



**MARKET ACCESS SECRETARIAT  
Global Analysis Report**

**Competitive Trade Analysis**  
Fresh, Frozen and Processed Fish in Germany

**August 2016**



**REPORT CONTENT SUMMARY**

This report looks to highlight fish imports into Germany, which is a priority for Canada, and attempts to identify the best opportunities for Canadian exports.

Specifically, the data analysis that follows focuses on Germany's top ten fresh, frozen, and processed fish imports (*excluding molluscs and crustaceans*), of which Canada may be a supplier. It identifies the gap between Germany's imports from the world and the proportion provided by Canada, and then outlines top international competitors.

Unless otherwise specified, all figures in this document are based on import data as reported by Germany Customs, and were sourced from Global Trade Atlas (2016).

**GERMANY'S MARKET SUMMARY**

Germany imported C\$23.2 million worth of fish and seafood from Canada in 2015, which made Germany the 15<sup>th</sup> export market for Canada's fish and seafood products.

Fish and seafood demand is decreasing in Germany but still continues to be 6<sup>th</sup> largest fish and seafood importer in the world. According to Euromonitor International, Germany has a high dependency on imports of fish and seafood, which is estimated to account for 88% of German consumption.

Germany's top fish commodity suppliers in 2015 were Poland with 21% market share, Norway (11.8%), Netherlands (10.2%), Denmark (10.1%), and China (9.8%).

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## MARKET CHARACTERISTICS

In 2015, Germany continued to experience slow growth from the previous year due to low confidence in exports caused by the Ukrainian crisis and western sanctions on Russia. Since then Germany's share of GDP has been lower than other large economies. However, Germany's real GDP is expected to grow by 1.8% in 2016, up from 1.5% in 2015. This comes from a rise in wages, employment, additional public spending, and rise in exports (Euromonitor International).

After Germany's economic downturn in 2014, fish consumption declined by 1% in volume sales. Despite this decline, processed fish, the smallest fish category, is experiencing successful growth in volume with a compound annual growth rate (CAGR) of 1.2% from 2009 to 2014. This is in part due to the shift from eating fish as a meal to eating fish as a convenient snack for busy consumers (Euromonitor International). Alternatively, fresh fish volume sales are expected to gain popularity as health-conscious consumers and Germany's aging society preference for fresh and chilled fish increase.

According to the Norwegian Seafood Council, the main reasons for fish consumption in Germany are fish's enjoyable flavour (75%), its health benefits (59%) and its use as a low-fat alternative to meat (44%). Older German consumers tend to buy fresh fish more often than younger consumers. However, many do not enjoy fish, they feel that fish can be hard to obtain and that it does not offer good value for money due to being too expensive (Euromonitor International, 2015). Nonetheless, the boost in Germany's economic confidence and increases in marketing campaigns are expected to have a positive influence on retail consumption towards expensive fish species.

Germany offers the widest range of Marine Stewardship Council Certified (MSC-certified) fresh and processed fish products, ahead of the Netherlands and the United Kingdom. High growth rates for MSC-certified fish are due to consumers being strongly aware of sustainability and looking for high quality fish with ecolabels (Euromonitor International, 2015).

Overall, Germany's food and beverages market (including fish and seafood) is highly competitive with retail prices being the lowest among all of Europe (Trade Commissioner Services, 2016).

### Volume Sales of Fish in Germany, in '000 Toones

Categories	2009	2010	2011	2012	2013	2014	CAGR % 2009-14
<b>Total Fish*</b>	<b>1,060.00</b>	<b>1,034.70</b>	<b>1,017.90</b>	<b>998.30</b>	<b>997.50</b>	<b>987.40</b>	<b>-1.4%</b>
Fresh Fish <sup>1</sup>	645.3	612.5	607.6	570.7	552.5	547	-3.3%
Processed Fish <sup>2</sup>	414.7	422.2	410.3	427.6	445	440.4	1.2%

Source: Euromonitor International<sup>1</sup> and Mintel Retail Market<sup>2</sup>

\*Note: The total volume of fish sales is a calculated combination of Fresh Fish and Processed Fish taken from two different source.

## TOP 5 FISH CONSUMPTION IN GERMAN

In Germany, seafish (61.4%) and freshwater fish (26.9%) accounted for 88.3% of fish and seafood consumption, while crustaceans and molluscs accounted for 11.7%. The largest fish consumption by fish species was Alaska Pollock with 22.9% of the total consumption by fish species, followed by Herring (18.7%) and Salmon (14.5%).



### Top 5 in German Fish Consumption, 2014

Fish	Consumption Share (%)
Alaska Pollock	22.9
Herring	18.7
Salmon	14.5
Tuna, Bonito	12.5
Pangasius	5.5

Source: Fisch Informationszentrum, 2014

## CANADA'S PERFORMANCE

According to Global Trade Atlas (GTA) data, total Canadian fish exports (excluding seafood) into Germany in 2015, were 2,161 tonnes (down by - 12.4% over 2014) and valued at C\$9.3 million (down by - 30.9%). Leading Canadian fish products were: frozen fish meat (C\$ 2.3 million, up by 36.1%), frozen Pacific salmon (C\$ 1.8 million, up by 26.5%), and caviar substitutes prepared from fish eggs (C\$ 1.3 million, down by -19.5%).

