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## Germany

### Seafood Annual Report

**1999**

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#### Report Highlights:

**Total sales of German fish and fish products increased to US\$2.14 billion in 1998. U.S exports of fish products to Germany doubled to a value of US\$47.1 million, mainly due to upswings in exports of frozen Pacific salmon and pollack fillet and salmon preparations. Per capita consumption was 14.9 kg. The German consumers long for innovative (convenient, fast and small) fish products.**

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Includes PSD changes: Yes  
Includes Trade Matrix: Yes  
Annual Report  
Bonn [GM1], GM

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## EXECUTIVE SUMMARY

Total turnover of German fish products increased by 4.3 percent to DM 3.76 billion (US\$2.14 billion) in CY 1998 (this includes sales of the fish processing industry, wholesale fish and deep sea fishing vessels). The fish industry produced 393,000 MT of fish and fish products in 1998 with a product value of DM2.52 billion (US\$1.4 billion). Per capita consumption of fish amounted to 14.9 kg in 1998.

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 70 percent of total consumption. Total imports in CY 1998 amounted to DM 4.29 billion (US\$2.4 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 82.8 million (US\$47.1 million) worth of fish and fish products in 1998, mainly frozen groundfish, Alaska salmon, live lobsters, caviar substitutes and frozen fillet. This amounts to approximately two percent of the import market. Imports soared compared to 1997 by 96 percent in value, mainly due to increased exports of frozen Pacific salmon, frozen Pacific pollack fillet and salmon preparations.

Since 1998, generic fish marketing has been carried out by the recently formed Fish Information Center. Total available funds per year of voluntary contributions by the fish industry are expected to be less than DM 1 million. Its focus is on public relations campaigns and on initiatives to create a positive image for fish and fish products in Germany, especially to sustain domestic coastal and sea fisheries and directly related industries in federal states with fishing industries.

In 1997, there were public funds of DM 29 million (US\$17 million) earmarked for structural aid intended for the fish industry; DM 18 million (US\$10.5 million) for capacity reduction aid and DM 11 million (US\$6.5 million) for investment aid. In CY 1998, DM 26 million (US\$14.5 million) were intended for the fish industry, DM 15 million (US\$8.3 million) for capacity aid and DM 11 million (US\$6.1 million) for investment aid.

Note 1: Entries in the PSD's and trade matrices for salmon and groundfish fillet or whole/eviscerated and landings of total edible fishery products are in catch weight. All other data are in product weight.

Note 2: The entry in the canned production line of the total edible fishery PSD's comprises all fish products except cured and fresh/frozen fish, e.g., canned, in plastic containers, fish salads, other fish preparations, live/frozen caviar or crayfish.

Note: 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;	

Further exchange rates are for:	ECU <sub>i</sub> /German mark:	ECU 1 = DM 1.95583,
	i /U.S. dollar:	ECU 1 = US\$ 1.06.

## SECTION I: SITUATION AND OUTLOOK

## General

Total sales of German fish products rose to DM 3.76 billion in 1998. Domestic sales that year were DM 3.13 billion, which reflects a 2.8 percent increase from the previous year. Exports sales increased by 12.5 percent to DM 630.3 million. Production of fish and fishery products in CY 1998 dropped by 3.7 percent to 393,000 MT product weight, and off-factory sales increased from DM 2.5 billion to DM 2.7 billion. (However, current numbers are not comparable with past numbers because salmon products, except smoked salmon, are no longer included in official production statistics. These product range made up for 14,000 MT of fish products in 1997 at a value of 72.5 million.) Major fish products sold are frozen products (fillet, fish sticks), herring, smoked fish and fish preparations (see Table 10).

The German fish industry and wholesalers successfully increased market prices for certain fish products (in response to higher world market prices for raw fish). Additionally, an increased demand for fish convenience products (plus 12.8 percent) and export demand boosted total turnover.

Nevertheless, restructuring in the German fish industry continues amidst fierce domestic (retail) and foreign (fish industries) competition. The total number of fish companies declined from 103 in 1997 to 97 in 1998 and employment from 11,281 to 10,709. However, productivity increased further as total turnover rose from DM 3.60 billion to 3.76 billion.

Strong domestic and foreign landings by German fish vessels with catch for domestic consumption, and fish imports resulted in a stable supply in 1998. Germany is only 24 percent self-sufficiency in fish and fishery products. Per capita consumption of fish amounted to 14.9 kg in 1998.

