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Germany

Fishery Products

Annual

2003

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Report Highlights:
The total volume of fish and fishery products produced in Germany amounted to 441,150 MT in 2002, a drop of 2.3 percent compared to 2001. Per capita consumption dropped to 14 kg from 15.3 kg in 2001, as consumers turned back to beef after the BSE crisis, but is expected to increase again to 14.5 kg in 2003. Germany is the biggest net-importer of fish and fishery products in the EU. Best prospects for U.S. fish products are for Alaska-pollock, salmon, lobster and caviar substitutes. In 2002, the U.S. was the biggest supplier of frozen Alaska-pollock fillets to Germany.

Includes PSD Changes: Yes
Includes Trade Matrix: Yes
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Executive Summary

Germany is the fourth largest fish processor in the EU-15, after the U.K., France, and Spain. However, only 21 percent of the raw fish is sourced domestically.

Production value of fish and fishery products at factory level was stable at U.S.$ 1.815 billion (1.582 billion Euro) in CY 2002, while production volume decreased by 2.3 percent compared to CY 2001 to 441,150 MT (product weight).

Calculated per capita consumption dropped to 14 kg in CY 2002, from 15.3 kg in CY 2001, but is still higher than in CY 2000, before the BSE crisis, when per capita consumption was at 13.7 kg.

Germany is the biggest net-importer of fish and fishery products in the EU. Total imports of fish and fishery products into Germany in CY 2002 amounted to 787,544 MT (product weight) at a value of U.S. $ 2.77 billion (Euro 2.41 billion).

The U.S. supplied 60,439 MT of fish and fish products in CY 2002 at a value of US$ 170 million (Euro 148 million). This amounts to 7.7 percent of the German import market. Frozen Alaska-pollock fillets, frozen Pacific salmon, live lobsters, and caviar substitutes are the most successful U.S. fish products on the German market. In 2002, the U.S. was the biggest supplier of frozen Alaska-pollock fillets to Germany. This was partly due to the fact that China, a major competitor, faced import restrictions because of deficiencies in its residue monitoring system.

Note 1: In this report trade data for groundfish fillets includes:

HS Codes		English Name	Scientific name
fresh or chilled fillets			
0304	1031	Cod	Gadus ssp. + Boreogadus siada
0304	1033	Coalfish	Pollachius virens
0304	1035	Redfish	Sebastes ssp.
0304	1038	Other	
frozen fillets			
0304	2021-2029	Cod	Gadus ssp.
0304	2031	Coalfish	Pollachius virens
0304	2033	Haddock	Melanogrammus aeglefinus
0304	2035-2037	Redfish	Sebastes ssp.
0304	2041	Whiting	Merlangius merlangus
0304	2055-2059	Hake	Merluccius ssp.
0304	2085	Alaska pollack	Theragra chalcogramma
0304	2091	Blue grenadier	Macrutonus novazealandiae
0304	2095	other	

Note 2: In recent years the U.S. dollar/Euro exchange rate has been as follows:

2001: US$1 = Euro 1.1165
2002: US$1 = Euro 1.0575

Further exchange rates (as of September 26, 2003, Handelsblatt) are for:
U.S. dollar/ Euro US$1 = Euro 0.8718
Euro/U.S. dollar Euro 1 = U.S. dollar 1.1470

Abbreviations:
CY = calendar year
HS = harmonized system of tariff codes
Kg = kilogram (1 kg = 2.2 pounds)
MT = metric ton (1 MT = 1000 kg = 2205 pounds)
n.a. = not available
PSD = production, supply and demand balance sheet
U.K. = United Kingdom
U.S. = United States

Related reports:

GM3007	Opportunities and limitations for fish and fishery products with German consumers

Production

The total catch of the German fishing fleet (landings in domestic and foreign ports) amounted to 247,000 MT (catch weight) in CY 2002, this is an increase of 9,000 MT or 4 percent compared to CY 2001. 125,000 MT of this were landed in foreign ports, 81,000 MT in domestic ports and 41,000 MT originated from aquaculture or river catch. Aquaculture mainly consists of pond raised trout and carp. Only a few closed aquaculture systems exist in salmon production but their production in Germany is marginal.