### Germany's Fish Commodity Imports from Canada, in C\$ Millions and Tonnes 2013 to 2015

HS Code	Description	Canada Dollars			Quantity		
		2013	2014	2015	2013	2014	2015
<b>Total Fish</b>		<b>9,964,560</b>	<b>13,388,373</b>	<b>9,255,144</b>	<b>1,423</b>	<b>2,465</b>	<b>2,161</b>
030499	Frozen Fish Meat, NESOI*	877,885	1,658,579	2,256,539	560	1,183	1,605
030312	Frozen Pacific Salmon, NESOI	1,203,356	1,416,398	1,806,138	314	451	254
160432	Caviar Substitutes Prepared From Fish Eggs	2,542,410	1,589,657	1,280,300	92	48	49
030541	Smoked Pacific, Atlantic And Danube Salmon,	700,831	838,418	979,436	26	29	30
030481	Frozen Pacific, Atlantic And Danube Salmon Fillets	843,026	1,031,724	599,788	55	65	32
030311	Frozen Sockeye Salmon	994,349	4,233,027	551,753	96	488	55
030489	Frozen Fish Fillets, NESOI	1,549,972	578,473	536,265	156	56	52
030390	Frozen Fish Livers And Roes	132,407	720,859	305,191	4	51	8
160420	Prepared Or Preserved Fish, , NESOI	134,451	130,962	173,835	6	6	7
030441	Fresh/Chilled Pacific, Atlantic, Danube Salmon Fillet	34,355	97,541	127,856	3	5	5

Source: Global Trade Atlas, 2016.

\* NESOI=no elsewhere specified or indicated

## TRADE OVERVIEW

Germany imported 841,359 tonnes of fish (excluding seafood products), worth C\$5.12 billion in 2015, respectively, a 3.06% decrease in volume and 0.83% decrease in value from 2014. Poland continues to be the top supplier of Germany's fish imports with C\$1.1 billion in value and 119,004 tonnes, followed by Norway with C\$606.5 million (and 88,076 tonnes). Canada is ranked as the 37<sup>th</sup> supplier based on value with 2,161 tonnes of fish products worth C\$9.3 million in 2015.



### Germany's Top Ten Suppliers of Fish in C\$ and % Share

#	Partner Country	Canada Dollars			% Share			% Change 2015/14
		2013	2014	2015	2013	2014	2015	
<b>World</b>		<b>4,549,658,580</b>	<b>5,167,776,710</b>	<b>5,124,667,779</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>- 0.83</b>
1	Poland	958,955,572	1,071,521,819	1,074,783,199	2.11	20.7	21.0	0.30
2	Norway	582,263,856	701,794,132	606,494,080	12.8	13.6	11.8	- 13.58
3	Netherlands	352,099,972	452,533,554	520,722,524	7.7	8.8	10.2	15.07
4	Denmark	398,985,069	503,535,559	515,012,275	8.8	9.7	10.1	2.28
5	China	455,093,035	476,443,418	503,390,712	10.0	9.2	9.8	5.66
6	United States	185,335,208	236,340,329	239,895,198	4.1	4.6	4.7	1.50
7	Lithuania	106,504,393	171,142,950	177,918,943	2.3	3.3	3.5	3.96
8	Iceland	104,794,327	107,526,762	114,351,856	2.3	2.1	2.2	6.35
9	Turkey	80,690,758	103,922,589	113,801,972	1.8	2.0	2.2	9.51
10	Vietnam	112832423	101437956	100511162	2.5	2.0	2.0	- 0.91
37	Canada	9,964,560	13,388,373	9,255,144	0.2	0.3	0.2	- 30.87

Source: Global Trade Atlas, 2016

### Germany's Top Ten Suppliers of Fish, Volume in Tonnes and % Share

#	Partner Country	Quantity			% Share			% Change 2015/2014
		2013	2014	2015	2013	2014	2015	
<b>World</b>		<b>830,496</b>	<b>867,953</b>	<b>841,359</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>- 3.06</b>
1	China	123,145	125,773	119,190	14.8	14.5	14.2	- 5.23
2	Poland	116,329	116,355	119,004	14.0	13.4	14.1	2.28
3	Denmark	99,490	114,709	115,445	12.0	13.2	13.7	0.64
4	Norway	90,467	106,816	88,076	10.9	12.3	10.5	- 17.54
5	Netherlands	55,242	57,600	71,542	6.7	6.6	8.5	24.20
6	United States	45,822	60,077	52,129	5.5	6.9	6.2	- 13.23
7	Vietnam	31,014	26,543	23,969	3.7	3.1	2.9	- 9.70
8	Lithuania	13,374	17,691	22,921	1.6	2.0	2.7	29.56
9	United Kingdom	26,386	27,395	20,961	3.2	3.2	2.5	- 23.48
10	Iceland	21,258	19,841	19,465	2.6	2.3	2.3	- 1.89
32	Canada	1,423	2,465	2,161	0.8	0.3	0.3	- 12.35

Source: Global Trade Atlas, 2016

### Fish Supply Gap, in C\$ millions

	2013	2014	2015	CAGR % 2013-15
Germany's imports from the world	4,549.7	5,167.8	5,124.7	6.13
Germany's import from Canada	10.0	13.4	9.3	-3.63
Supply Gap	4,539.7	5,154.4	5,115.4	6.15

