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Fishery Products

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Report Highlights:

Total turnover of German fish products decreased by 6.2 percent to DM 3.59 billion (US\$ 1.68 billion) in CY 2000. Per capita consumption of fish rose to 13.3 kg in CY 2000 up from 12.6 kg in 1999 and is expected to rise moderately further. 75 percent of the German fish product consumption consist of imports, about two percent of these imports originated from the United States. The US supplied about DM 72.8 million (US\$ 34.02 million) worth of fish and fish products, that is an increase of three percent compared to CY 1999.

Includes PSD changes: Yes

Includes Trade Matrix: No

Annual Report

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Table of Contents

Executive Summary	1
Production	3
Consumption	3
Trade	4
.....	4
Policy	4
Marketing	5
Statistical Section	6
Table 1: PSD for Salmon Whole/Eviscerated (in MT) and Import prices (in US\$ per MT)	6
Table 1 a: Correction of historical data for year 1999 in PSD for Salmon Whole/Eviscerated (in MT)	7
Table 2: German Import and Export of Salmon Whole/Eviscerated (in MT)	8
Table 3: PSD for Groundfish fillets (in MT) and Import prices (in US\$ per MT)	9
Table 3 a: Correction of historical data for 1997-1999 in PSD for Groundfish fillet (in MT)	10
Table 4: Import prices (in US\$ per MT) for Groundfish fillets	11
Table 5: German Import and Export of Groundfish fillets (in MT)	12
Table 6: Fishery Products Strategic Indicator Table	13
Table 7: German Production of Fish Products (in MT; DM1,000)	14
Table 8: German Import of Fish and Fish Products (in MT, DM1,000)	15
Table 9: German Import of Selected Fish Varieties from the United States (in MT, US\$ 1,000)	16
Table 10: Favorite German Fish Consumption, in Percent	17
Table 11: Fish Consumption by Product Group, in Percent	18

Executive Summary

Total turnover of German fish products decreased by 6.2 percent to DM 3.59 billion (US\$ 1.68 billion) in CY 2000 (this includes sales by the fish processing industry, wholesale fish and deep sea fishing vessels). The fish industry produced 391,253 MT of fish and fish products in 2000 (up 0.4 percent) with a product value at factory level of DM 2.81 billion (US\$ 1.31 billion). Per capita consumption of fish rose to 13.3 kg in CY 2000 up from 12.6 kg in 1999 and is expected to rise moderately further.

Germany supplies approximately 24 percent of its fish consumption. Thus, imports of fish and fish products (either raw or in the form of fish products) account for over 75 percent of total consumption. Total imports in CY 2000 amounted to DM 4.40 billion (US\$ 2.06 billion), DM 1.5 billion (US\$ 0.85 billion) from member countries of the European Union (EU) and DM 2.79 billion (US\$ 1.6 billion) from third countries.

The United States supplied about DM 72.8 million (US\$ 34.02 million) worth of fish and fish products in CY 2000, mainly frozen groundfish, frozen Pacific salmon, live lobsters, caviar substitutes and frozen fillet. This amounts to 1.68 percent of the German import market. Compared to 1999, imports from the United States rose by 3 percent in value, while at the same time dropping 34 percent in volume due to the unfavorable DM/US\$ exchange rate.

Generic fish market promotion is carried out by the Fish Information Center, Hamburg. Total available funds per year are expected to be less than DM 1 million (around US\$500,000 to US\$700,000). The center focuses on public relations campaigns and on initiatives to create a positive image for fish and fish products. It does not take part or fund sales promotion events. Direct sales promotions to increase sales are left to the individual companies.

In CY 2000, federal funds to support the fishing fleet went down to DM 21.2 million from DM 23 million in CY 1999. In CY 2000 DM 12 million were allocated for capacity adjustment aid, DM 3 million for structural aid, 5.5 million for cutter boat loans and DM 0.7 million for reduced interest rates for investments.

Note 1: Entries in the "new" -column of the PSDs and trade matrices for salmon whole/eviscerated and groundfish fillet are in catch weight. All other data are in product weight. Last's year entries in the PSD's erroneously were made in product weight, hence the large difference between the "old" and "new" column.