Generally, German imports determine over 70 percent of total consumption of raw fish and fish products. In 1998, 67 percent of German fish imports in product weight and on a volume basis were delivered by non-EU countries, and 65 percent on a value basis (see Table 10). Total imports in CY 1998 amounted to DM 4.289 billion, but only DM 1.495 billion of raw fish and fish products originated from EU countries whereas imports from third countries accounted for DM 2.794 billion. In terms of sales, Norway was Germany's biggest supplier of fish with DM 796.1 million in 1998, followed by Russia with DM 396.5 million and the Peoples Republic of China with DM 152.2 million. In terms of quantity, imports from Norway and Denmark were the most significant in CY 1998, followed by those of Russia, China and Poland (in product weight).

However, converted from product weight to catch weight, as expressed in the trade matrices, imports from Russia and China soared, which had to do with an upswing in imports of groundfish fillets, and imports from Russia and Poland dominated total imports of all edible fishery products.

The United States supplied DM 82.4 million worth of fish and fish products, mainly frozen groundfish meat, Alaska salmon, live lobsters, caviar substitutes and frozen fillet. This amounted to approximately two percent of the German import market (see Table 13). Imports soared compared to 1997 by 96 percent in value, mainly due to increased exports of frozen Pacific salmon, frozen Pacific pollack fillet and salmon preparations.

Traditionally, Norway is the main supplier of salmon to the German market way ahead of Denmark, Russia, China, the United States and Great Britain. Due to the strong increase of Norwegian salmon exports to the European Union in CY 1996, salmon import prices dropped drastically. The European Commission and

Norway concluded an agreement which curtails salmon imports through quotas and minimum export prices between 1997 and 2002. Consequently, German salmon imports from Norway decreased by 15 percent in CY 1998 from 62,798 MT to 58,328 MT (see Table 2). Still, Norway increased its shipments of fish and fish products on a volume basis slightly in 1998 over 1997.

German exports of fish and fish products in CY 1998 decreased to DM 1.39 billion, including DM 1.17 billion to the EU and DM 217.8 million to third countries. Major export destinations in the EU were France, the Netherlands, Italy and Austria. Poland was a major non-EU destination (see Table 2). Exports to the United States were not significant in the past and stagnated at around 475 MT in CY 1998.

## Market Development and Tastes

Convenient, fast and small - this describes best a market where even the classical fillet doesn't any longer satisfy consumers' tastes.

A fish product and even a fish fillet is convenient when it is deboned, portioned, and comes with garnishing or sauces, is marinated or seasoned, is self-service packed or comes in packaging which allows for quick preparation at home or at work.

A fish product is fast when it can be consumed immediately without any or only minimal preparation like fish salads, salmon in rice or crayfish preparations, fish sticks and other fish specialties for immediate consumption. Most likely, these products come in the traditional glasses or cans, but increasingly in plastic containers and wrappings, together with plastic cutlery and napkins.

Fish preparations may come in various sizes and quantities to service all types of households. Nevertheless, single households and consumption by passers-by make for an increasing and lucrative market. To satisfy these consumers, products need to be small in size to allow for a quick and enjoyable bite. Fitting in fish products may also satisfy consumers' desire to consume healthy snacks.

## Marketing

Consumer preference is for convenient, prepared or easy to prepare high-quality products or specialties like caviar, live lobsters or frozen crayfish. These products include frozen or fresh fillets, fish marinades and fish salads but also pre-sliced smoked salmon. They are sold increasingly in supermarkets and large discounters and distributors and, to a lesser extent, in specialty shops, farmers' markets and restaurants.

For several years the traditional distribution channel of fish and fishery products in Germany through specialized fish retail shops has been losing market share to other distributors. Particularly, food retail shops are more and more successful and competitive in selling fish products in Germany.

Post is aware of marketing activities for Norwegian salmon, e.g., recipes and advertisements. There is also timely advertising by other countries. France's SOPEXA and the Irish Fish Institute occasionally promote their products through advertisements, recipes, tastings and in-store promotion. The Netherlands annually engages in a monthly promotional campaign called the "Tour de Matjes" around May/June when its fish marketing office

tours Germany at the beginning of the herring catch/season to promote Dutch herring and other products.

Since 1998, generic fish marketing has been carried out by the recently formed Fish Information Center (Fisch Informations Zentrum). This office 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). Its focus will be 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.

