



The German Market for Seafood

Recent changes and challenges for the fisheries sector!

Dr. Matthias Keller
Fisch-Informationszentrum e. V., Hamburg

EUROPEAN SEAFOOD ECONOMY SUMMER 2018
9.8.2018, Bremerhaven

The German market for seafood



Germany

—

**Here
we
are!**

The German market for seafood



16
different
“Bundesländer”

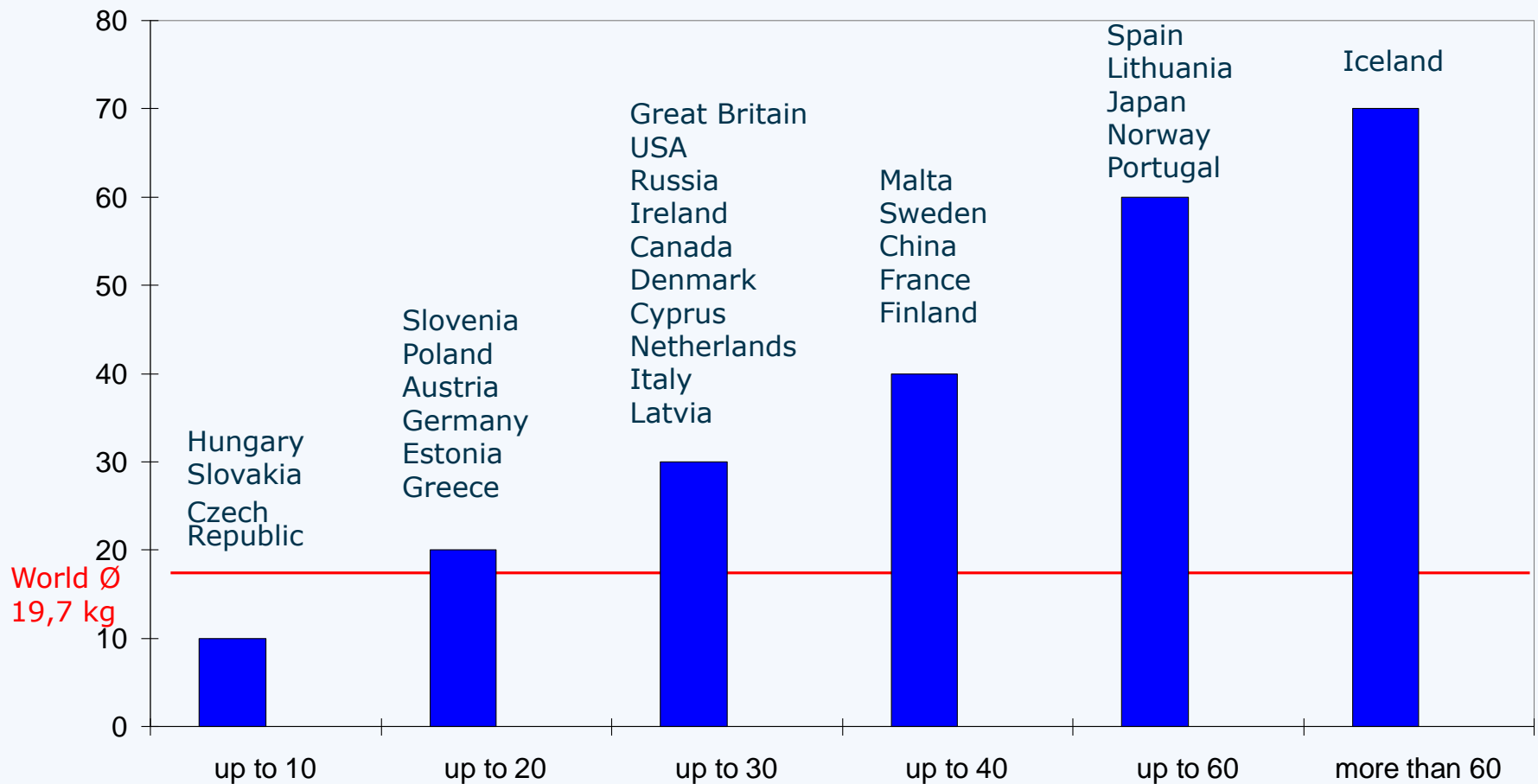
The German market for seafood

Market situation (1,000 tons live weight)

