Germany
Overseas Market Introduction Service

First Activity on
German Seafood Market

for

Sea Fish Industry Authority

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# Overseas Market Introduction Service

## Schedule of Contents

**First Activity** .................................................................................................................. 4

Executive Summary ........................................................................................................... 4

Methodology ....................................................................................................................... 5

The Research Team for this Report .................................................................................. 5

Germany – wide research ................................................................................................. 6

**SECTION 1 – MATCHING PROFILE** .............................................................................. 6

1.1. THE TRADE ENVIRONMENT ................................................................................. 6

1.2. THE SEAFOOD SECTOR ....................................................................................... 9

1.3. CONSUMER TRENDS .......................................................................................... 16

1.4. UK – SHARE AND EXPORT OPPORTUNITIES .................................................. 21

**SECTION 2 – DOING BUSINESS PROFILE** ................................................................. 29

2.1. The SUPPLY STRUCTURE ................................................................................. 29

2.2. THE RETAIL CHANNEL ..................................................................................... 31

2.3. THE FOOD SERVICE CHANNEL ....................................................................... 46

2.4. KEY REGULATIONS AND TARIFFS ................................................................. 47

- Being a member of the European Union, Germany follows the regulations of the Common Fisheries Policy (CFP). .............................................. 48

**SOURCES** .................................................................................................................... 50

Recommended Action Following Receipt of this First Activity ........................................ 51

Background Information on Germany ............................................................................. 51

Other German Speaking Markets .................................................................................... 51

Annexes ............................................................................................................................ 52

A Professional Approach ................................................................................................. 52

Postal Code Map of Germany ........................................................................................ 55
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First Activity

Executive Summary

Seafish commissioned an OMIS research report from UKTI in Berlin to update the existing Seafood Export Profile Germany profile published on their website. The original report was produced by “Food From Britain” in 2007, who probably commissioned it from industry experts in Germany. While we endeavour to update the information in the same order as it was in the original report, it may be that some data will not be obtainable from sources available to us. A copy of the workplan as agreed in November 2012 is attached as an annexe.

The sources for the research are mentioned below, under methodology. A major source of information was the most recent report of the Fischinformationszentrum in Hamburg titled “Data and Facts 2012”.

The big range of fish and seafood from all over the world has again attracted the interest of German consumers in 2011. The per capita fish consumption remained almost stable at 15.6 kg catch weight (2010 15.6 kg) and confirmed once again the positive consumer trend. This is even more remarkable at a time of price increase. Fish has become a trend product for healthy balanced living and people are prepared to spend more money on it. Apart from the great variety of fish and seafood products, the industry tries to give further impetus by offering new species from all over the world and offer processed products to satisfy the growing needs of consumers for a balanced and healthy diet. Yet good taste, healthy food and convenience are no longer the only decisive factors in this industry. At the same time consumers are increasingly interested in questions such as origin, environmentally friendly production and sustainability.

As in previous years the seafood demand of the German market was satisfied through imports. In 2011, the import share came to 88%. Germany is currently a small export market for British seafood suppliers and the value of exports has fallen slightly in the last few years. In 2011, as in previous years, the main suppliers for fish, seafood and seafood products relating to the import value were countries outside the European Union (59% market share). Norway led in front of China, followed by the USA and Vietnam. In the EU Poland was leading in front of the Netherlands and Denmark. The United Kingdom follows in the fourth position. As there has been an increased interest in fish as a source of healthy nutrition and as it is predicted that demand is going to outstrip supply in the next few years, with a focus on sustainable production, it may be a good time for British producers to look at Germany as a suitable export market.

For any companies who are interested in the German market, UKTI Germany will be able to provide some initial and specific advice on the prospects for business. This can be followed by further in depth and tailored market research through the Overseas Market Introduction Service (OMIS) to assist in finding partners or consumers.
Methodology

The trade team in Berlin has prepared this report using information obtained on a selective basis from local business contacts, commercial databases, trade publications, fair catalogues, trade associations as well as the internet.

The data for the household shopping of fish and fish products originates from the “GfK – Gesellschaft für Konsumforschung”, which is one of the largest consumer research organisations in the world. The data for the per capita consumption is based on statistics provided by the Federal Authority for Agriculture and Nutrition (Bundesamt für Landwirtschaft und Ernährung). In addition we used the database of the Federal Statistical Office for data on prices in product categories and business information.

Other additional sources of information used to update the report are the following:

Federal Ministry of Food, Agriculture and Consumer Protection
Fischinformationszentrum e.V.
Bundesverband des Deutschen Lebensmittelhandels, Fachverband der Fischfachhandel
Bundesmarktverband der Deutschen Fischwirtschaft e.V.
Bundesverband der Deutschen Fischindustrie
Deutscher Hochseefischerei Verband e.V.
Deutscher Fischereiverband
Warenuvein der Hamburger Börse
Bund für Lebensmittelrecht und Lebensmittelkunde
Deutsche Gesellschaft für Ernährung
Deutsche Landwirtschaftsgesellschaft
Fischmarkt Bremerhaven
Fischmarkt Cuxhaven
Fischmarkt Hamburg-Altona
Gesellschaft für Ernährungsmedizin und Diätetik e.V.
Lebensmittelrecht Online
Stiftung Warentest
Verbraucherzentrale Bundesverband e. V.

The Research Team for this Report

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Germany – wide research

SECTION 1 – MATCHING PROFILE

1.1. THE TRADE ENVIRONMENT

<table>
<thead>
<tr>
<th>Population</th>
<th>82</th>
</tr>
</thead>
<tbody>
<tr>
<td>Land Area</td>
<td>357,021 sq-km (137,810 sq. miles)</td>
</tr>
<tr>
<td>Inhabitants per sq km</td>
<td>230</td>
</tr>
<tr>
<td>Capital</td>
<td>Berlin</td>
</tr>
<tr>
<td>Other main cities</td>
<td>Hamburg, Düsseldorf, Cologne, Frankfurt am Main, Munich</td>
</tr>
<tr>
<td>Government Type</td>
<td>Federal Republic</td>
</tr>
<tr>
<td>Language</td>
<td>German</td>
</tr>
<tr>
<td>Religion</td>
<td>Primarily Christian (Protestant and Roman Catholic)</td>
</tr>
<tr>
<td>Currency</td>
<td>EURO (EUR)</td>
</tr>
<tr>
<td>Exchange Rate (as of 1 Dec 2012)</td>
<td>1GBP = 1.23 EUR</td>
</tr>
<tr>
<td>GDP (2011)</td>
<td>2,592.60 billion EUR (Federal Statistics Office)</td>
</tr>
<tr>
<td>Real GDP growth rate (2012*)</td>
<td>+ 0.5 % (Federal Statistics Office)</td>
</tr>
<tr>
<td>GDP per capita</td>
<td>38,400 $</td>
</tr>
<tr>
<td>Workforce (2012)</td>
<td>42 million</td>
</tr>
<tr>
<td>Unemployment rate (October 2012)</td>
<td>5.3%</td>
</tr>
<tr>
<td>Value of exports of goods and services</td>
<td>1061 billion EUR</td>
</tr>
<tr>
<td>Germany’s main import countries (2011)</td>
<td>Netherlands, China, France, United States, Italy, UK</td>
</tr>
<tr>
<td>Germany’s main export destinations</td>
<td>France, United States, Netherlands, UK, China, Italy, Austria</td>
</tr>
</tbody>
</table>

*Federal Statistics Office

Germany is Europe’s most industrialised and populous country and the fourth largest economy in the world. The German population is currently around 82 million. Population density is 230 persons per square kilometre. The working population makes up 40.8 million, which is the largest pool of labour in the EU. The level of education is high, more than 80% of the total workforce has gone through vocational training, or has a university degree. English is widely spoken and accepted as a business language.

Since reunification in 1990 Germany’s capital, and its biggest, city with about 3.5 million citizens, is Berlin. Germany has a strong federal structure and is divided into 16 states. Every state has its own government, and parliament and capital. The most populated German state is North Rhine Westphalia. The three cities of Bremen, Hamburg and Berlin form their own “city states”. Germany covers an area of 357,000 square kilometres. Geologically Germany can be divided into a northern and a southern part. The northern part is characterised by flat landscapes and the southern part includes low mountain ranges and the Alps.
Germany has an extensive and efficient infrastructure (roads, airports, railway lines) and telecommunication system. The excellent infrastructure has been confirmed by a number of recent studies, including the Swiss IMD’s World Competitiveness Yearbook and the 2011-2012 Global Competitiveness Report of the World Economic Forum (WEF).

Germany is the largest market in Europe. The legal system is transparent and efficient and therefore there is a high degree of legal certainty for investors. The German economy constitutes 20% of European GDP. It is both highly industrialised and diversified; with equal focus placed on services and production. German companies represent more than nine percent of European manufacturing companies and generate 27% of the total turnover in the sector. Small and medium-sized enterprises are Germany’s economic backbone. They constitute 99.6% of all companies, employing 79.5% of all employees in Germany.

Germany’s economic success is, to a large extent, built on its flourishing export industries, fiscal discipline, consensus-driven industrial relations and welfare policies. Germany’s export dependent economy was initially hit hard by the global financial crisis in 2008/2009 but, by 2010, its exports had helped the country to rebound more robustly than most other EU members.

Before turning to foreign trade some remarks as to the consumer climate as described by GfK in November 2012. The mood to shop and to spend money remains relatively stable among Germans. While economic expectations improved slightly both income expectations, and willingness to buy, dropped. Following a revised value of 6.1 points in November, the overall indicator is forecasting 5.9 points for December 2012.

As a result of the European debt crisis and the clear deterioration of the economic situation, German consumers continue to be unsettled. Despite this, in November, economic expectations have fared well, albeit at a low level, rising slightly for the third consecutive time.

**Table describing consumer attitude:**

<table>
<thead>
<tr>
<th></th>
<th>November 2012</th>
<th>October 2012</th>
<th>November 2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Economic expectations</td>
<td>-14.6</td>
<td>-15.8</td>
<td>-7.2</td>
</tr>
<tr>
<td>Income expectations</td>
<td>17.8</td>
<td>29.9</td>
<td>31.1</td>
</tr>
<tr>
<td>Willingness to buy</td>
<td>29.4</td>
<td>33.9</td>
<td>40.3</td>
</tr>
<tr>
<td>Consumer climate</td>
<td>6.1</td>
<td>6.1</td>
<td>5.4</td>
</tr>
</tbody>
</table>

**Key indicators private households in 2011 in billion Euros**

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salaries and income</td>
<td>1083,9</td>
</tr>
<tr>
<td>Private Households disposable income</td>
<td>1630,1</td>
</tr>
<tr>
<td>Private Consumer expense</td>
<td>1487,7</td>
</tr>
</tbody>
</table>
Germany is the UK’s number one export market in Europe. Exports from the UK to Germany totalled €44.8 billion in 2011. The UK exports as much to Germany as to all BRIC states together.

In 2011 German exports to the UK amounted to €65.5 billion. The main German export goods are cars and car parts whereas the main imports for the German market are oil and gas (source: Federal Statistics Office Wiesbaden).

**Population**

According to the Federal Statistical Office (Destatis), Germany’s population increased to more than 81.8 million at the end of 2011, that is, by 92,000 (+0.1%) on a year earlier. This was the first but slight increase in the population of Germany since 2002. The main reason was the clear rise in immigration in 2011.

The total population in Germany was last recorded in 2011 from 72.7 million in 1960, changing 12 percent during the last 50 years. The population of Germany represents 1.18 percent of the world’s total population which arguably means that one person in every 85 people on the planet is a resident of Germany. Below is a chart with historical data for Germany’s population.

The population of Germany mirrors the Europe of today. It is made up of native Germans as well as immigrants from other parts of Europe and Asia.

A negative natural population balance has been reported for Germany since 1972, which means that there have been more deaths than births. At the same time Germany has experienced net inward migration in 32 of the 40 years since 1970. Up until 2002 this net immigration exceeded the birth deficit in nearly 75% of all cases, therefore the population increased. Since 2003 net inward migration has no longer been sufficient to offset Germany’s birth deficit.

