



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 .

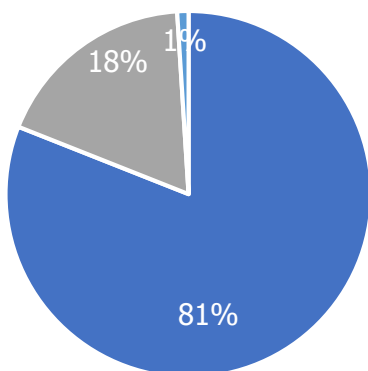
(1000 tonnes)	World	EU-28	Germany	% World	% EU-28
Catches	104.635	5.144	251	0,24%	4,9%
Aquaculture	106.094	1.307	30	0,03%	2,3%
Total	211.511	6.451	281	0,13%	4,4%

FISHING FLEET

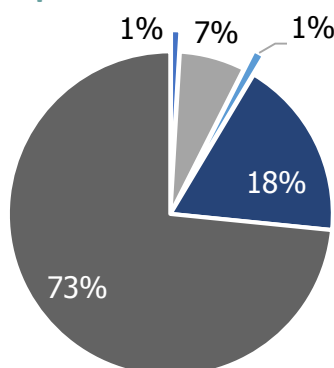
(2015, source: [JRC and Annual Economic Report](#))

Vessels	Capacity	Power
Number: 1.478 (407 inactive)	GT: 57	KW: 131
TOTAL FTE: 1.202		
Small scale	Large scale	Distant fleet
Jobs (FTE): 49%	Jobs (FTE): 51%	Jobs (FTE): N/A

The German **fishing fleet*** and **gear composition**:



- Small scale (less than 12m)
- Large scale (over 12m)
- High Seas (over 45 m)



- Drift and/or fixed netters
- Demersal trawlers and/or demersal seiners
- Pelagic trawlers
- Beam trawlers
- Passive gears

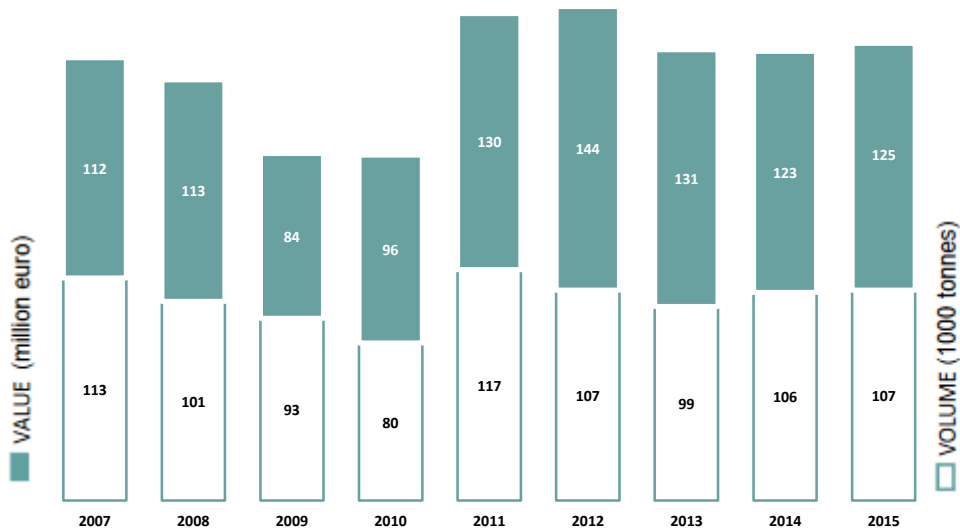


LANDINGS

Landings comprise the initial unloading of any fisheries products, including aquatic plants, from on board a fishing vessel to land in a given EU-28 Member State, regardless of the nationality of the vessel making the landings. Landings are recorded in net weight.

In Germany, the species are landed mainly fresh (37%), frozen (33%) and cooked (30%).

In Germany, there are 110 main ports (covered by EUMOFA).



