

The German fish market in figures: Update on valuable data!

1st Promotional Workshop of DIVERSIFY

Bremen, 24. May 2017



The German fish market in figures

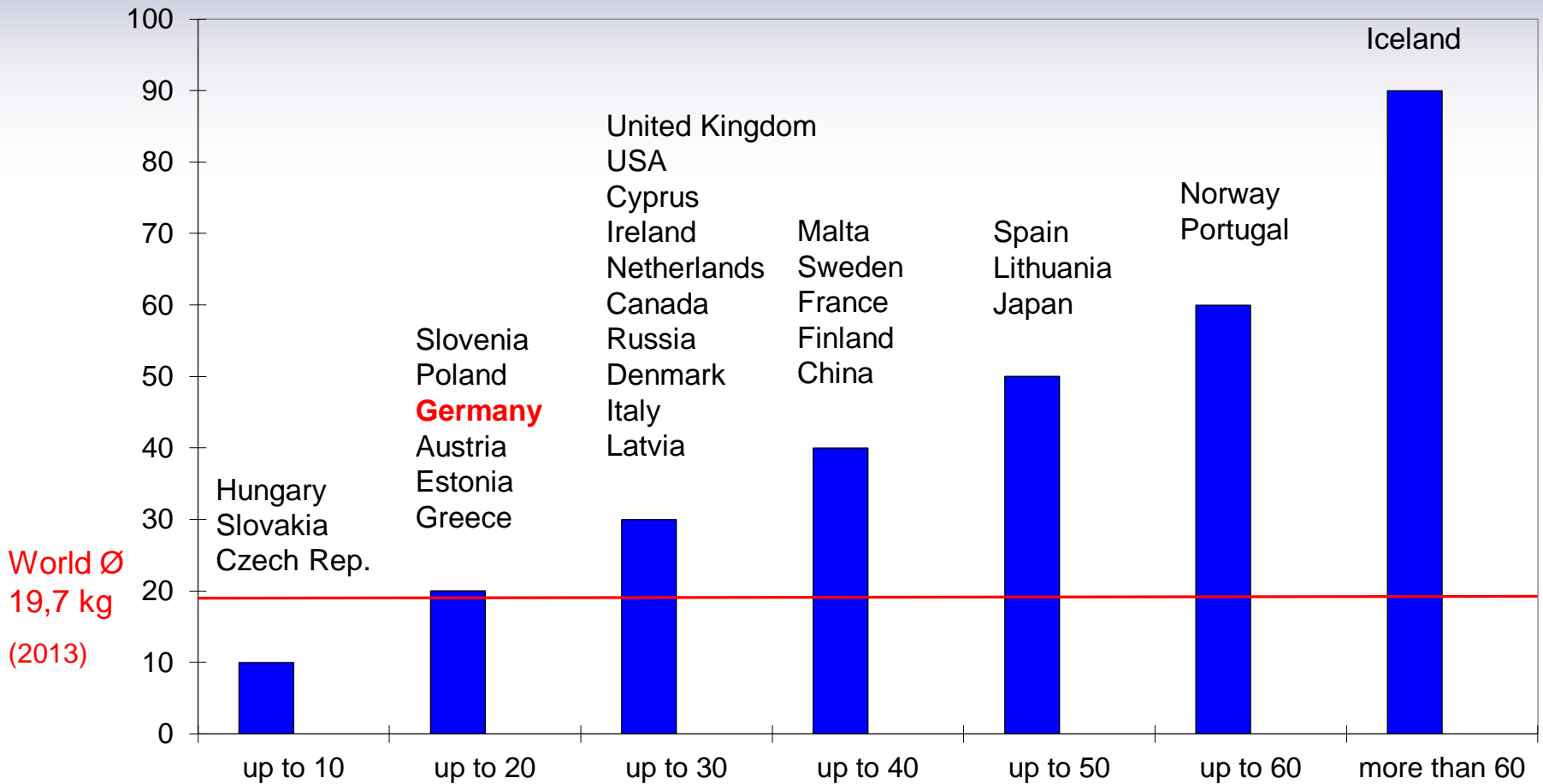
Market situation (1,000 tons live weight)

	2013	2014	2015 a)	2016 b)
Captures/landings	245	249	281	280
+ Imports	1,909	2,015	1,967	1,887
- Exports	1,057	1,102	1,124	988
- Feed	8	6	15	21
= Seafood consumption	1,119	1,156	1,109	1,158
Per-capita-consumption in kg	13,8	14,3	13,5	14,1