There is a difference of more than 40 percentage points between the population growth in Germany’s premier regions and its poorer regions.

**Decreasing Population**
Germany’s population has been marked by a declining growth in total numbers. The elderly population in Germany is increasing and this is accompanied by a lower count of young native German citizens. This lower count has forced Germany to allow skilled immigrants into the country. This inward migration has helped the country to maintain its technological and commercial advantage in Europe. A majority of the foreign population is from Turkey. They are followed by the Italians, Greeks and the Serbs. A large number of Asian immigrants, like those from India and Sri-Lanka, have also settled in Germany and accepted German citizenship. Germany occupies the position of the 14th most populous country in the world.

The population of Germany pyramid clearly shows the declining population growth. It also reveals a healthy mix of males and females in the total population. Males and females are born in equal numbers. This has contributed to a better economic growth of Germany.

**Population Forecast**

According to a forecast by the “Swiss Prognos Institute” Germany’s population will decrease by 12 million to 70.1 million by 2050. The average age in Germany is expected to rise by around 12 years between 2000 and 2050. The precipitous drop in population will be accompanied by a dramatic shift in the amount of elderly people in Germany. Of the country's current 82 million inhabitants, some 20 percent are now aged 65 and above. But in 2060, that percentage will increase to 33 percent.

In particular the consistently low birth rate and growing life expectancy is leading to an ageing and shrinking of the population. The shrinking population will be the “most important political and social challenges in the coming decades” for Germany.

In the next 50 years, the numbers of Germans being born will continue to decrease while the numbers of deaths increase, more than tripling the current annual birth deficit. But the population of working age people is expected to drop by as much as 34 percent by 2060, forcing greater immigration in order to prop up the country's generous welfare system for elderly Germans.

Even in the next 20 years the working population is expected to suffer the burden of Germany’s ageing population. Today, there are 34 people aged 65 and over to every 100 working-age people. In 2030, there will be 50 retirees to every 100 workers.

**1.2. THE SEAFOOD SECTOR**

The national German fish production (comprising German deep sea fishing, inland fisheries and aquaculture) increased by 1.5% to 278,000 tonnes in 2011 compared to 2010. The national industry has a market share of 12% of the overall fishing sector. Whereas inland fishers and anglers manage the lakes and rivers of Germany, fish varieties that are easily cultivated are bred in fish farms. In 2011 the overall fish and processed fish sector in Germany came to 2.24 million tonnes. Germany was, and remains, a major fish importer. In 2011 imports came to 1.96 million tonnes. This is a
share of 88% of the German market. Therefore imported fish is of vital importance for the supply of the German market. The “Bundesanstalt für Landwirtschaft und Ernährung” (The Federal Authority for Agriculture and Food, Department 523) provides a very comprehensive overview, which has partially been translated in English, and can be accessed here.

Within the framework of the Common European Fisheries Policy, Germany champions sustainable and responsible use of resources worldwide. The fisheries protection rules are vigorously enforced to ensure the sustainability of the fisheries industry. Every year the countries on the North Sea evaluate the rate the fish stocks are replenishing. A large part of the German fishing industry has now committed itself to purchasing only from sustainable fish stocks.

The German fishing industry also suffers from depletion, because its principal fishing grounds have become overfished by the many modern fishing fleets that enter North European waters. German vessels have long fished the North Sea, the Baltic Sea, and the Atlantic Ocean, off the British Isles and around Greenland, all areas where many competing fishing fleets also operate. The German ocean-fishing fleet has shrunk. Germany attempted, through the European Community, to establish rules that would prevent overfishing, but those rules have proved difficult to enforce.

### Market Shares

<table>
<thead>
<tr>
<th>Market shares of seafood in %</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Fish products</strong>&lt;sup&gt;1&lt;/sup&gt;</td>
</tr>
<tr>
<td>Sea fish</td>
</tr>
<tr>
<td>Fresh Water Fish</td>
</tr>
<tr>
<td>Crustaceans and Molluscs</td>
</tr>
<tr>
<td>Overall</td>
</tr>
</tbody>
</table>

The top 19 species landed in 2009, 2010 and 2011

<table>
<thead>
<tr>
<th>Ranking of the most important sea and fresh water fish species in %</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Species</strong></td>
</tr>
<tr>
<td>Atlantic pollack</td>
</tr>
<tr>
<td>Herring</td>
</tr>
<tr>
<td>Salmon</td>
</tr>
<tr>
<td>Tuna/bonito</td>
</tr>
<tr>
<td>Catfish</td>
</tr>
</tbody>
</table>
The top 5 consumed species

The Germans ate 1.24 million tonnes of fish in 2011. This corresponds to a consumption of 15.6 kg (catch weight) per capita. According to “Fischinformationszentrum Hamburg” there is no preference for sea fish over freshwater fish.

As shown on the picture Atlantic pollack (23.3%), herring (18.5 %), salmon (12.5), tuna (11.2%) and catfish (4.8%) are the most important species consumed in Germany.
These five types alone accounted for two thirds of the total consumption in 2011. The share of fresh fish purchased increased from 8% to 9% in comparison to 2010. A “Spiegel Magazine” article from 7th September 2012 even had the headline “The Germans eat as much fish as never before” and reported on fish as a trend food.

Historically the majority of sea fish consumption was in Northern Germany, for geographic and logistical reasons, and this is true to a certain extent even today. According to the GFK (Gesellschaft für Konsumforschung/Society for Consumer Research), the Hamburgers bought most fish (5.8kg purchased for household consumption) followed by the Federal States of Schleswig-Holstein (5.6 kg) and Saxony (5.3 kg). The lowest figures were recorded in Saxony-Anhalt (4 kg) and Baden-Württemberg (3.9 kg).

Bremerhaven is the leading port for large-scale deep sea fisheries and has developed over its long history into one of the largest fish markets in Europe. Major food industry players have established a presence there. Amongst them are companies like “Frozen Fish International”, which produce the famous “Käpt’n Iglo” fish fingers, Deutsche See and Frosta. Apart from Bremerhaven (24,000 tonnes in 2011), Cuxhaven (www.cuxhaven-port.de) companies, such as Cux Fisch Dietzer (www.cuxfisch.de), and Rostock (www-rostock-port.de) should be mentioned in connection with deep sea fishing and processing. Hamburg formerly played a major role but this has changed, although Hamburg still is an important place for fish trading, production, research and home of many relevant Trade Associations. Other ports to mention are Kiel, Sassnitz and Neu Mukran. More information on Germany’s seaports can be obtained from the following source: www.zds.seehafen.de
Most seafood arriving in the three main sea ports is auctioned there. For inshore fishing Germany has many more small ports along the shores of the North and Baltic Sea. Some of them are shown on the map above.

As mentioned previously the fish demand in the German market is fulfilled by 88% imports. Fish imports came to 1.96 million tonnes at a value of 3.56 billion Euros whereas exports by the German industry reduced by 1.7% to 957,000 tonnes. As fish became more expensive on the world market, export revenues increased by 2.0% and came to 1.62 billion Euros.

The German fishing sector faced difficult challenges in 2011. Despite tough conditions in the world and the raw material markets German consumers continued to expect a comprehensive, varied and sustainable offer at customer friendly prices. Turnover differed according to the sector. Deep-sea fishing and fish retail benefited most from the remaining high consumer interest in fish and seafood.

**Turnover of fish and seafood according to sector (million EUR)**

<table>
<thead>
<tr>
<th>Sector</th>
<th>Year</th>
<th>Turnover</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sea fisheries</td>
<td>2009</td>
<td>175</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2010</td>
<td>186</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2011</td>
<td>202</td>
<td>8,6%</td>
</tr>
<tr>
<td>Inshore fishing¹</td>
<td>2009</td>
<td>210</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2010</td>
<td>210</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2011</td>
<td>210</td>
<td>0 %</td>
</tr>
<tr>
<td>Fish industry</td>
<td>2009</td>
<td>2.280</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2010</td>
<td>2.251</td>
<td>- 0,7%</td>
</tr>
<tr>
<td></td>
<td>2011</td>
<td>2.236</td>
<td></td>
</tr>
<tr>
<td>Fish imports</td>
<td>2009</td>
<td>3.194</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2010</td>
<td>3.457</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2011</td>
<td>3.555</td>
<td>2,8 %</td>
</tr>
</tbody>
</table>
In comparison to deep water fishing freshwater fishing only plays a minor role. At the beginning of the 20th century freshwater fishing was reduced considerably due to using the rivers for shipping and energy production.

The German fishing fleet is active in national and international waters.

**German fishing fleet destinations from 2009 to 2011**

| Fanggebiete der deutschen Hochsee- und Küstenfischerei (t Fanggewicht) |
|----------------------|------------------|------------------|
| Jahr                | 2009            | 2010            | 2011            |
| Ostsee              | 56.358          | 44.523          | 36.145          |
| Nordsee             | 70.303          | 76.185          | 77.879          |
| Westbritische Gewässer | 37.321          | 45.513          | 51.195          |
| Nördlich der Azoren (inkl. Island) | 115            | 71              | 43              |
| Norwegische Küste   | 26.601          | 24.890          | 22.012          |
| Grönland            | 6.932           | 7.235           | 12.940          |
| Pazifik             | 33.525          | 13.246          | 471             |
| Mauretanien         | 0               | 0               | 30.555          |
| Sonstige Fanggebiete | 1.363          | 21.485          | 6.131           |

Source Fischinformationszentrum Hamburg 2011

The main areas for the German fishing fleet are the Baltic and the North Sea followed by the West British Waters, North of Azores, Coast of Norway, Pacific Ocean, Mauretania and others.

The number of employees in the seafood sector remained stable in 2011, although there was a decrease reported for fishing (-2%) and fish restaurants (-4%). Germany has 9 vessels for deep sea fishing and 1521 smaller fishing vessels for coastal and river fishing. Whereas the deep sea fishing fleet remained stable the inland fleet decreased by 5.4%, With 280,000 tonnes catch weight Germany’s fishing fleet is not using its catch quota to its full extent.
<table>
<thead>
<tr>
<th>Year</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Number of production units</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fishing production units</td>
<td>62</td>
<td>60</td>
<td>58</td>
</tr>
<tr>
<td><strong>Number of businesses in the trade and catering sector</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fishwholesalers</td>
<td>274</td>
<td>304</td>
<td>310</td>
</tr>
<tr>
<td>Fish retailers including specialist departments and mobile delicatessen outlets</td>
<td>10.000</td>
<td>10.000</td>
<td>10.000</td>
</tr>
<tr>
<td>Catering / Fish snacks</td>
<td>600</td>
<td>580</td>
<td>570</td>
</tr>
<tr>
<td><strong>Number of ships</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deep Sea Fishing and Fish Processing vessels</td>
<td>9</td>
<td>9</td>
<td>9</td>
</tr>
<tr>
<td>Fishing boats</td>
<td>1,760</td>
<td>1,607</td>
<td>1,521</td>
</tr>
<tr>
<td><strong>Number of employees</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deep Sea Fishing (Staff, Freight Handling)</td>
<td>3,048</td>
<td>2,889</td>
<td>2,831</td>
</tr>
<tr>
<td>Coastal- and Inland Fishing</td>
<td>4,100</td>
<td>4,050</td>
<td>4,000</td>
</tr>
<tr>
<td>Fish markets, Fish importers</td>
<td>700</td>
<td>700</td>
<td>700</td>
</tr>
<tr>
<td>Fish industry</td>
<td>7,590</td>
<td>7,316</td>
<td>6,856</td>
</tr>
<tr>
<td>Fish wholesalers</td>
<td>8,100</td>
<td>6,953</td>
<td>7,000</td>
</tr>
<tr>
<td>Fish retailers including specialist fish departments and mobile delicatessen outlets</td>
<td>18,900</td>
<td>18,900</td>
<td>18,900</td>
</tr>
<tr>
<td>Fish catering</td>
<td>6,500</td>
<td>6,300</td>
<td>6,050</td>
</tr>
<tr>
<td><strong>Overall Number of employees:</strong></td>
<td>48,938</td>
<td>47,108</td>
<td>46,337</td>
</tr>
</tbody>
</table>

Inland fishing and aquaculture remained at the same level as 2010. The revenues came mainly from fish bred and caught in lakes and ponds. Carp and trout, which are popular in the German market, are typical species for aquaculture breeding. In 2011 trout and similar species like char made up 11,000 tonnes whereas carp and tench came to 5400 tonnes. The most common species, within the trout group, were rainbow trout (8100 tonnes) and salmon trout (1000 tonnes). The above mentioned freshwater fish make up 78% of the production and are mainly bred in southern Germany. A smaller part comes from North Rhine Westphalia and Brandenburg. River fishing is of minor importance in
Germany apart from Central Germany (Mitteldeutschland) where 50-80 kg of fish are produced per hectare (e.g. brusque, pike perch, pike).

