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Report Name: Opportunities in Germany for US Fish and Seafood Exporters

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Report Highlights:

Germany is an important fish and seafood market for U.S. in Europe exporters. The growing demand for high-quality fish and seafood offers opportunities for U.S. suppliers especially with the partial resumption of shellfish trade in 2022. The German imports are traditionally dominated by Alaska pollock, but there are also good prospects for salmon, hake, cod, scallops, and dogfish, among others. In 2021, U.S. sales to Germany increased slightly to \$214 million. This report provides information about U.S. exports, market entry, import requirements, as well as trade and market data.

I. Market

Demand for fish and seafood in Germany decreased slightly lately to 14 kg/per capita annually. Due to COVID-19 and related lockdown measures, traditional fish consumption patterns changed with people consuming more fish at home and less in restaurants. Thus, sales on wholesale level went down 15 percent to €4.4 billion (\$5 billion USD) while sales on retail level grew by over 16 percent to reach a record high of €4.5 billion (\$5.1 billion USD) in 2020. Total volume of fishery and aquaculture products in Germany amounted to 2.1 million tons in 2020. Imports continue to be the most important source of supply for the German market, with a volume of 1.9 million metric tons (MMT) and a supply share of 89 percent. Imports were supplemented by domestic production of 200,000 MT. Domestic production is trending downward opening further opportunities for U.S. exporters.

Salmon is traditionally the favorite fish in Germany followed by tuna, Alaska pollock, herring, shrimp, and trout. These five species make up for roughly 70 percent of the total amount of fish and seafood consumed in Germany. There is general upward potential for fish and seafood products in Germany – not just for the leading species. In general, pricing level in Germany for fish and seafood is low due to the dominant position of the discounters in the retail food sector and even more in fish sales. Nevertheless, there is still a strong segment of upscale retailers and consumers willing to spend more on quality food products. Younger and affluent consumers tend to prioritize quality over price. With the ongoing trends for sustainable, healthy foods and new protein sources, forecasts for the fish and seafood sector in Germany are promising. This applies both for the low price and upscale markets.

II. Trade

The demand for fish and seafood in Germany exceeds domestic supply. Most imports come from other EU countries with neighboring countries Poland, Denmark, and the Netherlands as leading suppliers. Total imports increased slightly 2 percent to \$4.1 billion in 2021 with Pacific and Atlantic salmon, Tuna, Alaska pollock, shrimp, and cod as the most important import products. U.S. exports increased slightly to \$214 million in 2021. The United States ranked second among third-country origins behind China, followed by Norway and Russia.

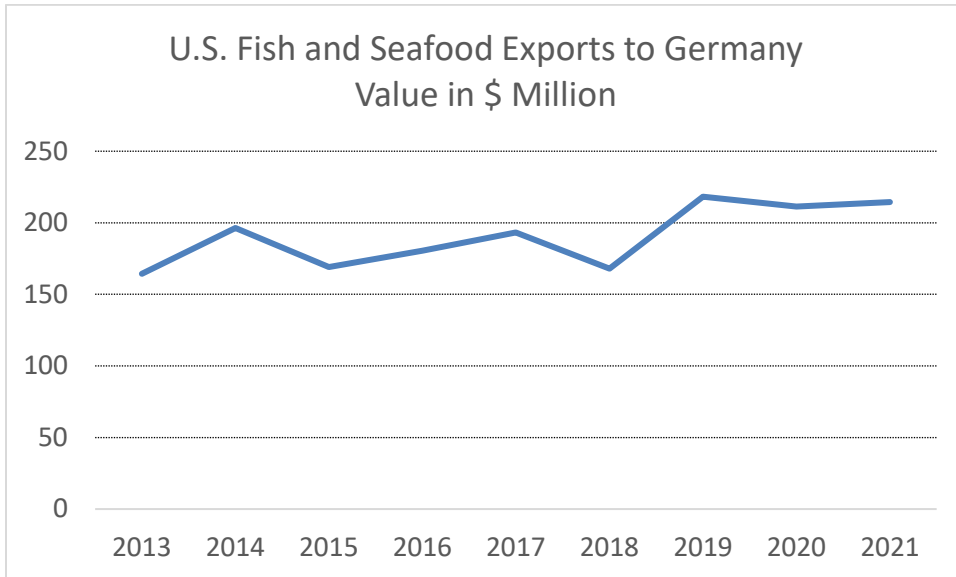
| Germany Imports of Fish and Seafood by Origin in Value (Million USD) | | | | | |
|---|-------|-------|-------|-------|-------|
| Partner Country | 2017 | 2018 | 2019 | 2020 | 2021 |
| World | 4.662 | 4.665 | 4.558 | 4.341 | 4.409 |
| Poland | 862 | 933 | 845 | 948 | 891 |
| Denmark | 703 | 639 | 631 | 578 | 609 |
| Netherlands | 608 | 643 | 587 | 573 | 608 |
| China | 356 | 389 | 474 | 393 | 344 |
| Sweden | 192 | 197 | 241 | 211 | 267 |
| United States | 193 | 168 | 218 | 211 | 214 |
| Lithuania | 221 | 204 | 216 | 199 | 176 |
| Norway | 258 | 262 | 201 | 150 | 169 |
| Russia | 68 | 102 | 85 | 97 | 139 |
| France | 97 | 109 | 98 | 96 | 137 |

