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Report Highlights:

Total sales of German fish and fish products stagnated in CY 1997 at US\$ 2.1 billion; however, fish imports increased slightly to \$2.2 billion. The United States supplied US \$25.3 million worth of fish and fish products to Germany. Further growth of per capita consumption is expected, and market prospects for fish exporters are in convenience and innovative fish products.

Includes PSD changes: Yes

Includes Trade Matrix: Yes

Annual Report

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EXECUTIVE SUMMARY

Total sales of German fish products remained stable at DM 3.6 billion (US\$2.1 billion) in CY 1997 while market sales of fish products on a volume basis (excluding herring) increased slightly by five percent to 615,500 MT.

Germany supplies only 23 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 1997 amounted to DM 3.8 billion (US\$2.2 billion), DM 1.4 billion (US\$0.82 billion) from member countries of the European Union (EU) and DM 2.4 billion (US\$1.4 billion) from third countries.

The United States supplies about DM 43 million (US\$25.3 million) worth of fish and fish products, mainly frozen groundfish, Alaska salmon, live lobsters, caviar substitutes and frozen fillet. This amounts to one percent of the import market.

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 of 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) are 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;
1992: US\$1 = DM 1.52;
1993: US\$1 = DM 1.65;
1994: US\$1 = DM 1.61;
1995: US\$1 = DM 1.43;
1996: US\$1 = DM 1.50;
1997: US\$1 = DM 1.70;
1998: US\$1 = DM 1.80 (estimate).

Further exchange rates are for: ECU/German mark: ECU 1 = DM 1.97,
ECU/U.S. dollar: ECU 1 = US\$ 1.11.

SECTION I: SITUATION AND OUTLOOK

General

Total sales of German fish products stagnated at a level of DM 3.6 billion in 1997. Domestic sales that year was DM 3 billion which reflects a 1.4 percent loss from the previous year. This decrease was compensated by an increase in exports sales of 8.5 percent to DM 558.7 million. Production of fish and fishery products in CY 1997 dropped by 5.2 percent to 408,245 MT product weight, and off-factory sales declined from DM 2.7 billion to DM 2.5 billion. Major fish products sold are frozen products (fillet, fish sticks), herring, smoked fish and fish preparations (see Table 17).

Reduced landings of German vessels with catch for domestic consumption in German ports were compensated by higher imports resulting in more supply in 1997. Self sufficiency of fish and fishery products in Germany accounts for only 23 percent of domestic consumption. Generally, German imports determine over 70 percent of total consumption of raw fish and fish products. In 1997, 62 percent of German fish imports were delivered by non-EU countries. Total imports in CY 1997 amounted to DM 3.8 billion, but only DM 1.4 billion of raw fish and fish products originated from EU countries whereas imports from third countries accounted for DM 2.4 billion. In terms of sales, Norway was Germany's biggest supplier of fish with DM 783.4 million in 1997, followed by Russia with DM 248.3 million and Poland with DM 141.1 million. The United States supplied DM 43.5 million worth of fish and fish products, mainly frozen groundfish meat, Alaska salmon, live lobsters, caviar substitutes and frozen fillet. This amounted to approximately one percent of the German import market (see Tables 18). In terms of quantity, imports from Russia were the most significant in CY 1997 followed by those of Denmark, Poland and Norway.

Traditionally, Norway is the main supplier of salmon to the German market way ahead of Denmark, 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 1997 from 68,996 MT to 58,661 MT (see Table 6).

German exports of fish and fish products in CY 1997 decreased to DM 1.26 billion, including DM 1.05 billion to the EU and DM 207.1 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 4). Exports to the United States were not significant in the past and stagnated of around 490 MT between CY 1996 and 1997.