**Supply through inland fishing and aquaculture in tonnes (species ranking listed are trout, carp and other fresh water fishes).**

<table>
<thead>
<tr>
<th></th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forellen</td>
<td>22,000</td>
<td>23,000</td>
<td>22,300</td>
<td>22,300</td>
</tr>
<tr>
<td>Karpfen</td>
<td>11,000</td>
<td>10,000</td>
<td>9,793</td>
<td>9,793</td>
</tr>
<tr>
<td>Sonstige Süßwasserfische</td>
<td>8,000</td>
<td>8,000</td>
<td>8,368</td>
<td>8,368</td>
</tr>
<tr>
<td>Binnenfischerei gesamt</td>
<td>41,000</td>
<td>41,000</td>
<td>40,461</td>
<td>40,461</td>
</tr>
</tbody>
</table>

Source Fischinformationszentrum Hamburg 2011

According to agriculture and fishery sector statistics, published by the Federal German Statistics Office in 2012, the overall production of 4,800 aquaculture businesses came to 39,000 tonnes, among them 18,000 tonnes of fish and roughly 21,000 tonnes of mussels. The mussel production came mainly from the Federal States of Schleswig-Holstein (11,000 tonnes) and Lower Saxony (10,000 tonnes). The remaining 100 tonnes were crustaceans, rogen, caviar and algae and other species. About 70% of all aquaculture companies were located in Bavaria. They mainly produced fish, but Bavarian fish only makes up 26% of the German fish production. The Federal State of Baden-Württemberg had only 3% of the German aquaculture businesses but produces 17% of the German aquaculture fish. Due to the increasing demand in fish aquaculture there is growth potential. The industry established its own Trade Association in November 2011.

### 1.3. CONSUMER TRENDS

Germans like to eat fish. Whereas fish consumption was at 11 kg per capita in the 60ies, 70ies and 80ies consumption steadily increased afterwards to 15.7 kg per capita in 2010. In 2011 consumption was slightly lower at 15.6 kg (compared with 61 kg per capita in meat in 2011) but more than beef (8.6 kg per capita) and poultry (11.5 kg per capita). Considering the per capita consumption Germany still has a considerable potential for growth. Yet it cannot be expected that the Germans eat as much fish as the Spanish (41kg) or the Portuguese (56 kg).
Fish consumption in Germany from 2004 to 2011.

Apart from traditional fish and seafood new fish products and innovative offers give impetus to the market. One example to showcase this trend was the consumer food fair “Grüne Woche” in Berlin in 2012 where consumers were familiarised with algae in various forms. In addition there was a display of 10 m² of 80 different species of fish, crabs and mollusks at the Fischinformationszentrum stand. Another relevant sector trade fair takes place in Bremen and is called “Slow Food Fish”, more information about the fair is available on the website.

In recent years more and more supermarkets introduced fish counters with a comprehensive display of frozen and fresh fish as well as fish products. The decision to establish such a counter was made on the basis of consumer demand and disposable income in the catchment area.

Taste and convenience are no longer the only decisive factors. Questions like the origin or sustainable processing are equally important for German consumers. So it is unlikely that Germany will be able to maintain its level of seafood consumption without increasing imports and developing aquaculture. This trend is also reflected in media reporting.
A reputable scientific database and useful instrument for trade journalists, fish buyers, food sector specialists and restaurants is “Fischbestände online” ()

According to a 2012 market study by “AMR” (Advanced Market Research/Düsseldorf) of 10 countries in Europe and major world markets 55% of the German consumers interviewed were aware of the blue Marine Stewardship Council (MCS) logo and relate it to sustainable fish. The European average was as low as 14%. German consumers also appeared to be especially worried about the environmental impacts of fishing. More than half of the interviewed candidates stated that overfishing of the oceans is a very serious problem and therefore they think sustainably in order to save the fish for the future. A total of 27% explained that they buy only fish and seafood from sustainable sources, independently from price and quality. They would even be prepared to go to another fish outlet to find sustainable fish. About 67% of the interviewed Germans consider it to be important that supermarkets in Germany offer sustainable fish. Sustainability is also relevant for the supply of restaurants. About 62% of the Germans interviewed said they saw the MCS logo on a fish menu. Many retailers nowadays have a comprehensive offer of certified products. In German supermarkets consumers can now choose between 4000 MCS certified products.

German consumers also seem to be very conscious about issues affecting food safety. This has a lot to do with the ever occurring food scandals. Therefore consumers are very interested in quality assurance and food hygiene. One example of this attitude was the high number of enquiries relating to the impact of Fukushima on German fish.

The supply of fish at reasonable prices was one of the main sector challenges in 2011. Satisfying the supply with species such as Atlantic pollack, cod, haddock, pollack and trout was not an issue whereas the reduction of the catch quota for the North Arctic herring had a major impact on market supply.

In Germany fish has an excellent healthy image and fits well with the overall trend towards lighter cuisine. The “Deutsche Gesellschaft für Ernährung” (German Nutrition Society) recommends two fish dishes per week for as part of a balanced diet. The increasing popularity of seafood is also reflected in cooking programs on TV and initiatives, such as the “School of Fish” which aims at providing more information about fish and healthy eating in schools.

The previous report provided by “Food from Britain in 2007” stated that Italian is the most popular ethnic restaurant in Germany. There is much more variety in international restaurants now. Germany also has a number of specialised fish restaurants with branches all over the country such as “Nordssee” (www.nordsee.com) for quick service and casual dining and “Gosch” (www.gosch.de, slightly higher priced level). In comparison to the past Germans also prepare much more fish at home and are experimenting more. Therefore it is no longer appropriate to state that fish is usually eaten out of the home, due to consumers lack of experience cooking it and perceived smell, as Germans move towards cooking fish at home. Fish has also become part of canteen menus due to the trend towards healthy food.
In an article of the leading Trade Journal “Fischmagazin” from September 2012 the Chairman of the Fischinformationszentrum e.V. Hamburg, Herr Thomas Lauenroth, gave an interview expressing the following:

“Fish is food with a future. More and more consumers appreciate the advantages of fish and seafood for their nutrition. They will have even more choice in the future. Over the recent years progress was achieved in sustainable management of the fish stock, but the fish sector has to fight with increasing raw material prices. Some species, for instance the herring, have doubled in price and this has a considerable impact on consumer prices for fish. There are a number of fast developing nations which have a growing demand in high fish quality. This is another reason why Germans will have to accept higher prices for fish.”

In 2011 German consumers preferred buying frozen fish. One of German children’s favourite dishes is fishfingers. The market for fishfingers is dominated by Iglo. In second place came canned fish and marinades followed by crabs and mollusks, fresh and smoked fish.

With sustainability in preserving fish stocks becoming increasingly important, it is unlikely that Germany will be able to maintain its level of seafood consumption without increasing imports and developing aquaculture.

The most popular fish products (in %)

In 2011 German consumers bought mainly frozen fish, which represented 31% of the total fish products consumed. In second place came canned fish and marinades (25%) followed by crabs and mollusks (17%), fresh (9%) and smoked fish (9%).
In the overall consumption of 15.6kg per capita, sea fish had a share of 10.1kg. Freshwater fish and products made from fresh water fish made up 3.6 kg. Crabs and mollusks came to 1.9 kg.

The chart below shows the per capita consumption of fish products in % according to production sectors from 2009 to 2011. The production classifications are frozen fish, followed by canned fish and marinades (herring and marinades, canned tuna, canned sardines), fresh fish, smoked fish, other fish products and salads.

### Per capita consumption according to production sectors in %

<table>
<thead>
<tr>
<th>Production sector</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Frozen fish</td>
<td>34</td>
<td>30</td>
<td>31</td>
</tr>
<tr>
<td>Canned fish and marinades</td>
<td>26</td>
<td>27</td>
<td>25</td>
</tr>
<tr>
<td>of this 1. Canned herring/marinades</td>
<td>16</td>
<td>16</td>
<td>14</td>
</tr>
<tr>
<td>2. Canned tuna</td>
<td>9</td>
<td>9</td>
<td>10</td>
</tr>
<tr>
<td>3. Canned sardines</td>
<td>1</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Crabs and mollusks (fresh, frozen, processed)</td>
<td>15</td>
<td>15</td>
<td>17</td>
</tr>
<tr>
<td>Fresh fish</td>
<td>9</td>
<td>10</td>
<td>9</td>
</tr>
<tr>
<td>Smoked fish</td>
<td>9</td>
<td>9</td>
<td>9</td>
</tr>
<tr>
<td>Other fish products (such as rollmops, anchovies, herring bits, matjes, salmon products)</td>
<td>6</td>
<td>7</td>
<td>7</td>
</tr>
<tr>
<td>Fish salads</td>
<td>1</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Overall</td>
<td>100</td>
<td>100</td>
<td>100</td>
</tr>
</tbody>
</table>

1 Basis: National consumption (product weight).  
2 Corrected.  
3 Preliminary

**Summary Consumer Trends in bullet points**

- Germany has 82 million of the world’s wealthiest consumers and it is by far the biggest market for food and beverages in the European Union (Euromonitor).

- The German food market is heavily dependent on imports to meet it consumer demands.

- German fish consumption is growing as consumers increasingly demand foods that support a healthy diet and are convenient to prepare.
• Domestic stock shortages have forced German fish and seafood suppliers to import larger quantities of these products, which has resulted in higher unit prices.

• Fish and seafood products with low fat and sugar contents, limited additives and, ideally, 100% organic ingredients, have shown recent growth.

• Conveniently prepared value-added products, including fillets with toppings, mixtures of fish and vegetables, and ready-meals, are increasingly attracting the busy German workforce, who have limited time to prepare food.

• Fish and seafood suppliers are increasingly providing chilled, processed foods fortified with omega 3 and vitamins.

• New products entering the European market are focused on having no additives and preservatives, enhancing the image of natural fish and seafood products free from monosodium glutamate (MSG) and polyphosphates, characteristics that appeal to Germans.

• In Europe, the health of the planet has become more important to consumers. Packaging has begun to reflect this trend, with clear labelling and prominent display of the MSC logo, which denotes sustainable and ethical products.

**1.4. UK – SHARE AND EXPORT OPPORTUNITIES**

The global financial crisis has not affected Germany as severely as other countries but economic uncertainty has led to a decrease in consumer spending on food. In 2008, the German economy slowed and by 2009 Germany was in a recession. In 2010 and 2011 the economy rebounded and Germany performed better than most western European countries. In 2011 unemployment fell to the lowest level in over a decade. Consumer spending recovered in line with the economy. However, continued fiscal consolidation and Germany’s dependence on exports could slow the pace of growth in consumer expenditures on food.

In 2011, the seafood demand of the German market was covered to 88% by imports ad to 12% through national supply. Imports came to 1.96 million tonnes. The import value was 3.56 billion Euros. Sourcing that volume of imported seafood in an increasingly competitive market is challenging. Prices are likely to be driven up by global population growth and growing demand in emerging markets.