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

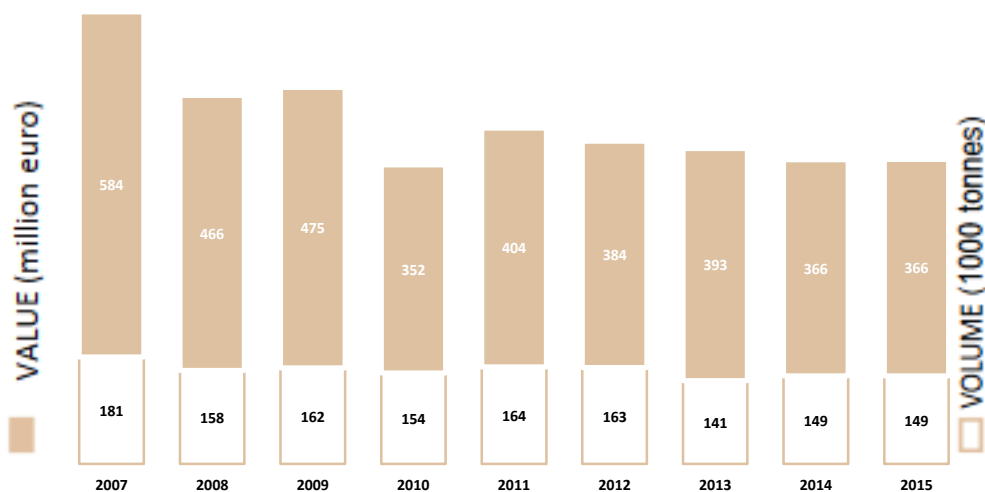
Species	Value (million euro)	% of total value	Volume (1000 tonnes)	% of total volume
TROPICAL SHRIMP	75	8%	37	20%
MISCELLANEOUS SHRIMP	71	8%	29	15%
HAKE	69	8%	16	9%
ANCHOVY	63	7%	11	6%
OTHER MARINE FISH	56	6%	10	5%
CUTTLEFISH	54	6%	9	5%
OTHERS	508	57%	77	41%
ANCHOVY				
SARDINE				
CLAM				
OTHER MARINE FISH				
TROPICAL SHRIMP				
HAKE				
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%	11	36%	MUSSEL
MUSSEL	12	15%	9	30%	TROUT
CARP	11	15%	5	16%	CARP
EEL	10	13%	2	8%	FRESHWATER CATFISH
OTHER SALMONIDS	7	9%	2	5%	OTHER SALMONIDS
OTHERS	13	6%	1	5%	OTHERS

(source: EUROSTAT)



PRODUCER ORGANISATIONS (2016, source: DG MARE, [link](#))

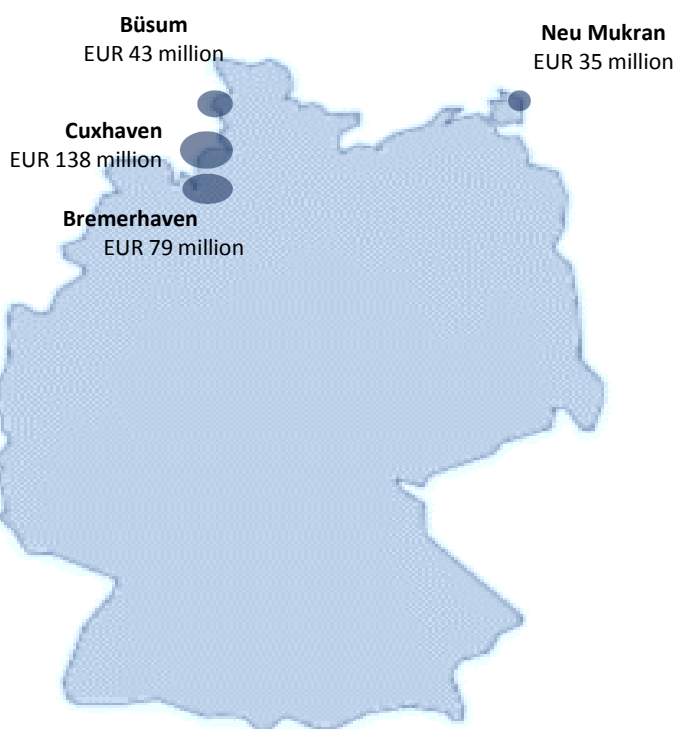
13 producer organisations (POs) and **1 association of POs** are recognised for the management of fishery activities of their associated members.