It was thought that CY 1998 would probably be a difficult year for the German fish industry as higher import prices in 1997 due to lower catch of important fish varieties may mean that consumers suffer and demand less. Furthermore, higher fish demand of countries like Brazil and Russia led to increased world market prices of fish and fishery products. Due to the attractive German fish market, domestic and import competition will grow. Fortunately, the German consumer did not reduce demand for fish and fishery products during the first seven months of

1998 despite increased prices. For CY 1998 the Federal Agency of Agriculture and Food

(Bundesanstalt fuer Landwirtschaft und Ernaehrung) expects the same per capita consumption of fish as in CY 1997 when it was 15 kg, compared to 14.6 kg in CY 1996. The German consumer has a positive attitude toward traditional fish and fishery products but also new product innovations as described in the next section. In general fish products are accepted as healthy and a safe alternative to the more controversial beef products. Exporters to Germany can gain market shares in supplying convenient and innovative fish products.

Marketing

Consumer preference is for convenient, preprepared or easy to prepare high-quality products or specialties like caviar, live lobsters or frozen crayfish. These products include frozen or fresh fillet, fish marinades and fish salads but also presliced 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 shares 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 is 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 impacts 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 costs of generic or branded sales promotion and advertising which may be carried out by private companies. A positive image for its 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 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)

PSD Table						
Country: Germany						
Commodity: Total Edible Fishery Products						
		1997		1998		1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1997		01/1998		01/1999
Landings/Comm'l Catch	130,000	120,688	0	120,000	0	120,000
Fresh/Frz Production	62,000	54,969	0	53,000	0	53,000
Canned Production	360,000	333,844	0	328,500	0	328,500
Cured Production	23,000	19,432	0	18,500	0	18,500
Total Production	445,000	408,245	0	400,000	0	400,000
Fresh/Frozen Imports	400,000	437,618	0	450,000	0	450,000
Canned Imports	115,000	96,250	0	95,500	0	95,500
Cured Imports	12,000	11,053	0	11,500	0	11,500
TOTAL Imports	527,000	544,921	0	557,000	0	557,000
Fresh/Frozen Exports	130,000	136,168	0	140,000	0	140,000
Canned Exports	45,000	43,758	0	44,000	0	44,000
Cured Exports	1,100	980	0	1,000	0	1,000
TOTAL Exports	176,100	180,906	0	185,000	0	185,000
Domestic Consumption	796,000	772,260	0	772,000	0	772,000

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 Prices for Total Edible Fish Products (in DM per MT)

Year: 1997			
Prices in DM per Metric Tons			
Year	1996	1997	% Change
Jan	4,877	4,510	-7.5%
Feb	4,128	4,515	9.4%
Mar	4,458	4,472	0.3%
Apr	4,127	4,794	16.2%
May	4,428	5,125	15.7%
Jun	4,574	4,574	0.0%
Jul	4,273	4,719	10.4%
Aug	4,387	3,899	-11.1%
Sep	4,649	4,356	-6.3%
Oct	4,450	4,335	-2.6%
Nov	4,331	4,253	-1.8%
Dec	5,094	4,623	-9.2%

Exchange Rate: 1.79 (local currency/US\$).

Date of Quote: 21 September 1998.

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

Table 3: German Import of Total Edible Fish Products (in MT)

Country: Germany		Units: Metric Tons			
Imports from	1996		1997		1998
U.S.	2,739	U.S.	2,698	U.S.	2,644
Others		Others		Others	
Denmark	84,958	Russia	90,836	Poland	110,903
Russia	71,423	Denmark	80,728	Russia	92,317
Norway	63,564	Poland	67,064	Denmark	70,278
Netherlands	36,862	Norway	62,767	Norway	52,982
Poland	34,726	China	30,000	China	38,201
China	26,775	Netherlands	28,897	Netherlands	28,709
Ireland	25,268	Ireland	22,809	Ireland	19,659
Iceland	21,553	Iceland	22,161	Iceland	17,707
Thailand	15,478	Philippines	10,766	Philippines	13,254
Philippines	13,080	France	10,247	France	10,112
Total for Others	393,687		426,275		454,122
Others not listed	123,569		115,948		100,234
Grand Total	519,995		544,921		557,000

Source: FAS/Bonn based on official data from the German Federal Office of Statistics in Wiesbaden.
FAS/Bonn estimate for 1998.

