

The German fish market 2018

About

the

German fish market 2018!

Dr. Matthias Keller
Bundesverband der deutschen Fischindustrie
und des Fischgroßhandels e. V., Hamburg

Groundfish Forum

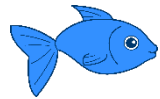
15.-17.10.2019

The German fish market 2018

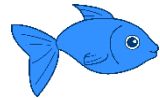
10 key figures

The German fish market 2018

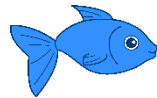
all live weight



300,000 t come from Germany fisheries sources



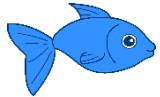
1,9 million t are imported fish and seafood



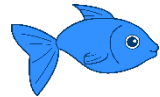
1,0 million t are exported fish and seafood

The German fish market 2018

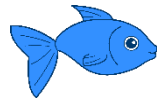
all live weight



1,2 million tonnes fish and seafood for consumption



83 million consumers



14.4 kg per capita consumption

The German fish market 2018

all product weight



401,000 t are consumed in households



3,9 billion € are spend by households



128,000 t, 1,001 billion € for frozen



70,000 t, 1,017 billion € for fresh

Fish processing in Germany!

Product quantity (tons)

Year	2016	2017	2018
Total	461,982	439,665	465,026
of it			
Frozen (incl. breaded prod.)	207,469	209,854	241,609
Prepared (incl. other frozen prod.)	105,549	96,195	84,237
Fresh	21,881	22,327	30,240
Fish salads	26,612	26,682	27,171
Smoked	26,502	24,710	25,585
Ready meals	19,488	22,532	22,282
Crustaceans and molluscs, prepared	8,131	7,185	6,458

Source: Destatis

Import is the backbone of the market

Import value by categories (million €)

Category	2016	2017	2018
Total import	4,878	4,988	4,873
of it			
freshwater fish	1,156	1,241	1,128
fish, salted/dried/smoked	893	914	865
crustaceans, molluscs	829	864	828
fish, prepared	768	839	921
seafish, frozen	907	818	811
seafish, fresh	317	303	274

Source: Destatis

Import is the backbone of the market

Imported species (live weight, thousand tons)

Species	2016	2017	2018
Total import	1,986	1,963	1,928
of it			
Alaska pollack	437	455	493
Salmon	336	304	268
Herring	209	192	200
Tuna	149	186	195
Cod	187	151	142
Shrimps	94	102	103
Pangasius	28	25	21
Tilapia	6	6	6

Source: Destatis

Import is the backbone of the market

Import value by country (million €)

Country	2016	2017	2018
Total import	4,878	4,988	4,873
of it EU	2,598	2,708	2,665
third countries	2,280	2,280	2,208
of it Poland	855	902	935
Netherlands	577	560	581
Norway	606	551	524
Denmark	461	490	443
China	388	353	354
USA	187	199	167
Ecuador	66	85	127

