

DOMESTIC FISHERY

Nineteen-ninety three was a very difficult year for the German fishing industry. The economic development of the individual sectors took place in an environment in which the overall economy was marked by recession and unemployment. There were particularly serious problems in the fishing sector, which suffered great losses. Based on OECD statistics, income from small deep-sea fishing and inshore fishing fell by 40 percent. Deep-sea fishing in Germany also suffered considerable losses. Profit losses and consequent capacity reductions were due particularly to declining catches, lower producer prices and insufficient fishing opportunities, but also partly due to the fact that production was not in accordance with demand and marketing was not optimum.

According to the Organization for Economic Co-Operation and Development, in 1993, landings in domestic and foreign ports by German fishing vessels amounted to 257,000 tons (1992: 265,000 tons) to the value of DM 284 million (1992: DM 311 million). Of this, deep-sea fishery accounted for approximately 155,000 tons, of which approximately 7,000 tons were fresh fish and 148,000 tons frozen fish. Approximately 60 percent of fresh fish catches were landed in foreign harbours, in particular in the United Kingdom, but also on the faroe Islands and in danish and French harbours. Some landings even took place in Iceland. Landings of cod on the Faroe Islands, still substantial in 1992, fell considerably in 1993 as cod prices were significantly lower than in the previous year, with the result that the cost advantage resulting from shorter distances was also removed.

The German processing industry was able to maintain its high level of production. According to the OECD, at 430,000 tons in 1993, it was only 1 percent lower than in the previous year, and ex-factory sales value was over DM 2.5 billion. The strongest product continued to be deep-frozen fish products, mainly fish fingers. Production, at 150,000 tons, exceeded the level of the year before by 6.5 percent and sales value was DM 519 million. Production of other deep-frozen fish products--gourmet fillets dominate in this product group--was however on the decrease.

Production of deep-frozen fish fillets increased in 1993 to 32,652 tons (value DM 157 million). Production of canned fish also increased from 55,879 tons (of which 43,689 tons in the old Federal Länder) to 57,839 tons at a value of DM 370 million. Production of fish salads fell by 2.5 percent, but in terms of value increased by 7.5 percent. In 1993, processing of smoked herring, sprat and smoked salmon increased substantially. Production of marinades decreased (reduction from approximately 88,000 tons at a value of DM 368 million to 79,400 tons at a value of DM 329 million).

According to provisional OECD data, 624,000 tons of fish, crustaceans and molluscs to the value of DM 2.87 billion were imported into Germany as a whole (not including fish meal or fish oil), approximately 9 percent less than 1992 in terms of weight, approximately 10 percent less in terms of value. The percentage of imports from non-EC countries increased from 352,000 tons (52 percent) to 387,000 (62 percent) in weight, and from approximately DM 1.7 billion to DM 1.8 billion in value. The most important supplier countries were Denmark and Norway with a share of 20 percent and 9 percent respectively of total German fisheries imports.