The focus will be less on sales promotion events. This policy shift reflects the enormous cost of generic or branded sales promotions and advertising which may be carried out by private companies. A positive image for their own fish industry and stable or rising prices are also more important for German fishermen and small-scale coastal fish industries than increased sales of imported fish and fish products by large scale fish companies, given the limited market share of the German catch of less than 25 percent of total consumption. Direct sales promotions to increase sales and higher per-capita consumption will not be an issue.

For German fish products prior to 1997, generic fish marketing was conducted by the now defunct Fish Marketing Institute (Fischwirtschaftliches Marketing-Institut, FIMA) a private marketing institute which was funded by checkoffs from the fish industry based on regulations laid out by the German Fishery Law. The annual budget was approximately DM 2 million. The FIMA carried out public relation campaigns, advertising and sales promotion for fish and fish products and co-financed market studies based on an annual marketing plan.

The FIMA dissolved in December 1996 when the Federal Ministry of Food, Agriculture and Forestry refused to grant funds for 1997, allegedly for budgetary reasons. However, the Ministry action came also as a result of industry complaints about FIMA being biased towards a few major fish companies and about high administrative costs and low effectiveness.

In 1997, checkoffs were collected and administered by the Federal Agency of Agriculture and Food (Bundesanstalt fuer Landwirtschaft und Ernaehrung), an executive organ of the Ministry of Agriculture. Funds were allocated on a project by project basis rather than through a preestablished marketing plan. Individual marketing plans and projects were considered and judged by a marketing board which consisted of members of the fish industry and representatives of those federal states (Bundeslaender) with seafood sectors. The German Seafood Law lapsed in December 1997 and with it all regulations for checkoff payments.

### **German and European Capacity Adjustment and Investment Aid for the Fish Industry**

In CY 1996, federal funds for the fishing fleet totaled DM 20 million (1995: DM 20.2 million) of which DM 11.5 million (DM 13.4 million) were spent on capacity reduction aid (part of this money will be reimbursed

by the European Fishery Funds) and DM 8.5 million (DM 6.8 million) on investment aid. Capacity adjustment aids are used to lay up coastal and cutter fishing vessels and retire deep sea factory ships to reduce overall overcapacity in the European fishing fleet concurrent with quantities granted under fishing rights for domestic and international waters. Nearly the entire volume of investment aids were in the form of grants, low-interest loans and aids at reduced interest rates which went to the coastal and cutter fishery sector to improve the often obsolete fishing fleet and sustain profitable and income-generating fishing.

In 1997, the federal budget allocated DM 29 million to support the fishing fleet, of which DM 18 million was for capacity adjustment aid and DM 11 million for investment aid. In CY 1998, DM 26 million are intended for the fish industry, DM 15 million for capacity aid and DM 11 million for investment aid.

**SECTION II: STATISTICAL TABLES**

Table 1: PSD for Total Edible Fish Products (in MT) and Import Prices for Total Edible Fish Products (in US\$ per MT)

		1998		1999		2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Landings/Comm'l Catch	120,000	120,000	120,000	120,000	0	120,000
Fresh/Frz Production	53,000	50,360	53,000	53,000	0	53,000
Canned Production	328,500	323,893	328,500	330,000	0	330,000
Cured Production	18,500	18,737	18,500	19,000	0	19,000
Total Production	400,000	392,990	400,000	402,000	0	402,000
Fresh/Frozen Imports	450,000	474,402	450,000	470,000	0	470,000
Canned Imports	95,500	124,360	95,500	120,000	0	120,000
Cured Imports	11,500	10,324	11,500	12,000	0	12,000
TOTAL Imports	557,000	609,086	557,000	602,000	0	602,000
Fresh/Frozen Exports	140,000	139,041	140,000	140,000	0	140,000
Canned Exports	44,000	41,245	44,000	40,000	0	40,000
Cured Exports	1,000	3,355	1,000	5,000	0	5,000
TOTAL Exports	185,000	183,641	185,000	185,000	0	185,000
Domestic Consumption	772,000	818,435	772,000	819,000	0	819,000

Year	1997	1998	% Change			1997	1998	% Change
Jan	2,811	2,705	-3.8%		Jul	2,634	2,146	-18.5%
Feb	2,696	2,284	-15.3%		Aug	2,116	2,362	11.6%
Mar	2,635	2,269	-13.9%		Sep	2,434	2,989	22.8%
Apr	2,802	2,389	-14.7%		Oct	2,467	3,477	40.9%
May	3,009	2,694	-10.5%		Nov	2,454	3,500	42.6%
Jun	2,648	2,741	3.5%		Dec	2,602	3,208	23.3%

Note: Live and frozen fish is not included in the import and export statistics to prevent double counting, assuming that these imports appear in the production statistics. Furthermore, possible reexports do not influence domestic consumption.

