Germany updated on 10-05-18

GERMANY IN THE WORLD AND IN THE EU

(2015, source: FAO and Eurostat)

Germany is the EU's 6th largest producer of fisheries and 10th largest of aquaculture products.

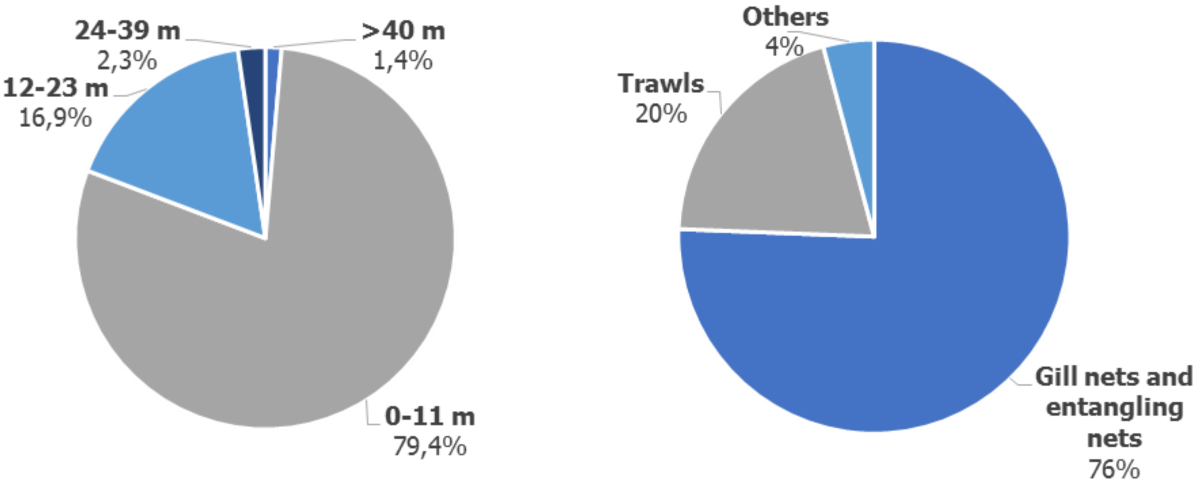
(1.000 tonnes)	World	EU-28	Germany	% world	% EU-28
Catches	104.635	5.144	251	0,2%	5%
Aquaculture	106.094	1.307	30	0,03%	2%
Total	211.511	6.451	281	0,1%	4%

FISHING FLEET

(**fleet** – 2017, source: EU fishing fleet register; **employment** – 2015: JRC)

<table>
<tr><th colspan="4">Vessels
(2017)</th><th colspan="4">Capacity
(2017)</th><th colspan="4">Power
(2017)</th></tr>
<tr><td colspan="4">Number: 1,382</td><td colspan="4">GT: 65.753</td><td colspan="4">KW: 138.531</td></tr>
<tr><td colspan="12">TOTAL FTE: 1.202 (2015, source: JRC)</td></tr>
<tr><td colspan="3">0-11 m</td><td colspan="3">12-23 m</td><td colspan="3">24-39 m</td><td colspan="3">>40 m</td></tr>
<tr><td colspan="3">Jobs (FTE): 49%</td><td colspan="3">Jobs (FTE): 27%</td><td colspan="3">Jobs (FTE): 13%</td><td colspan="3">Jobs (FTE): 11%</td></tr>
</table>