	1970	2000	2010	2015	2016	2017e)
Captures/landings	612	259	274	281	273	290
+ Imports	404	1,615	1,989	1,967	1,986	1,868
- Exports	222	743	974	1,124	1,054	1,035
- Feed	117	2	2	15	20	10
= Seafood consumption	677	1,129	1,250	1,109	1,185	1,113
Per-capita-consumption in kg	11.2	13.7	15.2	13.5	14.4	13.5

e) = estimated

Worldwide Per-capita-consumption (kg)



Import is the backbone of the market

Import value by categories (million €)

Category	2015	2016	2017
Total import	4,441	4,878	4,859
of it			
freshwater fish	1,676	2,015	2,064
fish, salted/dried/smoked	790	893	892
crustaceans, molluscs	776	826	839
fish, prepared	747	768	831
seafish, frozen	822	831	767
seafish, fresh	256	278	265

Import is the backbone of the market

Import value by country (million €)

Country	2015	2016	2017
Total import	4,441	4,878	4,859
of it EU	2,342	2,598	2,627
third countries	2,099	2,280	2,232
of it Poland	766	855	785
Norway	447	606	454
Netherlands	525	578	450
Denmark	419	462	442
China	376	388	332
USA	177	189	174
Vietnam	187	163	154

Fish processing in Germany!

Product quantity (tons)

Year	2015	2016	2017
Total	423,253	417,892	411,016
of it			
Frozen (incl. breaded prod.)	214,203	207,469	209,854
Prepared (incl. other frozen prod.)	109,132	105,549	96,195
Fish salads	27,232	26,612	26,682
Smoked	27,590	26,502	24,710
Ready meals	15,953	19,488	22,532
Fresh	19,439	21,881	22,327
Crustaceans and molluscs, prepared	8,302	8,131	7,185

The „Who is Who“ of the fish species in Germany!

market share in % (fish = 100)

Species	2015	2016	2017 e)
Salmon	20.9	20.3	19.0
Alaska Pollack	19.0	16.7	17.5
Herring	15.7	17.6	16.2
Tuna	14.6	10.9	14.3
Trout	6.3	6.0	7.1
Saithe	1.6	2.9	3.3
Cod	3.2	3.6	2.5
Pangasius	2.6	2.1	1.9
Pike perch e)	1.0	1.2	1.3

