIBUTION	0	755585	0	738500	0	739500	(MT)

Source: FAS/Berlin based on data from German Ministry of Consumer Protection, Food, and Agriculture (BMVEL), Annual Report on German Fisheries 2004; Federal Association of the German Fish Industry and Fish Wholesale; German Federal Office of Statistics, Wiesbaden.

Prices Table

Country Germany
Commodity Groundfish, Fillets

Prices in U.S.$ per uom MT

Year	2003	2004	% Change	2005	% Change
Jan	2842.26	2885.43	2%	2873.12	0%
Feb	2940.09	2800.75	-5%	2881.15	3%
Mar	2928.54	2764.25	-6%	2976.54	8%
Apr	3030.02	2833.11	-6%	2891.19	2%
May	2995.91	2530.45	-16%	2913.68	15%
Jun	2774.77	2633.21	-5%	2871.17	9%
Jul	2679.14	2648.91	-1%		
Aug	2842.32	2668.97	-6%		
Sep	2700.54	2647.53	-2%		
Oct	2870.08	2837.56	-1%		
Nov	2805.02	2813.04	0%		
Dec	2975.39	3046.69	2%		

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

Table 9: German Imports of Groundfish Fillets (in MT)

Import Trade Matrix

Country Germany
Commodity Groundfish, Fillets

Time Period	Jan/Dec	Units:	MT
Imports for:	2003		**2004**
U.S.	119194	U.S.	194432
Others		Others	
CHINA	243256	CHINA	261238
RUSSIA	133623	RUSSIA	94041
ICELAND	44814	DENMARK	36642
DENMARK	36821	ICELAND	24872
POLAND	29173	NORWAY	19634
NEW ZEALAND	29104	URUGUAY	15385
CHILE	27533	NETHERLANDS	13909
NORWAY	26967	ARGENTINA	13674
ARGENTINA	20256	POLAND	13531
NETHERLANDS	12646	NEW ZEALAND	10297
Total for Others	604193		503223
Others not Listed	61936		51430
Grand Total	785323		749085

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

Table 10: German Exports of Groundfish Fillets (in MT)

Export Trade Matrix

Country	Germany		
Commodity	Groundfish, Fillets		
Time Period	Jan/Dec	Units:	MT
Exports for:	2003		**2004**
U.S.	69	U.S.	220
Others		Others	
FRANCE	49486	FRANCE	41784
UNITED KINGDOM	40877	UNITED KINGDOM	21792
NETHERLANDS	18978	NETHERLANDS	16685
BELGIUM	14593	BELGIUM	12780
AUSTRIA	12318	AUSTRIA	12341
ITALY	8892	ITALY	9745
DENMARK	6046	POLAND	9286
SWEDEN	5739	SWEDEN	4989
SPAIN	4587	SPAIN	3762
GREECE	1688	DENMARK	3532
Total for Others	163204		136696
Others not Listed	9808		14203
Grand Total	173081		151119

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