

Everywhere you do business  
**The Canadian Trade  
Commissioner Service**

**Market Overview: EU and Germany  
for Canadian Exporters of Agriculture,  
Agri-Food & Seafood Products**

Julie Ferguson-Ceniti  
Trade Commissioner  
Mission of Canada to the EU

**Atlantic Canada  
EU Capacity-Building Workshop**  
September 2019



Global Affairs Canada  
Trade Commissioner Service

Affaires mondiales Canada  
Service des délégués commerciaux

Canada

## Setting the Scene:

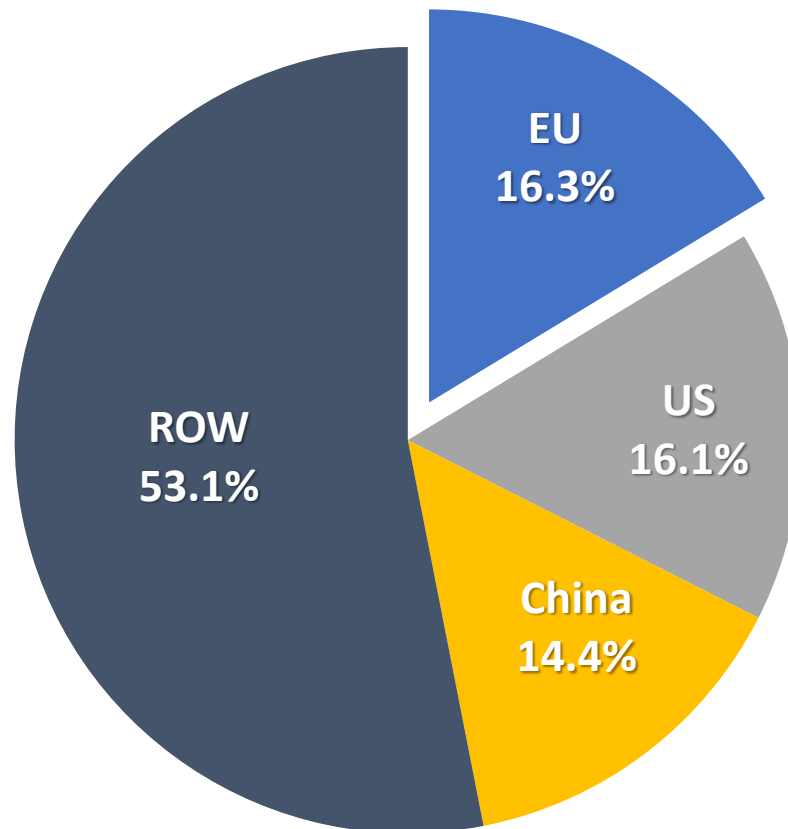
Introduction to the EU Market

CETA – very briefly!

