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Date: 4/11/2018

GAIN Report Number: GM18015

Germany

Post: Berlin

Fish and Seafood Market

Report Categories:

SP1 - Expand International Marketing Opportunities

Fishery Products

Approved By:

Emily Scott

Prepared By:

Leif Erik Rehder

Report Highlights:

Germany is the most important fish and seafood market for U.S. exporters in Europe where a growing demand for high-quality fish and seafood offers opportunities for U.S. suppliers. U.S. sales to Germany increased to nearly \$193 million in 2017. The German market is especially dependent on imports of Alaska pollock and there are also good prospects for salmon, cod, live lobsters, and dogfish among others. This report provides information about U.S. exports, market entry, import requirements as well as trade and market data.

General Information:

I. Market

Demand for fish and seafood in Germany continue to increase. Fish consumption in Germany climbed to 14.1 kg/per capita in 2016 – an increase by over 5 percent compared to 2015. Sales reached a record high of \$4.2 billion in 2016. Total domestic demand is more than seven times higher than domestic production. Imports reached 1.9 million metric tons (MMT) supplemented by domestic production of 0.3 MMT. Total distribution of fish and fishery products in Germany in 2016 was 2.2 Mio. Metric Tons (MT). Salmon is the favorite fish followed by Alaska pollock, herring, tuna, and trout. These five species make up for roughly 75% of the total amount 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 this pertain even more for 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 reached nearly \$4.6 billion in 2017 with Pacific and Atlantic salmon, Alaska pollock, cod, shrimp, and tuna as the most important. The US ranks third among third-country origins behind China and Norway.

Partner Country	2013	2014	2015	2016	2017
World	4,176	4,634	4,002	4,457	4,573
Poland	789	868	751	808	875
Denmark	540	624	557	653	696
Netherlands	454	521	493	530	588
China	418	406	379	388	356
Norway	330	346	266	315	258
Lithuania	101	145	136	182	212
United States	164	196	169	180	193
Sweden	101	136	127	187	164
United Kingdom	129	149	114	151	139
Vietnam	114	121	107	92	88

Source of Data: GTA

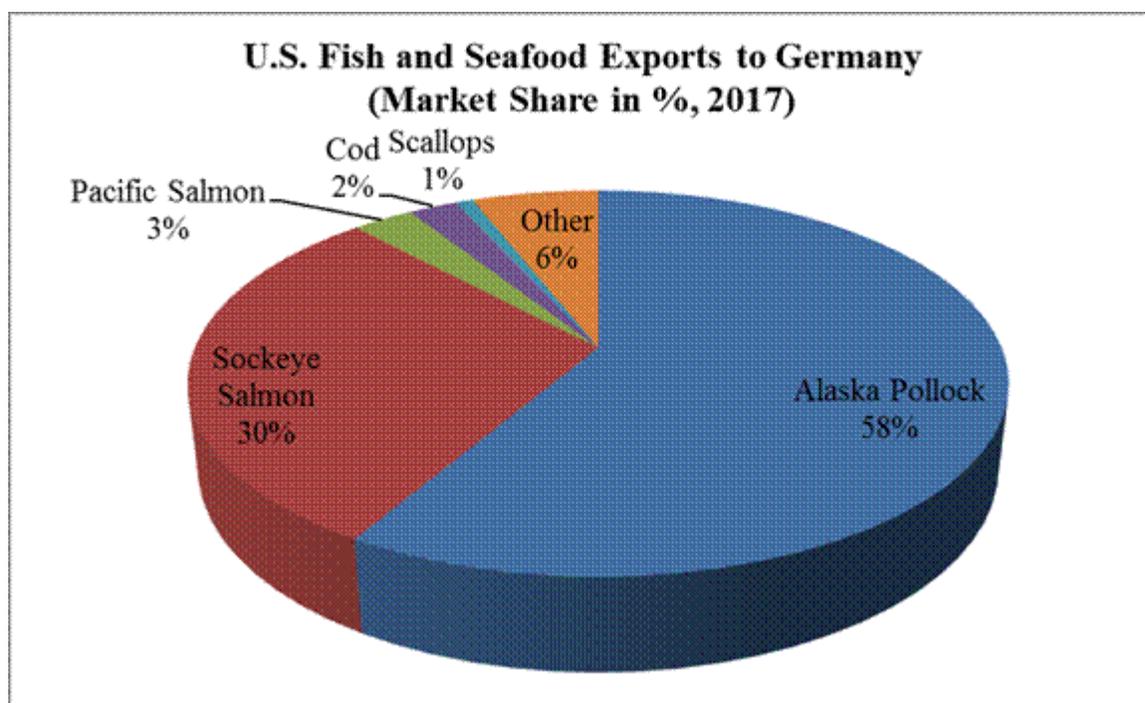
Germany is also a large exporter and especially re-exporter of fish and seafood products since domestic production is small. Exports were valued over \$1.9 billion in 2017. Top destinations were countries

within the European Union (EU) like the Netherlands, France, and Austria. The United States ranked 2nd after Switzerland among non-EU countries. German exports to the United States totaled \$100 million in 2017 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 fifth among U.S. export markets after China, Japan, Canada, and South Korea. In 2017, U.S. exports to Germany were valued at \$193 million. 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. But, share of Alaska pollock at total U.S. exports to Germany decreased lately. This is due to increased exports of Sockeye salmon, Pacific salmon and scallops to Germany while sales of Alaska pollock remained flat. There are also good prospects for cod, live lobsters, and dogfish among others on the German market.



Source: Global Trade Atlas

Promoting Alaska pollock in Germany has recently become a challenge since it is not seen as an identification of origin but a product name. 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 market.

IV. **Distribution**

Germany is located in the heart of Europe and German importers and distributors readily 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 become even stronger. In 2016, the market share of discounters on household sales increased to over 40 percent while supermarkets followed with 25 percent and superstores reached 13 percent. 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 point for fish and seafood in Germany is the seal of 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 on the right and check [MSC](#) website for more information.



V. **Import Requirements**

As a general principle, seafood is imported into the EU/Germany from approved countries and 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 both trade shows.

European Seafood Exposition

Brussels, Belgium

April 24-26, 2018

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

Fish International

Bremen, Germany

February 9-11, 2020

<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 associations 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.americanindianfoods.com

Food Export USA Northeast

Mr. Alexander Wever

Tel. 0049 2381 305 8647

E-Mail: alexander.wever@aw-fisch.de

www.aw-fisch.de

Southern United States Trade Association

Mr. Victor J. Phaff / Ms. Karin Defossez

Phaff Export Marketing BV

Tel.: 0031 321 387933

Mail: vjp@phaff.com / kd@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@state.gov

Please also check www.fas-europe.org for upcoming events with marketing opportunities in Europe, for access to our marketing reports, and to help you get in direct touch with the FAS Europe offices.