Source: Federal Office of Statistics, Annual Report of German Fisheries 1997 and 1998, Federal Association of the German Fish Industry and Fish Wholesale, Annual Report.



Table 2: German Import and Exports of Total Edible Fish Products (in MT)

Imports for	1997		1998		1999
U.S.	2,699	U.S.	7,806	U.S.	8,000
Others		Others		Others	
Russia	90,837	Russia	109,133	Poland	110,903
Denmark	82,794	Poland	101,014	Russia	92,317
Poland	67,064	Denmark	75,489	Denmark	70,278
Norway	62,798	Norway	58,328	Norway	52,982
Netherlands	30,011	China	45,030	China	38,201
China	30,001	Netherlands	29,626	Netherlands	28,709
Ireland	23,326	Iceland	20,542	Ireland	19,659
Iceland	22,228	Ireland	18,021	Iceland	17,707
France	10,783	Philippines	16,890	Philippines	13,254
Philippines	10,767	Thailand	10,844	France	10,112
Total for Others	430,609	Total for Others	484,917	Total for Others	454,122
Others not listed	117,105	Others not listed	116,365	Others not listed	120,000
Grand Total	550,413	Grand Total	609,088	Grand Total	582,122

Exports for	1997		1998		1999
U.S.	488	U.S.	475	U.S.	418
Others		Others		Others	
France	49,310	France	48,934	France	47,251
Netherlands	26,860	Italy	21,421	Netherlands	19,145
Italy	21,830	Netherlands	18,514	Italy	18,973
Poland	14,572	Austria	15,549	Austria	16,413
Great Britain	14,434	Poland	13,492	Great Britain	13,541
Austria	13,384	Great Britain	12,969	Bel/Lux	12,848
Belgium/Lux	12,464	Belgium/Lux	12,621	Poland	12,161
Spain	5,798	Spain	5,373	Russia	6,498
Russia	5,338	Denmark	4,741	Spain	5,869
Denmark	4,099	Russia	4,129	Denmark	5,306
Total for Others	168,089	Total for Others	157,743	Total for Others	158,005
Others not listed	24,182	Others not listed	25,425	Others not listed	26,577
Grand Total	192,759	Grand Total	183,643	Grand Total	185,000

Source: FAS/Bonn based on official data from the German Federal Office of Statistics in Wiesbaden.  
FAS/Bonn estimate for 1999.

Table 3: PSD for Salmon, Whole/Eviscerated (in MT) and Import Prices (in US\$ per MT)

		1998		1999		2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Beginning Stocks	0	0	0	0	0	0
Total Production	43	43	43	43	0	43
Intra-EC Imports	7,500	14,430	7,500	15,100	0	15,000
Other Imports	60,500	60,660	60,500	66,263	0	70,000
TOTAL Imports	68,000	75,090	68,000	81,363	0	85,000
TOTAL SUPPLY	68,043	75,133	68,043	81,406	0	85,043
Intra-EC Exports	24,750	15,036	24,750	42,000	0	42,000
Other Exports	450	1,638	450	450	0	450
TOTAL Exports	25,200	16,674	25,200	42,450	0	42,450
Domestic Consumption	42,843	58,459	42,843	38,956	0	42,593
Other Use/Loss	0	0	0	0	0	0
TOTAL Utilization	42,843	58,459	42,843	38,956	0	42,593
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	68,043	75,133	68,043	81,406	0	85,043

Source: Federal Office of Statistics, Annual Report of German Fisheries 1997 and 1998, Federal Association of the German Fish Industry and Fish Wholesale, Annual Report 1998.