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

1991: US\$1 = DM 1.66;	1996: US\$1 = DM 1.50;
1992: US\$1 = DM 1.52;	1997: US\$1 = DM 1.70;
1993: US\$1 = DM 1.65;	1998: US\$1 = DM 1.76,
1994: US\$1 = DM 1.61;	1999: US\$1 = DM 1.66,
1995: US\$1 = DM 1.43;	2000: US\$1 = DM 2.12.

Further exchange rates are for: Euro /German mark: Euro 1 = DM 1.95583,
 U.S. dollar/ i US\$1 = Euro 0.9151
 U.S. \$/ DM: US\$1 = DM 2.14 (as of September 21,2001, Handelsblatt)

Production

On January 1, 2000 the German ocean fishing fleet consisted of 2,313 ships: 15 deep sea fishing vessels plus 2,298 cutter fisher boats. In CY 2000 a total of 10,630 workers were employed by 99 fish processing companies, that was 220 workers more than in CY 1999. (Note: Only companies with more than ten employees were counted) .

Total catch of the German fishing fleet amounted to 259,000 MT (catch weight) in CY 2000, a reduction of 38,000 MT or 13 percent compared to CY 1999. German raw fish imports amounted to 1.542 million tons, an increase of 49,000 tons or 3.2 percent. The major fishing region is the North Sea, about 90 percent. On dressed weight basis 72 percent (67,959 MT) of the total catch was landed in German ports.

Total sales of German fish products dropped by 6.2 percent to DM 3.59 billion in CY 2000. Domestic sales that year were DM 3.05 billion, down 5.1 percent compared to CY 1999. Exports sales dropped by 11.9 percent to DM 539.7 million. Total production of fish and fishery products in CY 2000 went up slightly by 0.4 percent to 391,253 MT (product weight), and off-factory sales increased from DM 2.76 billion to DM 2.81 billion. Major fish products sold in Germany are frozen products (fillet, fish sticks), herring, smoked fish and fish preparations, the market share of fresh fish only amounted to 14 percent in CY 2000.

Note: All German catch of groundfish goes straight into the fresh market. Groundfish fillets produced in Germany are manufactured from imported fillets and just further processed into smaller pieces or convenience foods and packaged again. Post therefore does not enter a figure in the line for production in the PSD for groundfish fillet.

Consumption

Total calculated food consumption of fish added up to 1.088 million tons in CY 2000, up seven percent from the record low of 1.017 million MT in CY 1999. Calculated per capita consumption in CY 2000 rose to 13.3 kg, compared to 12.4 kilograms in the previous year. A great deal of this increase is attributed to consumers eating fish instead of beef in the light of the BSE-crisis. This however is only a temporary trend as recent surveys show that beef consumption is gradually going up again. Nevertheless, the effects of BSE-crisis might continue to contribute to an increased fish consumption as it introduced fish into the minds and diets of consumers who had not eaten fish regularly. Another, promising incentive for increased fish consumption is the increasing health consciousness and the health benefits of fish.

German consumers' favorite fishes are Alaska salmon (coalfish), herring and tuna followed by atlantic and pacific salmon (see table 10). As in other parts of the food sector, convenience products play an important role in the fish industry too. About 30 percent of total consumption is purchased as canned fish preparations, followed by frozen fish (25 percent). Fresh fish only contributes 14 percent. Crayfish and mollusk account for 13 percent, smoked fish for seven percent (see table 11).

Trade

Total imports of fish and fishery products into Germany amounted to 752 billion tons (product weight) at a value of DM 4.404 billion in CY 2000. Out of this roughly forty percent (273,511 MT at DM 1.733 billion) originated from EU countries, whereas imports from third countries accounted for about sixty percent (478,536 MT at DM 2.670 billion). In terms of value, Norway was Germany's biggest non-EU supplier of fish with DM 653 million, followed by Russia with DM 318.2 million and the Poland with DM 237.4 million. In terms of quantity, imports from Denmark and Norway were the most significant in CY 2000, followed by those of Russia, China and the Netherlands (by product weight).

The United States supplied about DM 72.8 million (US\$ 34.02 million) worth of fish and fish products in CY 2000, mainly frozen groundfish, frozen Pacific salmon, live lobsters, caviar substitutes and frozen fillet. This amounts to 1.65 percent of the German import market. Compared to CY 1999, imports from the United States rose by three percent in value, while dropping 34 percent in volume due to the unfavorable DM/US\$ exchange rate.