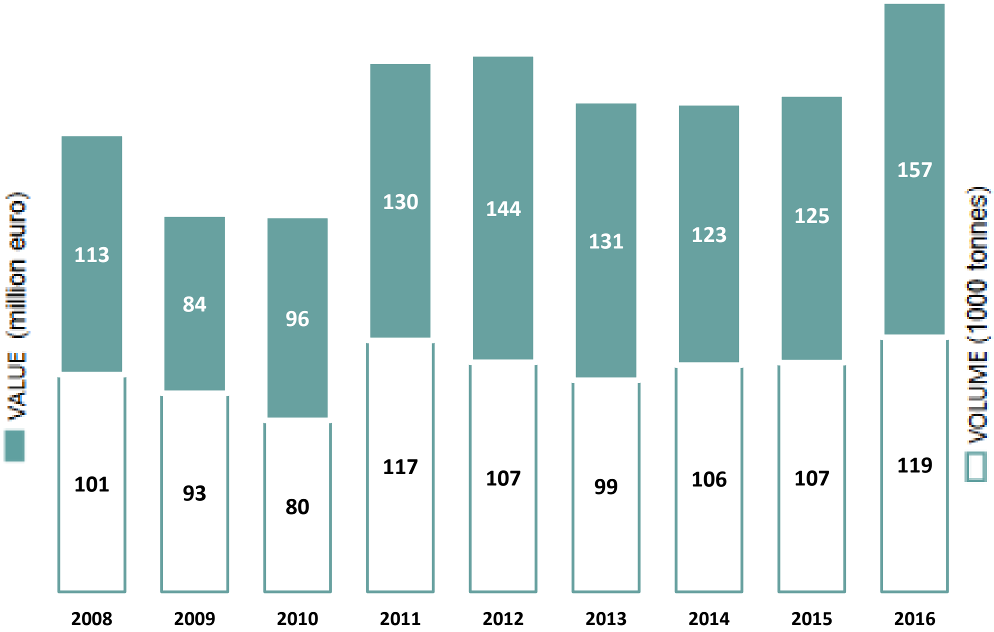
The German fishing fleet and gear composition:



LANDINGS

Landings represent the initial unloading of any quantity of fisheries products, including aquatic plants, from on board a fishing vessel to land in a given country, regardless of the nationality of the vessel making the landings. Landings are reported in net weight.

In Germany, 67% of landings are made by the national fleet and 33% by Danish vessels. Fish is landed fresh (47%), cooked (29%) and frozen (24%). The importance of cooked products is due to the *Crangon* shrimp. Almost all species landed are destined to human consumption. 203 fishing ports are recorded in Germany (source: EU Master Data Register).



Main commercial species landed and % of total
(2016, million euro and 1.000 tonnes)

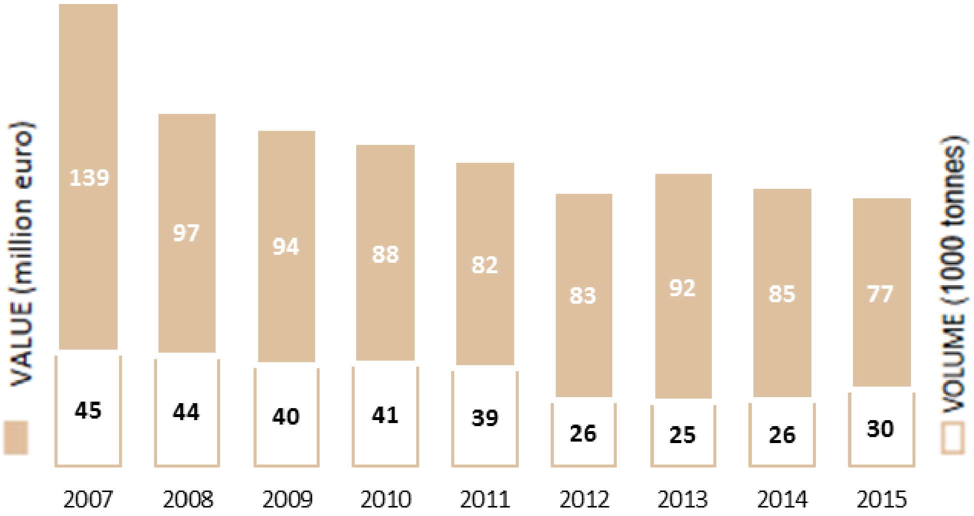
SHRIMP CRANGON SPP.	45	29%
HERRING	44	28%
MUSSEL MYTILUS SPP	25	16%
COD	15	10%
GREENLAND HALIBUT	13	8%
REDFISH	4	2%
OTHERS	11	7%

66	56%	HERRING
21	18%	MUSSEL MYTILUS SPP.
10	8%	BLUE WHITING
6	5%	SHRIMP CRANGON SPP.
5	4%	COD
2	2%	GREENLAND HALIBUT
9	7%	OTHERS

(source: EUROSTAT)

AQUACULTURE

Aquaculture refers to the farming of aquatic (freshwater or saltwater) organisms, such as fish, molluscs, crustaceans and aquatic plants. Aquaculture data are reported in live weight equivalent and value.