Year	1997	1998	% Change			1997	1998	% Change
Jan	4,238	3,894	-8.1%		Jul	3,718	4,124	10.9%
Feb	3,962	3,891	-1.8%		Aug	3,635	4,022	10.6%
Mar	3,761	3,707	-1.4%		Sep	3,662	3,827	4.5%
Apr	3,823	3,897	1.9%		Oct	3,792	3,686	-2.8%
May	3,804	4,075	7.1%		Nov	3,801	3,853	1.4%
Jun	3,773	4,416	17.0%		Dec	3,709	3,953	6.6%

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

Table 4: German Import and Export of Salmon Whole/Eviscerated (in MT)

Imports for	1997		1998		1999
U.S.	2,364	U.S.	6,112	U.S.	7,000
Others		Others		Others	
Norway	58,791	Norway	53,242	Norway	57,411
Denmark	6,924	Denmark	7,251	Great Britain	6,802
Great Britain	1,245	Great Britain	4,881	Denmark	6,503
Chile	496	Sweden	820	Sweden	900
Canada	483	Netherlands	750	Faroe Islands	852
Sweden	458	Faroe Islands	689	Chile	443
Ireland	256	Ireland	303	Ireland	371
Netherlands	240	Chile	302	Greece	270
France	189	Canada	190	Netherlands	261
Portugal	114	Greece	172	Canada	120
Total for Others	69,196	Total for Others	68,600	Total for Others	73,933
Others not listed	330	Others not listed	380	Others not listed	430
Grand Total	71,890	Grand Total	75,092	Grand Total	81,363

Exports for	1997		1998		1999
U.S.	0	U.S.	0	U.S.	0
Others		Others		Others	
France	22,973	France	25,000	France	25,000
Spain	7,438	Spain	10,000	Spain	10,000
Netherlands	4,805	Italy	3,171	Italy	2,728
Italy	4,272	Netherlands	2,541	Poland	1,504
Belgium/Lux	1,751	Bel/Lux	891	Great Britain	1,438
Great Britain	519	Poland	375	Austria	1,101
Portugal	424	Great Britain	341	Bel/Lux	703
Poland	375	Austria	315	Ireland	573
Austria	367	Portugal	87	Denmark	390
Denmark	89	Denmark	53	Netherlands	370
Total for Others	43,013	Total for Others	42,774	Total for Others	43,807
Others not listed	87	Others not listed	73	Others not listed	390
Grand Total	43,100	Grand Total	42,847	Grand Total	44,197

Source: FAS/Bonn based on official data from the German Federal Office of Statistics in Wiesbaden. FAS/Bonn estimate for 1999.

Table 5: PSD for Groundfish, Whole/Eviscerated (in MT) and Import Prices (in US\$ per MT)

		1998		1999		2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Beginning Stocks	0	0	0	0	0	0
Total Production	22,800	22,800	22,800	22,800	0	22,800
Intra-EC Imports	7,700	5,459	7,700	6,000	0	7,700
Other Imports	16,400	11,749	16,400	13,000	0	13,000
TOTAL Imports	24,100	17,208	24,100	19,000	0	20,700
TOTAL SUPPLY	46,900	40,008	46,900	41,800	0	43,500
Intra-EC Exports	10,800	11,865	10,800	13,000	0	10,800
Other Exports	60	50	60	50	0	60
TOTAL Exports	10,860	11,915	10,860	13,050	0	10,860
Domestic Consumption	36,040	28,093	36,040	28,750	0	32,640
Other Use/Loss	0	0	0	0	0	0
TOTAL Utilization	36,040	28,093	36,040	28,750	0	32,640
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	46,900	40,008	46,900	41,800	0	43,500

Source: Federal Office of Statistics, Annual Report of German Fisheries 1997 and 1998, Federal Association of the German Fish Industry and Fish Wholesale, Annual Report 1998.

Year	1997	1998	% Change			1997	1998	% Change
Jan	1,613	2,111	30.9%		Jul	1,747	2,465	41.1%
Feb	1,804	2,136	18.4%		Aug	1,720	2,142	24.5%
Mar	1,628	2,027	24.5%		Sep	1,788	2,025	13.3%
Apr	1,747	2,179	24.7%		Oct	1,736	2,605	50.1%
May	1,683	2,177	29.4%		Nov	1,901	2,337	22.9%
Jun	1,771	2,254	27.3%		Dec	1,923	2,170	12.8%

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

Table 6: German Import and Export of Groundfish, Whole/Eviscerated (in MT)

Imports for	1997		1998		1999
U.S.	0	U.S.	23	U.S.	43
Others		Others		Others	
Norway	13,066	Norway	13,063	Norway	12,579
Denmark	6,217	Denmark	6,117	Denmark	6,855
Poland	1,685	Russia	1,477	Iceland	1,177
Great Britain	697	Iceland	967	Russia	1,167
Iceland	623	Poland	756	Poland	1,024
Netherlands	589	Netherlands	331	Netherlands	410
Faroe Islands	394	Sweden	124	Greenland	273
Estonia	308	France	109	Sweden	192
Russia	243	Greenland	133	France	140
France	172	Great Britain	78	Great Britain	90
Total for Others	23,994	Total for Others	23,155	Total for Others	23,907
Others not listed	183	Others not listed	183	Others not listed	150
Grand Total	24,177	Grand Total	23,361	Grand Total	24,100