Traditionally, Norway is the main supplier of salmon to the German market, way ahead of Denmark, Great Britain and the United States. The market shares based on live weight for whole or eviscerated salmon in CY 2000 were as follows: Norway 60.6 percent, Denmark 13.2 percent, Great Britain 12.6 percent and the United States 4.5 percent. After a strong increase in Norwegian salmon exports to the European Union in CY 1996 and the subsequent drastic drop of salmon import prices, the European Commission and Norway concluded an agreement which curtails salmon imports through quotas and minimum export prices between 1997 and 2002.

Groundfish filets predominantly originate from Russia and China. On a live weight basis these two countries together made up 63.8 percent of the market in CY 2000, followed by Poland (6.6 percent), Denmark (6.1 percent) and Iceland (5.5 percent). The U.S. market share dropped from 2 percent in CY 1999 to a mere 0.6 percent in CY 2000.

German exports of fish and fish products in CY 2000 decreased by 5.4 percent to DM 1.855 billion, including DM 1.654 billion to the EU and DM 201 million to third countries. Major export destinations within the EU were France, the Netherlands, Italy and Austria. Poland and Switzerland were major non-EU destinations. Exports to the United States have increased by 75 percent in volume and 53 percent in value but still remained marginal with 914 MT at a value of DM 6.4 million in CY 2000.

Policy

Since Renate Künast has been appointed the new German minister for consumer protection, food and agriculture in January 2001, consumer protection is the number one priority in all areas of agricultural policy, including the fish sector. The number two topic for the German fish industry is resource protection.

In December 1999 the EU adopted the new "common organization of the markets in fishery and aquaculture products". Its rules went into effect on January 1, 2001 except the provisions for labeling laid down in Article 4, which will only be applied from January 2002 onwards. Article 4 says that all sales to the consumers have to be labeled with the following information: (a) the commercial designation of the species; (b) the production

method (caught at sea or in inland waters or farmed); (c) the catch area. Details still have to be worked out throughout CY2001 and may differ between the EU-member states. These rules will also be applied to imported products and thus may result in additional labeling costs for U.S. exporters as well.

Overfishing is a serious environmental and economical problem. Therefore Germany subsidizes capacity reduction and modernization measures. In CY 2000, federal funds to support the fishing fleet went down to DM 21.2 million from DM 23 million in CY 1999. DM 12 million of the DM 21.2 million were allocated for capacity adjustment aid, DM 3 million for structural aid, 5.5 million for cutter boat loans and DM 0.7 million for reduced interest rates for investments.

Marketing

Generic fish marketing is carried out by the Fish Information Center (Fisch Informations Zentrum, FIZ), 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 funded through voluntary contributions of its members. Total available funds per year are expected to be less than DM 1 million (around US\$500,000 to US\$700,000).

The FIZ focuses on public relations campaigns and on initiatives to create a positive image for fish and fish products and German fishing practices in Germany, e.g., addressing questions like quality and health aspects, animal welfare and fish harvesting practices, resource protection and the impact of fishing on the environment and third world countries, especially to sustain domestic coastal and deep sea fisheries and directly related industries in federal states with fishing industries. It does not take part or fund sales promotion events. Direct sales promotions to increase sales are left to the individual companies.

As pointed out in section "consumption" fishery products received increasing consumer attention in the light of the BSE crisis as they were looking for substitutes for meat products. In order to maintain this interest, marketing activities by U.S. companies should focus on positive health aspects of fish as well as the great taste of fish. When selling to the consumer directly it should also be kept in mind, that many German consumers either do not know how to prepare fresh fish or consider it to be too much hassle and thus prefer convenience products to whole fresh fish.