Out of the 13 POs, 12 are involved in fisheries and 1 in aquaculture (in shellfish farming).

FIRST SALES (2016, 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).

Cuxhaven, Bremerhaven, Büsum and Neu Mukran are the most important ports. Together, they represent 48% of the total volume and 52% of the total value.



101 places of sale were operating in 2016:

- 71 in the Baltic sea,
- 30 in the North sea.

In 2016, The 3 main places of sale covered 22% in terms of volume and 44% in terms of value

Top-3 places of sale	Volume (tonnes)	Value (million EUR)	Top-3 main commercial species (value)
Cuxhaven	25	138	Cod, Shrimp Crangon spp., Greenland halibut
Bremerhaven	30	79	Cod, Greenland halibut, Saithe
Büsum	4	43	Shrimp Crangon spp. (mainly), Cod, Plaice



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

PROCESSING (source: Eurostat-SBS)

In 2015, 7.557 persons were employed in Germany in the fish processing industry.

In Germany, the fish processing industry recorded a value added of EUR 372 million, covering only 1% of the value added of total manufacture of food products.

The main productions were fish fillets in batter or breadcrumbs (including fish fingers), processed herring, smoked salmon and fresh or chilled fish fillets.

201 companies

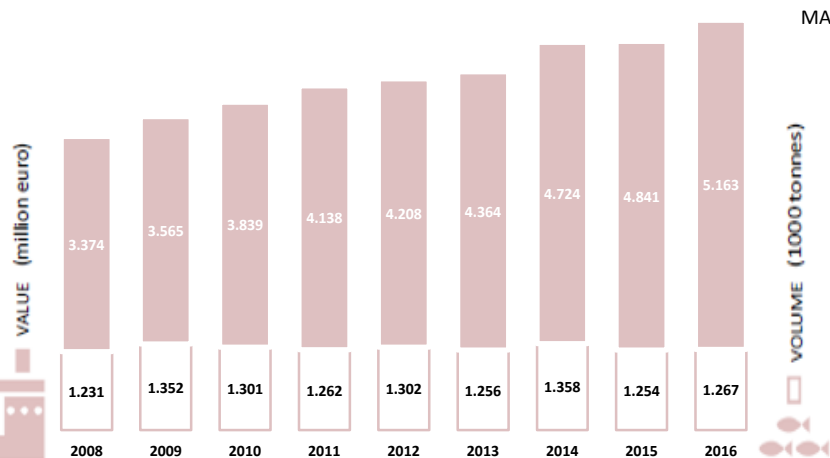
Sales: EUR 2,2 billion

(2015, source Eurostat - SBS)



TRADE (source: Eurostat)

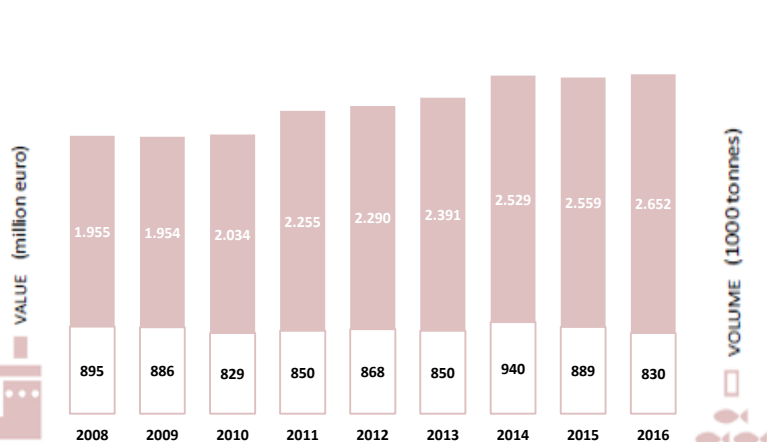
Import



MAIN COMMERCIAL SPECIES IMPORTED AND % OF TOTAL IMPORTS (2016, million euro)