Source: Global Trade Atlas, 2016



## Germany's Top Ten Fish Commodity Import from the World, C\$ Millions and % Share 2013 to 2015

HS Code	Commodity	Canada Dollars			% Share			% Change 2015/14
		2013	2014	2015	2013	2014	2015	
<b>Fish</b>		<b>4,549.7</b>	<b>5,167.8</b>	<b>5,124.7</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>-0.83</b>
030541	Smoked Pacific, Atlantic And Danube Salmon	587.7	708.3	704.0	12.92	13.71	13.74	-0.6
030475	Frozen Alaska Pollock Fillets	420.1	442.5	495.3	9.23	8.56	9.66	11.94
160414	Prep/Pres Not Minced Tunas/Skipjack/Bonito	432.3	399.9	433.9	9.5	7.74	8.47	8.51
030214	Fresh Or Chilled Atlantic Salmon And Danube Salmon	334.6	479.9	425.0	7.36	9.29	8.29	-11.45
030481	Frozen Pacific, Atlantic And Danube Salmon Fillets	286.7	344.5	277.4	6.3	6.67	5.41	-19.48
160419	Prepared Or Preserved, Whole Or Pieces Fish, NESOI*	151.5	175.9	207.8	3.33	3.4	4.05	18.11
030471	Frozen Cod Fillets,	144.6	181.9	203.9	3.18	3.52	3.98	12.12
030489	Frozen Fish Fillets NESOI	183.2	205.2	196.4	4.03	3.97	3.83	-4.28
030441	Fresh/Chilled Pacific, Atlantic, Danube Salmon Fillet	92.7	142.6	174.7	2.04	2.76	3.41	22.49
160412	Prep Or Pres, Whole Or In Pieces Herrings	158.7	141.9	128.1	3.49	2.75	2.5	-9.76

Source: Global Trade Atlas, 2016

\*NESOI=no elsewhere specified or indicated

### 1. Smoked Pacific, Atlantic and Dandube Salmon

#### Germany's Top Suppliers of Smoked Pacific, Atlantic and Dandube Salmon, C\$ and % Share

Partner Country	Canada Dollars			% Share			% Change 2015/14
	2013	2014	2015	2013`	2014	2015	
<b>World</b>	<b>587,715,653</b>	<b>708,270,547</b>	<b>704,008,154</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>- 0.60</b>
Poland	467,630,514	505,105,452	513,048,960	79.57	71.32	72.88	1.57
Lithuania	61,121,139	99,277,707	92,807,449	10.40	14.02	13.18	- 6.52
Norway	20,742,400	45,981,658	40,573,940	3.53	6.49	5.76	- 11.76
Denmark	14,965,450	20,690,202	26,945,520	2.55	2.92	3.83	30.23
United Kingdom	11,629,133	16,646,026	11,594,697	1.98	2.35	1.65	- 30.35
Ireland	4,492,080	4,150,902	7,374,631	0.76	0.59	1.05	77.66
Netherlands	1,814,683	3,822,862	3,938,925	0.31	0.54	0.56	3.04
Switzerland	1,671,304	2,149,458	2,516,505	0.28	0.30	0.36	17.08
Sweden	670,516	2,475,103	1,762,162	0.11	0.35	0.25	- 28.80
Canada	700,831	838,418	979,436	0.12	0.12	0.14	16.82

Source: Global Trade Atlas, 2016

#### Smoked Pacific, Atlantic and Dandube Salmon Supply Gap in C\$ Millions

	2013	2014	2015	CAGR % 2013-15
Germany's imports from the world	587.7	708.3	704.1	9.46
Germany's imports from Canada	0.7	0.8	1.0	18.22
Supply Gap	587.0	707.4	703.0	9.44

Source: Global Trade Atlas, 2016



## 2. Frozen Alaska Pollock Fillets

### Germany's Top Ten Suppliers of Frozen Alaska Pollock Fillets, C\$ and % Share

Partner Country	Canada Dollars			% Share			% Change
	2013	2014	2015	2013	2014	2015	2015/2014
<b>World</b>	<b>420,140,562</b>	<b>442,459,877</b>	<b>495,278,055</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>11.94</b>
China	260,102,374	254,593,666	285,038,508	61.91	57.54	57.55	11.96
United States	105,215,254	135,367,004	131,003,196	25.04	30.59	26.45	- 3.22
Russia	38,335,501	32,294,438	53,001,651	9.12	7.30	10.70	64.12
Netherlands	4,494,848	4,854,534	13,666,151	1.07	1.10	2.76	181.51
Poland	2,335,387	3,663,318	5,145,170	0.56	0.83	1.04	40.45
Vietnam	1,920,407	3,252,648	4,736,571	0.46	0.74	0.96	45.62
Belgium	972,959	1,749,047	1,042,591	0.23	0.40	0.21	- 40.39
France	59,476	1,987,968	771,761	0.01	0.45	0.16	- 61.18
Denmark	371,888	751,704	357,913	0.09	0.17	0.07	- 52.39
Lithuania	13,548	585,854	197,658	0.00	0.13	0.04	- 66.26

Source: Global Trade Atlas, 2016

### Frozen Alaska Pollock Fillets Supply Gap in C\$ Millions

	2013	2014	2015	CAGR % 2013-15
Germany's imports from the world	420.1	442.5	495.3	8.58
Germany's imports from Canada	0	0	0	0.00
Supply Gap	420.1	442.5	495.3	8.58