Statistical Section

Table 1: PSD for Salmon Whole/Eviscerated (in MT) and Import prices (in US\$ per MT)

PSD Table						
Country	Germany					
Commodity	Salmon, Whole/Eviscerated				(MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2001		01/2002
Beginning Stocks	0	0	0	0	0	0
Total Production	40	45	40	45	0	45
Intra-EC Imports	18000	22195	18000	21000	0	21000
Other Imports	44000	51045	45000	53000	0	53000
TOTAL Imports	62000	73240	63000	74000	0	74000
TOTAL SUPPLY	62040	73285	63040	74045	0	74045
Intra-EC Exports	40000	45863	35000	29700	0	29500
Other Exports	200	752	500	800	0	1000
TOTAL Exports	40200	46615	35500	30500	0	30500
Domestic Consumption	21840	26670	27540	43545	0	43545
Other Use/Loss	0	0	0	0	0	0
TOTAL Utilization	21840	26670	27540	43545	0	43545
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	62040	73285	63040	74045	0	74045

Source: German Ministry of Food, Agriculture and Forestry, Annual Report on German Fisheries 2000; Federal Association of the German Fish Industry and Fish Wholesale, Annual Report 2001; German Federal Office of Statistics, Wiesbaden.

Please note that figures in the "old" columns erroneously were reported in product weight instead of catch weight, hence the large differences to the "new" columns

Year	1999	2000	% Change			1999	2000	% Change
Jan	3795.78	3980.79	4.87%		Jul	3581.21	4304.39	20.19%
Feb	3807.68	4247.83	11.56%		Aug	4013.78	3957.73	-1.40%
Mar	3518.64	3997.69	13.61%		Sep	3548.1	3502.15	-1.30%
Apr	3913.7	4012.83	2.53%		Oct	3789.4	3268.91	-13.74%
May	3760.25	4484.75	19.27%		Nov	3888.11	3296.6	-15.21%
Jun	3737.11	4361.42	16.71%		Dec	3656.27	3202.37	-12.41%

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

Table 1 a: Correction of historical data for year 1999 in PSD for Salmon Whole/Eviscerated (in MT)

PSD Table		
Country		
Commodity		
	1999	
	old	new
Beginning Stocks	0	0
Total Production	40	43
Intra-EC Imports	16950	22415
Other Imports	49109	57074
TOTAL Imports	66059	79489
TOTAL SUPPLY	66099	79532
Intra-EC Exports	16591	36423
Other Exports	1499	1719
TOTAL Exports	18090	38142
Domestic Consumption	48009	41390
Other Use/Loss	0	0
TOTAL Utilization	48009	41390
Ending Stocks	0	0
TOTAL DISTRIBUTION	66099	79532

Please note that figures in the "old" columns erroneously were reported in product weight instead of catch weight, hence the large differences to the "new" columns

Table 2: German Import and Export of Salmon Whole/Eviscerated (in MT)

Time period	Jan/Dec	Units:	MT
Imports for:	1999		2000
U.S.	3808	U.S.	3293
Others		Others	
Norway	50920	Norway	44411
Denmark	11461	Denmark	9661
Great Britain	7909	Great Britain	9224
Faroe Islands	1669	Faroe Islands	1950
Ireland	1051	Ireland	1229
Netherlands	878	Netherlands	825
Sweden	646	Sweden	764
Canada	552	Canada	624
France	341	Chile	376
Belgium	121	Colombia	210
Total for Others	75548		69274
Others not Listed	136		673
Grand Total	79492		73240

Time period	Jan/Dec	Units:	MT
Exports for:	1999		2000
U.S.	-	U.S.	4
Others		Others	
France	17631	France	25774
Spain	6748	Netherlands	5636
Netherlands	4019	Spain	4659
Italy	2422	Denmark	4258
Denmark	2371	Italy	2465
Poland	1600	Belgium	1911
Belgium	1495	Poland	667
Portugal	861	Portugal	477
Austria	627	Austria	464
Great Britain	158	Luxemburg	67
Total for Others	37932		46378
Others not Listed	209		233
Grand Total	38141		46615

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

Table 3: PSD for Groundfish fillets (in MT) and Import prices (in US\$ per MT)

	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2001		01/2002
Beginning Stocks	0	0	0	0	0	0
Total Production	45000	0	46000	0	0	0
Intra-EC Imports	25000	68049	25000	70000	0	70000
Other Imports	220000	638091	220000	750000	0	750000
TOTAL Imports	245000	706140	245000	820000	0	820000
TOTAL SUPPLY	290000	706140	291000	820000	0	820000
Intra-EC Exports	55000	161996	55000	204000	0	204000
Other Exports	2000	3593	2000	4000	0	4000
TOTAL Exports	57000	165589	57000	208000	0	208000
Domestic Consumption	233000	540551	234000	612000	0	612000
Other Use/Loss	0	0	0	0	0	0
TOTAL Utilization	233000	540551	234000	612000	0	612000
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	290000	706140	291000	820000	0	820000

Source: German Ministry of Food, Agriculture and Forestry, Annual Report on German Fisheries 2000; Federal Association of the German Fish Industry and Fish Wholesale, Annual Report 2001; German Federal Office of Statistics, Wiesbaden.