Opportunities for agrifood & seafood by member state

Spotlight on : Germany . . . plus Poland, Netherlands

# The EU is the world's largest importer of agricultural and agri-food products

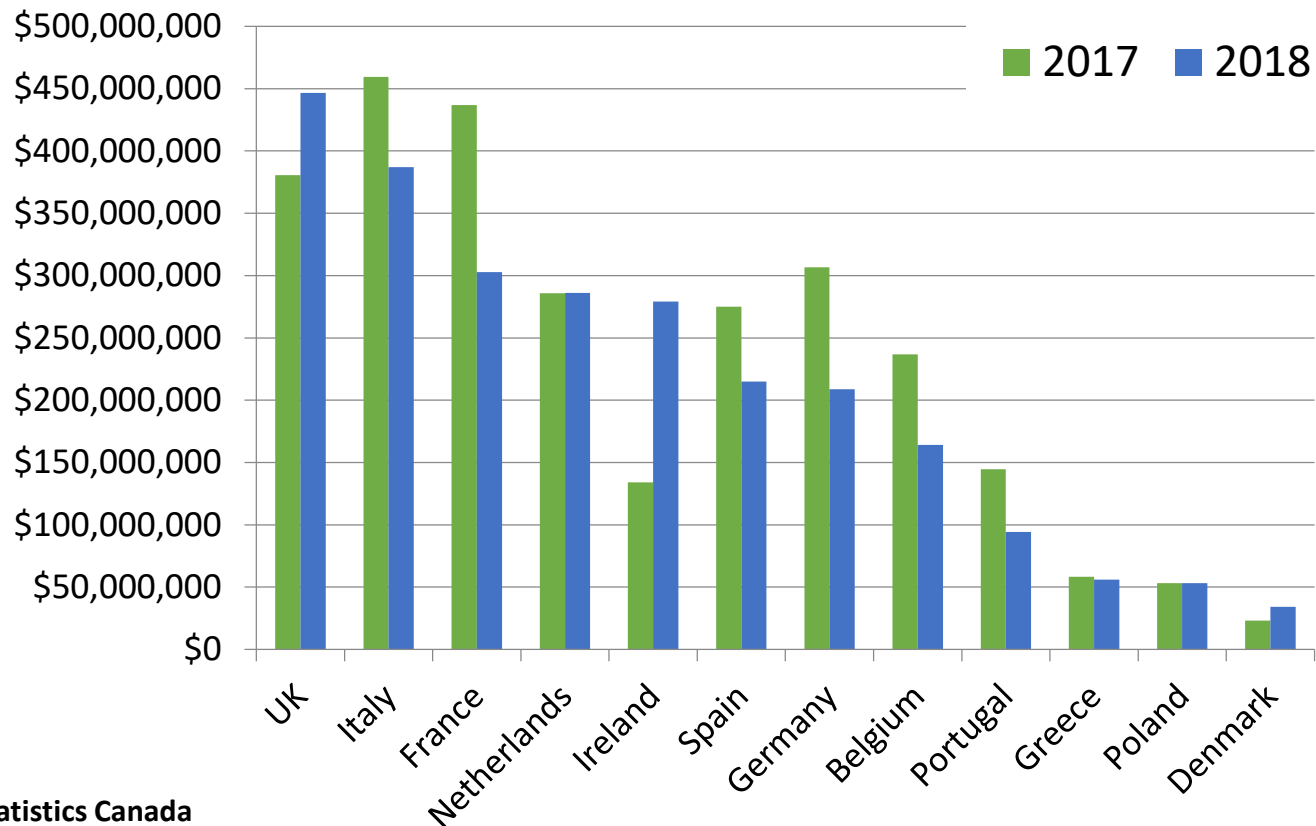


**Global  
Agriculture and  
Agri-food  
Imports, 2015**

Source: National Statistical Agencies

# Exports from Canada are spread across multiple Member States

## Top 12 Export Destinations for Canadian Agricultural and Agri-Food Products in the EU



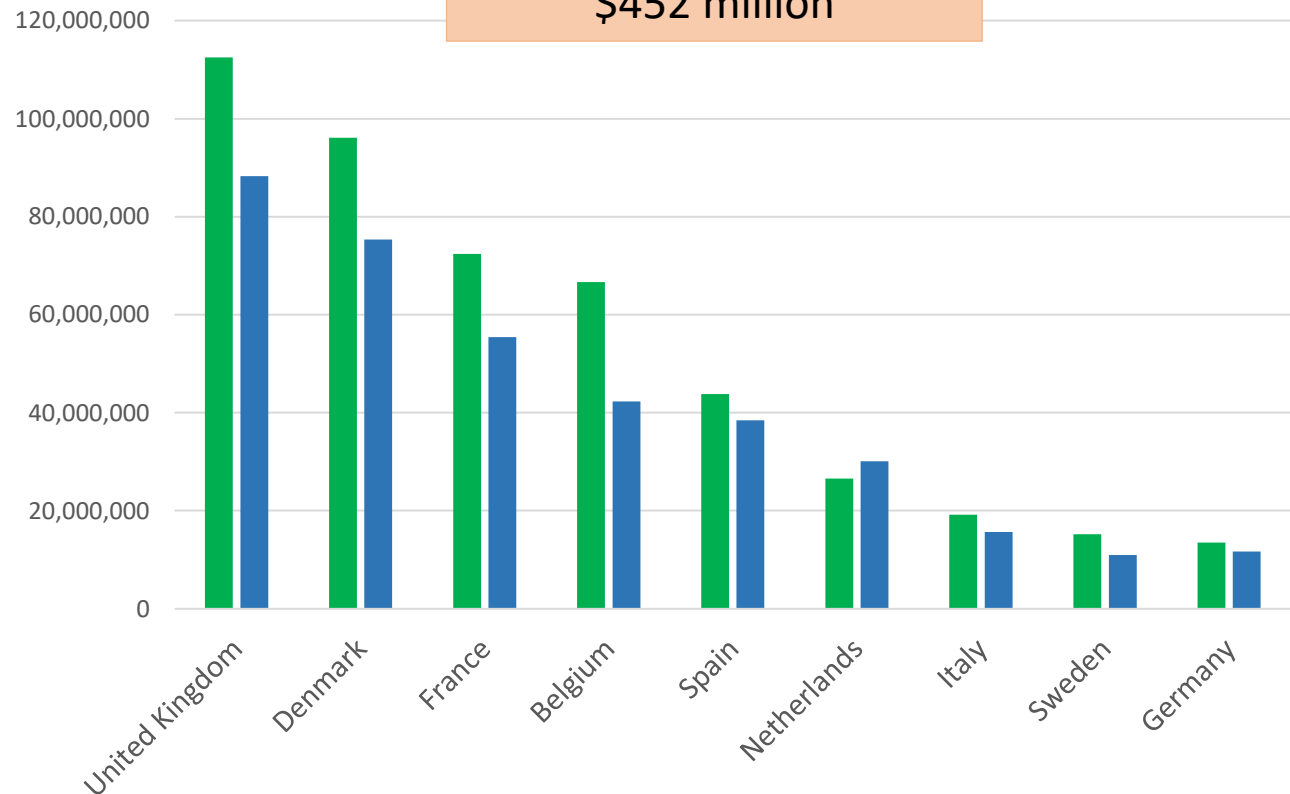
Canadian Agrifood Exports to the EU 2018: \$2.6 billion

# Exports from Canada are spread across multiple Member States

## Top Products:

- Lobsters, live
- Lobster, frozen
- CWP frozen, in shell
- CWP frozen, shelled
- Scallops
- Lobsters in brine
- Frozen Hake
- Prep/Pres Shrimps
- Live eels
- Prep/Pres lobster

Exports to the EU 2018:  
\$452 million



Source: Statistics Canada

## CETA (very briefly)

**C**anadian

As of 2017, 0% duties on most agrifood and seafood products

**E**xporters

Opportunity to take market share from countries with no FTA

**T**ake

Diversify your export destinations (not all your eggs in one basket)

**A**dvantage

Not without challenges, but opportunity for rewards is there

# CETA offers opportunities for Agrifood!

## Trade Commissioner Survey

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### Spain

- Gluten-free products
- Fish and seafood
- Dried berries
- Beef & Bison
- Craft beer, locally produced spirits, gins
- Quinoa, hemp

### France

- Couscous
- Bio flour
- Jams and Preserves
- Pet Food
- Cranberries & blueberries (conventional & bio)
- Frozen vegetables
- Honey in bulk
- Prepared fruit
- Bison meat

### Netherlands

- Bio products
- Vegan products
- Pork
- Artisanal products (cheese)

### Germany

- Bio products
- Vegan / vegetarian products
- Craft beer, locally produced spirits and gins
- Superfoods: berries, quinoa, hemp

### UK

- « Free from » products:
- Fish and seafood
- Healthy snacks

# ... and for Fish & Seafood!

## Trade Commissioner Survey

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### Belgium

- Lobster
- Lobster products
- Scallops
- Oysters
- Salmon (wild)