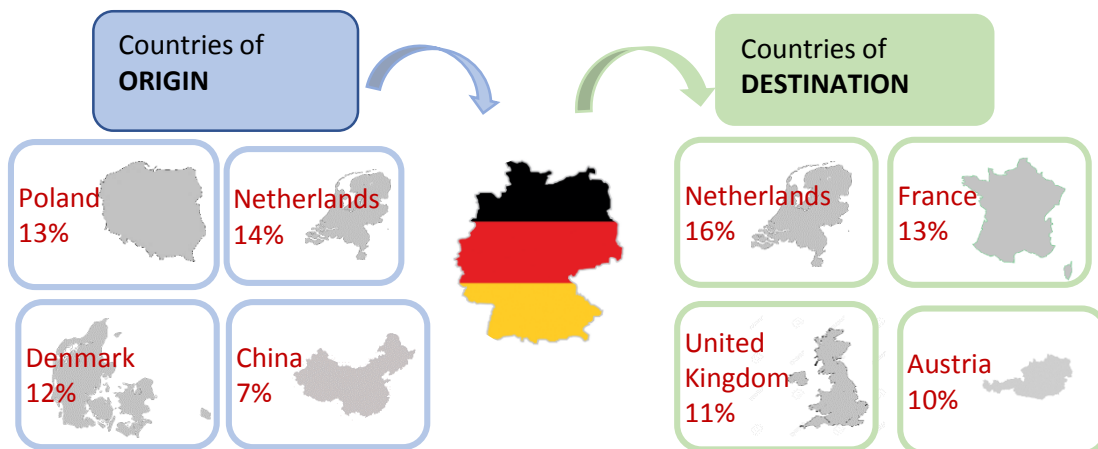
Species	Value (million euro)	% of Total Imports
SALMON	1.496	29%
ALASKA POLLOCK	345	7%
COD	325	6%
MISCELLANEOUS SHRIMP	279	5%
OTHER MARINE FISH	251	5%
TROPICAL SHRIMP	238	5%
OTHERS	2.228	43%

Export



MAIN COMMERCIAL SPECIES EXPORTED AND % OF TOTAL EXPORTS (2016, million euro)

Species	Value (million euro)	% of Total Exports
SALMON	476	18%
OTHER MARINE FISH	339	13%
COD	269	10%
FISHMEAL	233	9%
OTHER PRODUCTS	200	8%
OTHER GROUND FISH	107	4%
OTHERS	1.029	39%

