and registration before they can ship. Suppliers of processed food products must comply with complicated and strict German and EU regulations concerning additives and labelling. High transportation costs, the high value of the DM and the high relative cost of services make market research and promotions very expensive.

More than 65% of agri-food imports into Germany come from other members of the EU. Through aggressive marketing tactics, major non-EU suppliers such as the USA, Brazil, Turkey, Eastern Europe, Argentina and China have carved out a substantial share of the market. Canada ranks approximately 15th among non-EU agri-food suppliers to Germany with shipments equal to about 15% of those of first placed USA.

" Fish consumption per capita increased 40% in 20 years"

Objectives for next five years

The main objectives will be:
- *to introduce new Canadian consumer-ready products to the market*
- *to introduce Canadian capability to package private label products*
- *to develop sales to the fast-growing hospitality sector*
- *to organize Canadian food promotions at hotels and restaurants*

Activities

Canadian Wine Tasting Canadian wine tasting event to be held in Germany

BIO Fach	February 1998, Frankfurt International trade fair for organic food
Equitana	March 1999, Essen Equestrian sports
Canada Weeks	June 1997, Karstadt department stores, Germany-wide Promotion of Canadian food products
ANUGA	11-16 October 1997 and October 1999, Cologne International Food Fair, largest in the world
BRAU	13-15 November 1997, Nürnberg European Trade Fair for the brewery and beverage industries
ISM	1-5 February 1998, Cologne International Fair for Sweets and Biscuits
INTERZOO	May 1998, Nürnberg International Trade Fair for Pet Supplies and Pet Food Canadian participation organized by PIJAC/Canada
Eurotier	November 1998, Hannover International exhibition for livestock production and management

Fish

Overview

With a population of 80 million and annual per capita consumption of 14.6 kg, Germany is a sizeable market. It imports 1 million tons and exports 409,000 tons. Domestic consumption stands at 1.2 million tons. Long term consumption shows an upward trend from 10.5 kg in the late seventies.

German seafood imports in 1995 amounted to DM 3.5 billion of which DM 37.9 million came from Canada. Canadian statistics show seafood exports to Germany dropping from 17,300 tons valued at $48 million in 1988 to 8,000 tons valued at $32 million in 1995. The average value of these exports increased from $2.78/kg to $3.90/kg confirming a shift to more upscale items.

The German seafood market has been characterized by a strong emphasis on North Sea fish (herring, mackerel, saithe and cod). The big sellers are herring and more recently Alaska pollock with a combined total of about half the market. Rising incomes have resulted in more consumption of luxury products like lobster and shrimp. Less affluent consumers of the New Laender have reinforced demand for cheaper species. Level of consumption ranges from 25 kg in coastal areas to only 4 kg in Bavaria. Supermarkets control 27% of fresh seafood sales and 75% of frozen products. Traditional fishmongers are still important retaining more than 45% of fresh seafood sales.

Major companies

Unlike other European countries, there is no central fish market to serve as pricing and distribution hub. Most fish importers are located in the cities of Hamburg and Bremerhaven. Important importers are:

Atlantik-Fisch, Hamburg
F. Bierbichler oHG, Stephanskirchen
Deutsche See, Bremerhaven
Euro-Seafood GmbH, Düsseldorf
Fimex GmbH, Bremerhaven
Flamingo-Fisch, Bremerhaven
Chr. Goedeken, Hamburg
JadeKost KG, Wilhelmshaven
Rud. Kanzow KG, Hamburg
F.W.Lübbert, Bremerhaven
Manfred Maxein International, Hamburg
Nordsee, Bremerhaven
Zamek-Meinhardt GmbH, Minden