### Germany

- Processed shrimp
- Processed mussels
- Frozen lobster

### United Kingdom

- Coldwater shrimp
- Canned salmon
- Lobster
- Frozen mackerel
- Frozen haddock
- Frozen cod

### Netherlands

- Lobster
- Lobster products
- Mackerel
- Scallops
- Oysters
- Fish oil

### France


- Live lobster
- Lobster tails
- Fish eggs
- Smoked salmon

### Niche Products

- Geoduck
- Wild Salmon
- Sablefish
- Salmon products (smoked, candied)



## Doing Business in Europe

-  **EU regulations** (unchanged under CETA):
  - Meat, pet food have to come from an EU-approved establishment
  - Export documentation (catch certificate, health certificate for meat & plants) – information available on CFIA website
  - Labelling
  - Hormone and ractopamine-free requirement (e.g. beef, pork, veal)

 **CETA Rules of Origin and Origin Quotas**

 **EU Maximum Residue Levels** (e.g. glyphosate, cadmium)

 **Non-acceptance of GMO**

 **Strong trend to “buy local”**

 **Differences in business culture** (even across member states)

 **Exporting to Europe guides available** (Fish & Seafood)

# How do you achieve success in the EU?

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## **C**reativity

- Innovation
- product development
- value-added

## **E**xceptional

- Quality
- Sustainability. Traceability
- Brand

## **T**ransportation

- Cargo and shipping
- Logistics

## **A**ct

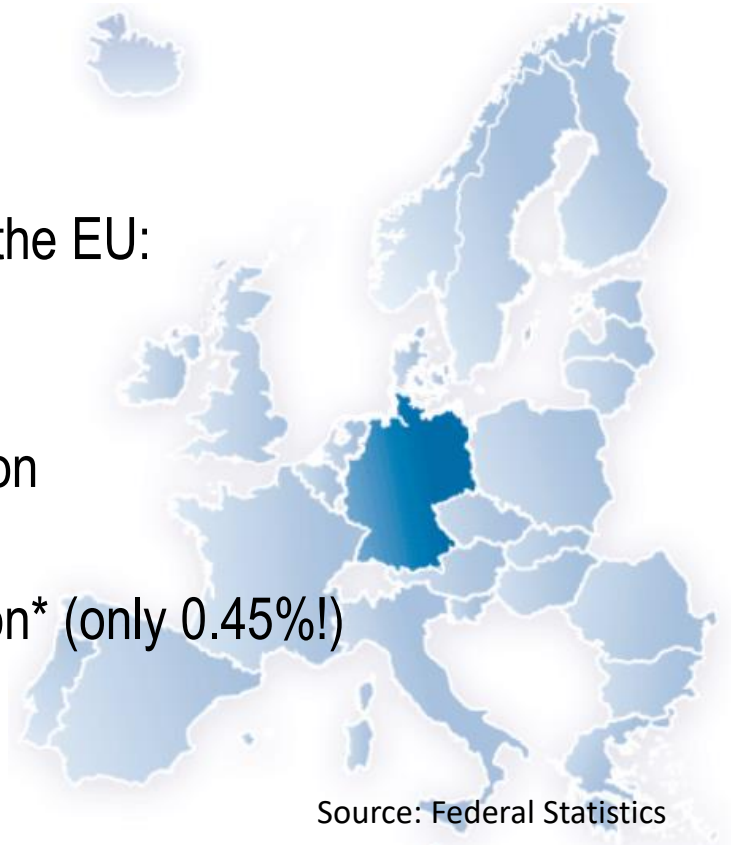
- New markets / customers
- Contact TCs
- Attend a Trade Show



# The German Market

## Germany: General Information

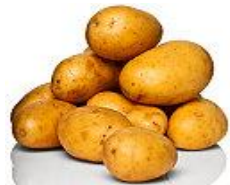
- Population: 81.8 million
- GDP per capita: 40,339 € (2018)
- Unemployment: 5.2% (average for 2018)
- Largest economy in Europe and motor of the EU:
  - GDP growth in 2018: +1.4%
  - Forecast for 2019: +0.9%
- Total food retail sales in 2018: €162.1 billion
- Total Agrifood imports: €54.8 billion
- Agrifood imports from Canada: €245 million\* (only 0.45%!)