28.9 MT of wild salmon was caught in the Baltic Sea.

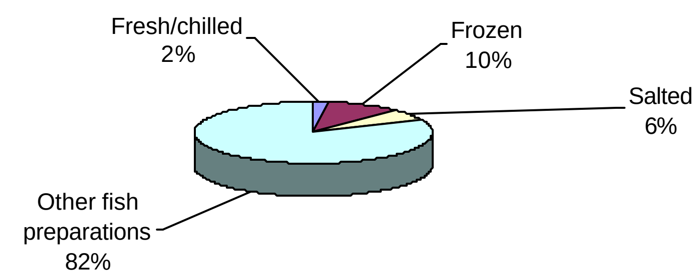
The major fishing regions for the German fleet are the North Sea (about 36 percent), followed by the Northeast Atlantic (34 percent) and the Baltic Sea (18 Percent).

On January 1, 2002 the German ocean fishing fleet consisted of 2,282 ships, 13 deep sea fishing vessels plus 2,269 cutter and coastal fisheries vessels. Total tonnage amounted to 71,270 gross register tons, engine power totaled 167,587 kW. That is a reduction of 33 ships, 179 gross register tons and 152 kW compared to the previous year. In CY 2002 a total of 10,126 workers were employed by 95 fishing and fish processing companies, 937 workers less than in CY 2001. (Note: Only companies with more than ten employees were counted)

Germany is the fourth largest fish processor in the EU-15, after the U.K., France, and Spain. Production value of fish and fishery products at factory level was stable at U.S.$ 1.815 billion (1.582 billion Euro) in CY 2002, while production volume decreased by 2.3 percent compared to CY 2001 to 441,150 MT (product weight).

Fish preparations, such as canned fish, baked fillets or fish sticks, make up the majority of production followed by frozen and salted fish. Fresh fish production is already the smallest segment and expected be less and less significant in the future. Production share of the different categories is illustrated in chart 1, details are shown in table 1.

Chart 1: German Production of Fish and Fishery Products in 2002



Source: FAS/Berlin based on data from the Association of the German Fish Industry and Fish Wholesale

Table 1: German Production of Fish Products (in MT, Euro 1,000, U.S. $ 1,000)

	MT		Euro 1,000		US $ 1,000	
Product	2001	2002	2001	2002	2001	2002
Fresh or chilled	10,222	7,737	55,766	47,535	63,964	54,523
Frozen						
- Filets	39,774	37,943	151,600	141,369	173,885	162,150
- Saltwater fish	n.a.	3,615	n.a.	16,053	n.a.	18413
- Fish meat	1,997	1,566	11,797	8,762	13,531	10,050
- Freshwater	329	261	2,702	2,629	3,099	3,015
Salted						
- Smoked Salmon	12,964	14,883	153,410	162,346	175,961	186,211
- Smoked Herring	1,922	936	6,179	3,504	7,087	4,019
- Other smoked Fish	13,589	9,226	100,477	67,983	115,247	77,977
Other fish preparations						
- Herring	70,072	73,143	213,433	243,946	244,808	279,806
- Salmon	6,414	5,387	36,861	36,101	42,280	41,408
- Mackerels	2,350	1,704	10,360	8,809	11,883	10,104
- Sardines, sprat	861	712	n.a.	n.a.	n.a.	n.a.
- Other fish	52,272	46,868	151,079	140,731	173,288	161,418
- Baked filets/sticks	124,174	131,541	324,913	343,652	372,675	394,169
- Otherwise prepared	47,854	44,658	140,053	139,993	160,641	160,572
- Fish salad	31,745	31,160	118,181	112,740	135,554	129,313
- Preserved Crayfish	3,631	3,155	24,816	21,929	28,464	25,153
- Crayfish preparations	2,239	2,428	24,500	27,098	28,102	31,081
- Caviar substitutes	1,060	1,730	15,726	28,795	18,038	33,028
- Frozen crayfish	401	278	n.a.	n.a.	n.a.	n.a.
Total Production*	451,325	441,150	1,580,065	1,582,259	1,812,335	1,814,851

n.a. = not published because of limited number of companies involved
* = including unpublished values and volumes
Source: FAS/Berlin based on data from the Association of the German Fish Industry and Fish Wholesale

Almost the entire German catch of groundfish goes straight into the fresh market. Less than one percent of the market supply of groundfish fillets are produced from fresh fish. Most groundfish fillets produced in Germany are manufactured from imported fillets and further processed into smaller pieces or convenience foods and repackaged. To avoid double counting, "production" in the PSD for groundfish fillets only reflects production from fresh fish.