Source: Trade Data Monitor

Germany is also a large exporter and especially re-exporter of fish and seafood products. Exports were valued nearly \$1.6 billion in 2021. Top destinations were EU countries like Netherlands, Austria, and Poland. The United States ranked sixth in total and is the most important non-EU export market followed by Switzerland. German exports to the United States totaled \$0.1 billion in 2021 which was mostly salmon – chilled and frozen.

III. U.S. Exports

Germany and the Netherlands are traditionally the most important fish and seafood market for U.S. exporters in Europe. Globally, Germany ranks sixth among U.S. export markets after Canada, China, Japan, South Korea, and neighboring Netherlands. The German market is especially dependent on imports of Alaska pollock since it is the main EU producer and exporter of Alaska pollock fish fingers. The share of Alaska Pollock at total U.S. fish and seafood exports is usually over 60 percent. Total U.S. fish and seafood exports to Germany were valued at \$214 million in 2021. While Alaska pollock exports decreased 14 percent to \$127 million in 2021, sales of Sockeye salmon increased nearly 60 percent to \$44 million. Sockeye salmon has been the only noteworthy positive export story in 2021 as exports of Pacific salmon decreased 45 percent to \$5 million. Same goes for Hake sales which are down 16 percent to \$4 million. Exports of cod, scallops, and dogfish among others are still on a low level but their prospects are considered good on the German market.



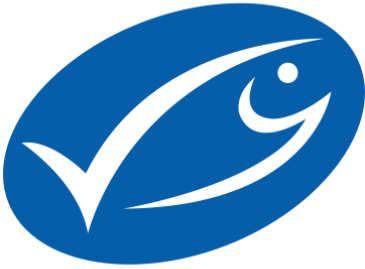
Source: Trade Data Monitor

Promoting Alaska pollock in Germany has recently become a challenge since it is not an identification of origin but a product name in Germany. This leads to confusion among consumers, because pollock from the Atlantic (*Pollachius virens*) from Russia or the double frozen product from China are also marketed by that name. Nevertheless, consumers associate the origin with the name and think that the lower quality products also originate from Alaska. Thus, sharing information about the origin FAO 67 for “true” Alaska pollock and differences between single and double frozen Alaska pollock is important.

Germany’s growing demand for high-quality fish and seafood offers opportunities for U.S. suppliers. In general, the United States is an accepted and well-known producer of fish and seafood, and the United States can supply seafood in all price ranges. Salmon and Alaska pollock, two of the strongest species of U.S. fisheries are among the most demanded food fish in Germany. Especially companies from Alaska can take advantage of the growing demand for sustainability in the fish and seafood market. By promoting Alaska’s key attributes wild, natural, sustainable, it meets the current trends on the German market.