Main commercial species farmed and % of total (2015, million euro and 1.000 tonnes)

TROUT	32	42%
MUSSEL MYTILUS SPP.	12	15%
CARP	11	15%
EEL	10	13%
OTHER SALMONIDS	7	9%
OTHERS	5	6%

11	36%	MUSSEL MYTILUS SPP.
9	30%	TROUT
5	16%	CARP
2	8%	FRESHWATER CATFISH
1	5%	OTHER SALMONIDS
2	5%	OTHERS

(source: EUROSTAT)

PRODUCER ORGANISATIONS (2018, source: DG MARE, link)

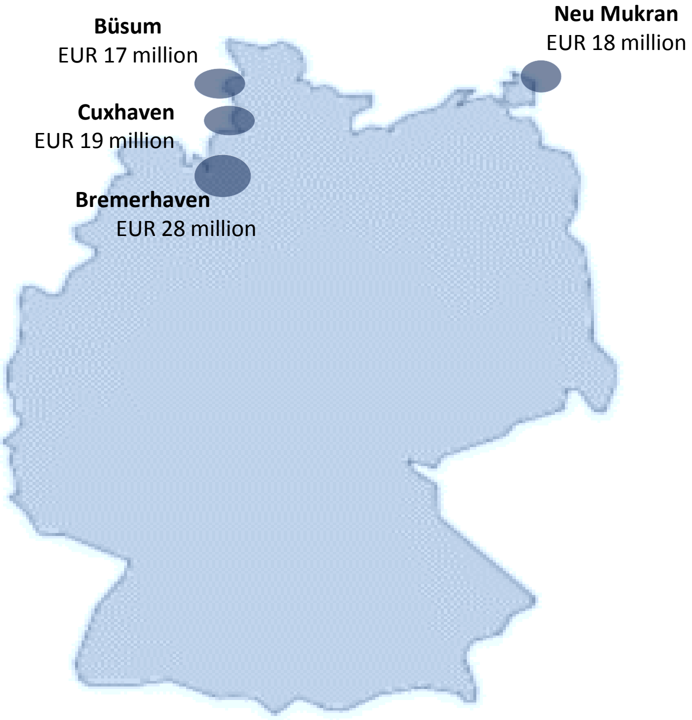
12 producer organisations (POs) and **2 associations of POs** are formally recognise. Their role is to contribute to the achievement of the CFP and of the CMO through the collective management of their members' activities.

1 PO is involved in aquaculture, while 11 POs operate in the fisheries sector. Both associations of POs are involved in fisheries as well.

FIRST SALES (2017, source: EUMOFA)

First sale concerns the fish that is sold or registered at an auction center or to registered buyers or to producer organizations (PO).

Of the 89 places of sale operating in 2017, the most important were Bremerhaven, Cuxhaven, Neu Mukran and Büsum. Together, they represent 88% of the total volume and 72% of the total value.



The top-3 places of sale covered 85% of the total in terms of volume and 57% in terms of value

Top-3 places of sale	Volume (tonnes)	Value (million EUR)	Top-3 main commercial species (in value)
Bremerhaven	21.403	28	Greenland halibut, cod, herring
Cuxhaven	3.402	19	Shrimp *Crangon*, cod, Greenland halibut
Neu Mukran	48.834	19	Herring, cod, sprat

WHOLESALE (source: Fischinformationszentrum)

Wholesale is an intermediary stage in the distribution channel that buys in bulk and sells to resellers (e.g. retailers) rather than to consumers.