Table 4: German Export of Total Edible Fish Products (in MT)

Country: Germany		Units: Metric Tons			
Exports to	1996		1997		1998
U.S.	498	U.S.	488	U.S.	418
Others		Others		Others	
France	48,420	France	46,684	France	47,251
Italy	25,006	Netherlands	26,344	Netherlands	19,145
Netherlands	18,949	Italy	19,483	Italy	18,973
Austria	16,184	Poland	14,572	Austria	16,413
Poland	12,156	Austria	12,997	Great Britain	13,541
Bel/Lux	11,332	Great Britain	12,558	Bel/Lux	12,848
Great Britain	9,788	Bel/Lux	11,695	Poland	12,161
Spain	5,666	Russia	5,338	Russia	6,498
Russia	4,617	Spain	4,700	Spain	5,869
Czech Republic	4,364	Denmark	3,795	Denmark	5,306
Total for Others	156,482		158,166		158,005
Others not listed	23,318		22,252		26,577
Grand Total	180,298		180,906		185,000

Source: FAS/Bonn based on official data from the German Federal Office of Statistics in Wiesbaden.
FAS/Bonn estimate for 1998.

Table 5: PSD for Salmon, Whole/Eviscerated (in MT)

PSD Table						
Country: Germany						
Commodity: Salmon, Whole/Eviscerated						
		1997		1998		1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1997		01/1998		01/1999
Beginning Stocks	0	0	0	0	0	0
Total Production	40	43	0	43	0	43
Intra-EC Imports	6,000	7,814	0	7,500	0	7,500
Other Imports	75,000	62,099	0	60,500	0	60,500
TOTAL Imports	81,000	69,913	0	68,000	0	68,000
TOTAL SUPPLY	81,040	69,956	0	68,043	0	68,043
Intra-EC Exports	40,000	24,737	0	24,750	0	24,750
Other Exports	100	432	0	450	0	450
TOTAL Exports	40,100	25,169	0	25,200	0	25,200
Domestic Consumption	40,940	44,787	0	42,843	0	42,843
Other Use/Loss	0	0	0	0	0	0
TOTAL Utilization	40,940	44,787	0	42,843	0	42,843
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	81,040	69,956	0	68,043	0	68,043

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.

Table 6: German Import Prices for Salmon Whole/Eviscerated (in DM per MT)

Year: 1997			
Prices in DM per Metric Tons			
Year	1996	1997	% Change
Jan	6,556	6,799	3.7%
Feb	6,435	6,636	3.1%
Mar	6,503	6,382	-1.9%
Apr	6,703	6,541	-2.4%
May	6,591	6,479	-1.7%
Jun	6,555	6,517	-0.6%
Jul	5,826	6,663	14.4%
Aug	5,534	6,696	21.0%
Sep	5,668	6,557	15.7%
Oct	5,885	6,661	13.2%
Nov	6,326	6,587	4.1%
Dec	6,584	6,589	0.1%

Exchange Rate: 1.79 (local currency/US\$).

Date of Quote: 21 September 1998.

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

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

Country: Germany		Units: Metric Tons			
Imports from	1996		1997		1998
U.S.	1,302	U.S.	2,364	U.S.	3,637
Others		Others		Others	
Norway	68,996	Norway	58,661	Norway	47,411
Denmark	6,016	Denmark	5,992	Great Britain	6,802
Great Britain	997	Great Britain	680	Denmark	6,503
Sweden	914	Chile	496	Sweden	900
France	331	Canada	483	Faroe Islands	852
Canada	330	Sweden	458	Chile	443
Portugal	245	Ireland	251	Ireland	371
Chile	253	Netherlands	166	Greece	270
Netherlands	184	Portugal	114	Netherlands	261
Ireland	138	France	61	Canada	120
Total for Others	78,404		67,362		63,933
Others not listed	224		187		430
Grand Total	79,930		69,913		68,000

Source: FAS/Bonn based on official data from the German Federal Office of Statistics in Wiesbaden.
FAS/Bonn estimate for 1998.