Consumption

Total human consumption of fishery products added up to 1.151 million MT in CY 2002, down 9 percent compared to the record year of 2001 (1.265 million MT), when the German BSE crisis of November 2000, resulted in consumers switching from beef to alternative protein sources. When consumers resumed beef consumption in 2002, calculated per capita consumption of fish dropped to 14 kg, from 15.3 kg in CY 2001. But it is still higher than in CY 2000, before the BSE crisis, when per capita consumption was at 13.7 kg. In CY 2003 per capita fish consumption is expected to increase again to 14.5 kg. A long-term upward trend is expected to continue in line with increasing demand for light meals and convenience products.

German consumers' favorite fishes are Alaska pollock, herring and tuna followed by Atlantic and Pacific salmon (see table 2).

Table 2: Favorite Fish Varieties in Germany, as a Percentage

	1998	1999	2000	2001	2002
Total Seafood Use	100	100	100	100	100
Thereof Saltwater Fish (incl Herring)	76.0	69.3	78.5	75.6	76.1
Sweet Water Fish	14.8	17.2	11.2	15.5	15.5
Crayfish, Mollusks	9.2	13.5	10.3	8.9	8.4

Type of Fish	1998	1999	2000	2001	2002
Alaska/Pacific Pollock	27.5	19.8	27.2	30.1	31.6
Herring	18.2	22.6	20.1	19.2	15.5
Tuna	8.0	13.2	12.6	9.8	12.2
Salmon	8.5	10.4	6.6	7.8	7.9
Hake	3.7	5.4	4.3	4.4	5.9
Redfish/Perch	4.4	6.0	5.0	4.0	5.1
Coalfish	6.1	4.6	4.3	3.9	4.9
Cod	8.8	7.0	3.3	4.2	4.0
Trout	4.1	5.1	2.6	2.6	2.0
Mackerel	1.7	2.0	2.2	2.4	2.0
New Zealand Hoki	n.a.	n.a.	n.a.	1.7	1.8
Plaice	1.0	1.6	1.3	1.3	1.1
Halibut	2.7	0.8	0.5	0.6	0.4
Other	8.0	2.3	10.5	8.0	5.6

Source: Fish Information Center: *Daten und Fakten 2003*

The importance of convenience products is increasing in the fish industry, as in other parts of the food sector. In CY 2002, frozen fish products had the largest market share (32 percent), followed by canned fish preparations (29 percent). Fresh fish remained stable at 12 percent. Crayfish and mollusk accounted for 11 percent, smoked fish for 6 percent, and fish salads for 3 percent (see table 3).

Table 3: Fish Consumption by Product Group, in Percent

	1997	1998	1999	2000	2001	2002
Frozen Fish	21	26	25	25	31	32
Preservations + Marinades	31	29	29	30	26	29
- Herring	21	18	17	16	15	16
- Thuna	7	8	10	11	9	11
- Sardines	2	2	1	2	1	1
- Mackerels	1	1	1	1	1	1
Fresh Fish	14	13	14	14	12	12
Crayfish + Mollusks	14	14	15	13	13	11
Smoked Fish	5	3	5	7	7	7
Fish Salads	4	5	4	4	4	3
Other Fish Products	11	10	8	7	7	7

Source: Fish Information Center: *Daten und Fakten 2003*

Trends in fish sales by retail type

On a volume basis, 81 percent of fishery products are purchased at retail chains, this translate into 70 percent on a value basis. Fish specialty stores account for 7 percent of the sales volume and other outlets such as farmers markets for 13 percent. Sales dropped in all retail types in 2002 compared to 2001, but least so in discount markets. The market held by discount stores (by volume) increased from 43 percent in 2001 to 45 percent in 2002. The trend towards shopping in discount stores was aggravated by the tight economic situation in conjunction with a widespread consumer perception that retailers took advantage of the introduction of the Euro by raising their prices. Various discount chains used this for marketing campaigns emphasizing their price leadership. Consequently, the discounters' market share by value is much less than by volume (see charts 2 and 3).