Germany is currently a small export market for British seafood suppliers and the value of exports has fallen slightly in the last few years. According to the Federal Statistics Office the value of imports for fish from the UK into Germany came to 12,423 000 € in 2011. The German fish export to the UK was at a value of 6,743,000 €. When asking Germans what comes to their mind about British fish they often answer in stereotypes, such as “fish and chips” and “Scottish salmon.” Trade shows like ANUGA, Green Week or the BioFach show in Germany enjoy an exceptional reputation within the global food industry and these shows outreach is, in many cases, global.

For fish we recommend to use sector leading events and trade fairs (e.g. Anuga/Hamburg,
Slow Food Fish Bremen, Eurotier) to promote British seafood in Germany. In addition the International Consumer Food Fair “Grüne Woche” could be a forum to attract German consumer interest and to convey a better understanding about the variety of British seafood. Participating in German food trade shows is a proven way to find the right distributor and facilitates the direct contact with German food brokers, importers and wholesalers.

According to “Deutscher Seafood Verband e.V.”, the Association of German Seafood Importers and Processing Companies, seafood demand in Germany is rising. Although prices for fish have increased by an average of 3.6 % (higher than with other food products) the demand has not declined. The rising popularity of fish is due to a better understanding of the importance of fish for a healthy diet. Depending on species and region prices can differ, for example herring increased in price whereas salmon is cheaper now.

**Overall supply in fish and fish products (by 1,000 tonnes of catch weight)**

<table>
<thead>
<tr>
<th>Year</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Imports</td>
<td>1.910</td>
<td>1.982</td>
<td>2.020</td>
<td>1.915</td>
<td>1.989</td>
<td>1.957</td>
</tr>
<tr>
<td>National fish landings/Production</td>
<td>321</td>
<td>330</td>
<td>306</td>
<td>274</td>
<td>274</td>
<td>278</td>
</tr>
<tr>
<td>Overall numbers</td>
<td>2.231</td>
<td>2.312</td>
<td>2.326</td>
<td>2.189</td>
<td>2.263</td>
<td>2.235</td>
</tr>
</tbody>
</table>

1 corrected
2 preliminary

In 2011 the most important sources (by value) of seafood and fish products for Germany were Poland (13.9%), Norway (13.8%), China (11.4%), Denmark (8.4%) and the Netherlands (8.4%). The total EU had a share of 41%. The main suppliers for seafood and seafood products were countries outside the European Union (59% market share) although Europe increased imports to Germany compared to the last seafood report in 2007. Norway led in front of China followed by the USA (5.3%) and Vietnam (4.8%). In the EU Poland was leading in front of the Netherlands and Denmark. The United Kingdom came in the forth position and had a 2.1% market share. As there has been an increased interest in fish as a source of healthy nutrition and as it is predicted that demand is going to outstrip supply in the next few years with a focus on sustainable production, it appears that Germany could be an important prospective market for the UK.
Sources of fish imports to Germany.

<table>
<thead>
<tr>
<th>Lieferländer für Fisch und Fischereierzeugnisse</th>
<th>Prozent des wertmäßigen Importaufkommens 2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Polen</td>
<td>13,9 %</td>
</tr>
<tr>
<td>Niederlande</td>
<td>8,4 %</td>
</tr>
<tr>
<td>Dänemark</td>
<td>6,4 %</td>
</tr>
<tr>
<td>Vereinigtes Königreich</td>
<td>2,1 %</td>
</tr>
<tr>
<td>Litauen</td>
<td>2,0 %</td>
</tr>
<tr>
<td>Frankreich</td>
<td>1,4 %</td>
</tr>
<tr>
<td>Spanien</td>
<td>1,4 %</td>
</tr>
<tr>
<td>Belgien</td>
<td>1,3 %</td>
</tr>
<tr>
<td>Italien</td>
<td>1,0 %</td>
</tr>
<tr>
<td>Sonstige EU-Länder (27)</td>
<td>1,9 %</td>
</tr>
<tr>
<td>Norwegen</td>
<td>13,8 %</td>
</tr>
<tr>
<td>VR China</td>
<td>11,4 %</td>
</tr>
<tr>
<td>USA</td>
<td>5,3 %</td>
</tr>
<tr>
<td>Vietnam</td>
<td>4,8 %</td>
</tr>
<tr>
<td>Thailand</td>
<td>3,0 %</td>
</tr>
<tr>
<td>Island</td>
<td>2,0 %</td>
</tr>
<tr>
<td>Russland</td>
<td>2,0 %</td>
</tr>
<tr>
<td>Philippinen</td>
<td>2,0 %</td>
</tr>
<tr>
<td>Ecuador</td>
<td>1,8 %</td>
</tr>
<tr>
<td>Chile</td>
<td>1,2 %</td>
</tr>
<tr>
<td>Indian</td>
<td>1,0 %</td>
</tr>
<tr>
<td>Indonesien</td>
<td>1,0 %</td>
</tr>
<tr>
<td>Papua-Neuguinea</td>
<td>0,7 %</td>
</tr>
<tr>
<td>Kanada</td>
<td>0,7 %</td>
</tr>
<tr>
<td>Sri Lanka</td>
<td>0,5 %</td>
</tr>
<tr>
<td>Marokko</td>
<td>0,5 %</td>
</tr>
<tr>
<td>Tansania</td>
<td>0,5 %</td>
</tr>
<tr>
<td>Grönland</td>
<td>0,4 %</td>
</tr>
</tbody>
</table>

(Source: Fischinformationszentrum Hamburg 2011)
Germany’s fishing fleet landings (national and international) in 1000 tonnes catch weight.

(Source Fischinformationszentrum Hamburg 2011)
Chart for imports into Germany by seafood type

The table above shows the seafood imports into Germany from 2009 to 2011. On the first line is Germany’s national seafood supply. From 2009 to 2011 the national supply decreased by 1% whereas imports increased by the same percentage to cover the demand. Altogether 1,956,545 tonnes (catch weight) were imported at a value of 3,555 million Euros (€1,166 million of sea fish, €707 million of freshwater fish, €1,049 million of processed fish and €583 million of crustaceans and mollusks).

The table below shows imports in canned fish and marinades from 2009 to 2011. The species listed according to import ranking are tuna/bonito, herring, sardines and mackerel in tonnes catch weight).
Imports of fish canned fish and marinades 2009-2011.

<table>
<thead>
<tr>
<th>Fish</th>
<th>Year</th>
<th>Tonnes</th>
<th>Revenue in €1,000</th>
<th>Revenue per kg</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thunfisch/Boniten</td>
<td>2009</td>
<td>69.371</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2010</td>
<td>66.594</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2011</td>
<td>73.016</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hering</td>
<td>2009</td>
<td>42.880</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2010</td>
<td>45.682</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2011</td>
<td>44.517</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sardinen</td>
<td>2009</td>
<td>8.499</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2010</td>
<td>7.185</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2011</td>
<td>6.708</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Makrele</td>
<td>2009</td>
<td>1.939</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2010</td>
<td>2.056</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2011</td>
<td>2.200</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Information on landings (in landed weight) of the British deep-sea and coastal fishing fleet in the calendar year 2011 and data on seafood exported into Germany is based on statistics provided by the “Bundesanstalt für Landwirtschaft und Ernährung”, Fischwirtschaft Referat 523. The full report can be found here.

Landings of British sea fish into German ports (delivered in containers, measured in catch weight/tonnes). The statistics showed mainly three species of fish: redfish, pollack and cod. The largest amount of imported fish in 2011 was ocean perch.

<table>
<thead>
<tr>
<th>Year</th>
<th>Tonnes</th>
<th>Revenue in €1,000</th>
<th>Revenue per kg</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>125.9</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2010</td>
<td>154.3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2011</td>
<td>21.9</td>
<td>44.7</td>
<td>2.04</td>
</tr>
</tbody>
</table>

The United Kingdom succeeded in increasing exports in canned tuna and bonito and maintained the same level in exports of canned mackerels. This is shown by the tables below taken from the report of Fischinformationszentrum Hamburg in 2011. From 2009 to 2011 canned tuna export was increased from 7 to 1393 tonnes. Exports to Germany in canned mackerels were between 70 (2009) to 69 tonnes (2011).
Import sources of canned Tuna and Bonito.

<table>
<thead>
<tr>
<th></th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ecuador</td>
<td>16.224</td>
<td>8.929</td>
<td>16.405</td>
</tr>
<tr>
<td>Philippinen</td>
<td>19.832</td>
<td>17.272</td>
<td>15.376</td>
</tr>
<tr>
<td>Papua-Neuguinea</td>
<td>6.813</td>
<td>11.251</td>
<td>8.683</td>
</tr>
<tr>
<td>Indonesien</td>
<td>8.136</td>
<td>6.655</td>
<td>8.028</td>
</tr>
<tr>
<td>Niederlande</td>
<td>4.303</td>
<td>6.244</td>
<td>7.695</td>
</tr>
<tr>
<td>Vietnam</td>
<td>3.993</td>
<td>3.317</td>
<td>5.378</td>
</tr>
<tr>
<td>Thailand</td>
<td>4.264</td>
<td>4.136</td>
<td>3.062</td>
</tr>
<tr>
<td>Madagaskar</td>
<td>0</td>
<td>890</td>
<td>1.499</td>
</tr>
<tr>
<td>Vereinigtes Königreich</td>
<td>7</td>
<td>1.092</td>
<td>1.393</td>
</tr>
</tbody>
</table>

Imports of canned mackerel.

<table>
<thead>
<tr>
<th></th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dänemark</td>
<td>1.026</td>
<td>1.175</td>
<td>1.439</td>
</tr>
<tr>
<td>Marokko</td>
<td>521</td>
<td>356</td>
<td>462</td>
</tr>
<tr>
<td>Niederlande</td>
<td>34</td>
<td>272</td>
<td>106</td>
</tr>
<tr>
<td>Vereinigtes Königreich</td>
<td>70</td>
<td>59</td>
<td>69</td>
</tr>
<tr>
<td>Litauen</td>
<td>14</td>
<td>36</td>
<td>45</td>
</tr>
<tr>
<td>Spanien</td>
<td>31</td>
<td>42</td>
<td>34</td>
</tr>
<tr>
<td>Polen</td>
<td>130</td>
<td>36</td>
<td>17</td>
</tr>
<tr>
<td>China</td>
<td>5</td>
<td>27</td>
<td>11</td>
</tr>
<tr>
<td>Andere Länder</td>
<td>108</td>
<td>53</td>
<td>17</td>
</tr>
<tr>
<td><strong>Gesamt</strong></td>
<td><strong>1.939</strong></td>
<td><strong>2.056</strong></td>
<td><strong>2.200</strong></td>
</tr>
</tbody>
</table>

The UK is not registered as one of the main exporters of canned herring and marinades to Germany in the years from 2009 to 2011. If there are any exports then they are summarised under other countries. The same applies for sardines in the table below.
Imports of canned herring and marinades.

<table>
<thead>
<tr>
<th>Import von Heringskonserven und Marinaden (t Produktgewicht)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jahr</td>
</tr>
<tr>
<td>Polen</td>
</tr>
<tr>
<td>Dänemark</td>
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<tr>
<td>Schweden</td>
</tr>
<tr>
<td>Niederlande</td>
</tr>
<tr>
<td>Litauen</td>
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<tr>
<td>Norwegen</td>
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<tr>
<td>Irland</td>
</tr>
<tr>
<td>Lettland</td>
</tr>
<tr>
<td>Andere Länder</td>
</tr>
</tbody>
</table>

Imports of canned sardines.