Table 8: German Export of Salmon Whole/Eviscerated (in MT)

Country: Germany		Units: Metric Tons			
Exports to	1996		1997		1998
U.S.		U.S.		U.S.	
Others		Others		Others	
France	23,868	France	12,593	France	10,537
Spain	9,335	Spain	4,729	Spain	5,466
Netherlands	5,785	Italy	3,171	Italy	2,728
Portugal	3,809	Netherlands	2,541	Poland	1,504
Great Britain	3,564	Bel/Lux	891	Great Britain	1,438
Bel/Lux	2,232	Poland	375	Austria	1,101
Italy	1,751	Great Britain	341	Bel/Lux	703
Sweden	1,601	Austria	315	Ireland	573
Austria	332	Portugal	87	Denmark	390
Denmark	176	Denmark	53	Netherlands	370
Total for Others	52,453		25,096		24,810
Others not listed	107		73		390
Grand Total	52,560		25,169		25,200

Source: FAS/Bonn based on official data from the German Federal Office of Statistics in Wiesbaden.
FAS/Bonn estimate for 1998.

Table 9: PSD for Groundfish, Whole/Eviscerated (in MT)

PSD Table						
Country: Germany						
Commodity: Groundfish, Whole/Eviscerated						
		1997		1998		1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1997		01/1998		01/1999
Beginning Stocks	0	0	0	0	0	0
Total Production	32,000	22,868	0	22,800	0	22,800
Intra-EC Imports	8,000	7,739	0	7,700	0	7,700
Other Imports	20,000	16,321	0	16,400	0	16,400
TOTAL Imports	28,000	24,060	0	24,100	0	24,100
TOTAL SUPPLY	60,000	46,928	0	46,900	0	46,900
Intra-EC Exports	14,900	10,869	0	10,800	0	10,800
Other Exports	100	58	0	60	0	60
TOTAL Exports	15,000	10,927	0	10,860	0	10,860
Domestic Consumption	45,000	36,001	0	36,040	0	36,040
Other Use/Loss	0	0	0	0	0	0
TOTAL Utilization	45,000	36,001	0	36,040	0	36,040
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	60,000	46,928	0	46,900	0	46,900

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.

Table 10: German Import Prices for Groundfish, Whole/Eviscerated (in DM per MT)

Year: 1997			
Prices in DM per Metric Tons			
Year	1996	1997	% Change
Jan	2,663	2,587	-2.9%
Feb	2,767	3,021	9.2%
Mar	2,244	2,762	23.1%
Apr	2,364	2,990	26.5%
May	2,453	2,967	21.0%
Jun	2,482	3,059	23.2%
Jul	3,009	3,131	4.1%
Aug	2,897	3,169	9.4%
Sep	3,200	3,201	0.0%
Oct	2,784	3,049	9.5%
Nov	2,537	3,295	29.9%
Dec	3,188	3,417	7.2%

Exchange Rate: 1.79 (local currency/US\$).

Date of Quote: 21 September 1998.

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

Table 11: German Import of Groundfish, Whole/Eviscerated (in MT)

Country: Germany		Units: Metric Tons			
Imports from	1996		1997		1998
U.S.	39	U.S.		U.S.	43
Others		Others		Others	
Norway	14,611	Norway	13,063	Norway	12,579
Denmark	5,231	Denmark	6,117	Denmark	6,855
Poland	3,353	Poland	1,685	Iceland	1,177
Great Britain	1,271	Great Britain	697	Russia	1,167
Netherlands	381	Iceland	623	Poland	1,024
Iceland	338	Netherlands	585	Netherlands	410
South Africa	343	Faroe Islands	394	Greenland	273
France	276	Estonia	308	Sweden	192
Russia	258	Russia	243	France	140
Austria	234	France	162	Great Britain	90
Total for Others	26,296		23,877		23,907
Others not listed	823		183		150
Grand Total	27,158		24,060		24,100

Source: FAS/Bonn based on official data from the German Federal Office of Statistics in Wiesbaden.
FAS/Bonn estimate for 1998.