Exports for	1997		1998		1999
U.S.	0	U.S.	0	U.S.	0
Others		Others		Others	
France	7,457	France	8,000	France	8,000
Netherlands	5,424	Netherlands	6,000	Netherlands	5,000
Denmark	1,180	Great Britain	610	Denmark	583
Great Britain	956	Denmark	460	Great Britain	575
Belgium/Lux	404	Bel/Lux	261	Bel/Lux	534
Spain	247	Spain	121	Spain	378
Portugal	47	Portugal	30	Russia	49
Belarus	26	Belarus	26	Poland	48
Czech Republic	20	Czech Republic	20	Italy	24
Italy	16	Italy	7	Portugal	29
Total for Others	15,777	Total for Others	15,535	Total for Others	15,220
Others not listed	15	Others not listed	15	Others not listed	7
Grand Total	15,792	Grand Total	15,550	Grand Total	15,227

Source: FAS/Bonn based on official data from the German Federal Office of Statistics in Wiesbaden.  
FAS/Bonn estimate for 1999.

Table 7: PSD for Groundfish, Fillet (in MT) and Import Prices (in US\$ per MT)

		1998		1999		2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Beginning Stocks	0	0	0	0	0	0
Total Production	54,000	50,360	54,000	54,000	0	54,000
Intra-EC Imports	41,000	32,567	41,000	30,000	0	41,000
Other Imports	525,000	661,292	525,000	550,185	0	525,000
TOTAL Imports	566,000	693,859	566,000	580,185	0	566,000
TOTAL SUPPLY	620,000	744,219	620,000	634,185	0	620,000
Intra-EC Exports	146,000	134,913	146,000	147,798	0	146,000
Other Exports	7,300	5,971	7,300	6,000	0	7,300
TOTAL Exports	153,300	140,884	153,300	153,798	0	153,300
Domestic Consumption	466,700	603,335	466,700	480,387	0	466,700
Other Use/Loss	0	0	0	0	0	0
TOTAL Utilization	466,700	603,335	466,700	480,387	0	466,700
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	620,000	744,219	620,000	634,185	0	620,000

Source: Federal Office of Statistics, Annual Report of German Fisheries 1997 and 1998, Federal Association of the German Fish Industry and Fish Wholesale, Annual Report 1998.

Year	1997	1998	% Change			1997	1998	% Change
Jan	2,044	2,019	-1.2%		Jul	1,990	2,515	26.4%
Feb	2,078	2,142	3.1%		Aug	1,844	2,658	44.1%
Mar	2,062	2,062	0.0%		Sep	2,030	2,793	37.6%
Apr	2,020	2,250	11.4%		Oct	2,030	3,020	48.8%
May	2,198	2,520	14.6%		Nov	2,030	3,069	51.2%
Jun	1,931	2,514	30.2%		Dec	2,146	2,945	37.2%

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

Table 8: German Import and Export of Groundfish, Fillets (in MT)

Imports for	1997		1998		1999
U.S.	55	U.S.	14,881	U.S.	15,000
Others		Others		Others	
Russia	274,286	Russia	343,765	Russia	283,446
China	92,551	China	148,380	China	121,998
Norway	51,280	Norway	44,344	Norway	41,500
Poland	44,693	Poland	44,321	Poland	40,547
Denmark	25,169	Denmark	22,981	Denmark	21,081
Iceland	14,377	Iceland	22,913	Iceland	19,997
Faroe Island	11,675	New Zealand	18,224	Faroe Island	6,993
Ireland	4,340	Faroe Islands	11,833	New Zealand	9,424
Netherlands	4,209	Netherlands	4,664	Netherlands	4,308
France	2,687	Senegal	2,808	France	2,391
Total for Others	525,267	Total for Others	664,233	Total for Others	551,685
Others not listed	14,373	Others not listed	14,246	Others not listed	13,500
Grand Total	539,695	Grand Total	693,360	Grand Total	580,185