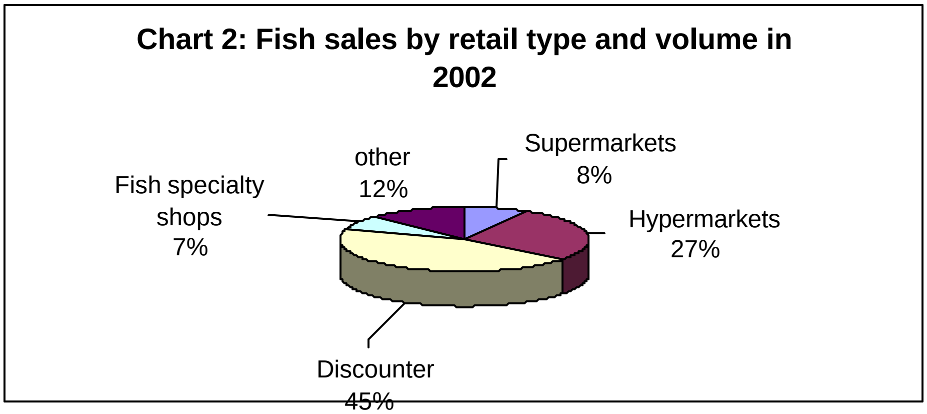
Discount markets are stores with a limited number of products, usually one per category and less than 1,000 in total. They compete on price and do not offer much customer service. The most successful discount chains in Germany are Aldi and Lidl. These stores are very popular as Germany is a very price sensitive market.

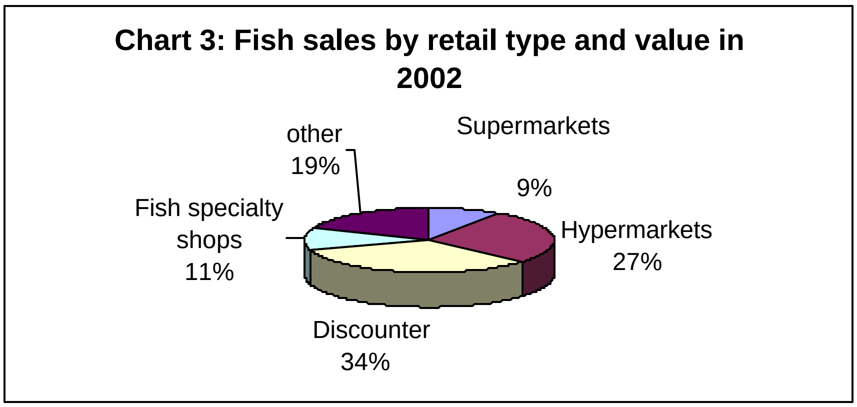
Table 4 : Fishery Product Sales by Retail Type and Year

Volume in MT	2001	2002	percent change 02/01
Multiple Retail chains	199,166	188,646	-5
thereof:			
Supermarket	20,953	19,691	-6
Hypermarkets	70,986	63,606	-10
Discounter	107,227	105,349	-2
Fish specialty shops	17,240	16,117	-7
other	33,922	29,161	-14
Total	250,328	233,924	-7
Value in Euro	**2001**	**2002**	**percent change 02/01**
Multiple Retail chains	1,186	1,127	-5
thereof:			
Supermarket*	152	148	-3
Hypermarkets**	479	437	-9
Discounter	555	542	-2
Fish specialty shops	180	178	-1
Other	342	304	-11
Total	1,708	1,609	-6
Value in U.S. $* **	**2001**	**2002**	**percent change 02/01**
Multiple Retail chains	1,360	1,293	-5
thereof:			
Supermarket	174	170	-3
Hypermarkets	549	501	-9
Discounter	637	622	-2
Fish specialty shops	206	204	-1
other	392	349	-11
Total	1,959	1,846	-6