# German Consumer Profile:

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## Perceived



## Actual

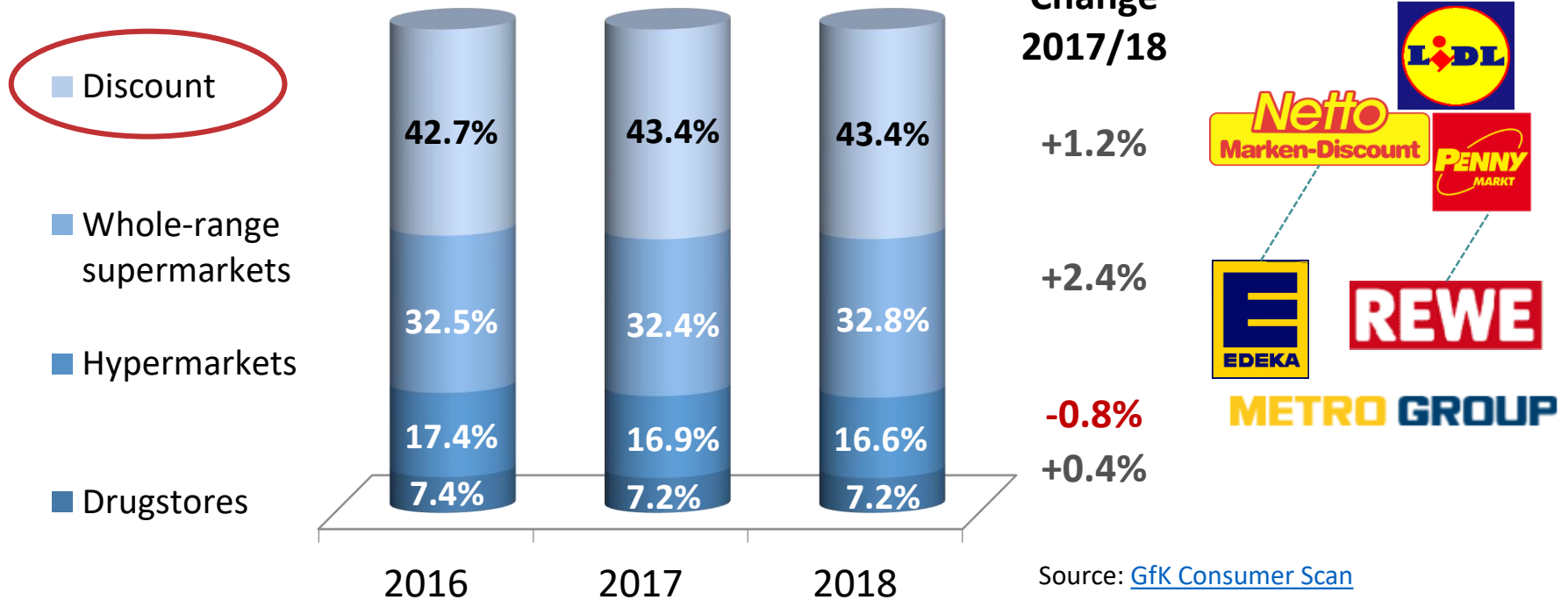


# Germany: Retail Landscape

Total food retail sales in 2018: **€162.1 billion**

*5 largest chains = 72% market share*

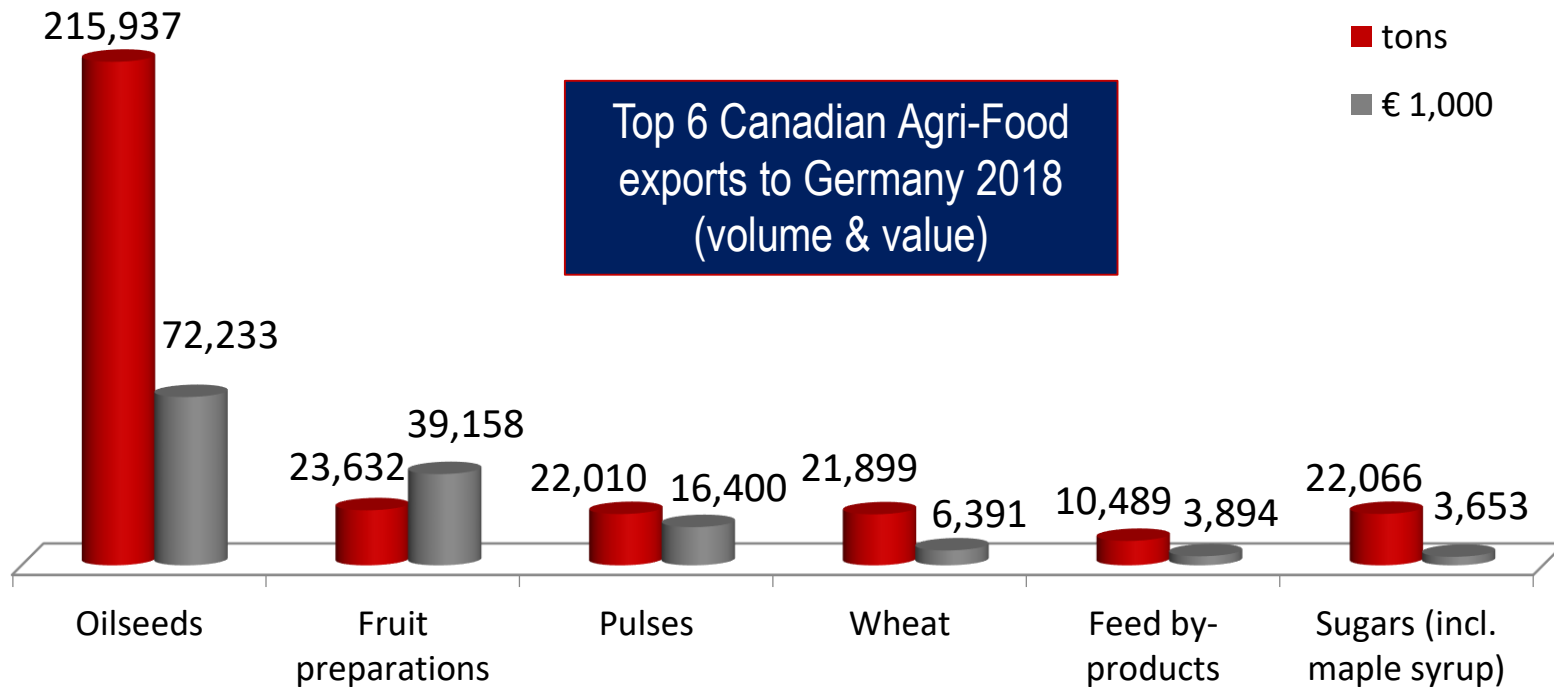
Turnover by distribution channels 2016 - 2018



Source: [GfK Consumer Scan](#)

## Canadian Exports to Germany

- Mainly bulk products: oilseeds & grains
- Growing interest in value-added products from German importers
- Need to work with importers and retailers to pull demand



Source: Federal Statistics Office, figures for Jan-Dec 2018

## Opportunities in the German Market

- Vegetarian/vegan products
- Superfoods
- Gluten-free, pulse-based foods, ancient grains
- High-protein foods
- Organic
- Premium meat
- Convenience foods
- Private-label foods
- Craft beer and spirits
- Specialties, attractive, unique (wild rice), and originally packaged products
- Products with a story to tell

### *Main Challenge?*

Competitive  
environment with  
low food retail  
prices



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# The Canadian Trade Commissioner Service

Connect with the TCS  
[trade commissioner.gc.ca](http://trade commissioner.gc.ca)

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