Exports for	1997		1998		1999
U.S.	288	U.S.	288	U.S.	500
Others		Others		Others	
France	58,770	France	66,877	France	66,981
Netherlands	32,184	Netherlands	32,064	Netherlands	30,093
Great Britain	26,806	Great Britain	20,127	Great Britain	17,585
Belgium/Lux	14,987	Bel/Lux	13,888	Bel/Lux	13,927
Austria	7,908	Austria	7,710	Austria	8,930
Sweden	3,297	Sweden	3,297	Denmark	2,887
Denmark	2,635	Denmark	2,451	Sweden	2,935
Russia	2,389	Russia	2,389	Russia	2,675
Spain	2,105	Spain	2,005	Spain	1,464
Italy	1,015	Italy	819	Israel	1,300
Total for Others	152,096	Total for Others	151,627	Total for Others	148,777
Others not listed	4,140	Others not listed	4,099	Others not listed	4,521
Grand Total	156,524	Grand Total	156,014	Grand Total	153,798

Source: FAS/Bonn based on official data from the German Federal Office of Statistics in Wiesbaden. FAS/Bonn estimate for 1999.

Table 9: Fishery Products Strategic Indicator Table

		1998	1999	2000	5 Year
		Year	Year	Year	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
		1998	1999	2000	5 Year
		Year	Year	Year	Projections/
Market Attractiveness	Measurement *	Situation	Situation	Expectations	Expectations
Per Capita Consumption of All Fishery Products	Kg per person	15	15	15	16
Per Capita Consumption of animal proteins (excluding fishery products)	Kg per person	90	89	88	85
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	63	63	62	60
Percent of fishery sales at HRI establishments	Percent	17	17	18	20
Percent of fishery sales at open markets	Percent	5	5	5	5

Source: FAS Berlin.



Table 10: German Production of Fish Products ( in MT, DM 1,000)

Product	MT			DM 1,000		
	1996	1997	1998	1996	1997	1998
<b>Fresh, chilled</b>	25,865	16,289	12,906	187,953	135,215	128,375
<b>Frozen</b>						
- Seafish	715	1,392	4,383	7,017	11,833	22,258
- Freshwater	587	370	349	8,997	6,085	5,478
- Fillets	36,714	36,946	32,722	207,026	204,992	206,566
<b>Salted, dried, smoked</b>						
- smoked salmon	6,010	5,064	5,594	145,992	114,428	143,924
- smoked herring	3,415	2,430	2,114	17,537	14,944	12,611
- other smoked fish	13,235	11,942	11,029	165,200	157,455	143,751
<b>Other fish preparations</b>						
- Salmon	6,424	n.a.	n.a.	74,085	n.a.	n.a.
- Herring	86,524	69,866	66,645	441,904	402,689	387,858
- Sardines, sprat	1,981	n.a.	n.a.	25,585	n.a.	n.a.
- Mackarels	2,784	2,157	1,688	21,733	18,326	14,408
- Baked fillets/sticks	120,257	123,073	137,022	546,617	545,316	671,532
- Other fish	63,785	65,374	50,076	317,686	332,109	275,183
- Fish salad	20,843	32,786	30,178	148,952	203,891	200,147
- Otherwise prepared	35,871	34,307	31,563	226,604	191,705	180,785
- Caviar substitutes	770	866	810	24,603	27,187	25,086
- Frozen crayfish	467	n.a.	n.a.	4,528	n.a.	n.a.
- Crayfish preprations	1,812	1,450	1,754	38,398	28,306	38,516
- Preserved Crayfish	4,841	3,962	4,117	66,300	60,650	64,373
<b>Total Production</b>	<b>430,426</b>	<b>408,042</b>	<b>392,990</b>	<b>2,676,717</b>	<b>2,455,231</b>	<b>2,520,851</b>

Source: Annual Report of the German Association of the Fish Industry and the Fish Wholesale 1999, page 33.