- a) Corrected
- b) Preliminary

Source: FIZ/Data and Facts 2016

Worldwide per-capita-consumption (kg)



World Ø
19,7 kg
(2013)

Import is the backbone of the market

Import value by categories (million €)

Category	2014	2015	2016 ^{a)}
Total import	4,253	4,441	4,743
of it			
Freshwater fish	964	958	1,100
Fish, salted/dried/smoked	800	790	869
Seafish, frozen	750	822	823
Crustaceans, molluscs	754	776	805
Fish, prepared	663	747	759
Seafish, fresh	216	247	259

a) Preliminary

Source: Federal Statistical Office

Import is the backbone of the market

Import value by country (million €)

Country	2014	2015	2016 ^{a)}
Total import	4,253	4,441	4,743
of it EU	2,163	2,342	2,518
third countries	2,090	2,099	2,225
of it Poland	739	766	823
Norway	480	447	531
Netherlands	437	525	524
Denmark	382	419	430
China	344	376	383
USA	168	175	185
Vietnam	173	187	162
Lithuania	117	134	148
Turkey	72	85	89

a) Preliminary

Source: Federal Statistical Office

The top 5 fish species consumed in Germany

Share of the fish species in the consumption %

Salmon



20.5

Alaska Pollack



18.3

Herring



15.9

Tuna, Bonito



14.1

Trout

6.2



2016

19,3