<table>
<thead>
<tr>
<th>Import von Sardinenkonserven (t Produktgewicht)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jahr</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Marokko</td>
</tr>
<tr>
<td>6,711</td>
</tr>
<tr>
<td>5,187</td>
</tr>
<tr>
<td>4,361</td>
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<tr>
<td>Niederlande</td>
</tr>
<tr>
<td>836</td>
</tr>
<tr>
<td>762</td>
</tr>
<tr>
<td>832</td>
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<tr>
<td>Peru</td>
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<tr>
<td>489</td>
</tr>
<tr>
<td>734</td>
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<td>Polen</td>
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<tr>
<td>0</td>
</tr>
<tr>
<td>0</td>
</tr>
<tr>
<td>181</td>
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<tr>
<td>Portugal</td>
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<td>74</td>
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<td>50</td>
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<td>28</td>
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<tr>
<td>35</td>
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<tr>
<td>Andere Länder</td>
</tr>
<tr>
<td>171</td>
</tr>
<tr>
<td>254</td>
</tr>
<tr>
<td>269</td>
</tr>
<tr>
<td>Gesamt</td>
</tr>
<tr>
<td>8,499</td>
</tr>
<tr>
<td>7,185</td>
</tr>
<tr>
<td>6,708</td>
</tr>
</tbody>
</table>

There was also statistical information available on the website of the Federal Ministry of Food, Agriculture and Consumer Protection. The most recent statistics were from 2010. For more information see page 7 of this report on the ministry website.

It is difficult to point out specific gaps in such a large and established market like Germany. Maybe there is some potential in fresh/frozen fish as there is a growing interest in cooking at home and in eating fish in restaurants and canteens. Opportunities could also be at the value-added end of the market. Trade buyers in Germany are in general open to new suppliers who can guarantee delivery times of a quality product within the agreed specifications and price-levels.
SECTION 2 – DOING BUSINESS PROFILE

2.1. The SUPPLY STRUCTURE

Overview

As mentioned before the seafood sector is highly reliant on imported products, which generally lands in frozen or in a further processed form to supply a large portion of the domestic market. A significant portion of seafood volumes are sold in processed form (canned or frozen packages), and a large part of imported frozen fish is sold into the domestic market as fresh product. The dominant drivers of value are:

- Balance of supply and demand in the chain and the price gained from wild-catch products.
- Increased demand for portion prepared products.

The supply structure for Germany is still the same as in the report provided by Food from Britain. The chart originates from “The European Seafood Market Information Report” provided by “Market Strategy Ltd”.

Fresh fish is the dominant channel across Spain, France and Italy. In comparison to the south of Europe, the German market relies more heavily on frozen and canned fish. As
the frozen logistics system is of very high standard in Germany it is economically efficient to sell frozen fish in this market.

Within fresh, the leading seafood distribution centre for north and central Germany is Padborg, across the border in Denmark. Here Scandinavian seafood including most of the Norwegian fresh salmon, is processed by a wide variety of traders and sold on into Germany. Many retailers order directly from the traders by telephone and arrange their own transport. Other important distribution centers are the seaports of Germany, such as Bremerhaven, Bremen and Hamburg.

Imported seafood from Africa and Asia, which comes by airfreight, is consolidated primarily at Frankfurt Airport at the Perishable Centre. A total of 9,000 sqm of storage space handle up to 32,000 tonnes of fish per annum. This is more than the ports of Hamburg and Bremen together. The logistics of the perishable centre offer favourable conditions for transport (six lorry loading ramps) and quality check and confection. The Customs and German Veterinary Authority are also located there. More information is available at wwwpcf-frankfurt.de.

There is a clear distinction between the supply chain of sea fish and fresh water fish. Sea fish is landed in the ports such as Bremerhaven, Cuxhaven or Padborg/Denmark where they are sold immediately at fish auctions and are passed on to large national retailers, like “Deutsche See”. Freshwater fish is mainly sourced on a regional basis and directly delivered into the stores from regional farms and suppliers.

Large amounts of processed fish are imported from Poland (where many large processors are located) at lower prices.

In retail, Deutsche See has a predominant role with its large sales force and perfect chilled logistics. Many retailers clearly state Deutsche See to be their first choice supplier with regards to fresh fish, as they have dedicated themselves to providing culinary satisfaction. This is because Deutsche See offers a full service with regards to orders. Fish and seafood are closely checked and undergo various processing stages in Bremerhaven, after which they are immediately transported to the 20 subsidiaries throughout Germany. One of them is in Berlin to supply the capital city. Its sales forces closely cooperate with the retailers and build up constant good relationships with key buyers.

Germany does not appear to be a nation aimed at fine dining and fine food grocery shopping. Consumers are very price-conscious. The frozen fish category was traditionally made up from a small range of species, whereas today more variety can be found.

It is dangerous to generalise but whole fish tends to be more popular in Mediterranean countries. In Germany however, it’s normally only in the high end restaurant trade that this product format is requested.

Throughout Europe and this is also true for Germany, fish fillets are the big growth driver, as people look for more convenient ways to consume fish. The best routes to market have to be examined on an individual basis. This is not only caused by different chilled/frozen logistics available and individual costs, but also depends very much on species, specifications and sales targets.
The main distribution channels used in Germany are refrigerated trucks, and cash and carry wholesalers with both dry and cold storage facilities.

2.2. THE RETAIL CHANNEL

Before going into detail with the retail structure, some general remarks about the German food sector. First of all the sector is very dynamic. Companies which survive the competition in prices and the change in consumer behavior in Germany could make it anywhere in the world. According to Martin Sorrell, CEO of WPP, the Germans are among the most price-conscious consumers for food in the world.

Consolidation, market saturation, strong competition and low prices are key characteristics of the German retail food market. The sector is dominated by five large retail companies. The major chains face slim margins due to fierce competition. However, in recent years, there has also been a trend in consumer preference toward smaller grocery formats, including convenience stores, small grocery retailers and independents.

Top 5 mainstream retail chains in Germany

Organised food retailers, such as supermarkets, hypermarkets, discount stores, and small, traditional retail stores, control a majority of food and beverage sales in Germany. Kiosks also contribute generously to retail sales, especially in the fish and seafood sector. Recent laws that benefit small retailers have further allowed these food and beverage providers to increase profits. The top three companies Aldi, Lidl (Schwartz Gruppe) and Penny (REWE) account for 43% of market share. Along with other stores, Aldi, Lidl, and Penny have broadened their selection of seafood products, as well as fresh meats, baked breads, and fresh fruits and vegetables.
Due to a large number of single-person households and the rising number of working women in Germany, interest in more convenient food and beverage purchasing methods has grown. Large retailers have been experimenting with new strategies to boost sales. Some of these methods include home delivery, mail-order, and internet shopping. Yet these methods of generating sales, especially internet shopping, are more difficult in the food sector and even more so with fish.

Despite higher prices, convenience retailers continue to maintain a large presence amongst German retailers. Snack stands and kiosks, totalling 48,000 across Germany represent half of the sales from convenience retailers.

The German retail market is highly competitive, which forces providers to capitalise on advanced marketing techniques to gain a competitive advantage. One technique distributors use is to host annual, or semi-annual, food shows to display their products.

The following chart shows where Germans bought fish in 2011.

The chart starts with a breakdown of the different retail channels and shopping behavior for fish. Most of the fish and seafood was purchased at discounters (51%), followed by supermarkets (36%) and fishmongers. Fresh fish was mainly bought in the supermarket (40%), followed by specialised fish mongers and other fish outlets. In this segment discounters only have a market share of 12%.

Where are which fish products bought?

Source: “Fischinformationszentrum Hamburg”

The top six discounters, Aldi, Lidl, Netto, Penny and Norma have a stranglehold on the fish and seafood sector.
Top 6 Discounters in Germany in 2012

The ranking, produced by Trade Dimensions, shows the six leading discounters in the German food market. Aldi Nord and Aldi Süd are in the lead followed by the Schwarz-Group with the discounter markets Lidl and Netto, the discounter of the Edeka-Group.

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<thead>
<tr>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Aldi-Gruppe</td>
<td>24.700</td>
<td>* 24.396</td>
<td>4.305</td>
<td>4.298</td>
</tr>
<tr>
<td></td>
<td>Aldi Süd, Mülheim</td>
<td>13.700</td>
<td>* 13.437</td>
<td>1.805</td>
<td>1.794</td>
</tr>
<tr>
<td></td>
<td>Aldi Nord, Essen</td>
<td>11.000</td>
<td>* 10.959</td>
<td>2.512</td>
<td>2.509</td>
</tr>
<tr>
<td>2</td>
<td>Lidl 1)</td>
<td>15.800</td>
<td>* 15.500</td>
<td>* 3.287</td>
<td>3.282</td>
</tr>
<tr>
<td>3</td>
<td>Netto 2)</td>
<td>11.814</td>
<td>11.439</td>
<td>4.098</td>
<td>4.090</td>
</tr>
<tr>
<td>4</td>
<td>Penny</td>
<td>7.582</td>
<td>7.554</td>
<td>2.363</td>
<td>2.382</td>
</tr>
<tr>
<td>5</td>
<td>Norma</td>
<td>2.650</td>
<td>* 2.625</td>
<td>1.278</td>
<td>1.266</td>
</tr>
<tr>
<td>6</td>
<td>Netto (Dansk Supermarked)</td>
<td>1.146</td>
<td>* 1.130</td>
<td>342</td>
<td>345</td>
</tr>
</tbody>
</table>

* Estimate
1) Including special item stores Mega-Cent
2) Including. Netto-Drinks-Discount

Source: Trade Dimensions – July 2012
Food sector contact list

Introduction

Direct sales to Germany’s leading retail companies is very difficult; however, it can be a desirable product-entry approach for a UK supplier. Due to their wide range of distribution, central buyers are generally flooded with offers from competing suppliers and they are usually not interested in taking on added responsibility of importing products directly. This is especially the case for new-to-market products, which may not comply with German requirements, food laws and packaging and labeling requirements. Retail buyers may only be interested in importing products directly if they are unique, possess some specific attribute, or offer significant advantages in terms of quality, price, or financial promotional support.

Each of Germany’s leading retail groups has a different business structure, purchasing, and distribution system. Many of the leading retailers have multiple retail chains, often with various types of retail formats such as large hypermarkets, discount and small neighborhood stores, or perhaps beverage and/or delicatessen outlets. Large retailers purchasing departments may also be divided by retail format and, sometimes, by region.

Discount Chains

**Aldi Nord Einkauf GmbH & Co. oHG**

Eckenbergstrasse 16
D-45307 Essen
Tel: (0201) 85930
Fax: (0201) 8593232
E-Mail: n/a
Website: www.aldi-nord.de

Date established: 1974
Staff employed: 80,000
Turnover: EUR 10.08 bn in 2010
Area covered: Germany
Language: Correspondence would be preferred in German.
Bankers: Deutsche Bank AG, Mülheim a.d. Ruhr

DESCRIPTION OF COMPANY

The Aldi concern operates a chain of discount grocery supermarkets. It also deals in non-food products, selling special-offer items for restricted time periods. Buying is conducted in very large quantities. Aldi-Nord operates outlets in the northern part of Germany. They have expanded to Belgium, Holland, Luxemburg, France, Denmark, Spain, Poland and Portugal.

Aldi do not give out buyers’ extension numbers or e-mail addresses. Initial approaches should be made by fax or normal mail.

**Aldi Sued Einkauf GmbH & Co KG**
Burgstrasse 37-39
D-45476 Mülheim
Tel: (0208) 99270
Fax: (0208) 9927250
E-Mail: n/a
Website: www.aldi-sued.de

Date established: 1974
Staff employed: 80,000
Turnover: EUR 11,3b in 2010
Area covered: Germany
Language: Correspondence can be in English.
Bankers: Deutsche Bank AG, Mülheim a.d. Ruhr

DESCRIPTION OF COMPANY
The Aldi concern operates a chain of discount grocery supermarkets with some 1,800 outlets in western and south-western Germany. They also have outlets in Austria (430), Switzerland (150), Slovenia (65), Hungary (75), USA (1,150), Great Britain & Ireland (540) and Australia (270). The majority of their sales programme are private label products, both food and non-food. They also deal in non-food products, selling special-offer items for restricted time periods. Buying is conducted in very large quantities.

We were told that all information material/offers must be sent as hard copy and accompanied by a company profile.

The market share for ALDI SÜD and ALDI NORTH is 13.6%.

