

## GERMAN MARKET FOR PREPARED SEAFOODS

The following summary has been extracted from the Food and Agriculture Organization's report *GLOBEFISH: Market for Fish-Based Ready Meals, Germany* Volume 23, 1993. The German market for fish products is one of the most interesting in Europe. Historically, the market for fish-based ready meals was characterized by a very conservative approach, especially regarding the fish species in demand. This is still reflected on the market, and can be seen by the popularity enjoyed by herring, Alaska pollock, saithe, hake and bonito. In contrast, and in line with the current climate of change, German consumers are becoming increasingly receptive to "exotic" fish species products which is mainly due to the growing number of restaurants offering international cuisine. Prepared seafood products is a growing segment in the German market, and will without doubt represent the greatest potential for Canadian producers interested in export growth through the German market.

In terms of traditional German fish-based ready meals, a relatively small number of local firms hold over 90 percent market share. Their dominance is not foreseen to change and thus represents a highly competitive market environment for interested foreign producers. To enter the German market with one, or more, products of the common "fish dishes" {such as Schlemmerfilets, fish fingers or other breaded fish products} could prove extremely difficult. Any Canadian fish and seafood exporters contemplating such action in the German market should study very carefully, and in detail, all aspects of the market as it is fiercely competitive.

The main advantage that Canadian fish and seafood exporters may have on the German market is the possession of products already accepted at home or in a third country, characterized by well-known features of increasingly popular international dishes. Such products could fare well and could meet with demand, as yet unfulfilled, on the market. When fish and seafood consumption in Germany is compared to other countries in Europe, it becomes apparent that it lags behind most other markets in terms of consumption per capita. It should, however, be noted that it is growing and is expected to increase from the current 14 kilograms to 20 kilograms per capita by the turn of the century.

The main obstacle for growth in Germany lies in the inherent problem of fish supply which is reflected in unstable prices. With past trends showing a lower availability of fish supplies, prices for fish products have increased to a point where they have a weak position against other food supplements, such as meat products. German consumers confronted by this trend have a tendency to turn away from fish as a viable food supplement, because German meat producers are increasingly competing with fish producers on the basis of health and nutrition.

It can therefore be concluded that the German market represents a challenge for both domestic and foreign fish producers, where the common aim will necessarily be that of increasing fish consumption amongst the general population for the benefit of all fish producers. Therefore, Canadian fish and seafood exporters interested in the German market must coordinate advertising and marketing activities towards educating the German consumer.