

Voluntary Report – Voluntary - Public Distribution

Date: April 17,2020

Report Number: GM2020-0026

Report Name: Strong Growth in US Fish Exports to Germany

Country: Germany

Post: Berlin

Report Category: Product Brief, Fishery Products

Prepared By: Leif Rehder

Approved By: Emily Scott

Report Highlights:

Germany is the most important fish and seafood market in Europe for U.S. exporters. Germany's growing demand for high-quality fish and seafood offers opportunities for U.S. suppliers. U.S. sales to Germany increased by 19% to nearly \$222 million in 2019. The German market is especially dependent on imports of Alaska pollock and there are also good prospects for salmon, hake, cod, scallops, and dogfish among others. 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 continue to increase. Consumption in Germany averages 14 kg/per capita annually. Sales reached a record high of €3.9 billion (\$4.2 USD) in 2018. Total domestic demand is more than seven times higher than domestic production. Distribution of fish and fishery products in Germany in 2018 was 2.2 million metric tons (MMT). Imports reached 1.9 MMT supplemented by domestic production of 0.3 Mio. MT. Alaska pollock has overtaken salmon as the favorite fish followed by tuna, herring, shrimp and trout. These six species make up for roughly 75% 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 purchase quality instead of looking for the best prices. 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 market.

II. Trade

The demand for fish and seafood in Germany exceeds domestic supply. Most imports come from other EU countries with the neighboring countries Poland, Denmark, and the Netherlands as leading suppliers. Total imports decreased by 5% to \$5.6 billion in 2019 with Pacific and Atlantic salmon, Tuna, Alaska pollock, shrimp, and cod as the most important import products. U.S. exports increased by nearly 20% to \$222 million in 2019 backed by strong sales of Alaska pollock and Sockeye salmon. In 2019, the US ranked second among third country origins behind China, followed by Norway and Vietnam.

Germany Imports of Fish and Seafood by Origin in Value (\$ Million)					
Partner Country	2015	2016	2017	2018	2019
World	4,945	5,411	5,653	5,875	5,565
Poland	871	976	1,062	1,204	1,126
Netherlands	704	758	798	875	775
Denmark	609	713	716	664	643
China	395	401	368	394	493
Lithuania	150	199	222	214	226
United States	188	198	211	186	222
Sweden	131	191	184	190	218
Norway	267	316	261	266	203
Vietnam	178	156	165	169	165
France	116	120	140	156	147

Source of Data: Trade Data Monitor

Germany is also a large exporter and especially re-exporter of fish and seafood products since domestic production is small. Exports were valued over \$2,4 billion in 2019. Top destinations were EU countries like Netherlands, France, and Austria. The United States ranked 2nd after Switzerland among non EU countries. German exports to the United States totaled \$0.1 billion in 2019 which was mostly salmon – chilled and frozen.

III. U.S. Exports

Germany is traditionally the most important fish and seafood market for U.S. exporters in Europe. Globally, it ranks sixth among U.S. export markets after China, Japan, Canada, South Korea, and the 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. Share of Alaska Pollock at total U.S. fish and seafood exports is usually close to 60%. While Alaska pollock exports increased by 18% in 2019, share dropped to 52% in 2019 due to strong exports of Sockeye salmon (+76%) and hake (+79%) to Germany while sales of Pacific salmon stayed flat. There are also good prospects for cod, scallops, and dogfish among others on the German market.

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 is also market by that name. Nevertheless, consumers associate the origin with the name and think that the lower quality products are originated in Alaska, too. 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 US is an accepted and well-known producer of fish and seafood and the US is able to supply seafood in most 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 in 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 discounter 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 number one selling argument for fish and seafood in Germany is the seal from the Marine Stewardship Council (MSC). In retail, the logo counts as the main selling point and is seen as most reliable by the majority of 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, except for live bivalve mollusks. This 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 (page 52-73) [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](#).

VI. Market Entry Strategy

Trade missions coordinated through industry/export organizations as well as participation in trade shows such as the annual European Seafood Exposition in Brussels are important in gaining knowledge about the market structure, consumer preferences and building contacts with importers. Germany also has its own tradeshow, Fish International, held biannually in Bremen in Northern Germany. Please see below for further information on European Seafood Exposition and Fish International.

European Seafood Exposition

Barcelona, Spain

April 27-29, 2021

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

Fish International

Bremen, Germany

February 13-15, 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:

ASMI Central & Western EU

mk2, Ms. Maria Kraus
Tel: 0049 228-943787-0
E-mail: info@mk-2.com
www.mk-2.com/en/

American Indian Foods

Ms. Christine Berthold
Berthold & Partners
Tel.: 0049 47 92 951 91 95
E-Mail: christine@bertholdpartners.de
www.indianagfoods.org/

Food Export USA Northeast

Mr. Alexander Wever
Tel. 0049 2381 305 8647
E-Mail: alexander.wever@aw-fisch.de
<https://aw-fisch.com/>

Southern United States Trade Association

Mr. Victor J. Phaff
Phaff Export Marketing BV
Tel.: 0031 321 387933
Mail: vjp@phaff.com
www.susta.org

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
www.fas-europe.org

Attachments:

No Attachments.