e) = estimated

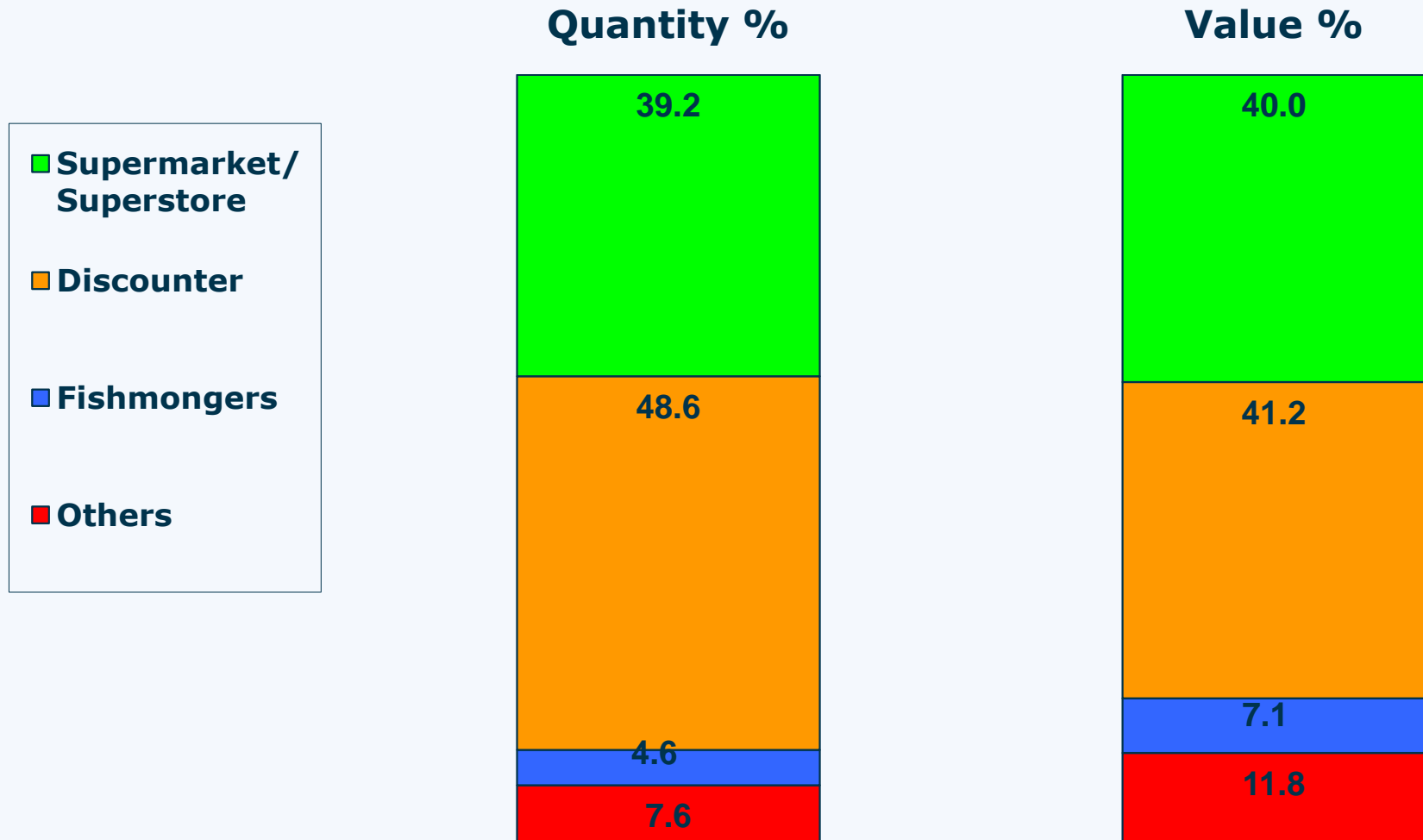
The German market for fish and seafood

Selected market shares (%)

	2015	2016	2017 e)
Marinated and canned fish	29	25	28
Frozen fish	26	28	25
Crustaceans and molluscs	13	13	14
Fresh fish	10	12	12
Smoked fish	13	13	11
Others	7	7	7
Salads	2	2	3

e) = estimated

The German market for fish and seafood in 2017



The German market for fish and seafood

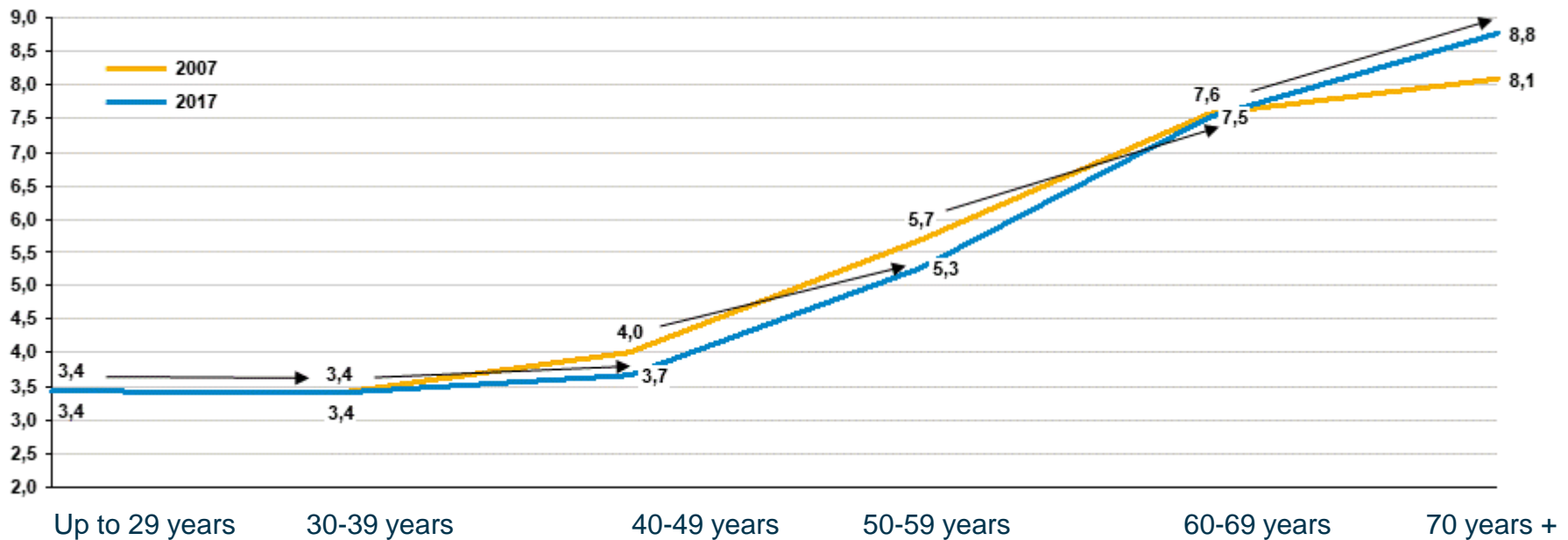
Where do the Germans buy seafood?