Source: Destatis

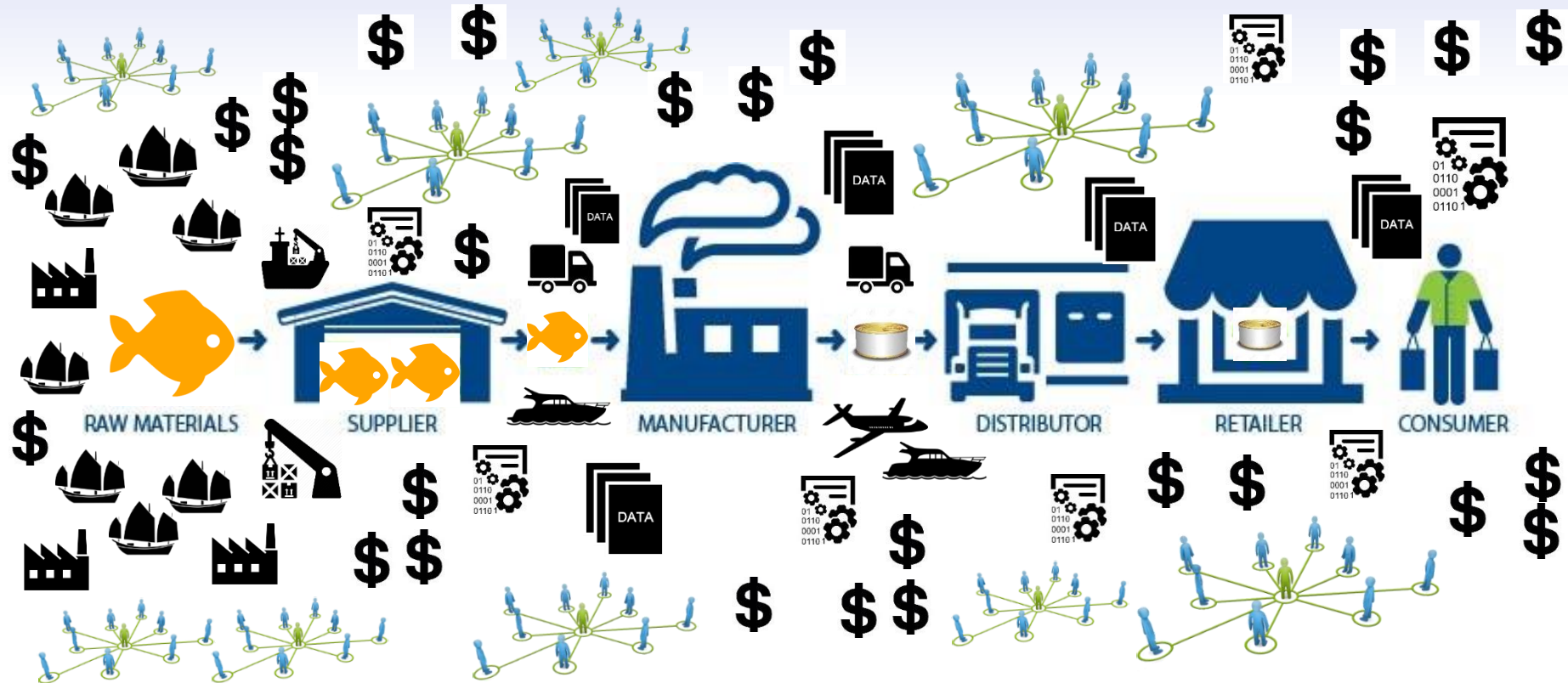
The „Who is Who“ of the fish market in Germany!

market share in %

Species	2016	2017	2018 p)
Alaska Pollack	14.9	16.5	18.4
Salmon	18.2	16.7	15.4
Tuna	9.8	12.9	14.4
Herring	15.7	13.9	13.6
Shrimp	5.9	7.0	7.4
Trout	5.4	5.8	6.3
Saithe	2.4	2.3	2.5
Squid	2.0	2.4	2.2
Cod	3.2	2.1	2.2
Pangasius	1.9	1.7	1.6