Note: Figures in the "old" columns erroneously were reported in product weight instead of catch weight, hence the large differences to the "new" columns

Note: All German catch of groundfish goes straight into the fresh market. Groundfish fillets produced in Germany are manufactured from imported fillets and just further processed into smaller pieces or convenience foods and packaged again. Post therefore does not enter a figure in the line for production in the PSD for groundfish fillet.

Table 3 a: Correction of historical data for 1997-1999 in PSD for Groundfish fillet (in MT)

PSD Table	- Correction of historical data -					
Country	Germany					
Commodity	Groundfish, Fillets					
	1997		1998		1999	
Beginning Stocks	0	0	0	0	0	0
Total Production	53236	0	50360	0	44700	0
Intra-EC Imports	38324	38324	32567	32567	20968	59914
Other Imports	500129	500129	661292	661292	162250	533988
TOTAL Imports	538453	538453	693859	693859	183218	593902
TOTAL SUPPLY	591689	538453	744219	693859	227918	593902
Intra-EC Exports	139602	139602	134913	134913	41222	154599
Other Exports	6412	6412	5971	5971	5157	8807
TOTAL Exports	146014	146014	140884	140884	46379	163406
Domestic Consumption	445675	392439	603335	552975	181539	430496
Other Use/Loss	0	0	0	0	0	
TOTAL Utilization	445675	392439	603335	552975	181539	430496
Ending Stocks	0	0	0	0	0	
TOTAL DISTRIBUTION	591689	538453	744219	693859	227918	593902

Source: German Ministry of Food, Agriculture and Forestry, Annual Report on German Fisheries 2000; Federal Association of the German Fish Industry and Fish Wholesale, Annual Report 2001; German Federal Office of Statistics, Wiesbaden.

Note: Figures in the "old" columns erroneously were reported in product weight instead of catch weight, hence the large differences to the "new" columns

Note: All German catch of groundfish goes straight into the fresh market. Groundfish fillets produced in Germany are manufactured from imported fillets and just further processed into smaller pieces or convenience foods and packaged again. Post therefore does not enter a figure in the line for production in the PSD for groundfish fillet.

Table 4: Import prices (in US\$ per MT) for Groundfish fillets

Prices Table			
Country	Germany		
Commodity	Groundfish, Filletts		
Prices in	U.S. \$	per uom	MT
Year	1999	2000	% Change
Jan	3079.48	2487.6	-19.22%
Feb	3401.51	2620.56	-22.96%
Mar	3044.91	2400.34	-21.17%
Apr	2843.7	2630	-7.51%
May	3110.66	2357.4	-24.22%
Jun	2779.46	2355.23	-15.26%
Jul	2898.22	2448.37	-15.52%
Aug	2934.76	2166.08	-26.19%
Sep	2669.43	2287.43	-14.31%
Oct	2741.7	2190.03	-20.12%
Nov	2633.46	2122.27	-19.41%
Dec	2634.07	2448.32	-7.05%

Table 5: German Import and Export of Groundfish fillets (in MT)

Time period	Jan/Dec	Units:	MT
Imports for:	1999		2000
U.S.	12,297	U.S.	4,325
Others		Others	
Russia	156,589	Russia	268,912
China	129,732	China	168,336
Poland	55,909	Poland	46,373
New Zealand	43,569	Denmark	43,042
Iceland	43,475	Iceland	39,155
Denmark	40,779	Norway	33,572
Norway	35,523	Peru	17,414
Chile	16,792	Netherlands	15,759
Argentina	11,960	New Zealand	15,574
Netherlands	10,933	Chile	14,325
Total for Others	545,261		662,462
Others not Listed	36,347		39,353
Grand Total	593,905		706,140