Source: Global Trade Atlas, 2016

## 3. Prep/Pres Not Minced Tunas/Skipjack/Bonito

### Germany's Top Ten Suppliers of Prep/Pres Not Minced Tunas/Skipjack/Bonito, C\$ and % Share

Partner Country	Canada Dollars			% Share			% Change
	2013	2014	2015	2013	2014	2015	2015/2014
<b>World</b>	<b>432,285,064</b>	<b>399,901,001</b>	<b>433,926,857</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>8.51</b>
Philippines	61,188,869	58,214,714	81,245,149	14.15	14.56	18.72	39.56
Netherlands	41,468,002	60,938,368	69,633,942	9.59	15.24	16.05	14.27
Papua New Guinea	55,670,919	40,915,910	68,490,327	12.88	10.23	15.78	67.39
Ecuador	93,417,447	77,346,521	64,347,236	21.61	19.34	14.83	- 16.81
Spain	35,281,097	29,100,926	44,111,929	8.16	7.28	10.17	51.58
Vietnam	38,542,748	34,533,837	29,747,002	8.92	8.64	6.86	- 13.86
Italy	15,599,667	20,534,694	18,900,241	3.61	5.13	4.36	- 7.96
Thailand	21,157,181	23,886,669	15,334,471	4.89	5.97	3.53	- 35.80
Indonesia	18,200,033	19,075,392	14,117,537	4.21	4.77	3.25	- 25.99
Peru	9,041,351	9,599,242	5,804,105	2.09	2.40	1.34	- 39.54
Canada (45)	2,828	3,021	-	0.00	0.00	0.00	- 100.00

Source: Global Trade Atlas, 2016



### Smoked Pacific, Prep/Pres Not Minced Tunas/Skipjack/Bonito Supply Gap in C\$ Millions

	2013	2014	2015	CAGR % 2013-15
Germany's imports from the world	45.8	42.0	41.1	-5.27
Germany's import from Canada	0.002	0.003	0.000	-100.00
Supply Gap	43.3	40.	39.8	-4.13

Source: Global Trade Atlas, 2016

#### 4. Fresh or Chilled Atlantic and Danube Salmon

##### Germany's Top Ten Suppliers of Fresh or Chilled Atlantic and Danube Salmon, C\$ and % Share

Partner Country	Canada Dollars			% Share			% Change
	2013	2014	2015	2013	2014	2015	2015/2014
<b>World</b>	<b>334,629,858</b>	<b>479,930,311</b>	<b>424,957,780</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>- 11.45</b>
Norway	281,255,289	331,251,820	292,163,713	84.05	69.02	68.75	- 11.80
Denmark	31,046,295	122,900,657	109,340,371	9.28	25.61	25.73	- 11.03
United Kingdom	13,354,101	12,598,047	11,197,162	3.99	2.62	2.63	- 11.12
Netherlands	4,705,877	5,154,780	5,152,756	1.41	1.07	1.21	- 0.04
Ireland	2,653,851	5,032,443	4,259,846	0.79	1.05	1.00	- 15.35
Belgium	322,202	197,191	1,352,142	0.10	0.04	0.32	585.70
Iceland	662,274	843,829	772,534	0.20	0.18	0.18	- 8.45
France	328,515	667,612	266,539	0.10	0.14	0.06	- 60.08
Faroe Islands	5,446	-	200,830	0.00	0.00	0.05	0.00
Poland	1,320	26,980	76,486	0.00	0.01	0.02	183.50
Canada (15)	13,785	10,160	14,145	0.00	0.00	0.00	39.23

Source: Global Trade Atlas, 2016

##### Smoked Pacific, Fresh or Chilled Atlantic Salmon And Danube Salmon Supply Gap in C\$ Millions

	2013	2014	2015	CAGR % 2013-15
Germany's imports from the world	334.6	479.9	425.0	12.70
Germany's import from Canada	0.013	0.010	0.0	0.00
Supply Gap	334.6	479.9	424.9	12.69

Source: Global Trade Atlas, 2016





## 5. Frozen Pacific, Atlantic And Danube Salmon Fillets

### Germany's Top Ten Suppliers of Frozen Pacific, Atlantic and Danube Salmon Fillets, C\$ and % in Share

Partner Country	Canada Dollars			% Share			% Change
	2013	2014	2015	2013	2014	2015	2015/2014
<b>World</b>	<b>286,683,439</b>	<b>344,453,767</b>	<b>277,351,252</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>- 19.48</b>
China	72,799,597	91,359,597	81,919,160	25.39	26.52	29.54	- 10.33
Poland	35,273,870	35,191,879	52,963,970	12.30	10.22	19.10	50.50
Chile	69,078,730	71,255,684	43,768,042	24.10	20.69	15.78	- 38.58
Norway	50,399,303	42,065,350	27,779,149	17.58	12.21	10.02	- 33.96
Denmark	33,001,422	40,986,737	24,212,620	11.51	11.90	8.73	- 40.93
Belgium	2,515,964	6,847,065	10,216,133	0.88	1.99	3.68	49.20
Sweden	3,649,956	4,650,419	9,016,684	1.27	1.35	3.25	93.89
Netherlands	1,794,738	6,275,679	6,600,356	0.63	1.82	2.38	5.17
Estonia	457,595	6,775,944	5,618,172	0.16	1.97	2.03	- 17.09
Lithuania	1,565,528	14,347,142	4,190,993	0.55	4.17	1.51	- 70.79
Canada (19)	843,026	1,031,724	599,788	0.29	0.30	0.22	- 41.87

