

## GERMANY

### SUPPLY AND CONSUMPTION

The German market for salmon is supplied wholly by imports as Germany does not catch or produce salmon species. Pacific and Atlantic salmon are imported, with the latter largely sourced in Norway. Seventy percent of salmon imports are fresh/chilled product with most of the farmed salmon imported in fresh form. Approximately one-half of the imported salmon is smoked, with the remainder mainly sold fresh on ice. Quantities of salmon used in value added preparations are small, but growing.

Germany imports substantial quantities of smoked salmon and exports small quantities. Smoked salmon imports come primarily from Denmark, and represents a mixture of smoked Atlantic and smoked Pacific salmon. Total consumption has more than doubled during the period 1980-87. There has been static total consumption of fish in Germany, but as in other European markets, imports of smoked salmon have risen during this period from 714 tonnes in 1980, to 2,325 tonnes in 1987. The increase in consumption is attributed to imports of Atlantic farmed salmon.

German smokers buy 3-4 kilogram to 7-8 kilogram salmon, with a limited, but growing demand for 2-3 kilogram size as the market for small packs of slices increases. Sales are made to both the catering and retail sectors. Demand is highly seasonal with an estimated 30-40 percent of sales made during the last two months of the year, with another smaller peak during the Easter period. The increased consumption of smoked salmon has created year-round demand. The catering sector purchases largely whole sides of between one kilogram and 2.6 kilograms, while the retail sector purchases sides and packs of slices between 50 and 500 grams, with 200 gram packs dominating the market. Most smoked salmon is packed in vacuum packs. Prices for smoked salmon vary between DM48 per kilogram and DM75 per kilograms. Smoked salmon is sold under manufacturer labels, and by the retail brand by the major retailers.

The market in Germany is segmented by quality, with higher income consumers and quality restaurants purchasing the top quality Atlantic salmon, with consumption of Pacific salmon confined to the more price conscious consumers. Imported smoked salmon from Scotland and Norway tends to sell in the higher priced segment of the market. German salmon smokers vary in size, with approximately 80-90 percent of output originating from four large German companies serving the country, with smaller regional suppliers. The larger companies, and most of the smaller companies, source raw materials directly from the exporting country. Smokers operate their own distribution direct to retailers and caterers. Wholesalers are used mainly to serve smaller specialty retailers and catering outlets via general food wholesalers.