18,3

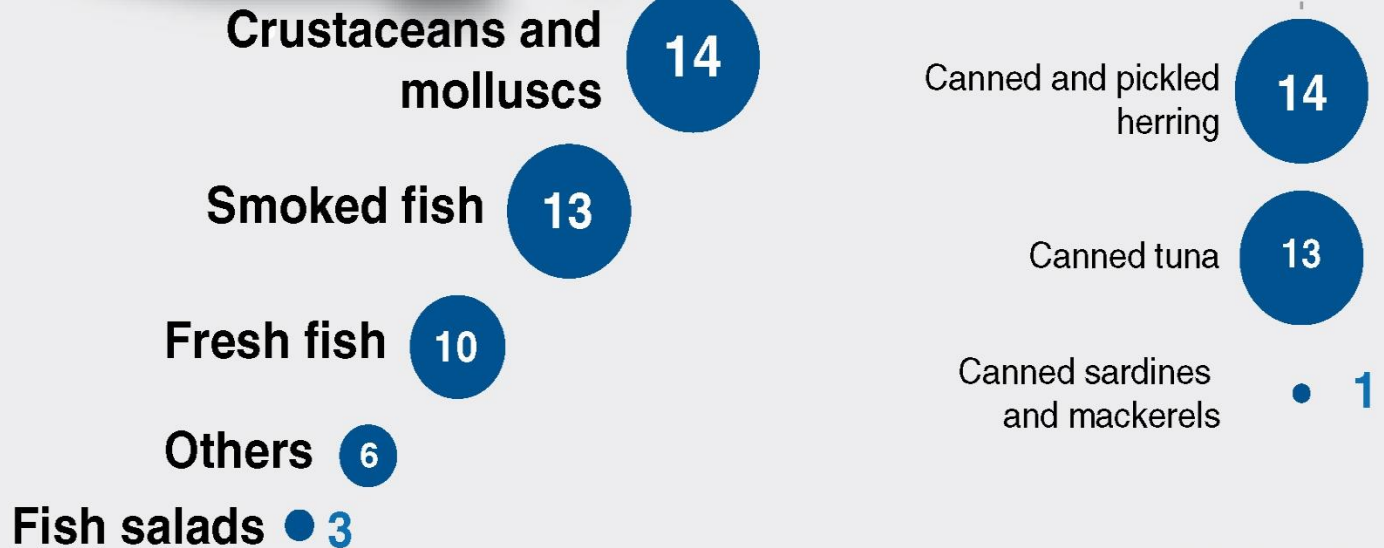
17,3

11,5

5,3

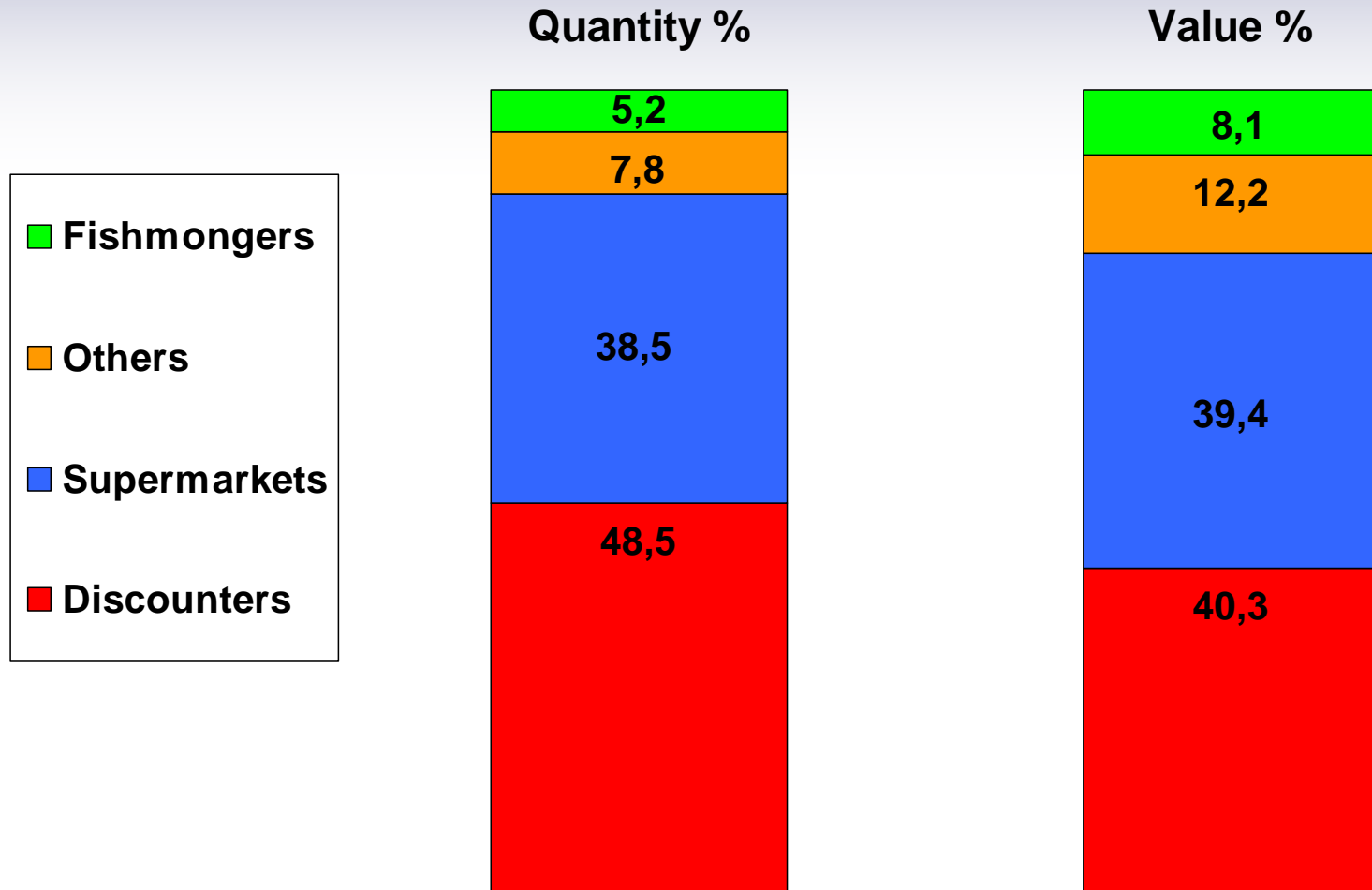
The most popular seafood products

Percentages



The market for seafood in Germany

Distribution channels – seafood/total in 2016

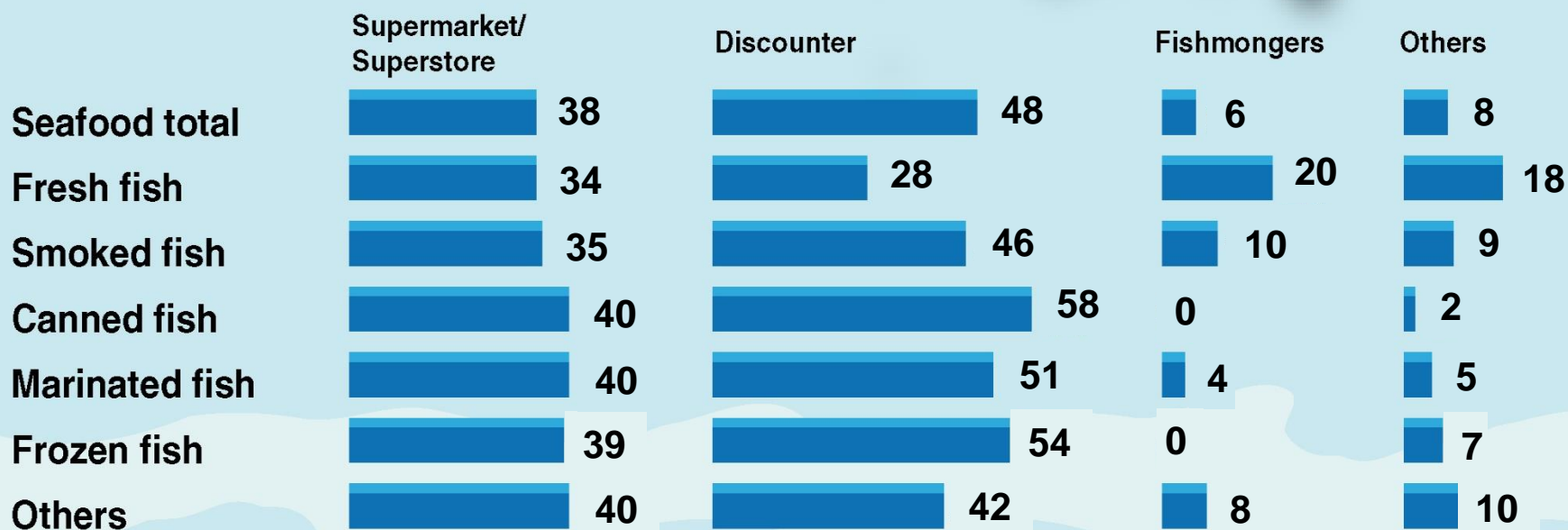


Source: GfK household panel 2016

Where do the Germans buy seafood?



Percentages (weight) in 2016



Development of household consumption of seafood in Germany

January–April 2016/2017

	Quantity (t)		Value (T €)		Change (%)		Ø Price (€)
	„2016“	„2017“	„2016“	„2017“	Quant.	Value	1–4/2017
Total	152,644	149,854	1,375	1,373	-1,8	-0,1	9,20
Fresh fish	25,120	24,259	354	343	-3,4	-3,1	14,20
Frozen fish	52,295	51,221	382	382	-2,1	0	7,50
Smoked fish	16,570	15,901	258	271	-4,0	+5,0	17,00
Canned fish	22,889	23,572	134	141	+3,0	+5,0	6,00
Marinated fish	23,571	24,357	128	135	+3,3	+5,4	5,50
Others	12,199	10,545	118	101	-13,6	-14,7	9,60

Source: GfK 2017

Fish made in Germany

Export value by categories (million €)

Category	2014	2015	2016 ^{a)}
Total export	2,034	2,144	2,233
of it			
Fish, prepared	683	677	657
Freshwater fish	333	336	422
Seafish, frozen	350	404	394