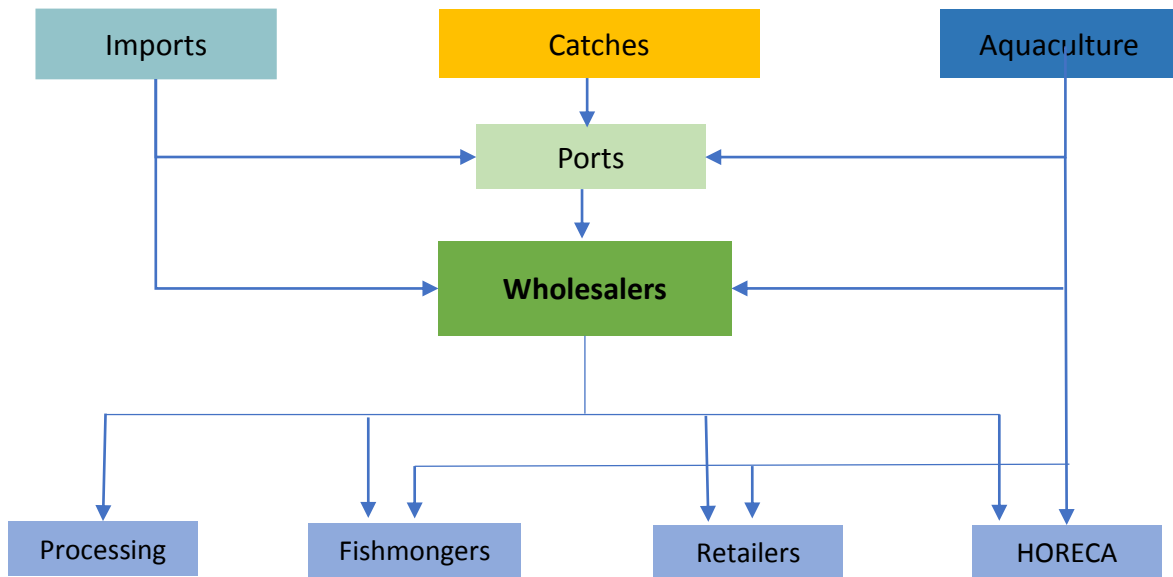




DISTRIBUTION

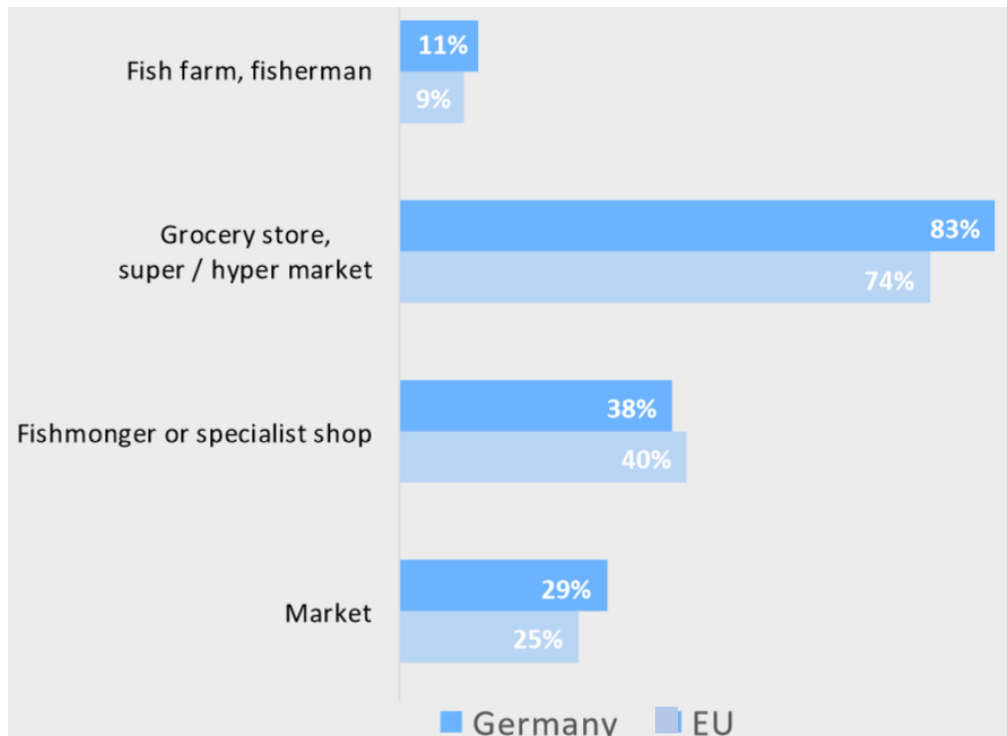
The supply chain of fishery and aquaculture products in Germany

(source: Sea Fish Industry Authority)