Source: Global Trade Atlas, 2016

### Frozen Pacific, Atlantic and Danube Salmon Fillets Supply Gap in C\$ Millions

	2013	2014	2015	CAGR % 2013-15
Germany's imports from the world	286.7	344.5	277.4	-1.64
Germany's import from Canada	0.8	1.0	0.6	-13.40
Supply Gap	285.8	343.4	276.8	-1.59

Source: Global Trade Atlas, 2016

## 6. Prepared or Preserved, Whole Or Pieces Fish, NESOI\*

### Germany's Top Ten Suppliers of Prepared or Preserved, Whole or Pieces Fish, NESOI, C\$ and % in Share

Partner Country	Canada Dollars			% Share			% Change
	2013	2014	2015	2013	2014	2015	2015/2014
<b>World</b>	<b>151,474,010</b>	<b>175,897,340</b>	<b>207,747,983</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>18.11</b>
Netherlands	33,081,132	51,635,982	81,805,178	21.84	29.36	39.38	58.43
Poland	50,553,099	54,646,905	63,191,052	33.37	31.07	30.42	15.64
Denmark	25,476,765	22,996,956	24,608,678	16.82	13.07	11.85	7.01
South Africa	16,122,214	15,039,777	12,727,602	10.64	8.55	6.13	- 15.37
United Kingdom	7,050,852	4,402,142	4,811,359	4.65	2.50	2.32	9.30
Belgium	4,278,257	5,586,993	3,952,689	2.82	3.18	1.90	- 29.25
France	3,552,875	7,025,832	3,445,181	2.35	3.99	1.66	- 50.96
Lithuania	4,459,092	3,977,460	2,617,409	2.94	2.26	1.26	- 34.19
Turkey	22,987	83,825	2,504,275	0.02	0.05	1.21	2887.51
China	1,062,344	4,111,198	1,629,174	0.70	2.34	0.78	- 60.37

Source: Global Trade Atlas, 2016

\*NESOI=no elsewhere specified or indicated





### Prepared or Preserved, Whole or Pieces Fish, NESOI\* Supply Gap in C\$ Millions

	2013	2014	2015	CAGR % 2013-2015
Germany's imports from the world	151.5	175.9	207.8	17.12
Germany's import from Canada	0	0	0	0.00
Supply Gap	151.5	175.9	207.8	17.12

Source: Global Trade Atlas, 2016

\*NESOI=no elsewhere specified or indicated

### 7. Frozen Cod Fillets

#### Germany's Top Ten Suppliers of Frozen Cod Fillets, in C\$ and in % Share

Partner Country	Canada Dollars			% Share			% Change 2015/2014
	2013	2014	2015	2013	2014	2015	
<b>World</b>	<b>144,588,259</b>	<b>181,866,654</b>	<b>203,905,226</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>12.12</b>
China	55,674,422	61,051,776	73,728,111	38.51	33.57	36.16	20.76
Poland	40,559,701	53,938,161	48,238,227	28.05	29.66	23.66	- 10.57
Denmark	5,503,953	8,283,116	27,890,180	3.81	4.55	13.68	236.71
United Kingdom	5,942,126	10,014,188	9,508,566	4.11	5.51	4.66	- 5.05
Vietnam	10,588,586	9,580,316	7,866,049	7.32	5.27	3.86	- 17.89
Greenland	8,633,744	7,142,835	7,817,662	5.97	3.93	3.83	9.45
Lithuania	2,117,848	9,272,195	7,174,183	1.46	5.10	3.52	- 22.63
Russia	2,785,338	3,670,369	5,725,741	1.93	2.02	2.81	56.00
Norway	3,782,585	6,560,339	5,271,631	2.62	3.61	2.59	- 19.64
Netherlands	2,906,119	4,436,525	4,534,970	2.01	2.44	2.22	2.22

Source: Global Trade Atlas, 2016

#### Frozen Cod Fillets Supply Gap in C\$ Millions

	2013	2014	2016	CAGR % 2013-15
Germany's import from the world	144.6	181.9	204.0	18.78
Germany's imports from Canada	0	0	0	0.00
Supply Gap	144.6	181.9	204.0	18.78

Source: Global Trade Atlas, 2016



## 8. Frozen Fish Fillets

### Germany's Top Ten Suppliers of Frozen Fish Fillets, in C\$ and in % Share

Partner Country	Canada Dollars			% Share			% Change
	2013	2014	2015	2013	2014	2015	2015/2014
<b>World</b>	<b>183,221,507</b>	<b>205,229,537</b>	<b>196,439,598</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>- 4.28</b>
Turkey	6,657,973	32,861,397	29,317,043	9.09	16.01	14.92	- 10.79
Kazakhstan	29,376,241	36,473,905	27,526,252	16.03	17.77	14.01	- 24.53
Netherlands	17,822,732	22,801,783	27,076,368	9.73	11.11	13.78	18.75
Russia	17,694,574	17,140,966	19,943,826	9.66	8.35	10.15	16.35
Iceland	15,878,072	13,839,101	15,376,003	8.67	6.74	7.83	11.11
China	10,972,962	10,968,970	13,131,086	5.99	5.34	6.68	19.71
Ukraine	4,195,625	7,323,309	9,796,689	2.29	3.57	4.99	33.77
Poland	8,619,135	10,863,377	9,701,890	4.70	5.29	4.94	- 10.69
United Kingdom	22,114,595	14,448,062	7,567,121	12.07	7.04	3.85	- 47.63
Vietnam	7,372,058	5,589,117	7,004,006	4.02	2.72	3.57	25.32
Canada	1,549,972	578,473	536,265	0.85	0.28	0.27	- 7.30