Netto Marken-Discount AG & Co.
Industriepark Ponholz 1
D-93142 Maxhütte-Haidhof
Tel: (09471) 320713
Fax: (09471) 320 149
Website: www.netto-online.de

Date established: 1983
Staff employed: 50,000
Turnover: EUR 3,270 m in 2010
Area covered: Germany
Language: Correspondence can be in English.
Bankers: Deutsche Bank AG, Regensburg

DESCRIPTION OF COMPANY
Netto is a discount retail chain for food and non-food products. In 2009 they took over the Plus discount chain which brought the number of Netto’s outlets to over 4,000. They offer over 3,500 articles for sale, many of which are private label products. Netto is part of the Edeka group but most buying, including that for private label products, is undertaken independently.
Norma Lebensmittel-
Filialbetrieb GmbH & Co. KG
Heisterstrasse 4
D-90441 Nürnberg
Tel: (0911) 97390
Fax: (0911) 7591993
Website: http://www.norma-online.de

Date established: 1921
Staff employed: not divulged
Turnover: not divulged
Area covered: Germany, Austria, France, Czech Republic
Language: Correspondence preferred in German, English possible.
Bankers: not divulged

DESCRIPTION OF COMPANY
Norma is a discount retail chain for food and non-food products with some 1,300 outlets. They also carry food and non-food private label products.

OHG NETTO Supermarkt GmbH & Co
Preetzer Strasse 22
D-17153 Stavenhagen
Tel: (039954)3600
Fax: (039954)360199
E-Mail: sh@netto.de
Website: www.netto.de

Date established: 1992
Staff employed: 3900
Turnover: EUR 1 bn in 2010
Area covered: Germany
Language: Correspondence can be in English, German preferred.
Bankers: Deutsche Bank AG, Berlin

DESCRIPTION OF COMPANY
This is a discount chain for food and non-food products. They are part-owned (75%) by Dansk Supermarket and Edeka (25%). OHG Netto operate 1,000+ (325 in Germany) outlets in Germany, Denmark, Poland and Sweden.

Lidl Stiftung & Co. KG Einkauf International
Stiftsbergstrasse 1
D-74167 Neckarsulm
Tel: (07132) 94-2000
Website: www.lidl.com

Date established: 1930
Staff employed: 50,000 (Germany)
Turnover: EUR 64 bn in 2011
Area covered: Germany and Europe
Language: Correspondence can be in English, German.
Bankers: not divulged

DESCRIPTION OF COMPANY
This is a discount chain for food and non-food products. They are owned by Schwarz Group and are among the top 10 German retailers. Kaufland also belongs to the same group.

Supermarket Chains

Edeka Zentrale AG & Co. KG
New-York-Ring 6
D-22297 Hamburg
Tel: (040) 6377-2273
Fax: (040) 6377-2231
Website: www.edeka.de

Date established: 1907
Staff employed: 300,000
Turnover: EUR 43.5 bn in 2010
Area covered: Germany
Language: Correspondence can be in English.
Bankers: Edeka-Bank AG, Hamburg

DESCRIPTION OF COMPANY
Edeka is the largest supermarket chain in Germany. They currently have some 12,000 outlets throughout Germany. Most Edeka outlets are franchised but they do run a number of outlets themselves.

REWE Zentrale AG
Domstrasse 20
D-50668 Köln
Tel: (0221) 1490
Fax: (0221) 1499000
Website: www.rewe.de

Date established: 1927
Staff employed: 200,000+
Turnover: EUR 34.89 bn in 2009
Area covered: Germany
Language: Correspondence can be in English.
Bankers: Westdeutsche Landesbank Girozentrale, Köln

DESCRIPTION OF COMPANY
REWE operate from their headquarters in Cologne and run the largest retail grocery chain in Germany with over 10,000 shops and more than 200,000 employees. REWE also own the discounter PENNY Markt, the DIY chain Toom, cash & carry markets Fegro Selgros, as well as shares in several travel agencies, such as ITS and Tjaereborg.
Globus SB Warenhaus Geschaeftsuehrungs-GmbH
Leipziger Strasse 8
D- 66606 St. Wendel
Tel: (06851) 90 90
Fax: (06851) 90 96 00
Website: www.globus.de

Date established: 1828
Staff employed: 32,500 for the whole Group
Turnover: EUR 6.08 bn in 2011
Area covered: Germany, Czech Republic, Luxemburg
Language: Correspondence preferred in German.
Bankers: not divulged

DESCRIPTION OF COMPANY
Globus is a traditional family owned business and is one of the few independent supermarket chains in Germany. Globus has two logistics centres. They have 44 supermarket branches all over Germany and 79 DIY outlets. Next year they will expand further in Germany. In addition to Germany they have branches in the Czech Republic and Luxembourbg.

TEGUT
Tegut Theo Gutberlet ( Stiftung & co)
Gerloser Weg 72
D-36039 Fulda
Tel: (0661) 104624
Fax: (0661) 104496
E-Mail: n/a
Website: www.tegut.com

Date established: 1947
Staff employed: 5,464
Turnover: EUR 1.05 bn in 2010
Area covered: southern Germany
Language: Correspondence must be in English.
Bankers: Commerzbank AG, Fulda

DESCRIPTION OF COMPANY
Tegut is a retail chain for food and non-food articles with some 310 outlets in southern Germany.

All offers to Tegut must be with net prices in EUR delivered free to their offices in Fulda. If any products offered to Tegut contain any genetically modified ingredients, these must be declared and must be approved in Germany.

K+K
Klaas & Kock B.V. & Co. KG
Ochtruper Strasse 165  
D-48599 Gronau (Wesf.)  
Tel: (02562) 18362  
Fax: (02562) 25479  
Website: www.klaas-und-kock.de

Date established: 1950  
Staff employed: 7,800  
Turnover: EUR 534.8 m in 2010  
Area covered: Northwestern Germany  
Language: Correspondence can be in English.  
Bankers: Bremer Landesbank, Oldenburg

DESCRIPTION OF COMPANY
This is a retail chain for food and non-food articles. They have some 210 outlets, mainly in north western Germany, and carry some 18,000 articles including a small range of private label products.

Kaiser's Kaffee Geschäft AG  
Wissollstrasse 5-43  
D-45478 Mülheim  
Tel: (0208) 37774531  
Fax: n/a  
Website: www.ktmh.de  
Contact: Herr Kühner, Buyer for private label sauces/seasonings

Date established: 1867  
Staff employed: 20,377  
Turnover: EUR 2.5 bn in 2010  
Area covered: Germany  
Language: Correspondence can be in English.  
Bankers: Deutsche Bank AG, Viersen

DESCRIPTION OF COMPANY
This is a part of the Tengelmann Group with some 550 outlets. They sell food and non food articles throughout Germany. They have 3 private label ranges for low priced products, premium products and organic products. All purchasing is done through Kaiser's Kaffee. Other parts of the group are well-known chains like Kik (non-food). There are some 740 outlets throughout Germany.

Kaufland Warenhandels GmbH & Co. KG  
Postfach 2455  
D-74014 Heilbronn  
Tel: n/a  
Fax: n/a  
Website: www.kaufland.de

Date established: 1930
Staff employed: 170,000  
Turnover: EUR 8.1 bn in 2010  
Area covered: Germany  
Language: Correspondence can be in English.  
Bankers: Commerzbank AG, Heilbronn

DESCRIPTION OF COMPANY
Kaufland is a part of the Schwarz Group. They have approximately 560 outlets throughout Germany. The company also has outlets in Poland, Slovakia, Croatia, Romania and Bulgaria. They carry several lines of private label products.

Lüning Handels-GmbH & Co. KG  
Westerwieher Strasse 33  
D-33397 Rietberg  
Tel: (05244) 7050  
Fax: (05244) 705145  
Website: www.luening.de

Date established: 1853  
Staff employed: 553  
Turnover: EUR 61 m in 2010  
Area covered: northern Germany  
Language: Correspondence preferred in German, English possible.  
Bankers: Deutsche Bank AG, Gütersloh

DESCRIPTION OF COMPANY
Lüning is a retail chain for food and non-food products with some 28 outlets in northern Germany. They also have C+C outlets which service petrol station shops, independent food retailers and bulk customers like canteens etc. Lüning are affiliated to Edeka.

Tengelmann Warenhandelsgesellschaft Unternehmenszentrale  
Wissollstrasse 5-43  
D-45478 Muelheim/Ruhr, Germany  
D-33397 Rietberg  
Tel: (0208) 58064  
Fax: (0208) 58066401  
Website: www.tengelmann.de

DESCRIPTION OF COMPANY
The Tengelmann Group is a large retail chain for food and non-food products with some 4,256 branches in Germany. The group has 83,437 employees. Apart from Germany Tengelmann is active in 15 European countries. The turnover came to almost 11 bn Euros in 2011

Purchasing Organisations
Markant Handels- und Service GmbH
Hanns-Martin-Schleyer-Strasse 2
D-77656 Offenburg
Tel: (0781) 616327
Fax: n/a
E-Mail: marcel.blum@de.markant.com
Website: www.markant.de

Date established: 1987
Staff employed: 368
Turnover: EUR 46.78 bn in 2009
Area covered: Germany
Language: Correspondence can be in English.
Bankers: not divulged

DESCRIPTION OF COMPANY
Markant is a purchasing organisation and commission agency dealing in a very wide range of food and non-food products. They are active on behalf of some 100 wholesalers and retailers with approx. 20,000 outlets altogether.

They purchase on behalf of retailers such as: Kaiser's Tengelmann, Konsum, V-Markt, Tegut as well as several others. Large chains such as Kaiser's Tengelmann also carry out their own purchasing. For smaller chains such as V-Markt all purchasing is done through Markant.

Cash + Carry

Metro SB-Großmärkte GmbH & CO KG
Metrostrasse 2
D-40235 Düsseldorf
Tel: (0211) 9691168
Fax: (0211) 9694901168
Website: www.metro.de

Date established: 1966
Staff employed: 283,280 for the whole Group
Turnover: EUR 67.3 bn in 2010
Area covered: Germany
Language: Correspondence can be in English.
Bankers: West LB AG, Düsseldorf

DESCRIPTION OF COMPANY
Metro is the largest cash and carry business in the world. The group has subsidiaries around the world (Makro is the UK subsidiary). They also own the following retail chains: real and extra (food + non-food), Kaufhof (department stores), Praktiker (DIY) and Media Markt (brown and white goods, electronics). Buying for those companies is partly done independently.
**The Flagship Department Store for Food**

KaDeWe Kaufhaus des Westens  
Tauntzenstrasse 21-24  
0789 Berlin, Germany  
Tel: (49-30) 212 10  
Fax: (49-30) 211 01 90  
Homepage: [www.kadewe.de](http://www.kadewe.de)

KaDeWe is the flagship of the Karstadt department store chain. It is comparable to Harrods in London and claims to have the biggest food & delicatessen department in Europe.

**Online shops**

**Lachskontor**  
Bischofsnadel 1-2  
D-28195 Bremen  
Tel: (0421) 5360896  
Fax: (0421) 5360897  
E-Mail: info@lachskontor.de  
Website: [www.boders.de](http://www.boders.de)

DESCRIPTION OF COMPANY  
The first fish online shop was founded by Markus Hoffmann in 1998. In July 2012 the business was handed over to Peter Koch Bode. Lachskontor supplies restaurants and private customers with fresh seafood.

**Gourmantis**  
Michael Vetter  
Neue Strasse 15 A  
D-65520 Bad Camberg  
Tel: (06434) 9096736  
Fax: (06434) 9096738  
E-Mail: geniessen@gourmantis.de  
Website: [www.gourmantis.de](http://www.gourmantis.de)

DESCRIPTION OF COMPANY  
Gorumantis is a family enterprise and online shop for fine foods and delicatessens.