Percentages in 2017



Who are the fish consumers in Germany?



Source: GfK household panel 2017

MAP fish conquers Germany!

Overview of the channels for fresh and MAP fish Supermarket / Superstore



MAP fish conquers Germany!

Overview of the channels for fresh and MAP fish Discounter



MAP fish conquers Germany!

Overview of the channels for fresh and MAP fish Fishmongers



MAP fish conquers Germany!

Overview of the channels for fresh and MAP fish

Streetmarket



MAP fish conquers Germany!

Retail sales of fish in Germany

Year	Total fish		Fresh and MAP fish	
	Quantity (t)	Value (€)	Quantity (t)	Value (€)
2012	418,451	3,376,675	51,818	692,882
2013	414,557	3,482,690	50,810	698,417
2014	416,663	3,587,305	55,867	766,659
2015	420,811	3,699,955	65,763	880,363
2016	410,423	3,779,090	68,091	957,794
2017	413,496	3,876,683	70,688	1,003,320

MAP fish conquers Germany!

Retail sales (tons) of fresh and MAP fish in Germany

Year	Supermarket	Superstore	Discounter	Fish mongers	Street market
2012	12,517	7,424	5,578	14,530	11,770
2013	12,148	6,742	7,168	13,789	10,963
2014	12,174	6,604	13,848	13,291	9,950
2015	14,029	7,983	18,359	13,327	12,065
2016	15,820	7,835	20,355	12,491	11,591
2017	16,295	9,188	22,191	11,606	11,408

Source: GfK household panel 2017

MAP fish conquers Germany!

Retail sales (tons) of fresh and MAP fish in Germany

Year	Supermarket	Superstore	Discounter	Fish mongers	Street market
2012	12,517	7,424	5,578	14,530	11,770
2013	12,148	6,742	7,168	13,789	10,963
2014	12,174	6,604	13,848	13,291	9,950
2015	14,029	7,983	18,359	13,327	12,065
2016	15,820	7,835	20,355	12,491	11,591
2017	16,295	9,188	22,191	11,606	11,408

+ 93 %

MAP fish conquers Germany!

Retail sales (value T€) of fresh and MAP fish in Germany

Year	Supermarket	Superstore	Discounter	Fish mongers	Street market
2012	165,781	90,854	83,142	198,037	166,192
2013	168,169	83,968	102,928	190,290	153,061
2014	173,683	85,957	178,207	191,050	137,762
2015	202,158	96,669	216,553	195,810	166,192
2016	232,345	105,319	253,265	191,050	137,762
2017	237,765	119,157	287,481	195,810	166,192

Source: GfK household panel 2017

MAP fish conquers Germany!

Retail sales (value T€) of fresh and MAP fish in Germany

Year	Supermarket	Superstore	Discounter	Fish mongers	Street market
2012	165,781	90,854	83,142	198,037	166,192
2013	168,169	83,968	102,928	190,290	153,061
2014	173,683	85,957	178,207	191,050	137,762
2015	202,158	96,669	216,553	195,810	166,192
2016	232,345	105,319	253,265	191,050	137,762
2017	237,765	119,157	287,481	195,810	166,192

73 % MAP

MAP fish conquers Germany!

WILL THE SUCCESS STORY CONTINUE?