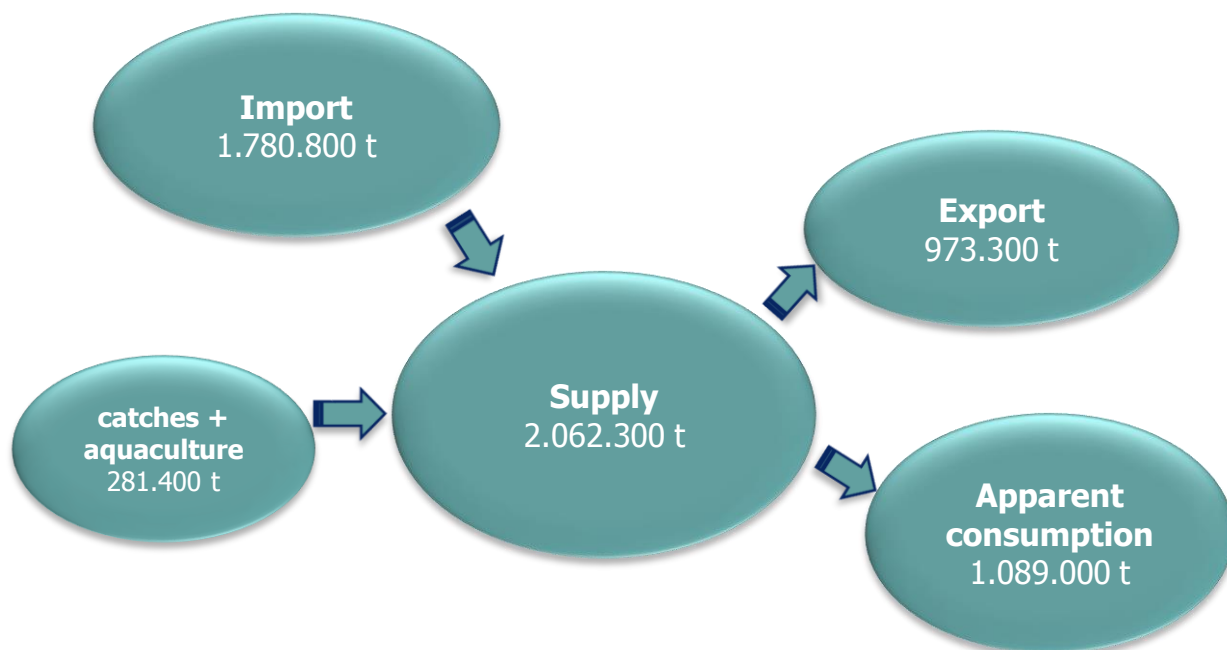
Consumers preferences on purchasing channels

(source: EUROBAROMETER)





SUPPLY BALANCE (source: EUMOFA)





CONSUMPTION

Apparent consumption of fishery and aquaculture products in Germany amounted to **13,4 kg/per capita in 2015**, slightly lower (-2%) compared to the previous year.

The main consumed species are **prawns, tuna, Alaska pollock, saithe and salmon**.

