

SEAFOOD STUDY 2014. INSIGHTS AND OUTLOOK: HOW THE GERMANS EAT FISH.





THE PRESENT SEAFOOD STUDY, PUBLISHED IN JANUARY 2015 BY THE GERMAN OFFICE OF THE NORWEGIAN SEAFOOD COUNCIL, DRAWS ON THE RESULTS OF THE FOLLOWING STUDIES:

Seafood Market Insight,

carried out by Ipsos Marketing on behalf of the Norwegian Seafood Council (German office), November 2014, sample size: 1,011 respondents

Seafood Consumer Insight (SCI),

carried out by TNS Gallup on behalf of the Norwegian Seafood Council, 2014, sample size: 1,011 respondents

Analysis of salmon used to make sushi and sashimi,

carried out by Euromonitor International on behalf of the Norwegian Seafood Council, 2014

Analysis of salmon and herring markets in Europe,

carried out by Euromonitor International on behalf of the Norwegian Seafood Council, 2014

Seafood-Exportzahlen 2013, published by the Federal Office for Agriculture and Food (BLE), processed by the Norwegian Seafood Council (German office)

Iss was, Deutschland? [‘What’s cooking, Germany?’] frozen food study into the eating habits of people in Germany, carried out by the Techniker Krankenkasse (TK), 2013, sample size: 1,000 respondents

GfK Consumer Scan, GfK Germany for Fischwirtschaftsgipfel 2013, sample size: 30,000 households

GfK Consumer Scan, GfK Germany for Fischwirtschaftsgipfel 2013, sample size: 13,000 households

GfK Panel Services, GfK Germany, published by the German Fish Information Centre (FIZ), January 2014, processed by NSC Germany, 2014

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PREFACE

The cold, clear seas of Norway provide the ideal conditions for fish and seafood. Every day, 37 million meals with ingredients from here end up on dinner tables around the globe.

Norway exports a variety of species to more than 143 countries, and it is the second largest exporter of fish and seafood in the world. It goes without saying that we have a firm grasp of export statistics and an understanding of the markets. At the Norwegian Seafood Council, however, we also believe our task involves learning as much as possible about fish consumption and fish consumers in individual countries and sharing this knowledge with our partners.

Germany is a very important market for us: in 2014, Norway exported fish and seafood worth 297 million euros directly to Germany. With its export to third countries such as Poland, Denmark and the Netherlands, Germany represents the second largest consumer market for Norwegian fish today, after France, and the largest consumer market for Norwegian salmon.

The range of fish and seafood available in Germany today is better and more diverse than ever before. However, fish consumption has declined slightly, while meat consumption continues to rise. In 2013, fish consumption in Germany even fell by more than one kilogram per capita. The figures for 2014 appear to be stable.

In order to achieve an upward trend for fish in Germany, there is a need for more knowledge about fish consumption and fish consumers. Who eats fish, and who does not? What types of fish are especially popular, when do people eat them, and why are others less often served at the dinner table in Germany?

These and many other questions are the focus of our attention in this seafood study. For example, did you know that households led by people between the age of 30 and 49 claim to eat fish least often? Other interesting insights are that Germany has the second lowest level of consumption of salmon sushi in Europe, and the availability of fresh fish is perceived to be as much of a barrier as the price. And when it comes to sustainability, an important issue for industry and retail, how much does the environment matter to German consumers?

Fish is healthy, and it can taste wonderful. As a major fishing nation, it is our responsibility to conserve this valuable resource so that future generations can continue to enjoy fish and seafood of Norwegian origin.

Ensuring that more healthy food from the sea is served at the dinner table in Germany is the shared responsibility of everyone in the fish trade. This study aims to make a small contribution by providing more information about German fish consumers and their eating habits.

Best regards,



Kristin Pettersen
Country Director Germany
Norwegian Seafood Council





1. FISH CONSUMPTION IN GERMANY

According to an old German saying, it is traditional to eat fish on Fridays. But is that really true?

If this were accurate, average fish consumption among Germans would be much higher than the current level of 13.4 kilograms per capita per year.¹

This begs the question of whether a small number of people eat a lot of fish? Or is it more the case that many people eat only a little fish less frequently?