Table 12: German Export of Groundfish, Whole/Eviscerated (in MT)

Country: Germany		Units: Metric Tons			
Exports to	1996		1997		1998
U.S.		U.S.		U.S.	
Others		Others		Others	
France	11,086	France	4,944	France	4,562
Netherlands	5,983	Netherlands	4,433	Netherlands	4,071
Denmark	1,767	Great Britain	610	Denmark	583
Great Britain	1,356	Denmark	460	Great Britain	575
Bel/Lux	763	Bel/Lux	261	Bel/Lux	534
Spain	412	Spain	121	Spain	378
Portugal	459	Portugal	30	Russia	49
Lithuania	64	Belarus	26	Poland	48
Poland	62	Czech Republic	20	Italy	24
Italy	36	Italy	7	Portugal	29
Total for Others	21,988		10,912		10,853
Others not listed	27		15		7
Grand Total	22,015		10,927		10,860

Source: FAS/Bonn based on official data from the German Federal Office of Statistics in Wiesbaden.
FAS/Bonn estimate for 1998.

Table 13: PSD for Groundfish, Fillet (in MT)

PSD Table						
Country: Germany						
Commodity: Groundfish, Fillets						
		1997		1998		1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1997		01/1998		01/1999
Beginning Stocks	0	0	0	0	0	0
Total Production	65,000	53,236	0	54,000	0	54,000
Intra-EC Imports	55,000	38,324	0	41,000	0	41,000
Other Imports	485,000	500,129	0	525,000	0	525,000
TOTAL Imports	540,000	538,453	0	566,000	0	566,000
TOTAL SUPPLY	605,000	591,689	0	620,000	0	620,000
Intra-EC Exports	108,000	139,602	0	146,000	0	146,000
Other Exports	7,000	6,412	0	7,300	0	7,300
TOTAL Exports	115,000	146,014	0	153,300	0	153,300
Domestic Consumption	490,000	445,675	0	466,700	0	466,700
Other Use/Loss	0	0	0	0	0	0
TOTAL Utilization	490,000	445,675	0	466,700	0	466,700
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	605,000	591,689	0	620,000	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.

Table 14: German Import Prices for Groundfish, Fillets (in DM per MT)

Year: 1997			
Prices in DM per Metric Tons			
Year	1996	1997	% Change
Jan	3,518	3,279	-6.8%
Feb	3,345	3,480	4.0%
Mar	3,483	3,499	0.5%
Apr	3,236	3,456	6.8%
May	3,201	3,744	17.0%
Jun	3,412	3,336	-2.2%
Jul	3,090	3,566	15.4%
Aug	3,288	3,397	3.3%
Sep	3,258	3,635	11.6%
Oct	3,228	3,566	10.5%
Nov	2,988	2,473	-17.2%
Dec	3,445	3,813	10.7%

Exchange Rate: 1.79 (local currency/US\$).

Date of Quote: 21 September 1998.