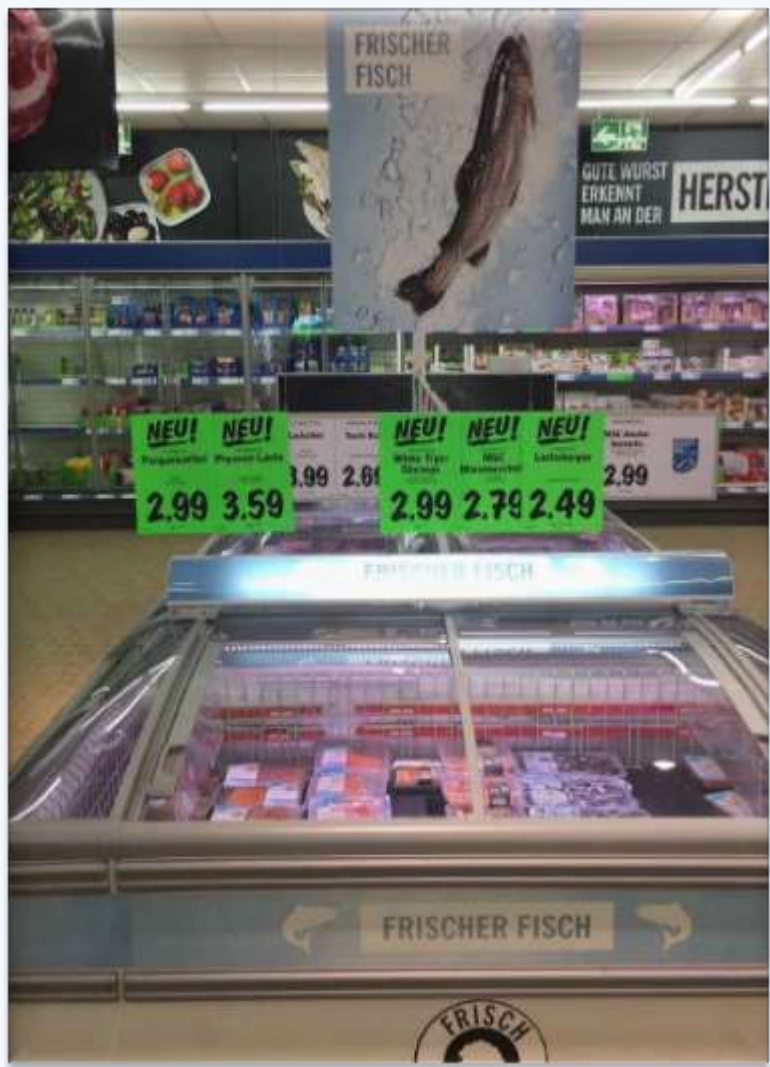
MAP fish conquers Germany!

WILL THE SUCCESS STORY CONTINUE?

Yes,

**sales of fresh and MAP fish are increasing in
2018!**

MAP fish conquers Germany!



MAP fish conquers Germany!



GOLDEN SEAFOOD®
Kabeljaufilet****

300-g-Packung

4.19

(kg = 13.97)

Küchenfertig; eignet sich
besonders zum Braten oder
Dünsten; MSC-zertifiziert



GOLDEN SEAFOOD®
Alaska
Seelachsfilet****

330-g-Packung

3.79

(kg = 11.48)

Küchenfertig; eignet sich
besonders zum Braten oder
Dünsten; MSC-zertifiziert



GOLDEN SEAFOOD®
Norwegisches
Lachsfilet****

300-g-Packung

3.99

(kg = 13.30)

Mit Haut; eignet sich
besonders zum Braten,
Dünsten oder Grillen

**Aus der Kühlung

****Aus der Frischetruhe

MAP fish conquers Germany!