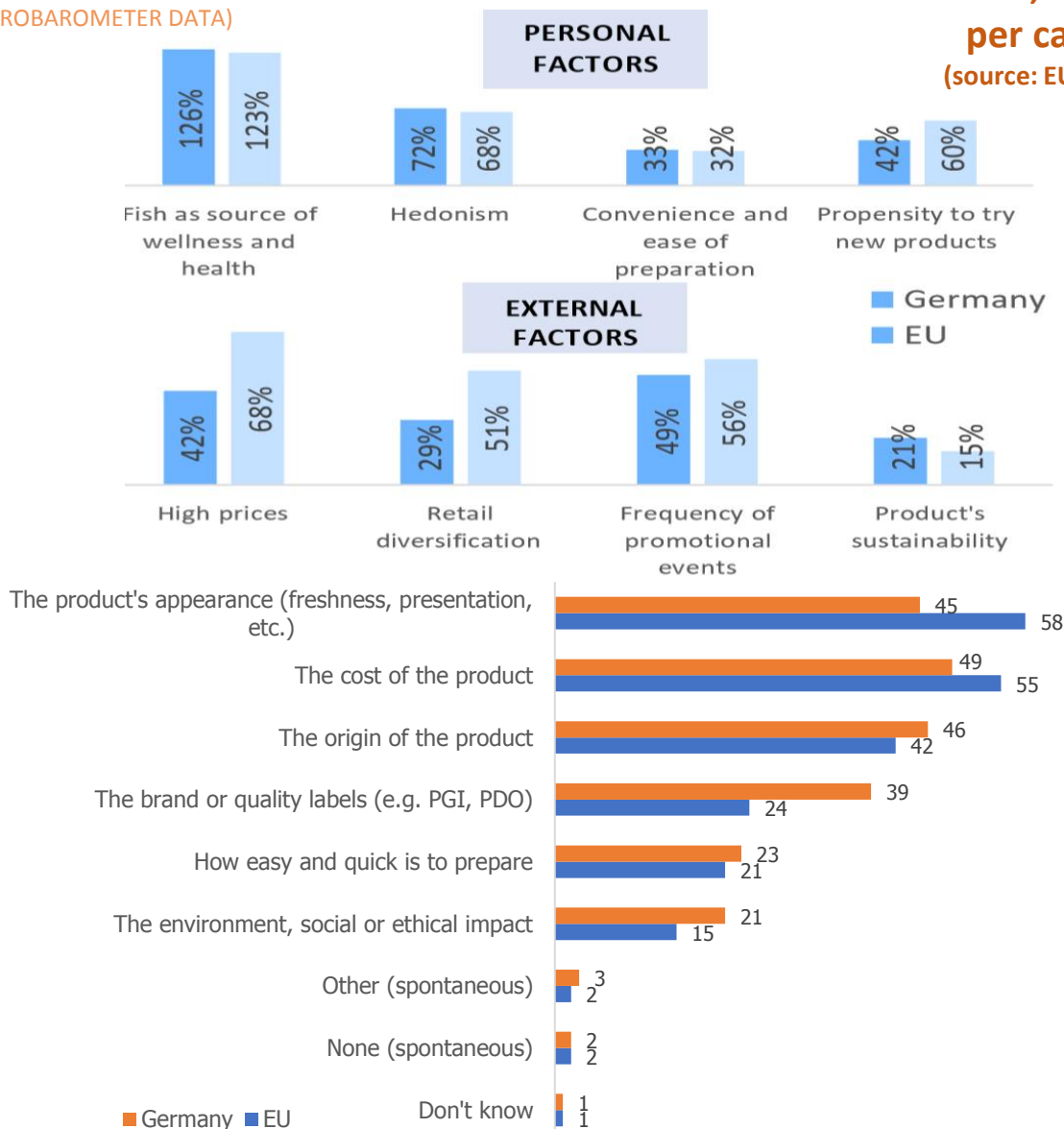
From a socio-demographic point of view, the age groups 15-24 years and 25-39 years have the lowest number of regular seafood consumers across the EU. In Germany the age group 15-24 years has more regular consumers than the EU average for this group, but overall the number of regular consumers in Germany is lower than the EU average (42%-66% for Germany and 67-77% for EU) (source: "EU consumer habits regarding fishery and aquaculture products").

Germans consume specially frozen and fresh products, while loose fish is more rarely consumed (54%) than the EU average (68%).

Purchasing factors

(source: EUROBAROMETER DATA)

**13,4 Kg
per capita**
(source: EUMOFA)





GERMANY IN EUMOFA



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 all auctions included in the data transmission (110 auctions). 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 for this supply chain are available.

PROCESSING

Volumes and values are collected from **EUROSTAT – PRODCOM**. Data concern 16 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.