In Germany, auctions have lost their importance and most fish is sold directly to the wholesale trade, filleting wholesalers (in fishing harbours) and processors, or processed and sold by fishermen's cooperative trade and filleting units.

445 fish wholesalers were active in Germany in 2016, with a turnover of EUR 5 billion.

PROCESSING

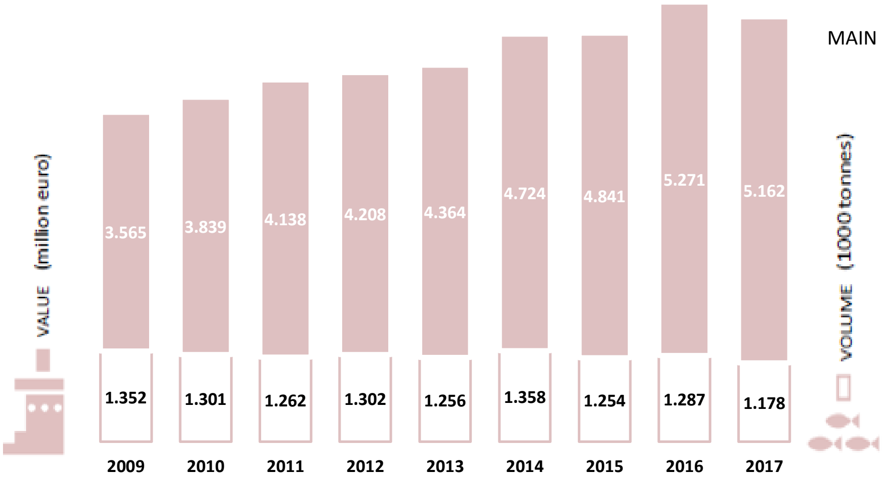
According to Eurostat-SBS, the German fish processing industry in 2015 employed 7.557 persons and recorded a value added of EUR 372 million, covering 1% of the value added of total manufacture of food products.

The main products sold in 2016 were fish fillets in batter or breadcrumbs (including fish fingers), processed herring, smoked salmon and fresh or chilled fish fillets (source: Eurostat-PRODCOM).

201 companies
Sales: EUR 2,2 billion
(2015, source Eurostat - SBS)

TRADE (source: **Eurostat**)

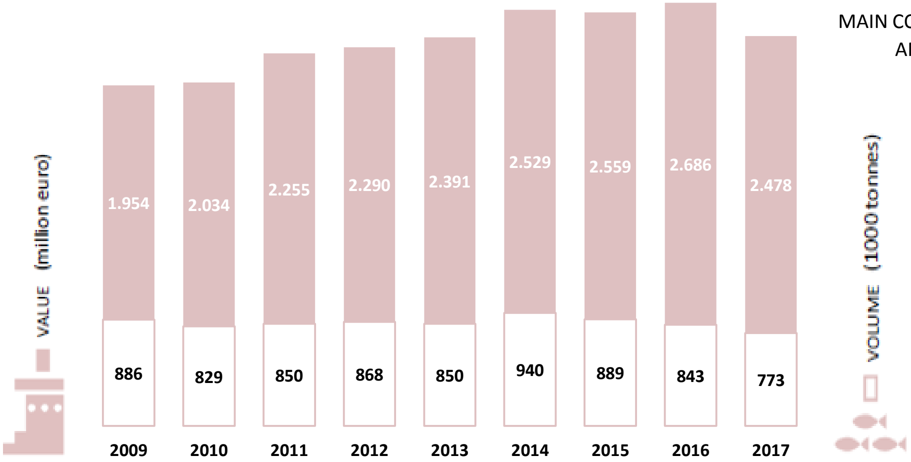
Import



MAIN COMMERCIAL SPECIES IMPORTED
AND % OF TOTAL IMPORTS
(2017, million euro)