Source: Global Trade Atlas, 2016

### Frozen Fish Fillets Supply Gap in C\$ Millions

	2013	2014	2015	CAGR % 2013-15
Germany's imports from the world	183.2	205.3	196.4	3.54
Germany's imports from Canada	1.6	0.6	0.5	-44.10
<b>Supply Gap</b>	<b>181.7</b>	<b>204.7</b>	<b>196.0</b>	<b>3.86</b>

Source: Global Trade Atlas, 2016

## 9. Fresh/Chilled Pacific, Atlantic, Danube Salmon Fillet

### Germany's Top Ten Suppliers of Fresh/Chilled Pacific, Atlantic, Danube Salmon Fillet, in C\$ and in % Share

Partner Country	Canada Dollars			% Share			% Change
	2013	2014	2015	2013	2014	2015	2015/2014
<b>World</b>	<b>92,663,640</b>	<b>142,599,872</b>	<b>174,675,837</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>22.49</b>
Poland	7,913,214	24,749,576	63,385,554	8.54	17.36	36.29	156.11
Netherlands	11,950,058	20,031,899	39,146,681	12.90	14.05	22.41	95.42
Denmark	21,796,753	28,932,477	32,542,910	23.52	20.29	18.63	12.48
Norway	41,022,729	55,310,624	30,282,766	44.27	38.79	17.34	- 45.25
United Kingdom	6,422,573	10,046,805	6,574,690	6.93	7.05	3.76	- 34.56
Belgium	1,086,068	2,644,155	1,956,866	1.17	1.85	1.12	- 25.99
Ireland	32,549	58,446	138,244	0.04	0.04	0.08	136.53
Canada	34,355	97,541	127,856	0.04	0.07	0.07	31.08
Luxembourg	-	82,320	120,069	0.00	0.06	0.07	45.86
United States	189,546	180,667	104,991	0.20	0.13	0.06	- 41.89

Source: Global Trade Atlas, 2016



### Fresh/Chilled Pacific, Atlantic, Danube Salmon Fillet Supply Gap in C\$ Millions

	2013	2014	2015	CAGR % 2014-15
Germany's imports from the World	92.7	142.6	174.7	37.28
Germany's imports from Canada	0.03	0.10	0.12	92.91
Supply Gap	92.6	142.5	174.6	37.31

Source: Global Trade Atlas, 2016

### 10. Prepared or preserved, whole or in Pieces Herrings

#### Germany's Top Ten Suppliers of Prepared or preserved, Whole or in Pieces Herrings, in C\$ and in % Share

Partner Country	Canada Dollars			% Share			% Change 2015/2014
	2013	2014	2015	2013	2014	2015	
<b>World</b>	<b>158,724,384</b>	<b>141,931,670</b>	<b>128,077,115</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>- 9.76</b>
Poland	103,256,039	94,455,370	86,998,543	65.05	66.55	67.93	- 7.89
Denmark	19,771,222	14,825,079	16,990,971	12.46	10.45	13.27	14.61
Lithuania	14,121,931	13,573,671	11,620,210	8.90	9.56	9.07	- 14.39
Netherlands	9,998,900	9,793,397	6,972,573	6.30	6.90	5.44	- 28.80
Sweden	9,513,032	7,089,412	3,880,271	5.99	4.99	3.03	- 45.27
Belgium	176,624	186,038	568,963	0.11	0.13	0.44	205.83
Czech Republic	291,196	539,032	288,378	0.18	0.38	0.23	- 46.50
Latvia	257,668	460,459	234,808	0.16	0.32	0.18	- 49.01
Norway	462,913	613,052	138,204	0.29	0.43	0.11	- 77.46
Belarus	32,937	29,335	106,814	0.02	0.02	0.08	264.11

Source: Global Trade Atlas, 2016

### Prepared or preserved, Whole or in Pieces Herrings Supply Gap in C\$ Millions

	2013	2014	2015	CAGR % 2013-15
Germany's imports from the World	158.7	141.9	128.1	-10.16
Germany's imports from Canada	0	0	0	0.0%
Supply Gap	158.7	141.9	128.1	-10.16

Source: Global Trade Atlas, 2016

\*CAGR = Compound Annual Growth Rate

## RETAIL MARKET

German consumers prefer live and fresh fish products; however consumer interest in frozen and processed fish products is growing as they offer greater convenience.