¹Bundesamt für Landwirtschaft und Ernährung (BLE), 2013, Daten aufbereitet vom NSC Deutschland.

1.1 FREQUENCY OF CONSUMPTION

Five out of ten Germans (54%) state that they eat fish or seafood at least once a week. One in four even claim to do so twice a week or more.

If we compare these figures with similar statistics for a country with high per capita fish consumption, such as Norway, it becomes clear that the crucial difference between countries with high and low per capita consumption can be explained by the frequency of consumption. Some 85% of Norwegians eat fish at least once a week, and every other Norwegian (53%) eats fish at least twice a week. With this in mind, the first goal should be to increase the frequency of consumption. After all, only 3% of Germans state that they never eat fish or seafood.

It is interesting to note that half of all Germans sit down to a meal containing fish at least once a week. However, in other countries with a similar frequency, such as Sweden, per capita fish consumption is more than 30 kilograms. This raises the question as to why fish consumption per capita is not higher in Germany. There is a simple explanation. Whereas fish is usually served as part of a warm meal in Sweden, it tends to feature as a smaller component of dishes in Germany: a few slices of smoked salmon, a fishcake or a few pieces of herring count as a single serving of fish.²

THE OLDER PEOPLE ARE IN GERMANY, THE MORE FISH AND SEAFOOD THEY EAT.

Some 66% of Germans aged 50+ state that they eat fish at least once a week.² At the same time, 41% say they take care to make sure their food does not contain too many calories, but plenty of vitamins and minerals.³

When this age group is asked to give good reasons for their fish consumption, 59% mention health-related aspects.⁴

FISH CONSUMPTION IN EUROPEAN COUNTRIES, 2013 (kilograms per capita):

Portugal:	57.1
Norway:	53.4
Spain:	43.0
France:	43.0
Sweden:	31.1
UK:	19.0
Switzerland:	19.0
Germany:	14.8

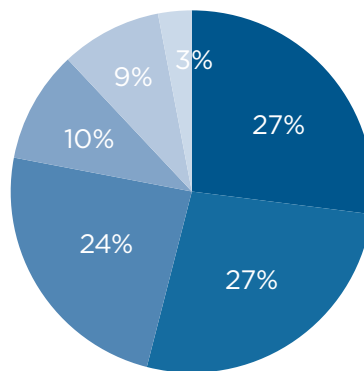
Source: Food and Agriculture Organization of the United Nations (FAO), 2013



Like the FAO and WHO, the Norwegian Ministry of Health and Care Services recommends eating fish two or three times a week with total consumption of between 300 and 450 grams. If most Germans followed this guideline, per capita consumption would not be 13.4 but almost 50 kg (WFE).*

„ In order to increase fish consumption, people should eat fish more often as a main meal – and they should eat more of it. “

HOW OFTEN THE GERMANS EAT FISH



Legend:
 ■ Twice or more a week
 ■ Once a week
 ■ 2-3 times a month
 ■ Less than once a week
 ■ Never

Question: How often do you eat fish or seafood?
 Figure 1: TNS Gallup/NSC, 2014

*Consumption figures are calculated as a whole fish equivalent (WFE), which corresponds to the landed weight of whole fish. In Germany, the WFE is 13.4 kg a year, whereas actual per capita consumption is 7 kg a year in terms of product weight.

²TNS Gallup/NSC, Seafood Consumer Insight (SCI), 2014, Country: Germany, sample size: 1,011 respondents.

³'Iss was, Deutschland?', Techniker Krankenkasse, 2013, sample size: 1,000 respondents.

⁴TNS Gallup/NSC, Seafood Consumer Insight (SCI), 2014, Country: Germany, sample size: 1,011 respondents.

People aged 20 to 29 eat fish almost just as frequently: 61% consume fish at least once a week. In the same age group, however, people pay much less attention to healthy eating. Only 23% of young adults place importance on a healthy diet.⁵

PERCENTAGE OF PEOPLE WHO EAT FISH AT LEAST ONCE A WEEK	
Aged 20-29:	61%
Aged 30-49:	50%
Aged 50+:	66%
Source: TNS Gallup/NSC, 2014	

We can therefore conclude that there is no definite correlation between a healthy lifestyle and fish consumption.