IV. Distribution

Germany is located in the heart of Europe and German importers and distributors supply other European markets. The German retail food market is characterized by consolidation, market saturation, strong competition and low prices with discounters as the leading channel. When it comes to sales of fish and seafood, discounters are even stronger. Lidl and Aldi are the leading discounters, which offer a wide range of branded fish and seafood products and own gourmet lines besides the basic private label portfolio. For more information on the German retail sector please see [German retail report](#).



The seal from the Marine Stewardship Council (MSC) is crucial for fish and seafood sales in Germany. In retail, the logo counts as the main selling point and is seen as most reliable by most customers. Due to this consumer behavior, there are some retailers that are not willing to list products without MSC certification. Please see image above and check [MSC website](#) for more information.

V. Import Requirements

As a general principle, seafood is imported into the EU/Germany from only approved countries and from approved establishments, e.g., processing plants, factory or freezing vessels, cold storages or brokers. Since 2006, the U.S. Seafood Inspection System has been recognized by the EU as equivalent to the European Seafood Inspection System. On February 4, 2022, the United States and EU concluded negotiations to allow for resumption of bilateral trade in bivalve molluscan shellfish. For the first time since 2011, U.S. producers, beginning in the states of Massachusetts and Washington, are eligible to export live, raw and processed bivalve molluscan shellfish to the EU, including oysters, clams, mussels, and whole or roe-on scallops. For more please see [U.S. administration secures EU market access for shellfish industry after 10 years of trade disruption](#).

The mutual recognition facilitates seafood trade between the United States and the EU. Furthermore, it creates a framework under which Member States cannot impose national requirements on U.S. seafood exporters on top of EU harmonized legislation. However, differences of interpretation among Member States can lead to delays at border inspection posts.

All EU Member States apply the same tariff on goods imported from outside the EU. The import duty rate is determined by the classification of a good in the EU Tariff Schedule and by the customs value. For the customs classification of goods, the EU uses the Combined Nomenclature established by Council Regulation 2658/87. This eight-digit coding system is based on the Harmonized System which is also the basis for the import and export codes used by the United States. The full list of fish and seafood products duties can be found in Chapter 3 [here](#). A health certificate issued by a government-approved veterinarian from the exporting country must accompany all fish shipments to Germany. Products packed for retail sale also must bear a label in the German language with the date of production clearly stated. Exporters should also check with German importers regarding standards. For guidelines regarding seafood exports to Germany and the EU in general, information is available from the National Oceanic and Atmospheric Association, NOAA. Please check [NOAA's website for guidance on exporting to the EU](#).

VI. Market Entry Strategy

There is no one-size –fits-all strategy for market entry. Trade missions coordinated through industry/export organizations have been proven useful. Participation in trade shows such as the annual Seafood Expo Global in Barcelona (previously held in Brussels) are important in gaining knowledge about the market structure, consumer preferences and building contacts with importers. Germany also has its own trade show, Fish International, held biannually in Bremen in Northern Germany. Please see below for further information on Seafood Expo Global and Fish International.

Seafood Expo Global Barcelona, Spain

April 26-28, 2022

<https://www.seafoodexpo.com/global/>

Fish International Bremen, Germany

September 4-6, 2022

<http://fishinternational.com/en/>

The Office of Agricultural Affairs of the U.S. Embassy in Berlin (FAS Berlin) partners with the Alaska Seafood Marketing Institute (ASMI), American Indian Foods (AIF), Food Export USA - Northeast (FoodExport NE), and the Southern United States Trade Association (SUSTA) at events to promote the image and increase sales of U.S. fish and seafood products in Germany. ASMI and AIF are cooperators in USDA's Market Promotion Program. FoodExport NE and SUSTA are state regional trade association promoting U.S. food and agricultural products.

Please see below for in country representatives of ASMI, AIF, FoodExport NE, and SUSTA:

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VII. Further Information and Key Contacts

U.S. seafood exporters may obtain a list of current importers by contacting FAS Berlin. For more information concerning the German market please contact:

Office of Agricultural Affairs, Berlin, Germany
Embassy of the United States of America
Tel.: 0049 30 8305 1150
E-mail: agberlin@usda.gov
Error! Hyperlink reference not valid. www.fas-europe.org

Attachments:

No Attachments.