or

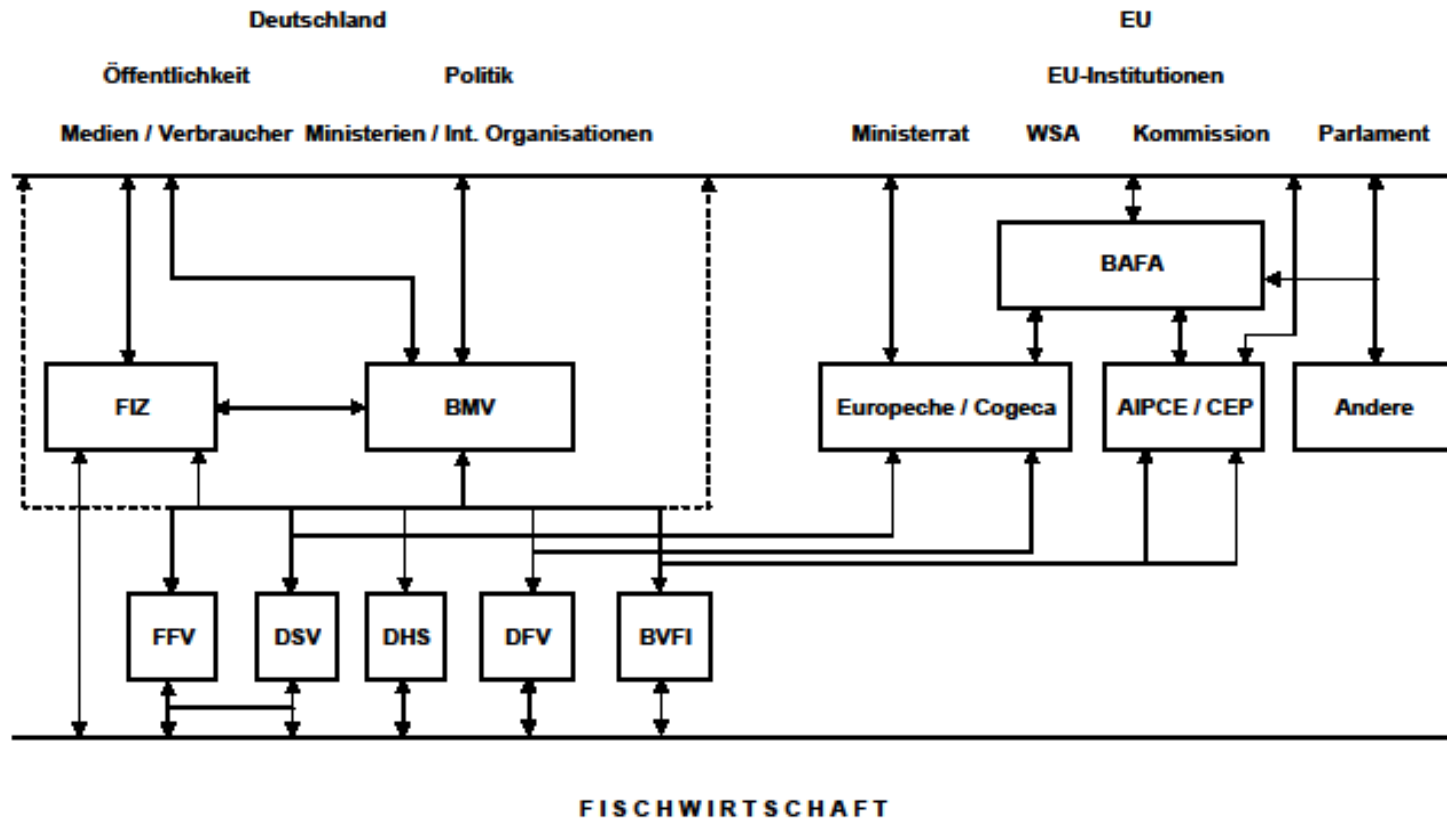




**Thank you
for your attention!**

**Visit us on
www.fischinfo.de**

Fischwirtschaftliche Organisationen im Überblick



DHS = Dt. Hochseefischereiverband
 DFV = Dt. Fischereiverband
 BVFI = Bundesverband d. dt. Fischindustrie u.d. Fischgroßhandels
 FFV = Fischfacheinzelhandelsverband
 DSV = Deutscher Seafood Verband e. V.
 BMV = Bundesmarktverband der Fischwirtschaft e.V.
 FIZ = Fisch-Informationszentrum e.V.

Europeche = EU-Fischereiverband
 Cogeca = EU-Genossenschaftsverband
 AIPCE = EU-Fischindustrieverband
 CEP = EU-Fischhandelsverband
 BAFA = EU-Berat. Ausschuß Fischerei/Aquakultur