Fish, salted/dried/smoked	294	307	346
Crustaceans, molluscs	246	277	284
Seafish, fresh	85	105	97

a) Preliminary

Source: Federal Statistical Office

Export value by country (million €)

Country	2014	2015	2016 ^{a)}
Total export	2,034	2,144	2,233
of it EU	1,847	1,910	1,951
third countries	187	234	281
of it Netherlands	320	341	333
France	237	260	256
United Kingdom	228	236	241
Switzerland	75	82	103
USA	26	50	78
China	8	13	11
Vietnam	6	5	9
Japan	7	8	8
Island	7	11	7

a) Preliminary

Source: Federal Statistical Office

Fish processing in Germany

Product quantity (tons)

Year	2014	2015	2016
Total	463,413	471,999	461,982
of it			
Frozen ^{a)}	221,623	208,667	207,469
Prepared ^{b)}	127,578	109,132	105,549
Smoked	23,666	27,590	26,802
Fish salads	25,123	27,232	26,612
Fresh	12,210	19,439	21,881
Ready meals ^{c)}	14,432	15,953	19,488
Crustaceans and molluscs, prepared	8,013	8,302	8,131

Source: FIZ/Data and Facts 2016

a) Frozen seafood/freshwater fish, breaded and unbreaded fish fillets, breaded products

b) Including other frozen fishery products

c) Based on fish, crustaceans and molluscs

Thank you for your attention!