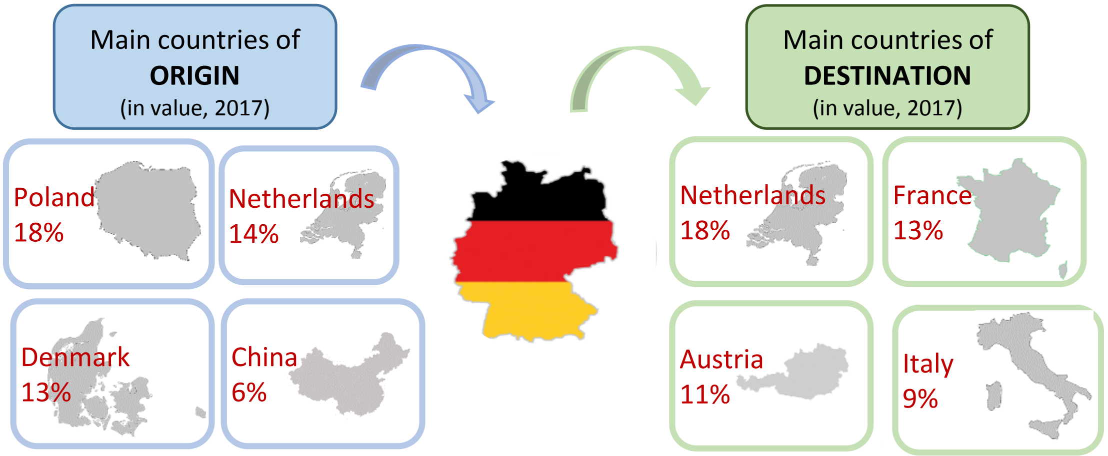
SALMON	1.564	30%
SKIPJACK TUNA	324	6%
ALASKA POLLOCK	320	6%
MISCELLANEOUS SHRIMPS	294	6%
COD	273	5%
TROPICAL SHRIMPS	273	5%
OTHERS	2.114	42%

Export



MAIN COMMERCIAL SPECIES EXPORTED
AND % OF TOTAL EXPORTS
(2017, million euro)

SALMON	474	19%
OTHER MARINE FISH	324	13%
COD	229	9%
OTHER PRODUCTS	197	8%
OTHER GROUNDFISH	112	5%
FISHMEAL	103	4%
OTHERS	1.039	42%



Main countries of
ORIGIN
(in value, 2017)

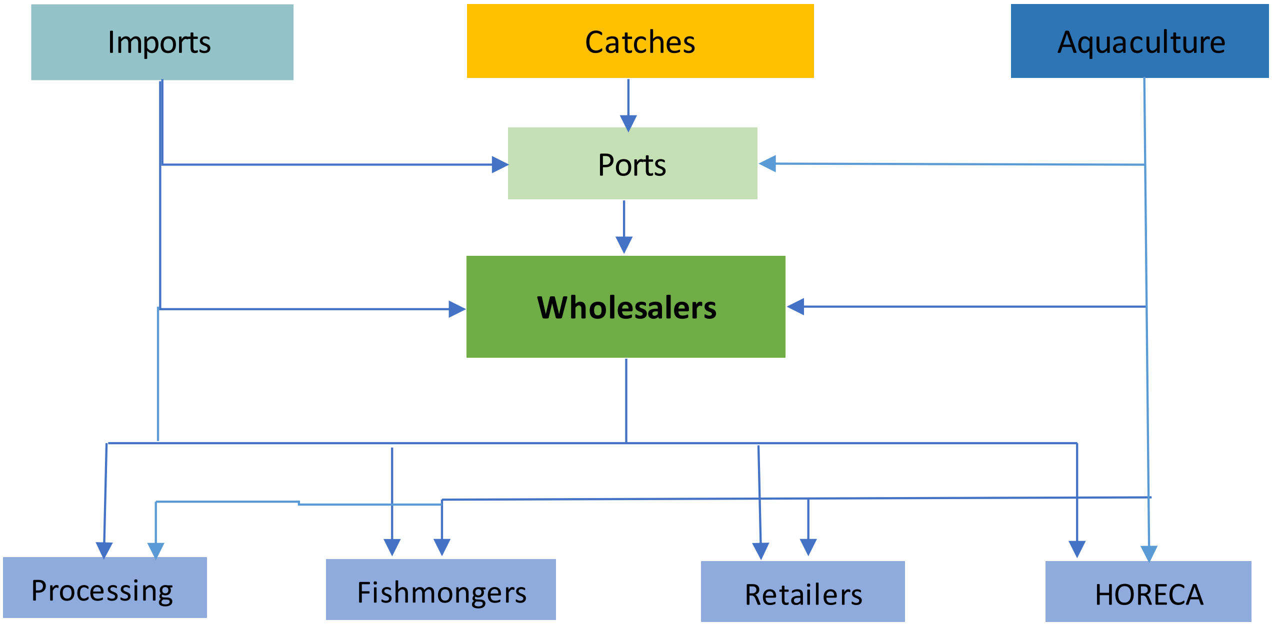
- Poland 18%
- Netherlands 14%
- Denmark 13%
- China 6%

