

GERMAN MARKET FOR CANNED SEAFOOD

The following summary has been extracted from the Food and Agriculture Organization's report *GLOBEFISH: Markets for Canned Fish in Europe*, Volume 27, April 1994. Preserved and semi-preserved products are the most important seafood item in Germany. Market share for these products declined during the 1980's, down from 40 percent in 1984 to 31 percent in 1989, but demand has remained stable since. Total sales fell during the same period, but after unification of the Federal Republic of Germany and the German Democratic Republic, production and sales increased.

The most popular canned fish items are herring and tuna, followed by sardines and mackerel. Blue mussels are also popular, and Germans tend to eat most canned seafood items on bread for supper. In the case of tuna, also for mackerel, but much less for sardines, use with green salads is also very common. When canned seafood products are consumed with cooking, pizza is the dish most frequently consumed. For this purpose, tuna is dominant, but mussels and anchovies are also regularly added. German consumers have a growing awareness of the amount and kind of packaging material used and its relation to the environment. Metal or glass packaging is used in the canning industry presents no problem, but extra cardboard boxes are no longer accepted and any additional wrapping is regarded suspiciously. Retailers generally do not accept packaging that has no recycling guarantee by the company "*Duales System Deutschland*" (DSD), and shows this with the Green Dot on the packaging.

Herring

Traditional herring products have the largest share in the segment and also domineer the German market for canned fish. Herring preserves are usually sold in 200 gram cans, and less often in 190 gram cans. There are several dozen different sauces and preparations found on the German market, but preparations in tomato sauce are the most prevalent.

Tuna

The amount of preserved tuna sold in Germany has been increasing steadily for more than 10 years and is slowly closing in on herring. There is no tuna industry in Germany, therefore all consumer demand is met through imports. Imports of canned tuna into Germany increased from 14,400 tons in 1982 to 35,500 tons in 1987, up to 44,100 in 1992.

Sardines

There is no sardine canning industry in Germany and all demand is met through imports. However, market insiders feel that there is a stagnating and rather declining trend in the sardine trade within the German market. The canned sardine market is very much controlled by low prices, and there is a great variety of high value sardine products found in many of the retail stores in different oils and sauces.

Mackerel

Canned mackerel preserves are becoming increasingly important in the German consumer market, with imports increasing from 2,700 tons in 1987 to 5,800 tons in 1992. The market is dominated by sardine-sized cans with 125 gram contents, packed as skinless, boneless fillet cuts in vegetable or soya oil, however, fillets in brine instead of oil follow modern nutrition concerns.