It is people between the age of 30 and 49 who consume the least fish. One in five state that they eat fish only once a month or even less frequently. In other words, apparent 'fish haters' are found in the age group of people who most often live with children. Is it possible that less fish is eaten here because children do not like it? We can say

that this is not the case, because 82% of respondents with children at home said that their children like eating fish.⁶

Unlike many countries in Europe, where women eat much more seafood than men, there is hardly any difference in Germany: 54% of women eat fish once or more a week, while the figure for men is 55%.

'Surprisingly, it is not the youngest people who are least fond of fish.'

North Germans eat more fish than their counterparts in the south. Six out of ten northerners eat fish at least once a week, and one in three even have it two or three times a week. On the other hand, one in five southerners eats fish less than once a month. No major differences can be seen between western and eastern Germany.

This means that south Germany has the greatest potential for increased consumption in regional terms.

Here, too, it is mainly a question of increasing the frequency of consumption, as only 10% of south Germans say they never eat fish or seafood.

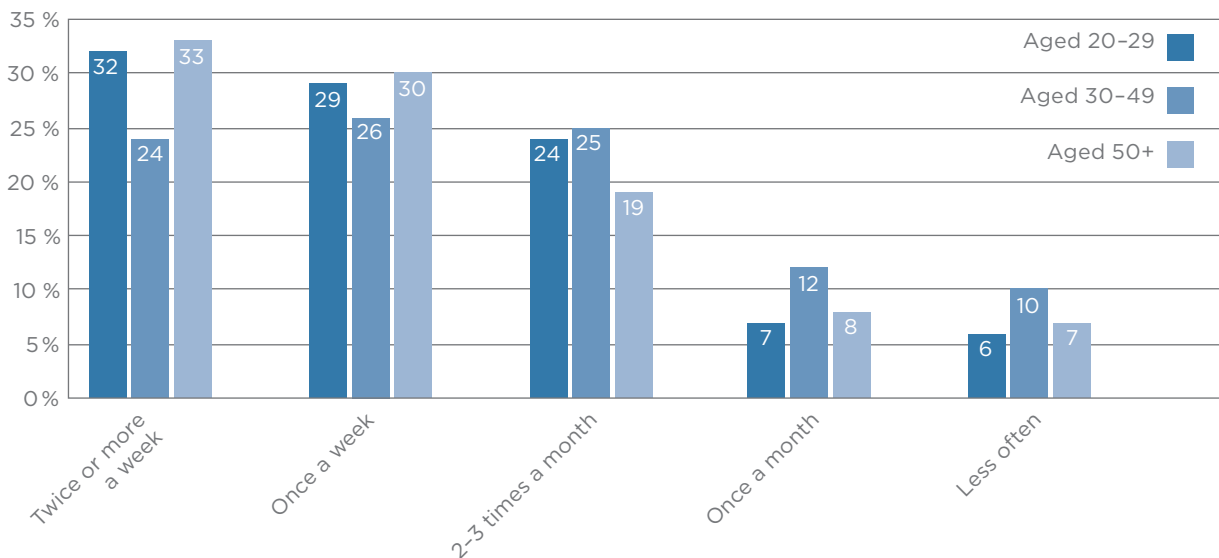
PEOPLE PREFER MARINE FISH TO FRESHWATER FISH

Compared to other countries, Germany has a rather short coastline of around 2,389 km. With this in mind, you might expect people to eat more freshwater fish than marine fish.

The modern distribution of fresh fish from the sea and the ubiquity* of marine fish in frozen form has led to a reverse trend, however: Today, Germans eat 66% marine fish and only 21% freshwater fish; the remainder is accounted for by other seafood.⁷

Only 24% of Germans would consider eating rainbow trout as part of a meal during the week. By way of comparison, 76% would think about eating salmon.⁸

FREQUENCY OF FISH CONSUMPTION BY AGE (ALL MEALS, WEEKDAYS ONLY)



Question: How often do you eat fish or seafood?
Figure 2: TNS Gallup/NSC, 2014

* The greatest possible distribution density.