**Dinses Culinarium Delikatessen Versand**  
Weiherstrasse 26  
D-35415 Pohlheim  
Tel: (06004) 9159600  
Fax: (06004) 9159602  
E-Mail: service@dinsesculinarium.de  
Website: [www.dinsesculinarium.de](http://www.dinsesculinarium.de)
DESCRIPTION OF COMPANY
Dinses Culinarium, a fine food mail order company, was established by two passionate cooks. Germany’s food magazine “Der Feinschmecker” identified Dinses Culinarium as one of the best fine food shopping outlets in Germany.

**Köser Delikatessen Versand**
An der Packhalle IX 18
D-27572 Bremerhaven
Tel: (0471) 979720
Fax: (0471) 979721
E-Mail: info@koeser.com
Website: www.koeser.com

DESCRIPTION OF COMPANY
Köser is a delicatessen family business established by two brothers. The main focus is on fresh produce. Köser supplies restaurants as well as private customers.

**Other online shops:**
Erich von Schach Versand
www.lachs.de
Specialise in salmon from Ireland

Meeres-Kost Wolfgang Behrmann
www.meereskost.de
Specialise in fresh fish and seafood

Seifarth Caviarvers
www.seifarth.de
Import fish and seafood from Alaska, Iran and France

Sylter Royal – Dittmeyer’s Austern
www.sylter-royal.de
Supply oysters and mussels.

Thiele
www.fisch-thiele.de
Concentrate on smoked fish and marinades

Wildlachsversand Gobel
www.wildlachsversand.de
Supply fresh salmon, mainly from Ireland

Fisch Kalter
www.send-a-fish.de
Online shop and outlet in Wilhelmshafen for fresh fish, salads and herring

**Product range and price**

Hypermarkets, superstores and larger supermarkets, cash and carry’s and most food halls of department stores have a fresh seafood counter. This applies in particular to
northern and north eastern Germany but is more widespread now than some years ago. Apart from that, several trials of Germany retailers wanting to establish a fresh seafood counter proved not to be viable due to differences in purchasing power and tradition. Therefore some larger supermarkets present pre-packed fresh seafood in chilled cabinets instead.

Fish and sea food like cod, sea bass, salmon, halibut, redfish, haddock are sold fresh, whereas fish products like herring, shrimps, crabs are mainly used for mayonnaise-based, chilled, ready to eat salads for convenience ranges. Formerly there was only a limited range of mainstream products available, whereas today there is a lot of choice.

Fish stocks are being depleted, resulting in a heavy dependence on aquaculture. This decreased supply has resulted in increased fish prices in Germany. Nevertheless, the demand for fish and seafood products is growing. It is important to note that foreign producers face the challenge of acquiring local marketing representation when attempting to enter the German food market.

Best practices

The top five retailers listed on the previous pages, in 2011, account for almost 70% of the total German grocery turnover. These five carry a wide range from previous brands up to value line private labels.

Best practice can usually be viewed in food halls of department stores such Kaufhof or Karstadt. The most attractive display is in the Karstadt flagship store, the KADEWE, in Berlin. Alternatively delicatessen chains like Dallmayr or Käfer, both are located in Munich, are examples of high standard. The fish counters in the big supermarkets and the METRO Group has also considerably improved choice and presentation.

Consumer Demographics and trends

Consumer segmentation by retailer is not very common in Germany. Today even world leading discounters like ALDI, which started as a shop for lower income groups, attracts all segments of the population.

Convenience stores take advantage of a trend towards ready-to-eat products and are increasing sales. An ongoing development within this channel is a decrease in independent stores but an increase in chain stores.

Basic expectations for German consumers are for high quality food products. However they are very price sensitive. Germans are devoted to their discounters and the country has the highest share of discounters in food retailing globally. This is one reason why margins at the retail level are so thin. Only in recent years has German classic retail started to develop new strategies and ways of winning back some of their lost customers from the discounters. This will be difficult as discounters have introduced gourmet, organic and fresh products into their range.

Another additional delivery route is home delivery services, dominated by Eismann and Bofrost, as well as specialised delicatessen stores, which are mostly privately owned and smaller. Internet food shopping is also a consideration and several supermarket chains
are pursuing this approach. On the other hand, traditional open markets are increasingly taking advantage of the popularity of locally produced fresh foods. Weekly markets can be found in nearly all German cities, though they play only a minor role in terms of sales. Most of them have fish stands.

A key demographic factor in the future will be Germany’s aging population, which is already ranked among the oldest in the world. Demand for convenience, health, wellness, and luxury foods, will continue to affect food retailing.

For sustainability in particular, major retailers and producers are increasingly requiring private certification. Unilever, for example, has pledged to purchase 100% ‘sustainable’ products by 2020 and is already making strong progress towards that goal.

Germany is increasingly dependent on supplies of bulk and intermediate products, like seafood, fresh produce etc, from other EU member states and third countries. Another reason why importers and food distributors turn to foreign markets is the search for unique products.

**Alternative Channels for Seafood**

As Germany’s largest speciality market and supplier of fine foods “Frischeparadies”, a privately-owned group of gourmet cash and carry’s, offers a comprehensive selection. Frischeparadies employs 300 people. They have 80 lorries to supply restaurants and other customers. Ambitious restaurateurs and private customers will find over 5,000 delicacies from more than 70 countries. The central purchasing is in Hürth where there is also a shop. Other markets are in Berlin (2), Essen, Frankfurt, Hamburg, Munich, Stuttgart and Vienna.

Website: [www.frischeparadies.de](http://www.frischeparadies.de)
Contact e-mail for central purchasing: zek@frischeparadies.de

Nordsee is Europe’s largest chain of seafood restaurants employing 6,000 people. In 2011, Nordsee had a total of 20 million customers in catering and retail sales. The retail trade generated 85 million Euros of sales in 2011. The chain generated sales revenues of €359 million (2011). As of 31 December 2011 Nordsee is present in : 404 locations (337 in Germany, 36 in Austria, 4 in Slovakia, 4 in Romania, 4 in Russia, 3 in the Czech Republic, 3 in Dubai, 3 in Bulgaria, 3 in Switzerland, 2 in Egypt, 2 in Hungary and 1 in Belgium, Italy and Poland). 125 branches have an added seafood and fresh fish counter.In these branch stores the focus is on retail commerce with fresh fish and fish delicacies, fine seafood, smoked fish, shellfish, and convenient take-out orders.

Website: [www.nordsee.com](http://www.nordsee.com)

RUNGIS express AG is one of the biggest German trading companies for exclusive foods representing a well-known brand in the sector of first-class gastronomy for more than 30 years. The company is permanently expanding and since 2005 incorporated in the group of CCG Cool Chain Group Holding AG with its headquarter in Bremen. Various restaurants, traders of fine foods and hotels from Germany, other European countries and abroad order their specialities here. With CCG DE GmbH, a wholly owned subsidiary based in Frankfurt / Main (Germany), RUNGIS express AG runs its own freight forwarding
company concentrating on temperature-controlled shipments of perishable goods. In addition, CCG DE GmbH offers a broad variety of services at all major airports in Germany, like import and export customs clearance, quality control, interim storage in IFS-standardised cold stores etc. The company is also committed to expand its nationwide distribution network to Europe in the near future. In October 2011 RUNGIS express AG founded a strategic alliance with the Swiss gastronomy supplier Fideco AG. Together they want to tackle the Swiss market with focused know-how. Petit RUNGIS express GmbH is a company which works exclusively for private customers. It offers passionate amateur cooks a broad choice of fresh foods and special delicacies.

2.3. THE FOOD SERVICE CHANNEL

Food service establishments are also an important market for fish. They include restaurants, cafes, fast food outlets, hotels and other catering establishments.

Consumer foodservice in Germany benefited from the relatively good performance of the economy. The German economy saw GDP growth in 2011, which positively affected consumer food service sales. Following a strong recovery in 2010, consumers showed fairly high economic confidence in the first half of 2011 and were more likely to eat out in a restaurant. Consumer foodservice operators across different categories benefited from increased demand resulting from the more positive economic situation. However, when the Eurozone debt crisis occurred in the second half of 2011 the consumer confidence index dropped considerably in Germany, with many consumers concerned by the prospect of another economic slowdown. This had however only a limited effect on consumer food service. While afraid of potential economic consequences, most consumers did not experience any negative effects by the end of the year.

Full-service restaurants account for the largest proportion of total consumer food service sales, followed by fast food. Full-service restaurants are very much dominated by independent operators, while the leading international chains have a relatively strong position in fast food. McDonald’s heads fast food and succeeded to further extend its leadership, followed by its competitor Burger King. Independent consumer food service loses out to chained consumer food service. In Germany in 2011, full-service restaurants were able to grow by 4% to €16.9 billion, making it the most successful year on record.

In line with the trend during previous years, independent outlets lost further ground to chained outlets. Similarly, with respect to food service value sales, chained consumer food service out performed independent consumer food service in terms of growth. Domestic and international chains increasingly benefit from high popularity and customer loyalty, which allowed them to further expand across the country.

It is expected that the positive growth outlook for chained outlets will be at the cost of independent outlets. A sector supporting market growth in fish is the popularity of sushi. Many sushi restaurants and bistros opened up all over Germany.

As far as the competitive environment is concerned, chained street stalls/kiosks in Germany are to a large degree in the hand of franchisees of the different franchise operators. Apart from franchisees, SSP Deutschland GmbH is another important player in the category, whereby SSP’s outlets continued to be almost exclusively present in travel
locations. Until 2016, retail value sales of street stalls/kiosks in Germany are expected to see a further small annual increase in constant value terms, so that in 2016 sales are expected to reach €1.5 billion, more than €60 million higher than in 2011. Both independent and chained operators are expected to contribute to this growth, which mirrors the fact that lifestyles will continue to see a constantly growing rate of mobility across most parts of the population.

Consumer food service is likely to see a small decline over the forecast period in terms of value as well as number of outlets. In view of another slowdown of the economy following the European debt crisis, consumers are likely to adopt more careful spending behaviour and tend to dine out a less frequently. Consumer foodservice is expected to suffer from the poor economic outlook as consumers fear the potential consequences of another crisis.

However, restaurants, hotels and caterers are critical sales targets for fish and seafood wholesalers in Germany and they could potentially present higher levels of profits for the industry, because they are more prepared to pay premium prices for high-quality products in comparison to the price-sensitive retail sector.
(Source Euromonitor 2011)

For the best restaurants in Germany see [www.deutschlandgourmet.info](http://www.deutschlandgourmet.info).

The 10 biggest restaurants in Germany according to the newspaper “die Welt” are the following:

Tabelle: Die zehn größten Unternehmen der Gastronomie in Deutschland

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<tr>
<th>Platz</th>
<th>Unternehmen</th>
<th>Umsatz in Mio. Euro</th>
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<tbody>
<tr>
<td>1</td>
<td>McDonald’s</td>
<td>2909</td>
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<tr>
<td>2</td>
<td>Burger King</td>
<td>765*</td>
</tr>
<tr>
<td>3</td>
<td>LSG Lufthansa Service Holding</td>
<td>670</td>
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<tr>
<td>4</td>
<td>Tank &amp; Rast</td>
<td>595*</td>
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<tr>
<td>5</td>
<td>Nordsee</td>
<td>207,5</td>
</tr>
<tr>
<td>6</td>
<td>Subway</td>
<td>230*</td>
</tr>
<tr>
<td>7</td>
<td>Metro Konzerngastronomie</td>
<td>185*</td>
</tr>
<tr>
<td>8</td>
<td>Ikea</td>
<td>173</td>
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<tr>
<td>9</td>
<td>SSP (Bahnhöfe u.a.)</td>
<td>171</td>
</tr>
<tr>
<td>10</td>
<td>Aral</td>
<td>169,8</td>
</tr>
</tbody>
</table>

2.4. KEY REGULATIONS AND TARIFFS
Being a member of the European Union, Germany follows the regulations of the Common Fisheries Policy (CFP).