Main countries of
DESTINATION
(in value, 2017)

- Netherlands 18%
- France 13%
- Austria 11%
- Italy 9%

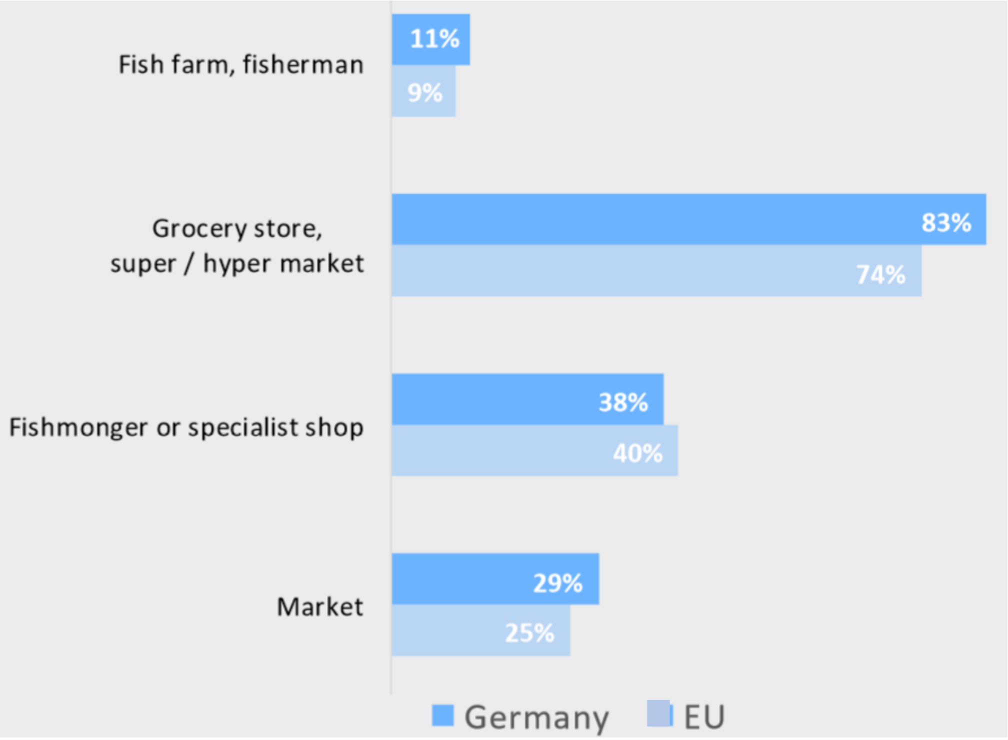
DISTRIBUTION

The supply chain of fisheries and aquaculture products in Germany

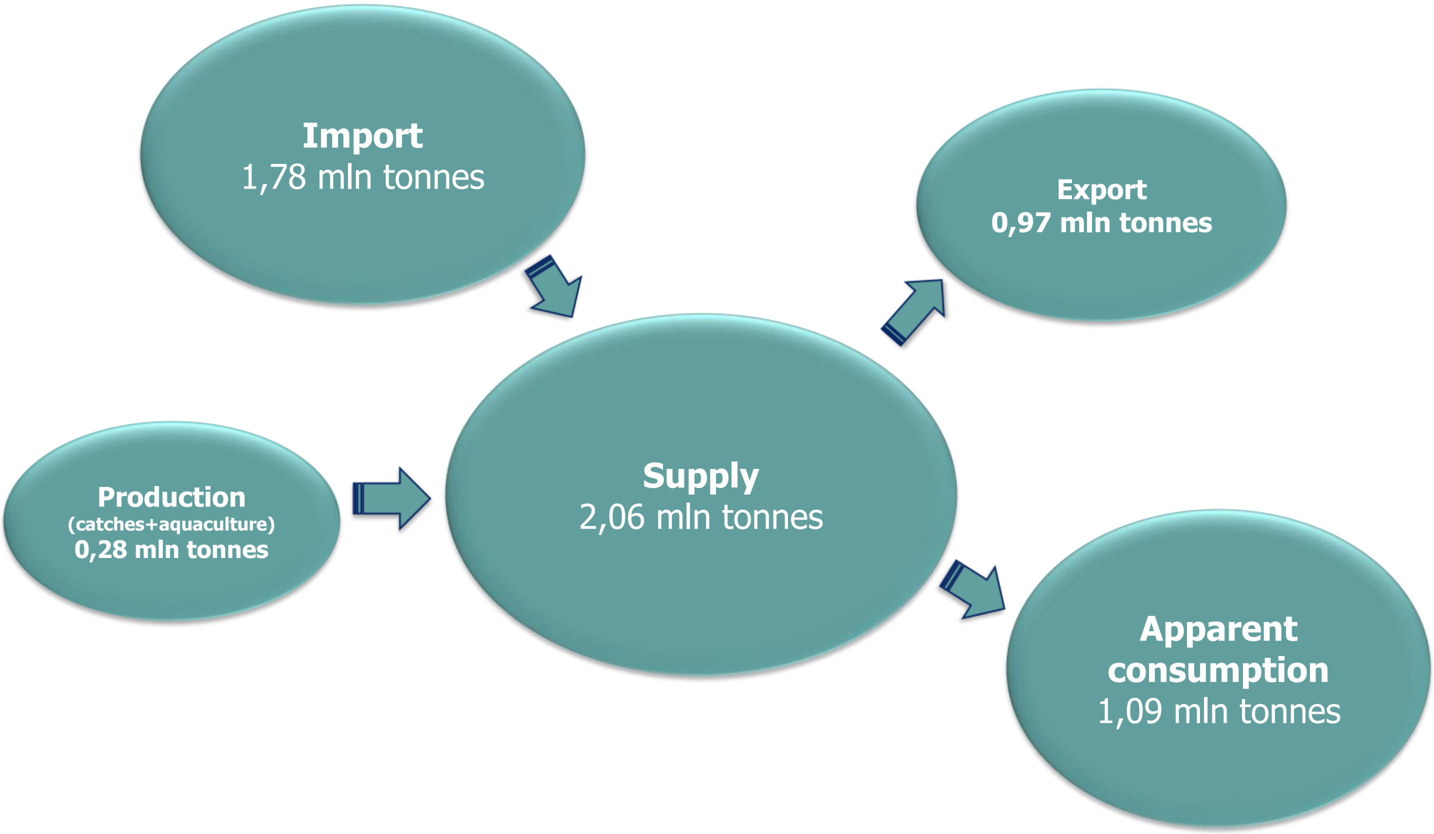


Consumer preferences on purchasing channels

(source: EUROBAROMETER)



SUPPLY BALANCE (2015, source: EUMOFA)



Import
1,78 mln tonnes

Export
0,97 mln tonnes

Production
(catches+aquaculture)
0,28 mln tonnes

Supply
2,06 mln tonnes

Apparent consumption
1,09 mln tonnes

CONSUMPTION

Apparent consumption of fishery and aquaculture products in Germany amounted to 13,4 kg per capita in 2015, slightly lower (-2%) compared to 2014. The main consumed species are prawns, tuna, Alaska pollock, saithe and salmon. Germans prefer frozen products; loose fish is more rarely consumed (54%) than the EU average (68%).