⁵ 'Iss was, Deutschland?', Techniker Krankenkasse, 2013, sample size: 1,000 respondents.

⁶ Ipsos for NSC Germany, 2014, sample size: 1,011 respondents.

⁷ Federal Office for Agriculture and Food (BLE), data processed by the German Fish Information Centre (FIZ), 2013.

⁸ TNS Gallup/NSC, Seafood Consumer Insight (SCI), 2014, Country: Germany, sample size: 1,011 respondents.

SALMON AND PRAWNS TOP THE LIST

Salmon is the most preferred fish, and the type that people eat most often: 29% of those surveyed prefer salmon for a meal during the week. About 70% eat salmon in some form at least once a month, during the week or at the weekend, either at home or away from home.

Prawns came second on the list of preferred species (12%), followed by saithe (also known as coalfish, 10%) and tuna (9%).

If we compare the results of popular fish species with the actual figures for consumption in Germany, a different picture emerges:

Alaska pollock is still the most widely eaten type of fish in Germany, accounting for 22% of consumption. Salmon follows in second place (17%), with herring next on the list (16%).⁹

The variation in results between the popularity of fish species and actual consumption is due to the fact that many consumers are unfamiliar with Alaska pollock and believe they are eating saithe. Furthermore, Alaska pollock is used as an affordable alternative in the production of frozen fish fingers and oven-baked fish, and this in

turn explains why the consumption of this species is so high in Germany.

While the consumption of salmon rose by 5% in 2013, the consumption of Alaska pollock fell by 16%. Herring consumption was down by a significant 20% in 2013 compared to the previous year. Today, Germans eat 2 kg of herring per capita per year on average, and the trend is falling.¹⁰

Some 42% of Germans claim to eat herring at home at least once a month. For a long time, this species was considered to be a staple product for every day of the week and for the home.

WHERE DO PEOPLE EAT HERRING?	
At home during the week	48%
At home at the weekend	39%
Away from home	24%

Source: TNS Gallup/NSC Norway, 2014

A brief inspection of the detailed results for each age group explains why herring consumption is in decline. The age group of people aged 50+ accounts for two-thirds of consumption. In the target group of people aged 20 to 29, only 3% prefer to eat herring. Overall, this leads to lower per capita consumption of herring.

1.2 WHERE AND HOW: FISH CONSUMPTION IN AND OUT OF THE HOME

Almost two-thirds of fish (65%) is eaten in German households, while about one-third (35%) is eaten away from home.

Fish tastes good, it is healthy, and it is also quick and easy to prepare. On this basis, it might be fair to assume that people frequently cook fish at home. Is this assumption correct? If so, are there differences when it comes to what time of day people eat fish? And are there differences between meals during the week and at weekends?

FISH CONSUMPTION AT HOME

Fish consumption in Germany during 2013 was 13.4 kg (WFE), which equates to actual fish consumption of around 7 kg per capita per year in terms of product weight.

Assuming that people eat at home once a day and that a fish meal represents 150 grams per person, the overall composition of a German dinner plate is as follows:

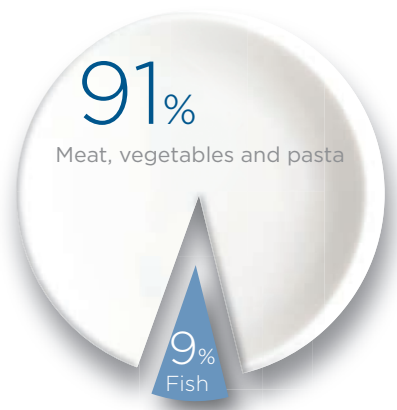


Figure 4: NSC, 2014

Fish is served at the dinner table on around only 30 days a year, although the recommendation is at least two or three times a week.