**Labelling, Packaging and recycling regulations**

All foods sold in Germany must be safe. This applies to imported products as well. Additives must be approved residues in pesticides are banned. It should also be readily obvious from the label whether a food contains allergens. Food safety is under the responsibility of the Federal Ministry of Food, Agriculture and Consumer Protection (BMRLV). The BMRLV, and its public authorities, also ensure that risks are continuously assessed and the provisions and structures are constantly adapted to new scientific findings. Under Germany’s Basic Law the German Länder (Federal States) are responsible for carrying out the official food checks. The responsible bodies for checking are food supervisory authorities located in the Federal Länder. The responsible authority is the authority at the importer's access location in Germany.

An importer can also apply to an officially appointed and sworn commercial chemist in order to clarify legal questions regarding the import of food. The addresses of commercial chemists can be obtained from the chambers of industry and commerce. The German customs authority also publishes a list of national and EU "prohibitions and restrictions that are to be complied with when importing food". Another relevant body for the seafood sector is the Bundesanstalt für Landwirtschaft und Ernährung (BLE) (www.ble.de). According to the German labelling law of 15th August 2002 the BLE is in charge of compiling and updating the fish trade list.

In order to improve consumer information in the common European fishing and aquaculture market (according to article 4 of the EU regulation Nr. 104/2000) the European Commission worked out the following regulations: EG Nr. L 17 S. 22, the operation procedures EG Nr. 2065/2001 and the fish product retail marketing regulations EG Nr. L 278. The essential information required is the following:

- species trade name,
- production method used (sea or freshwater, wild fish, farmed or cultivated/for aquaculture products),
- catch area (for products at sea a reference to areas/FAO zones, for products in fresh water a reference to the country of origin, for farmed products a reference to the country in which the product undergoes the final development stage).

In addition to the EU requirements producers can choose to give additional information such as nutritional elements.

Similar to the legislation in other EU countries the main elements of packaging, such as product description, weights, product ingredients, manufacturer’s address and best before dates must all comply with German law and be written in German. The German labelling requirements for fishery and aquaculture products are explained in the following legal documents: “Fischetikettierungsgesetz – FischEtikettG” of 1st. August 2002 (BGBl. I, Nr. 55, S. 2980 vom 8. August 2002) and the „Verordnung zur Durchführung des Fischetikettierungsgesetzes (Fischetikettierungsverordnung-FischEtikettV) of 15th August 2002 (BGBl. I, Nr. 60, S. 3363 of 27th August 2002). For more information please click here.
Germany has historically been in the forefront of environmental protection and as mentioned in previous chapters of the report sustainability is key in the German market.

In order to avoid, or to reduce, the effects of packaging waste on the environment Germany passed the "Packaging Directive" which can be accessed on the website of the Ministry for the Environment, Nature Conservation and Nuclear Safety.

The Packaging Ordinance is aimed at manufacturers and distributors of sales packaging. According to the directive they are obliged to take back their packaging, send it for recycling and to provide proof of this. The same conditions apply for all sales packaging and all companies.

The Act for Promoting Closed Substance Cycle Waste Management and Ensuring Environmentally Compatible Waste Disposal entered into force in 1996. Based on this Act, the Federal government has issued a number of statutory ordinances and guidelines as well as voluntary agreements, containing requirements for waste supervision, transport licenses, specialised waste management companies and associations, waste management concepts, waste-life-cycle analysis and requirements for the disposal and recovery of wastes.

The economic agents affected, producers and distributors, have come together to set up a "Dual Disposal System", which operates alongside the existing public waste disposal arrangements. The Duales System Deutschland GmbH (DSD) organises the kerbside collection of waste packaging directly from private households, the sorting of this waste into material groups, and the recycling of these materials. The levying of charges, on a scale related to the type of packaging material used, is documented by the license label, the "Green Dot" ("Grüner Punkt"), which is printed on products. Since the introduction of the Green Dot System in 1993, more than 20 million tonnes of used packaging have been brought to recycling and the consumption of packaging per year has been reduced by about 1.3 million tonnes compared to 1991 levels.

Furthermore, the wishes and needs of the Federal Länder must also be considered. The Federal Länder enforce waste law together with the competent authorities and monitor the waste sector. Most legal provisions in the waste sector therefore require the consent of the Federal Länder in the Bundesrat.

**Organic certification requirements**

In order to call a product organic, producers must first prove that 85% of all ingredients come from organic farming. More information is available here. In addition to this a product is always sent to market with a control identification number, as well as the name of the controlling body.

In addition to the EC mark there are about 100 bio and organic brands. Many retailers have their own organic brands and various certifications known in the German market such as: Biokreis, Bioland and others.
Consumers are more and more committed to the subject of sustainability when buying fish. The same applies to the government.

The Federal Government expressly supports the introduction of certification systems for sustainable fisheries, such as the Marine Stewardship Council. Fish having this certification sells better in the German market.

**Tax on Food**

Since Germany and the UK are both EU member states no tax is charged on food entering the German market. VAT applies as follows:

The standard VAT rate in Germany is 19%. For food and milk there is a reduced VAT rate of 7% (excluding beverages which have a tax of 19%). If seafood is consumed in restaurants the full VAT of 19% is applied. If the food is taken away 7% is applied.

**SOURCES**

Federal Ministry of Food, Agriculture and Consumer Protection
Fischinformationszentrum e.V.
Bundesverband des Deutschen Lebensmittelhandels, Fachverband der Fischfachhandel
Bundesmarktverband der Deutschen Fischwirtschaft e.V.
Bundesverband der Deutschen Fischindustrie
Deutscher Hochseefischerei Verband e.V.
Deutscher Fischereiverband
Warenverein der Hamburger Börse
Bund für Lebensmittelrecht und Lebensmittelkunde
Deutsche Gesellschaft für Ernährung
Deutsche Landwirtschaftsgesellschaft
Fischmarkt Bremerhaven
Fischmarkt Cuxhaven
Fischmarkt Hamburg-Altona
Gesellschaft für Ernährungsmedizin und Diätetik e.V.
Lebensmittelrecht Online
Stiftung Warentest
Verbraucherzentrale Bundesverband e. V.
Spiegelmagazin
European Seafood Market Report by Strategy Ltd 2008
Consumer Trends Seafood Germany Report by Agriculture and Agri-Food Canada, 2010
The German Food Retail Market by USDA, the US Foreign Agricultural Service, 2012
Euromonitor
Recommended Action Following Receipt of this First Activity

It is worth visiting or exhibiting at a German trade fair in the sector you cover. Your International Trade Adviser, your UK trade association or the UK Trade & Investment website can provide comprehensive information on supported trade shows, eligibility criteria and process for applying for a grant.

Background Information on Germany

Background information on Germany is available at www.ukti.gov.uk. This web site holds information for exporters to all markets and is a useful point of reference for general and sector information on each country.

Other German Speaking Markets

Our colleagues in Austria and Switzerland will be happy to offer advice and assistance on exporting to their markets - and your German trade literature would be valid there too.

British Embassy Vienna Austria
Please contact commerce@britishembassy.at

British Embassy Berne Switzerland
Please contact ukti@britishembassy.ch
A Professional Approach

Sven Riemann is Manager of Marketing Services at the German-British Chamber in London and offers tips for greeting and meeting your German business partner.

Even though the European Union and its constituent parts have been developing together over the last 30 years, there are still many cultural differences between the UK and Germany. British companies exporting to Germany may have already experienced these differences. It is worthwhile exploring these in more detail.

The British visualisation of the German stereotype typically involves a Bavarian dancing in Lederhosen and holding a beer. This is the fun side. However, in business the Germans have a reputation for being thorough and correct. Therefore, when doing business in Germany, it is necessary to adapt to this.

When first contacting a representative of a German company, you will need to address him with his correct title. For example, as academic titles are used in Germany as a matter of course, it is important to know if they have a doctor title. In Germany, even lower-level employees sometimes address each other with their titles and last names when talking between themselves. This rule is only broken when an older or more experienced colleague suggests they call each other by their first names. The German language reinforces this formality: the "Sie" form is the official "you", while "Du" (which also means "you") is only for family and close friends. This may seem quite strange to a British person but the use of Mr and Mrs was standard in Britain until relatively recently. Since the 1970s the trend has moved to using first names and slowly, with these British and American influences, certain companies in Germany are changing to using a more informal approach.

When starting a conversation with a German business partner, clear, direct argumentation and concise presentation is important. Professional and formal behaviour is vital. What is being said will be taken seriously, promises made are held and small talk is withheld! Be careful when using humour as German and British sensibilities are very different in this respect. Avoid black humour and indirect communication which can be confusing and, at worst, offensive. Furthermore, you might find that during conversation, your partner is very direct in expressing his views and opinions. This attribute can seem rude to a British person, who is more used to a "hidden language ". For example, if you are trying to arrange a meeting with your German partner and he has no interest, he will inform you directly rather than using English, indirect style, such as "Well, in the future, I might be interested".

A meeting with your potential business partner is your ideal goal and is worth thorough preparation, especially as the Germans have a reputation for being well prepared and being up to speed. As when arranging meetings with business people of any nationality, it is a good idea, and conveys a professional approach, if you confirm the meeting with a letter/fax including time and date, a list of attendees (with their positions) and an agenda. This shows good business manners and demonstrates credibility. Be punctual for the meeting and if you are delayed - even by as little as five minutes - telephone to let them know.
At the first point of contact, a "Guten Tag" greeting, together with your name and a firm handshake, shows that you mean business. Once you have arrived in the meeting room, try to keep the chat short. As a German would say, "If I were interested in the weather, I would talk to a meteorologist". Aim to keep to the agenda as much as possible. You might find that if the partner is from the former East Germany, his English is not so good. In such a case, you might need a German speaker to support you. Germans in general like to speak foreign languages and therefore your partner's English might be good enough to conduct the meeting in English - but do not assume so!

During the meeting you will find that Germans are impressed with quality, reputability and reliability. The formality and respectable distance to you is usual and should not be taken the wrong way. Unlike in, say, southern Europe, business and pleasure in Germany are often separated.

Once finished, the meeting can be ended with "Auf Wiedersehen" and again a strong handshake. At this point, it makes a good impression to send them a letter/fax summarising what you have discussed and what further points need to be pursued. These action points will probably form the basis for long-term plans, which are viewed as crucial by managers in Germany.

All this may seem a large amount of work in comparison with that required for recruiting potential British customers. However, you will find that the Germans, once they have begun business with you, will be keen to develop the relationship and will remain loyal. When describing business culture, one inevitably falls into the trap of stereotyping - so one might describe the attitude to business adopted by Germans in larger cities such as Munich and Frankfurt as being "Anglo-Saxon". However, in the business arena, paying attention to cultural diversities and behaving appropriately could make the difference between a deal or no deal. As the old adage goes: it is better to be safe than sorry!
UK Trade & Investment - Location of Offices in Germany

**Central Co-Ordination Unit** for all trade enquiries from the UK:

British Consulate-General
Central Co-Ordination Unit
Yorckstrasse 19
40476 Düsseldorf
Tel: +49 (0)211 9448-211 or +49 (0)211 9448-216
Fax: +49 (0)211 486359
E-Mail: central.coordination.unit.duesseldorf@fco.gov.uk
Website: www.ukti.gov.uk

**OMIS REGIONS**

**North - Berlin**

British Embassy
Trade Section
Wilhelmstraße 70
10117 Berlin
Tel: +49 (0)30 20457-0
Fax: +49 (0)30 20457-577

<table>
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<tr>
<th>Federal State</th>
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<tbody>
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<td>Brandenburg</td>
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<td>Schleswig-Holstein</td>
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**Central – Düsseldorf**

British Consulate-General
Trade Section
Yorckstrasse 19
40476 Düsseldorf
Tel: +49 (0)211 9448-211 or +49 (0)211 9448-216
Fax: +49 (0)211 486359

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<td>Saarland</td>
<td>1.02</td>
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**South - Munich**

British Consulate-General
Trade Section
Möhlstrasse 5
81675 München
Tel: +49 (0)89 21109-0
Fax: +49 (0)89 21109-155

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<tr>
<td>Baden-Württemberg</td>
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Postal Code Map of Germany

Source: Stefan Kühn