* supermarkets = less than 800 square meters or about 8,611 square feet
** hypermarkets = more than 800 square meters
*** calculated with conversion rate of Sept. 26, 2003: U.S. $ 1 = 0.8718 Euro

Source: FAS/Berlin based on data from the Association of the German Fish Industry and Fish Wholesale





Source: FAS/Berlin based on data from the Association of the German Fish Industry and Fish Wholesale

Trade

Total Imports

Germany is the biggest net-importer of fish and fishery products in the EU. Total imports of fish and fishery products into Germany in CY 2002 amounted to 787,544 MT (product weight) at a value of U.S. $ 2.77 billion (Euro 2.41 billion). Of this, roughly 36 percent originated from other EU countries (281,162 MT at U.S.$ 1.06 billion or Euro 925 million). Imports from third countries accounted for about 74 percent of total imports (506,382 MT at U.S.$ 1.7 billion or Euro 1.49 billion). In terms of value, Denmark was the most important EU supplier of fishery products at U.S. $ 427 million (Euro 372 million), Norway was Germany's biggest non-EU supplier at U.S. $ 335 million (Euro 292 million).

German imports from the United States surged in 2002. They benefited from EU import restriction for animal products originating from China, that were imposed in January 2002 after an EU inspection team detected severe deficiencies in the Chinese residue monitoring system. From February through June 10, 2002, imports from China were prohibited, from June 10 through September 27 imports of fishery products were allowed but 20 percent of import had to be tested for antibiotics (chloramphenicol). The U.S. supplied 60,439 MT of fish and fish products in CY 2002 at a value of US$ 170 million (Euro 148 million). This amounts to 7.7 percent of the German import market. In CY 2001 only 4 percent or 32,154 MT of German imports originated in the U.S.. Frozen Alaska-pollock fillets, frozen Pacific salmon, live lobsters, and caviar substitutes are the most successful U.S. fish products on the German market.

Table 5: German imports of fish and fishery products from the United States

		2001		2002	
Product	HS Code	MT	1000-$	MT	1000-$
Total frozen Alaska pollock		**26,348**	**50,154**	**52,555**	**115,166**
Frozen Pacific pollock fillet	0304 20 850	25,943	49,569	49,915	111,429
Frozen meat of Alaska pollock	0304 90 610	405	585	2,640	3,737
Caviar substitutes	1604 30 900	211	4,438	271	5,116
Total frozen hake		**495**	**672**	**3,876**	**5,815**
Frozen hake fillets	0304 20 580	172	275	2,528	4,144
Frozen meat of hake	0304 90 470	323	397	1,348	1,671
Total frozen Pacific salmon		**79**	**478**	**2,467**	**5,488**
Other frozen Pacific salmon	0303 19 000	-	-	2,347	4,892
Frozen Pacific salmon fillets	0304 20 130	79	478	120	596
Live lobsters, not frozen	**0306 22 100**	**184**	**2,504**	**168**	**2,264**
Frozen meat of other saltwater	**0304 90 970**	**332**	**3,064**	**138**	**1,274**
Sockeye salmon (red salmon),	**0303 11 000**	**-**	**-**	**211**	**673**
Frozen monkfish fillets	**0304 20 830**	**131**	**1,254**	**95**	**593**
Total frozen dogfish		**201**	**686**	**176**	**580**
Frozen dogfish 'squalus acanthias'	0303 75 200	181	461	143	289
Frozen dogfish fillets 'squallus acant.	0304 20 610	20	225	33	291
Other freshwater fish fillets,	**0304 20 190**	**76**	**553**	**53**	**354**
Other frozen fish fillets	**0304 20 950**	**38**	**306**	**36**	**252**
Shrimps in packagings =<2 kg	**1605 20 910**	**0**	**0**	**17**	**162**
Surimi preparations	**1604 20 050**	**51**	**150**	**43**	**129**
Frozen crabs 'paralith.camcha	**0306 14 100**	**6**	**165**	**4**	**112**
Molluscs, prepared/preserved	**1605 90 300**	**0**	**1**	**17**	**108**
Frozen fillets of cod	**0304 20 210**	**0**	**3**	**23**	**103**
Other		4,211	15,495	559	6,467
Grand-total		**32,152**	**75,485**	**60,438**	**139,540**