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

Table 15: German Import of Groundfish, Fillets (in MT)

Country: Germany		Units: Metric Tons			
Imports from	1996		1997		1998
U.S.	238	U.S.	55	U.S.	815
Others		Others		Others	
Russia	214,875	Russia	274,286	Russia	283,446
China	88,488	China	92,551	China	121,998
Norway	55,554	Norway	51,276	Norway	41,500
Poland	45,500	Poland	44,693	Poland	40,547
Denmark	31,773	Denmark	24,538	Denmark	21,081
Peru	28,273	Iceland	14,377	Iceland	19,997
Argentina	21,330	Faroe Island	11,675	Faroe Island	6,993
Chile	12,436	Netherlands	3,832	New Zealand	9,424
Iceland	10,462	Ireland	4,340	Netherlands	4,308
Faroe Islands	5,621	France	2,584	France	2,391
Total for Others	514,312		524,152		551,685
Others not listed	26500		14246		13500
Grand Total	541050		538453		566000

Source: FAS/Bonn based on official data from the German Federal Office of Statistics in Wiesbaden.
FAS/Bonn estimate for 1998.

Table 16: German Export of Groundfish, Fillets (in MT)

Country: Germany		Units: Metric Tons			
Exports to	1996		1997		1998
U.S.	357	U.S.	288	U.S.	2
Others		Others		Others	
France	47,744	France	56,877	France	66,981
Netherlands	17,666	Netherlands	32,064	Netherlands	30,093
Great Britain	17,662	Great Britain	20,127	Great Britain	17,585
Bel/Lux	11,983	Bel/Lux	13,888	Bel/Lux	13,927
Austria	9,273	Austria	7,710	Austria	8,930
Russia	3,509	Sweden	3,297	Denmark	2,887
Denmark	2,972	Denmark	2,451	Sweden	2,935
Sweden	2,489	Russia	2,389	Russia	2,675
Italy	1,490	Spain	2,005	Spain	1,464
Spain	1,056	Italy	819	Israel	1,300
Total for Others	115,844		141,627		148,777
Others not listed	4,067		4,099		4,521
Grand Total	120,268		146,014		153,300

Source: FAS/Bonn based on official data from the German Federal Office of Statistics in Wiesbaden.
FAS/Bonn estimate for 1998.

Table 17: Fishery Products Strategic Indicator Table

U.S. Competitive Position	Measurement	1997 Situation	1998 Situation	1999 Expectations	5 Year Projections/ Expectations
U.S. Access Relative to Rest of World- Non-Tariff Measures (NTM)	Worse, equal, or better	equal	equal	equal	equal
U.S. Access Relative to Rest of World - Tariffs	Higher, equal, lower	equal	equal	equal	equal
Presence of Marketing Programs (domestic and 3rd country) versus U.S. programs	More aggressive, about the same, less aggressive,	same	same	same	same
U.S. Prices Relative to Domestic and 3rd Country Prices	Higher, equal, lower	higher	higher	higher	higher
U.S. Market Share (3 Year. Average)	Percent	one	one	one	one

Market Attractiveness	Measurement	1997 Situation	1998 Situation	1999 Expectations	5 Year Projections/ 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

Table 18: German Production of Fish Products (in MT, DM 1,000)

Product	MT		DM 1,000	
	1996	1997	1996	1997
Fresh, chilled	25,865	16,290	187,953	135,233
Frozen				
- Seafish	715	1,392	7,017	11,832
- Freshwater	587	341	8,997	5,447
- Fillets	34,240	36,946	207,026	205,600
Salted, dried, smoked				
- smoked salmon	6,010	5,061	145,992	114,457
- smoked herring	3,415	2,430	17,537	14,943
- other smoked fish	13,235	11,941	165,200	157,555
Other fish preparations				
- Salmon	6,424	n.a.	74,085	72,484
- Herring	86,524	69,866	441,904	402,688
- Sardines, sprat	1,981	n.a.	25,585	n.a.
- Mackarels	2,784	2,157	21,733	18,326
- Baked fillets/sticks	120,257	123,073	546,617	545,304
- Other fish	63,785	65,374	317,686	332,110
- Fish salad	20,843	32,788	148,952	203,938
- Otherwise prepared	35,871	34,307	226,604	191,705
- Caviar substitutes	770	866	24,603	27,187
- Frozen crayfish	467	n.a.	4,528	n.a.
- Crayfish preparations	1,812	1,451	38,398	28,307
- Preserved Crayfish	4,841	3,962	66,300	60,650
Total Production	430,426	408,245	2,676,717	2,527,766

Source: Annual Report of the German Association of the Fish Industry and the Fish Wholesale 1998, page 27.