THE MOST POPULAR TYPES OF FISH IN GERMANY

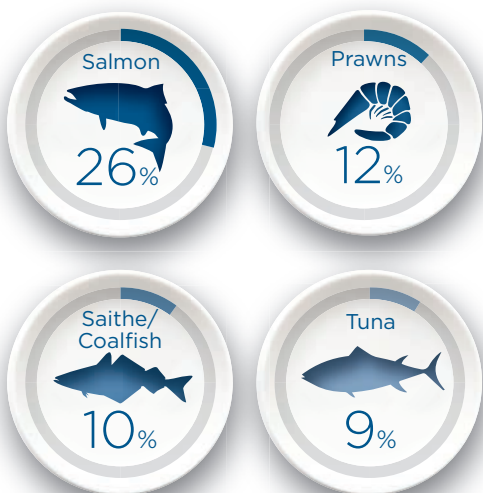


Figure 3: TNS Gallup/NSC, 2014

⁹Federal Office for Agriculture and Food (BLE), 2013, data processed by the German fish information centre (FIZ).

FISH CONSUMPTION AT HOME DURING THE WEEK

When fish or seafood is prepared cooked during the week, it is usually for lunch or dinner.

Snacks are growing as a category: Whereas only 7% of people ate fish as a snack between meals in 2012, this figure has more than doubled since then to 16%.

This result is consistent with a more general trend in eating habits: 50% of German households state that they tend to graze throughout the day rather than sit down to a main meal (snacking).¹⁰

Turning to fish consumption at home by gender, it is apparent that women eat fish for main meals a little more frequently than men. We will see later that health is a more important consideration for women than for men when it comes to fish consumption. This is one possible explanation for such behaviour.

SALMON AND SAITHE ARE FAVOURITES AT HOME DURING THE WEEK

Almost one in three Germans prefer to eat salmon. In third to fifth place are prawns, tuna and herring.

By age group, those aged 20 to 29 like salmon, prawns, saithe and tuna most, while those aged 50 and over prefer mackerel and herring after salmon. Only when it comes to the consumption of saithe is there no appreciable difference between the age groups. We believe that the main reason for this is the many different frozen products containing saithe.

At which meals at home during the week do people in Germany normally eat fish or seafood?

Dinner	47%
Lunch	49%
Supper	21%
Snack	16%
Breakfast	7%

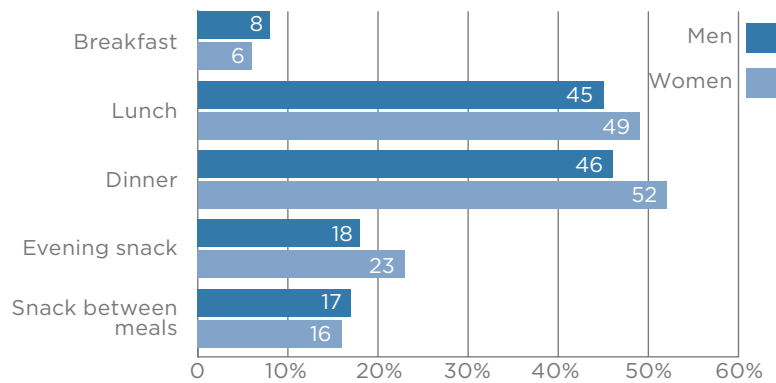
Source: TNS Gallup/NSC, 2014

Change in the number of meals in German households since 2005

Breakfast:	-370 million
Lunch:	-1,090 million
Dinner:	+80 million

Source: GfK for Fischwirtschaftsgipfel 2013

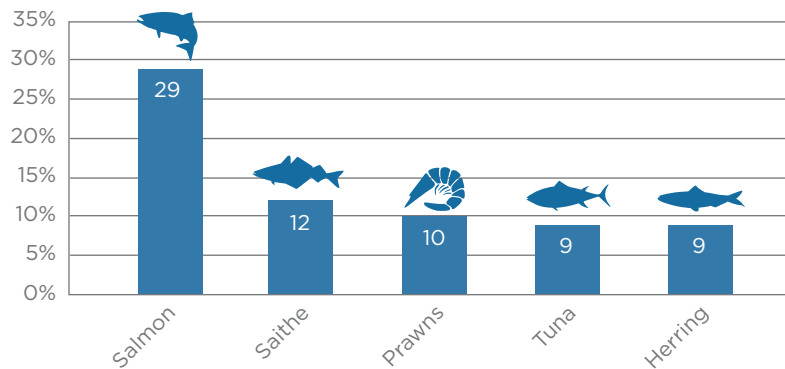
SEAFOOD CONSUMPTION DURING THE WEEK BY GENDER



Question: At which meals do you usually eat fish and/or seafood?