Source: FAS/Berlin based on German Federal Office of Statistics, Wiesbaden

Salmon Imports

Traditionally, Norway is by far the main supplier of salmon to the German market followed by Denmark, the U.K. and the United States with market shares of 72, 11, 5.3 and 5 percent, respectively (based on live weight for whole or eviscerated salmon in CY 2002). Imports from the United States amounted to 2,963 MT.

Groundfish Fillets Imports

In 2002, for the first time, the U.S. managed to become the most important supplier of groundfish fillets (mainly Alaska-pollock) to the German market and break the traditional predominance of Russia and China in this market. The U.S. market share exploded from 0.6 percent in 2000 to 11 percent in 2001 and 23 percent in 2002. This big increase in 2002 is largely a result of import restrictions for animal products originating in China (see section on total imports). These restriction were lifted later in 2002, which resulted in a resumption of imports from China. In the first half year of 2003, China was the largest supplier again.

However, prospects for U.S. exports remain good, as German importers value the sustainable sources and the stable supply, offered by the U.S.

Exports

German exports of fish and fish products in CY 2002 decreased in volume by 2.5 percent and in value by 1.4 percent compared to the previous year. Exports reached 306,886 MT, valued at U.S.$ 1.1 billion Euro 957 million), including U.S.$ 955 million (Euro 832 million) to other EU countries and U.S. $ 143 million (Euro 125 million) to third countries. Major export destinations within the EU were France, the Netherlands, the U.K., Italy, and Austria. Poland, Switzerland, the Czech Republic and Lithuania were major non-EU destinations. Exports to the United States are marginal. In CY 2002 they reached 704 MT, with a value of U.S. $ 2,964 million.

Marketing

Direct sales promotions and other marketing campaigns aimed at increasing sales are entirely the responsibility of individual companies.

Generic fish promotions are carried out by the Fish Information Center (Fisch-Informationszentrum, FIZ, www.fischinfo.de) in Hamburg. It was founded in 1997 and is part of the Federal Association of the German Fish Industry and the Fish Wholesalers (Bundesverband der deutschen Fischindustrie und des Fischgrosshandels e.V.). It is open to private industry and associations and is funded through membership contributions.

The FIZ does not take part or fund sales promotion events, instead it focuses on public relations campaigns and on initiatives to create a positive image for fish and fish products and German fishing practices in Germany. FIZ addresses questions like quality and health aspects, animal welfare and fish harvesting practices, resource protection, and the impact of fishing on the environment and for third world countries.

For information concerning the trends in fish sales by retail type please see the consumption section above.

Seafood Trade Shows

Fish International is the leading international seafood show in Germany, and includes the following four areas: trading, technology, logistics and point of sale. It is held bi-annually in Bremen. The next show date is February 12 –15, 2004. In 2002, 483 companies from 54 countries attracted more than 12,200 visitors. For more information about the show and how to participate please visit: http://www.fishinternational.com/

European Seafood Exposition (ESE) in Brussels is another important trade show for the German fish market. ESE is an annual show and the next show will be held on May 4-6, 2004. For more information about the show and how to participate please visit: http://www.euroseafood.com/

Section II: Statistical Tables

Table 6: PSD and Import Price Table for Salmon, Whole/Eviscerated (in MT, U.S. $)

PSD Table

Country Germany
Commodity Salmon, Whole/Eviscerated (MT)