Table 19: German Import of Fish and Fish Products (in MT, DM 1,000)

Product	MT		DM 1,000	
	1996	1997	1996	1997
Freshwater Fish (live, fresh, frozen)	113,529	108,295	788,187	780,692
Herring (fresh/frozen)	99,890	86,588	788,187	780,692
Seafish (fresh)	72,815	66,793	134,818	121,721
- Whole	50,374	47,592	220,894	226,110
- Fillet	22,441	19,201	123,076	128,950
Seafish (frozen)	230,460	244,098	807,710	891,134
- Whole	27,397	24,856	98,324	103,929
- Fillet	184,476	195,872	663,674	736,878
- Fish meat	18,587	23,370	45,712	50,327
Seafish (salted, dried, smoked)	41,607	38,940	345,303	330,856
Seafish, preparations	137,529	157,021	583,844	593,256
Crayfish, mollusks	64,971	62,258	604,582	611,791
- fresh, frozen	40,475	37,959	326,224	335,790
- prepared	24,496	24,299	278,358	276,001
Total Imports	763,385	766,069	3,704,773	3,777,800

Source: Annual Report of the German Association of the Fish Industry and the Fish Wholesale 1998, pages 32 and 33.

Table 20: German Export of Fish and Fish Products (in MT, DM 1,000)

Product	MT		DM 1,000	
	1996	1997	1996	1997
Freshwater Fish (live, fresh, frozen)	51,504	27,315	343,423	205,956
Herring (fresh/frozen)	24,015	29,101	19,979	23,135
Seafish (fresh)	26,846	16,949	68,842	49,800
- Whole	23,200	12,612	58,909	36,855
- Fillet	3,646	4,337	9,933	12,945
Seafish (frozen)	73,059	71,896	251,155	272,970
- Whole	30,015	20,534	56,556	39,577
- Fillet	39,268	47,774	184,847	224,479
- Fish meat	3,776	3,588	9,752	8,914
Seafish (salted, dried, smoked)	13,788	5,606	103,668	47,711
Seafish, preparations	105,236	157,021	462,828	501,655
Crayfish, mollusks	37,733	30,599	146,843	132,318
- fresh, frozen	32,607	27,683	99,716	98,571
- prepared	5,126	2,916	47,127	33,747
Total Exports	332,733	293,246	1,431,881	1,261,807

Source: Annual Report of the German Association of the Fish Industry and the Fish Wholesale 1998, pages 34 and 35.

Table 21: German Import of Selected Fish Varieties from the United States (in MT, US\$ 1,000)

	1995		1996		1997	
	MT	US\$ 1,000	MT	US\$ 1,000	MT	US\$ 1,000
Frozen pacific salmon	724	2,216	1,006	2,260	2,047	5,051
Atlantic/Danube salmon, frozen	14	85	125	346	9	24
Frozen Pacific Halibut	19	130	46	306	46	297
Frozen dogfish 'Squalus acanthias'	318	545	285	360	360	649
Various fish fillets, fresh/chilled	24	238	125	1,097	81	590
Frozen pacific salmon fillets	96	607	133	623	92	406
Oth. freshwater fish fillets, frozen	147	1,126	220	1,508	137	937
Frozen monkfish fillets	125	882	122	793	175	1,115
Frozen meat of other seawater fish	1,727	12,366	1,547	9,430	1,801	6,322
Live lobsters, not frozen	179	2,229	230	2,974	232	2,721
Other squid 'loligo spp', frozen	388	548	319	440	310	451
Prep/preserved salmon, whole	0	1	2	19	66	307
Caviar substitutes	136	3,818	94	2,280	148	3,255
Total	4,555	28,442	4,946	25,646	5,905	24,186

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