Figure 5: TNS Gallup/NSC, 2014

PREFERRED FISH SPECIES FOR MEALS AT HOME DURING THE WEEK



Question: If you are planning a weekday meal (Monday to Friday) at home with fish/seafood, which types of fish or seafood do you prefer?

Figure 6: TNS Gallup/NSC, 2014

¹⁰GfK study results, prepared for Fischwirtschaftsgipfel 2013, presented by Helmut Hübsch, 2013.

FISH CONSUMPTION AT HOME AT THE WEEKEND

At the weekend, people eat a lot more fish for lunch and dinner compared to during the week. A significant 59% say they eat fish for dinner, if at all, and 56% for lunch. Fish consumption at home at the weekend is a few percentage points higher than during the week.

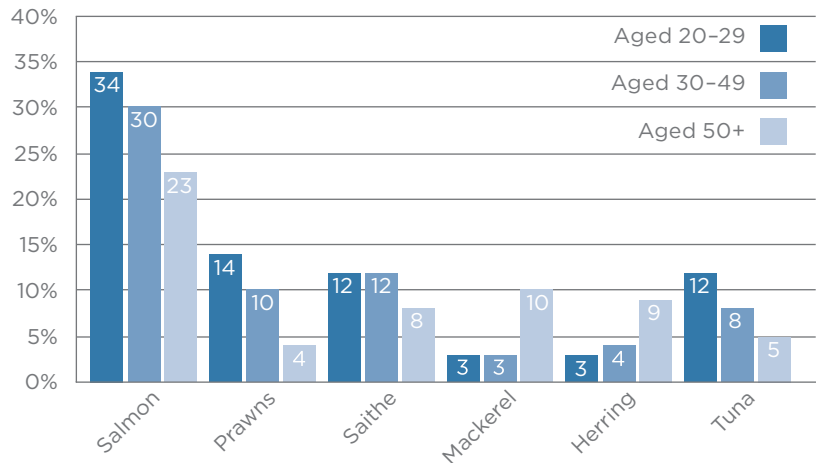
Only for breakfast can we see a large difference between fish consumption at the weekend and during the week. At weekends, three times as much fish is eaten at breakfast (22%) compared to during the week (8%).¹¹

Most notably smoked salmon is served at the breakfast table in German households (43%). Regardless of age, gender or income, smoked salmon is the fish of choice. The next most popular dishes, by quite a margin, are prawn cocktail (7%) followed by smoked trout (5%).

More women (47%) than men (38%) prefer smoked salmon for breakfast.

Almost half of those aged 20 to 29 (45%) prefer smoked salmon at breakfast. In contrast, only 1% in this age group enjoy herring salad. Only in group of people aged 50 and over do 6% name herring salad as a preferred dish.

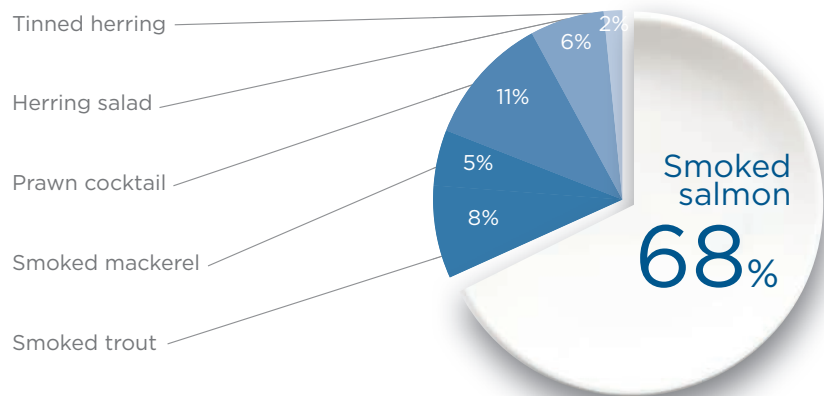
PREFERRED FISH SPECIES FOR MEALS AT HOME DURING THE WEEK BY AGE



Question: What types of fish/seafood do you usually prefer for a weekday meal?