### Germany - Processed Fish: Historic Retail Market Segmentation by Value (US\$ billion), Expenditure per Capita (US\$), Unit Price (US/kg) and % Growth

	Units	2011	2012	2013	2014	2015 <sup>E</sup>
Value	bn US\$	3.9111	3.8033	4.1577	4.1599	3.5739
Spend per capita (population)	US\$	48.69	47.23	51.46	51.23	43.79
Spend as a proportion of GDP	%	0.10412	0.1073	0.1108	0.1072	0.1072
Unit prices	US\$ per kg	9.532	8.895	9.343	9.446	7.951
Value growth	%	3.3	-2.8	9.3	0.1	-14.1



**Germany - Processed Fish: Forecast Retail Market Segmentation by Value (US\$ billion), Expenditure per Capita (US\$), Unit Price (US/kg) and % Growth**

	Units	2016	2017	2018	2019
Value	bn US\$	3.4801	3.7894	4.0669	4.2884
Spend per capita (population)	US\$	42.56	46.25	49.58	52.28
Spend as a proportion of GDP	%	0.10754	0.10626	0.10594	0.1061
Unit prices	US\$ per kg	7.655	8.265	8.814	9.254
Value growth	%	-2.6	8.9	7.3	5.4

Source for both: FIZ, Information Resources, Inc., The Nielsen Company, Economist Intelligence Unit, Mintel

**Germany's – Process Fish: Retail Market Segmentation by Volume ((000) tonnes)**

Segment	2011	2012	2013	2014	CAGR % (2011-14)
<b>Total</b>	<b>410.3</b>	<b>427.6</b>	<b>445</b>	<b>440.4</b>	<b>2.4</b>
Frozen	181.5	185.1	188.8	184.6	0.6
Chilled	136.4	152.3	165.7	159.2	5.3
Shelf Stable	92.4	90.2	90.5	96.6	1.5

**Germany's – Process Fish: Retail Market Segmentation by Value (Billion US\$)**

Segment	2011	2012	2013	2014	CAGR % (2011-14)
<b>Total</b>	<b>2816</b>	<b>2966.6</b>	<b>3118.3</b>	<b>3119.9</b>	<b>3.5</b>
Chilled	1166	1300.8	1351.5	1344	4.8
Frozen	1188	1213.8	1267.2	1248.2	1.7
Shelf Stable	462	452	499.6	527.7	4.5

Source for both: FIZ, Information Resources, Inc., The Nielsen Company, Economist Intelligence Unit, Mintel

**Germany - Processed Fish: Company Retail Market Share by Volume (%)**

Market Player	2011	2012	2013	2014
Iglo Foods Group Ltd	2.5	2.7	2.8	3
Nadler Vertriebs GmbH (Unternehmensgruppe Theo Müller S.e.c.s.)	1.4	1.5	1.6	1.6
Ostsee Fisch GmbH & Co. Produktions- und Vertriebs KG	1.4	1.5	1.5	1.5
Homann Feinkost GmbH (Unternehmensgruppe Theo Müller S.e.c.s.)	1.4	1.4	1.4	1.4
B. Paulus GmbH	1.5	1.4	1.3	1.2
Gottfried Friedrichs KG	0.6	0.6	0.6	0.6
Popp Feinkost GmbH	0.6	0.6	0.6	0.6
Bofrost Dienstleistungs GmbH & Co. KG	0.6	0.5	0.5	0.5
Stührk Delikatessen Import GmbH & Co. KG	0.3	0.3	0.3	0.3
Own Label	67.7	67.7	67.7	67.7
Others	22	21.8	21.7	21.5



### Germany - Processed Fish: Company Retail Market Share by Value (%)

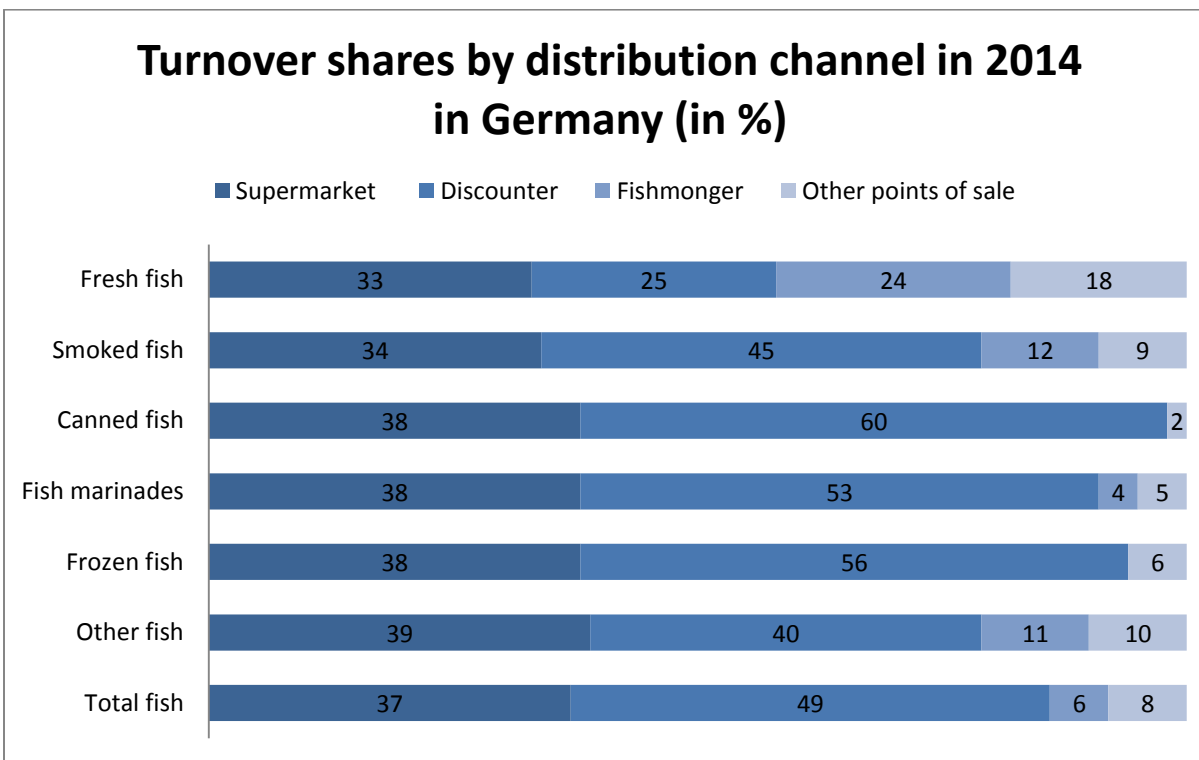
Market Player	2011	2012	2013	2014
Iglo Foods Group Ltd	3.3	3.5	3.5	3.6
Nadler Vertriebs GmbH (Unternehmensgruppe Theo Müller S.e.c.s.)	2.5	2.7	2.7	2.8
B. Paulus GmbH	2.9	2.7	2.5	2.4
Homann Feinkost GmbH (Unternehmensgruppe Theo Müller S.e.c.s.)	2.1	2.2	2.3	2.4
Ostsee Fisch GmbH & Co. Produktions- und Vertriebs KG	1.7	1.8	1.8	1.8
Gottfried Friedrichs KG	0.9	0.9	0.9	0.9
Bofrost Dienstleistungs GmbH & Co. KG	1	0.8	0.8	0.8
Popp Feinkost GmbH	1	0.9	0.8	0.8
Stührk Delikatessen Import GmbH & Co. KG	0.4	0.4	0.4	0.4
Own Label	53.3	53.2	53.1	53
Others	31	30.9	31.2	31.1