	2002	Revised	2003	Estimate	2004	Forecast
	USDA Official [Ol	Estimate [New]	USDA Official [Ol	Estimate [New]	USDA Official	st Estimate [New]
Market Year Begin		01/2002		01/2003		01/2004
Beginning Stocks	0	0	0	0	0	0
Total Production	45	35	35	29	0	30
Intra-EC Imports	21000	13593	11000	19000	0	19500
Other Imports	53000	51005	42000	43000	0	43600
TOTAL Imports	74000	64598	53000	62000	0	63100
TOTAL SUPPLY	74045	64633	53035	62029	0	63130
Intra-EC Exports	29500	25709	20000	20000	0	20000
Other Exports	1000	275	280	120	0	130
TOTAL Exports	30500	25984	20280	20120	0	20130
Domestic Consumption	43545	38649	32755	41909	0	43000
Other Use/Loss	0	0	0	0	0	0
TOTAL Utilization	43545	38649	32755	41909	0	43000
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	74045	64633	53035	62029	0	63130

Source: FAS/Berlin based on data from German Ministry of Consumer Protection, Food, and Agriculture (BMVEL), Annual Report on German Fisheries 2002; Federal Association of the German Fish Industry and Fish Wholesale; German Federal Office of Statistics, Wiesbaden.

Prices Table

Country Germany
Commodity Salmon, Whole/Eviscerated

Prices in U.S. $ per uom MT

Year	2001	2002	% Change
Jan	3540	2989	-16%
Feb	3222	2741	-15%
Mar	3140	2942	-6%
Apr	3105	3022	-3%
May	3138	3048	-3%
Jun	3053	3268	7%
Jul	3090	3431	11%
Aug	3203	3327	4%
Sep	2959	3153	7%
Oct	2903	3334	15%
Nov	2974	3355	13%
Dec	2995	3557	19%

Source: FAS/Berlin based on data from German Federal Office of Statistics, Wiesbaden

Table 7: German Exports of Salmon Whole/Eviscerated (in MT)

Export Trade Matrix

Country	Germany		
Commodity	Salmon, Whole/Eviscerated		
Time Period	Jan/Dec	Units:	MT
Exports for:	2001		**2002**
U.S.	0	U.S.	0
Others		Others	
FRANCE	15,226	FRANCE	13,491
NETHERLANDS	4,562	NETHERLANDS	4,256
SPAIN	1,948	ITALY	2,326
DENMARK	1,764	SPAIN	2,066
ITALY	1,404	UNITED KINGDOM	1,446
BELGIUM	1,205	BELGIUM	791
UNITED KINGDOM	717	DENMARK	483
PORTUGAL	681	AUSTRIA	421
AUSTRIA	562	PORTUGAL	132
POLAND	431	POLAND	114
Total for Others	28,500		25,526
Others not Listed	167		183
Grand Total	28,667		25,709
INTRA-EU-15	28,158		25,434
EXTRA EU-15	509		275
World	28,667		25,709

Source: FAS/Berlin based on data from German Federal Office of Statistics, Wiesbaden

Table 8: German Imports of Salmon Whole/Eviscerated (in MT)

Import Trade Matrix

Country Germany

Commodity Salmon, Whole/Eviscerated

Time Period	Jan/Dec	Units:	MT
Imports for:	2001		**2002**
U.S.	4,054	U.S.	2,963
Others		Others	
NORWAY	42,550	NORWAY	46,682
DENMARK	11,861	DENMARK	7,270
UNITED KINGDOM	4,586	UNITED KINGDOM	3,436
IRELAND	1,762	IRELAND	1,803
FAROE ISLANDS	1,264	CANADA	542
SWEDEN	797	SWEDEN	473
CANADA	652	NETHERLANDS	329
NETHERLANDS	459	COLOMBIA	116
CHILE	350	FRANCE	123
COLOMBIA	190	BELGIUM	117
Total for Others	64,471		60,891
Others not Listed	844		744
Grand Total	69,369		64,598
INTRA-EU-15	19,705		13,593
EXTRA EU-15	49,664		51,005
World	69,369		64,598

Source: FAS/Berlin based on data from German Federal Office of Statistics, Wiesbaden

Table 9: PSD and Import Price Table for Groundfish Fillets (in MT, $)

PSD Table

Country Germany
Commodity Groundfish, Fillets (MT)