Time period	Jan/Dec	Units:	MT
Exports for:	1999		2000
U.S.	344	U.S.	6
Others		Others	
France	52,480	France	59,392
Great Britain	31,951	Great Britain	35,697
Netherlands	29,191	Netherlands	28,006
Belgium	14,167	Austria	10,343
Austria	11,266	Belgium	8,122
Denmark	4,410	Italy	4,827
Italy	3,459	Luxemburg	4,352
Poland	3,239	Denmark	4,130
Sweden	3,182	Sweden	2,826
Spain	1,931	Spain	1,674
Total for Others	155,276		159,369
Others not Listed	7,785		6,214
Grand Total	163,405		165,589

Table 6: Fishery Products Strategic Indicator Table

FISHERY PRODUCTS STRATEGIC INDICATOR TABLE					
		Previous	Current	Next	5 Year
		2000	2001	2002	Projections/
U.S. Competitive Position	Measurement *	Situation	Situation	Expectations	Expectations
U.S. Access Relative to Rest of World-Non-Tariff Measures (NTM)	Worse, equal, or better (choose one)	equal	equal	equal	equal
U.S. Access Relative to Rest of World - Tariffs	Higher, equal, or lower (choose one)	equal	equal	equal	equal
Presence of Marketing Programs (domestic and 3rd country) versus U.S. programs	More aggressive, about the same, or less aggressive (select one)	same	same	same	same
U.S. Prices Relative to Domestic and 3rd Country Prices	Higher, equal, or lower (choose one)	higher	higher	higher	higher
U.S. Market Share (3 Year. Average)	Percent	one	one	one	one
		Previous	Current	Next	5 Year
		2000	2001	2002	Projections/
Market Attractiveness	Measurement *	Situation	Situation	Expectations	Expectations
Per Capita Consumption of All Fishery Products	Kg per person	13.3	13.5	14	15
Per Capita Consumption of animal proteins (excluding fishery products)	Kg per person	88	85	84	80
Percent of population with refrigerators	Percent	99	99	99	99
Percent of fishery product sales at supermarkets	Percent	45	45	45	45
Percent of total food sales at supermarkets	Percent	60	60	60	58
Percent of animal protein sales at supermarkets (excluding fishery products)	Percent	62	62	61	60
Percent of fishery sales at HRI establishments	Percent	18	19	19	21
Percent of fishery sales at open markets	Percent	5	5	5	5

Table 7: German Production of Fish Products (in MT; DM1,000)

	MT			DM 1,000		
Product	1998	1999	2000	1998	1999	2000
Fresh chilled	12,906	12,533	11,171	128,375	119,343	110,004
Frozen						
- Seafish	4,383	3,766	1,767	22,258	18,982	13,029
- Freshwater	349	306	363	5,478	n.a.	n.a.
- Filets	32,665	30,691	34,936	206,490	198,382	216,603
- Fish meat	836	1,034	1,519	8,323	10,537	16,693
Salted						
- Smoked Salmon	5,594	8,040	15,112	143,924	161,842	331,756
- Smoked Herring	2,114	1,873	1,722	12,611	11,319	10,626
- Other smoked Fish	11,029	12,127	12,683	143,751	159,903	182,937
Other fish preparations						
- Salmon	n.a.	5,103	5,672	81,960	56,501	72,143
- Herring	66,645	66,604	67,373	387,858	387,550	382,939
- Sardines, sprat	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
- Mackrels	1,688	1,783	2,250	14,408	14,226	18,539
- Baked filets/sticks	137,022	126,271	113,488	671,532	709,611	568,463
- Other fish	51,203	43,444	43,773	281,512	279,098	260,684
- Fish salad	30,178	28,866	29,225	200,147	197,621	205,412
- Otherwise prepared	31,563	40,004	42,698	180,785	226,863	228,068
- Caviar substitutes	810	888	885	25,086	26,160	25,597
- Frozen crayfish	445	282	381	6,333	n.a.	n.a.
- Crayfish preparations	1,794	1,874	2,244	38,516	39,944	47,375
- Preserved Crayfish	4,117	4,186	3,991	64,373	62,824	51,735
Total Production	395,341	389,675	391,253	2,623,720	2,680,706	2,742,603
Source: Annual Report of the German Fish Industry, page 21						