Source: FIZ; p) = preliminary

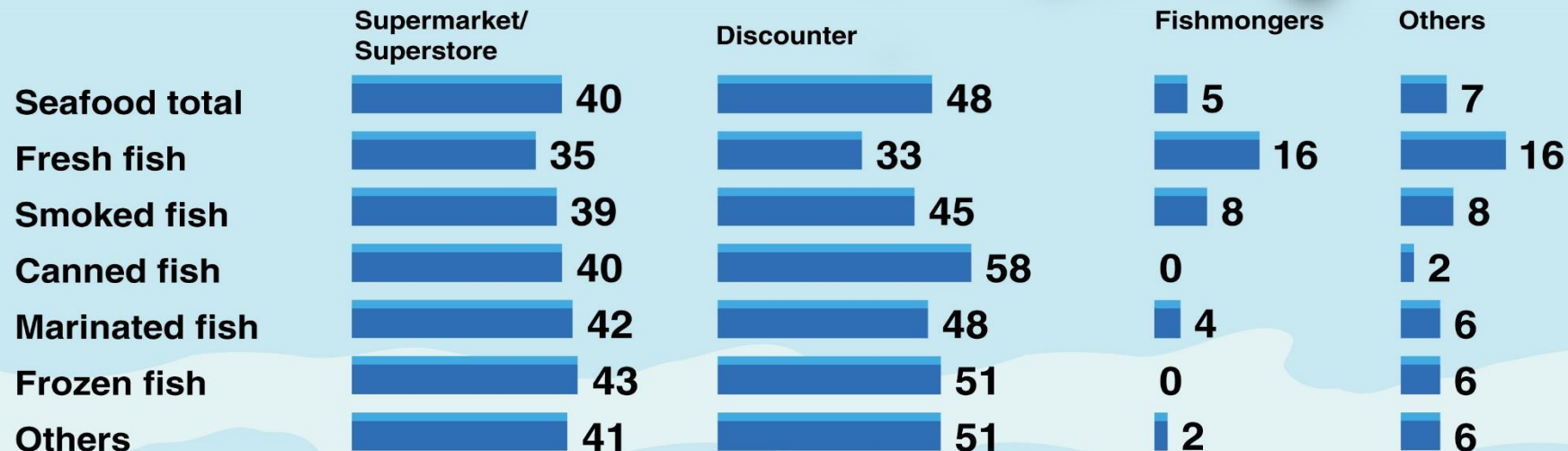
Who is driving the fish market in Germany?



The German market for fish and seafood

Where do the Germans buy seafood?

Percentages in 2018



MAP fish conquers Germany!?

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

	Discounter		All other channels	
Year	Fresh / MAP	Frozen	Fresh / MAP	Frozen
2013	7,168	84,491	43,643	62,938
2014	13,848	81,024	42,020	65,007
2015	18,359	74,427	47,404	64,255
2016	20,568	71,173	47,739	61,003
2017	22,348	71,730	48,496	62,950
2018	22,913	65,822	46,897	62,541

MAP fish conquers Germany!?

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

	Discounter		All other channels	
Year	Fresh / MAP	Frozen	Fresh / MAP	Frozen
2013	7,168	84,491	43,643	62,938
2014	13,848	81,024	42,020	65,007
2015	18,359	74,427	47,404	64,255
2016	20,568	71,173	47,739	61,003
2017	22,348	71,730	48,496	62,950
2018	22,913	65,822	46,897	62,541

18/13

+15.745

-18.669

+3.254

-397

MAP fish conquers Germany!?

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

Year	Discounter		All other channels	
	Fresh / MAP	Frozen	Fresh / MAP	Frozen
2013	7,168	84,491	43,643	62,938
2014	13,848	81,024	42,020	65,007
2015	18,359	74,427	47,404	64,255
2016	20,568	71,173	47,739	61,003
2017	22,348	71,730	48,496	62,950
2018	22,913	65,822	46,897	62,541

18/13

+15.745

-18.669

-2.924

+3.254

-397

+2.857

MAP fish conquers Germany!?

Retail sales (million €) of fresh and MAP fish and frozen fish in Germany

	Discounter		All other channels	
Year	Fresh / MAP	Frozen	Fresh / MAP	Frozen
2013	103	511	595	489
2014	178	487	588	479
2015	216	467	664	522
2016	255	475	705	531
2017	289	476	716	556
2018	303	444	714	557

Source: GfK 2019

MAP fish conquers Germany!?

Retail sales (million €) of fresh and MAP fish and frozen fish in Germany

	Discounter		All other channels	
Year	Fresh / MAP	Frozen	Fresh / MAP	Frozen
2013	103	511	595	489
2014	178	487	588	479
2015	216	467	664	522
2016	255	475	705	531
2017	289	476	716	556
2018	303	444	714	557

18/13

+200

-67

+119

+68

MAP fish conquers Germany!?

Retail sales (million €) of fresh and MAP fish and frozen fish in Germany

Year	Discounter		All other channels	
	Fresh / MAP	Frozen	Fresh / MAP	Frozen
2013	103	511	595	489
2014	178	487	588	479
2015	216	467	664	522
2016	255	475	705	531
2017	289	476	716	556
2018	303	444	714	557

18/13



Thank you for your attention!