	2002	Revised	2003	Estimate	2004	Forecast
	USDA Official [	Estimate [	DA Official [	Estimate [	A Official [	Estimate [
Market Year Begin		01/2002		01/2003		01/2004
Beginning Stocks	0	0	0	0	0	0
Total Production	0	6500	6000	6500	0	6500
Intra-EC Imports	70000	71099	70000	71100	0	71200
Other Imports	750000	762111	770000	772000	0	772000
TOTAL Imports	820000	833210	840000	843100	0	843200
TOTAL SUPPLY	820000	839710	846000	849600	0	849700
Intra-EC Exports	204000	163333	180000	167000	0	167000
Other Exports	4000	5895	5000	6300	0	6300
TOTAL Exports	208000	169228	185000	173300	0	173300
Domestic Consumption	612000	670482	661000	676300	0	676400
Other Use/Loss	0	0	0	0	0	0
TOTAL Utilization	612000	670482	661000	676300	0	676400
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	820000	839710	846000	849600	0	849700

Source: FAS/Berlin based on data from German Ministry of Consumer Protection, Food, and Agriculture (BMVEL), Annual Report on German Fisheries 2002; Federal Association of the German Fish Industry and Fish Wholesale; German Federal Office of Statistics, Wiesbaden

Prices Table

Country Germany
Commodity Groundfish, Fillets

Prices in U.S. $ per uom MT

Year	2001	2002	% Change
Jan	2236	2423	8%
Feb	2393	2384	0%
Mar	2440	2682	10%
Apr	2502	2407	-4%
May	2435	2573	6%
Jun	2214	2734	23%
Jul	2539	2886	14%
Aug	2442	2742	12%
Sep	2620	2706	3%
Oct	2478	2763	11%
Nov	2462	2748	12%
Dec	2567	2904	13%

Source: FAS/Berlin based on data from German Federal Office of Statistics, Wiesbaden

Table 10: German Exports of Groundfish Fillets (in MT)

Export Trade Matrix

Country	Germany		
Commodity	Groundfish, Fillets		
Time Period	Jan/Dec	Units:	MT
Exports for:	2001		**2002**
U.S.	14	U.S.	17
Others		Others	
FRANCE	60,335	UNITED KINGDOM	50,242
UNITED KINGDOM	36,723	FRANCE	37,986
NETHERLANDS	24,727	NETHERLANDS	20,371
AUSTRIA	12,831	BELGIUM	13,096
BELGIUM	10,095	AUSTRIA	11,174
DENMARK	8,168	DENMARK	10,831
ITALY	7,129	ITALY	6,466
LUXEMBURG	5,895	SWEDEN	5,304
SWEDEN	5,810	SPAIN	4,629
SPAIN	3,846	GREECE	1,227
Total for Others	175559		161326
Others not Listed	7549		7885
Grand Total	183122		169228
INTRA-EU-15	178,239		163,333
EXTRA EU-15	4,883		5,895
World	183,122		169,228

Source: FAS Berlin based on data from German Federal Office of Statistics, Wiesbaden

Table 11: German Imports of Groundfish Fillets (in MT)

Import Trade Matrix

Country	Germany		
Commodity	Groundfish, Fillets		
Time Period	Jan/Dec	Units:	MT
Imports for:	2001		**2002**
U.S.	95,745	U.S.	190,064
Others		Others	
PR CHINA	249,190	RUSSIA	176,936
RUSSIA	228,121	PR CHINA	160,358
DENMARK	53,545	ICELAND	42,022
ICELAND	40,878	DENMARK	39,839
POLAND	39,575	CHILE	35,184
PERU	25,236	POLAND	27,855
NORWAY	24,088	NORWAY	24,083
CHILE	18,268	NEW ZEALAND	33,053
NEW ZEALAND	24,079	PERU	20,382
NETHERLANDS	16,932	ARGENTINA	21,341
Total for Others	719,912		581,053
Others not Listed	48,800		62,093
Grand Total	864,457		833,210
INTRA-EU-15	87,250		71,099
EXTRA EU-15	777,207		762,111
World	864,457		833,210

Source: FAS/Berlin based on data from German Federal Office of Statistics, Wiesbaden