Table 11: German Import of Fish and Fish Products (in MT, DM 1,000)

Product	MT			DM 1,000		
	1996	1997	1998	1996	1997	1998
<b>Freshwater Fish (live, fresh, frozen)</b>	113,529	111,510	109,019	788,187	805,777	810,363
<b>Herring (fresh/frozen)</b>	99,890	86,988	74,567	134,818	122,657	102,242
<b>Seafish (fresh)</b>	72,815	68,229	60,525	343,970	368,323	387,197
- Whole	50,374	48,357	42,090	220,894	233,760	231,208
- Fillet	22,441	19,872	18,435	123,076	134,563	155,989
<b>Seafish (frozen)</b>	230,460	245,097	275,998	807,710	896,758	1,220,796
- Whole	27,397	25,577	21,410	98,324	107,527	91,975
- Fillet	184,476	196,126	231,979	663,674	738,673	1,075,713
- Fish meat	18,587	23,394	22,609	45,712	50,558	53,108
<b>Seafish (salted, dried, smoked)</b>	41,607	40,009	37,521	345,303	335,479	342,259
<b>Seafish, preparations</b>	137,529	130,001	140,323	583,844	601,727	658,446
<b>Crayfish, mollusks</b>	64,971	72,268	68,709	604,582	638,001	673,873
- fresh, frozen	40,475	47,455	45,827	326,224	355,471	387,965
- prepared	24,496	24,813	22,882	278,358	282,530	285,908
<b>Total Imports</b>	<b>763,385</b>	<b>756,278</b>	<b>768,632</b>	<b>3,704,773</b>	<b>3,869,212</b>	<b>4,289,527</b>

Source: Annual Report of the German Association of the Fish Industry and the Fish Wholesale 1999, pages 38 and 39.

Table 12: German Export of Fish and Fish Products (in MT, DM 1,000)

Product	MT			DM 1,000		
	1996	1997	1998	1996	1997	1998
<b>Freshwater Fish (live, fresh, frozen)</b>	51,504	44,705	19,422	343,423	329,564	169,664
<b>Herring (fresh/frozen)</b>	24,015	32,188	11,848	19,979	24,840	12,316
<b>Seafish (fresh)</b>	26,846	23,019	16,085	68,842	70,277	61,803
- Whole	23,200	18,487	13,274	58,909	55,500	45,289
- Fillet	3,646	4,532	2,811	9,933	14,777	16,514
<b>Seafish (frozen)</b>	73,059	75,874	64,462	251,155	291,595	303,912
- Whole	30,015	20,887	16,074	56,556	41,127	30,142
- Fillet	39,268	51,276	45,151	184,847	240,934	263,008
- Fish meat	3,776	3,711	3,237	9,752	9,534	10,762
<b>Seafish (salted, dried, smoked)</b>	13,788	11,218	10,717	103,668	93,720	106,714
<b>Seafish, preparations</b>	105,236	111,574	113,041	462,828	503,760	560,207
<b>Crayfish, mollusks</b>	37,733	33,271	37,847	146,843	141,363	147,317
- fresh, frozen	32,607	29,982	35,073	99,716	103,254	109,385
- prepared	5,126	3,289	2,774	47,127	38,109	37,932
<b>Total Exports</b>	332,733	332,450	273,800	1,431,881	1,485,881	1,387,904

Source: Annual Report of the German Association of the Fish Industry and the Fish Wholesale 1999, pages 40 and 41.

Table 13: German Import of Selected Fish Varieties from the United States ( in MT, US\$ 1,000)

	1996		1997		1998	
	MT	US\$ 1,000	MT	US\$ 1,000	MT	US\$ 1,000
<b>Frozen pacific salmon</b>	1,006	2,260	2,047	5,051	5,312	13,517
<b>Atlantic/Danube salmon, frozen</b>	125	346	9	24	3	10
<b>Frozen Atlantic Halibut</b>	-	-	2	16	25	130
<b>Frozen Pacific Halibut</b>	46	306	46	297	35	177
<b>Frozen dogfish 'Squalus acanthias'</b>	285	360	360	649	241	584
<b>Various fish fillets, fresh/chilled</b>	125	1,097	81	590	120	438
<b>Frozen pacific salmon fillets</b>	133	623	92	406	152	483
<b>Oth. freshwater fish fillets, frozen</b>	220	1,508	137	937	118	835
<b>Frozen monkfish fillets</b>	122	793	175	1,115	246	1,591
<b>Other frozen fish fillets</b>	-	-	13	147	22	155
<b>Frozen meat of other seawater fish</b>	1,547	9,430	1,801	6,322	1,824	5,175
<b>Live lobsters, not frozen</b>	230	2,974	232	2,721	266	3,386
<b>Salmon prepared/preserved</b>	-	-	66	307	257	1,091
<b>Prep/preserved salmon, whole</b>	2	19	66	307	257	1,091
<b>Caviar substitutes</b>	94	2,280	148	3,255	132	2,956
<b>Total</b>	4,946	25,646	5,905	24,186	13,920	47,084

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