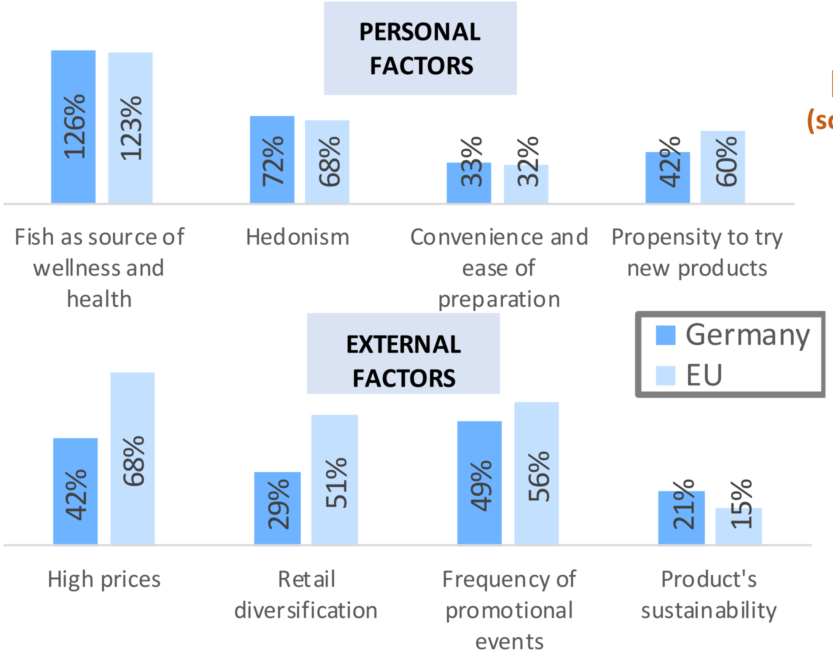
The number of regular consumers in Germany is lower than the EU average (42%-66% for Germany and 67-77% for EU). From a socio-demographic point of view, they mainly belong to the age groups 15-24 and 25-39 (source: “EU consumer habits regarding fishery and aquaculture products”).

Purchasing factors

(source: EUROBAROMETER)

13,4 Kg per capita

(source: EUMOFA)



GERMANY IN EUMOFA

updated on 10-05-18

LANDINGS

Volumes and values are collected by EUMOFA from **EUROSTAT – Fishery**. Data concern all species landed in Germany by vessels of all nationalities.

Data are available on a yearly basis, accessible through simple and advanced tables.

FIRST SALES

Volumes and values are collected from the **Federal Office for Food and Agriculture (BLE)** on a weekly and monthly basis. Data include all sales occurred through auctions and do not include other sales occurred out of auctions (e.g. direct sales).

Weekly data are collected and disseminated for 15 species and 10 places of sale. Click here for the list of species and places of sale.

Monthly data are collected and disseminated for all species sold in the places included in the data transmission (click here for the list of auctions).

Both types of data are accessible through simple and advanced tables.

TRADE

Volumes and values are collected from **EUROSTAT – COMEXT.** Data concern trade of all fisheries and aquaculture products as recorded by national customs, available on a monthly and yearly basis.

Data are accessible through simple and advanced tables.

AQUACULTURE

Volumes and values are collected by EUMOFA from **EUROSTAT – Fishery**. Data are available on a yearly basis, accessible through simple and advanced tables.

WHOLESALE

No data available for this supply chain stage

PROCESSING

Volumes and values are collected from **EUROSTAT – PRODCOM.** Data concern 18 processed products as recorded through the PRODCOM nomenclature.

Data are available on a yearly basis and are accessible through simple tables.

CONSUMPTION

Household consumption of fresh fishery and aquaculture products is collected from a **private provider** by EUMOFA on a monthly basis for 10 products based on panel reporting. Click here for the products per each Member State.

Data (volumes and values) are accessible through simple queries on a monthly and yearly basis.