Table 8: German Import of Fish and Fish Products (in MT, DM1,000)

	MT			DM1,000		
Product	1998	1999	2000	1998	1999	2000
Freshwater Fish (live/fresh/frozen)	115,047	114,583	109,226	857,780	864,598	906,175
Herring (fresh/frozen)	82,190	88,855	67,470	113,361	116,002	91,258
Seafish (fresh)	64,593	63,869	55,772	418,492	409,657	372,654
- Whole	45,044	45,429	39,381	253,060	249,705	219,035
- Fillet	19,549	18,440	16,391	165,432	159,952	153,619
Seafish (frozen)	280,955	213,573	248,004	1,239,804	1,038,353	1,157,838
- Whole	25,009	20,834	16,201	102,391	85,868	89,929
- Fillet	233,218	177,293	210,044	1,083,466	905,969	1,000,863
- Fish meat	22,728	15,448	18,759	53,947	46,516	67,246
Seafish (salted/dried/smoked)	40,235	32,342	30,892	365,408	343,180	345,773
Seafish, preparations	143,177	152,251	158,096	673,668	678,248	694,509
Crayfish, Mollusks	75,568	76,637	79,429	717,424	672,374	733,132
- Fresh/frozen	51,824	53,201	56,201	423,891	385,288	440,772
- Prepared	23,744	23,436	23,228	293,533	287,086	292,360
Total Imports	803,800	744,669	752,047	4,480,842	4,217,112	4,404,768
Source: Annual Report of the German Fish Industry page 26						

Table 9: German Import of Selected Fish Varieties from the United States (in MT, US\$ 1,000)

	1999		2000	
	MT	US\$ 1,000	MT	US\$ 1,000
Frozen pacific salmon	3,309	8,019	2,828	7,041
Atlantic/Danube salmon, frozen	0	1	18	33
Frozen Pacific Halibut	11	61	13	89
Frozen dogfish 'Squalus acanthias'	267	552	226	439
Frozen pacific salmon fillets	46	175	164	461
Other. freshwater fish fillets, frozen	128	753	88	580
Frozen monkfish fillets	149	1,159	103	1,030
Frozen Pollack Fillet	2,305	6,160	1,108	1,920
Frozen meat of other seawater fish	1,540	6,842	856	6,877
Live lobsters, not frozen	297	3,948	248	3,375
Prep/preserved salmon, whole	95	661	921	4,817
Caviar substitutes	172	3,786	175	4,353
Total	10,934	38,514	7,246	34,247

Source: FAS/Bonn based on official data from the German Federal Office of Statistics in Wiesbaden.

Table 10: Favorite German Fish Consumption, in Percent

	1997	1998	1999	2000
Total Seafood Use	100	100	100	100
Thereof Sea Fish	74.4	76.0	69.3	75.3
Sweet Water F.	14.7	14.8	17.2	13.7
Crayfish, Mollusks	10.9	9.2	13.5	11.0
Type of Fish				
Alaska Salmon (Coalfish)	24.7	27.5	19.9	28.5
Herring	21.8	18.2	24.7	18.5
Thuna	8.4	8.0	13.4	13.2
Pacific Atlantic and other. Salmon	6.7	8.5	9.5	6.0
Perch	5.1	4.4	6.1	5.4
Pollack	6.5	6.1	4.7	4.5
Sea Pike	4.9	3.7	5.2	4.4
Cod	8.4	8.8	4.6	3.7
Mackerel	2.9	1.7	1.5	2.4
Trout	5.0	4.1	5.6	2.2
Plaice	1.1	1.0	1.6	1.4
Halibut	2.7	2.7	0.9	0.5
Source: Fish Information Center				

Table 11: Fish Consumption by Product Group, in Percent

	1997	1998	1999	2000
Preservations + Marinades	31	29	29	30
- Herring	21	18	17	16
- Thuna	7	8	10	11
- Sardines	2	2	1	2
- Mackerels	1	1	1	1
Frozen Fish	21	26	25	25
Fresh Fish	14	13	14	14
Crayfish + Mollusks	14	14	15	13
Smoked Fish	5	3	5	7
Fish Salads	4	5	4	4
Other Fish Products	11	10	8	7
Source: Fish Information Center				