Source for both: Mintel, 2015

### RETAIL DISTRIBUTION

For fish products, retail is the most important distribution channel, accounting for 73.3% share of retail volume consumption in 2014, followed by foodservice (19.5).

Within the retail channel discounters are the preferred distribution channels, where 49% of total fish is sold, followed by supermarkets with 37% and fish mongers with 6% (Trade Commissioner Services, 2016).



Source: Trade Commissioner Services, 2016



### Distribution of Fish by Format: % Total Volume 2011 to 2015

Outlets	2011	2012	2013	2014	2015 <sup>E</sup>	CAGR* % 2011-15
Retail	68.20	71.00	71.10	72.30	73.30	1.8
Foodservice	23.90	21.80	21.70	20.80	19.50	-5.0
Institutional	7.90	7.20	7.20	6.90	7.20	-2.3
Total	100.00	100.00	100.00	100.00	100.00	0.0

Euromonitor International, 2015

\*CAGR = Compound Annual Growth Rate E= Estimate

## CONCLUSION

Canada is Germany's 37<sup>th</sup> supplier of fish products in the world and 24<sup>th</sup> non-EU supplier, with a value of C\$9.23 million in 2015. In comparison to Germany's imports of fish products from the world versus Germany's imports from Canada, there is a C\$5.12 billion supply gap in imports. Canada is represented in three of Germany's top ten fish commodity import groups, three of which had a large supply gap in 2015. Smoked Pacific, Atlantic and Dandube Salmon had a supply gap of C\$703 million, frozen fish fillets with a gap of C\$196 million and fresh/chilled Pacific, Atlantic, Danube salmon fillet with a gap of C\$174.6 million. This shows an opportunity for Canadian suppliers of fish products to increase exports to Germany for all three commodities.

Consumer knowledge about fish is still low, with many barriers preventing consumers from buying fish and cooking fish. There is still opportunity to increase consumer consumption of fish with a stronger marketing focus on fresh fish dishes and their health benefits (Euromonitor International, 2015). In addition to increased marketing efforts to focus on the ethical nature of sustainable products, such as MSC-certified fish products. This also represents an opportunity for products with ecolabels.

Overall, Germany is an ideal market opportunity for fish producers for both fresh and processed fish products. As German consumers, specifically older people, prefer fresh/chilled or frozen fish for its health benefits and ethical images, while other German consumers prefer fish products that are at a discount price and convenient.

## FOR MORE INFORMATION

International Trade Commissioners can provide Canadian industry with on-the-ground expertise regarding market potential, current conditions and local business contacts, and are an excellent point of contact for export advice.

- **Overview of Trade Commissioner Services in Germany**  
[www.tradecommissioner.gc.ca/de](http://www.tradecommissioner.gc.ca/de)
- **Find a Trade Commissioner**  
[www.tradecommissioner.gc.ca/eng/find-trade-contacts.jsp](http://www.tradecommissioner.gc.ca/eng/find-trade-contacts.jsp)

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- [ats-sea.agr.gc.ca](http://ats-sea.agr.gc.ca)



For additional information On Seafood Expo Global (SEG) 2016 please contact:

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Agriculture and Agri-Food Canada  
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## RESOURCES

Euromonitor International, Fish and Seafood in Germany 2015.

Euromonitor International Processed Meat and Seafood in Germany, 2015.

Fisch Informationszentrum, 2014

Global Trade Atlas, 2016

Mintel Market Sizes, Processed Fish – Germany, 2015.





## **FRESH, FROZEN AND PROCESSED FISH IN GERMANY**

*Global Analysis Report*

Prepared by: Ranna Bernard, Market Analyst

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