Figure 7: TNS Gallup/NSC, 2014

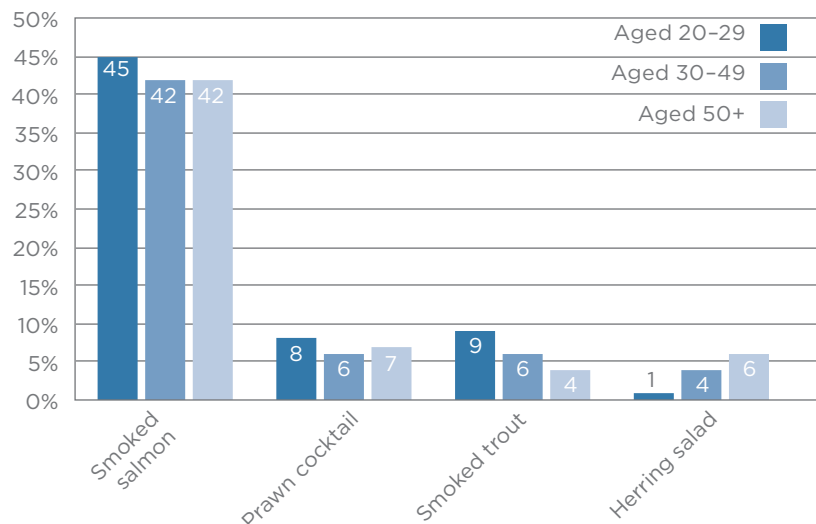
PREFERRED FISH SPECIES FOR BREAKFAST AT THE WEEKEND



Question: If you eat fish for breakfast at the weekend, what is your favourite fish dish?

Figure 8: Ipsos/NSC, 2014

PREFERRED FISH DISH FOR BREAKFAST AT THE WEEKEND BY AGE



Question: If you eat fish for breakfast at the weekend, what is your favourite fish dish?

Figure 9: Ipsos/NSC, 2014

¹¹TNS Gallup/NSC, Seafood Consumer Insight (SCI), 2014, Country: Germany, sample size: 1,011 respondents.

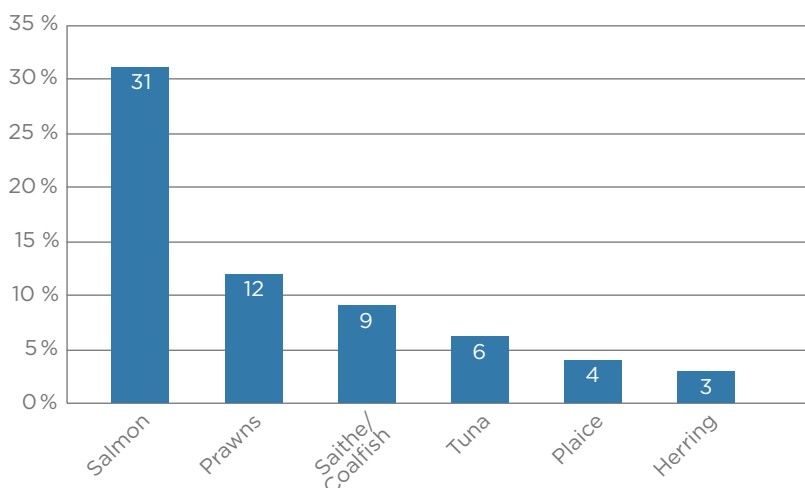
SALMON IS NUMBER ONE - IT ALSO PREVAILS IN THE CATEGORY OF MAIN MEALS EATEN AT HOME AT THE WEEKEND

One in three Germans prefer salmon when fish is cooked at home at the weekend. As for weekdays, the next most popular choices are prawns, saithe and tuna. Only 3% prefer herring at weekends.

For consumption at home, we compared preferences during the week and the weekend. On the whole, there is not much difference between eating habits at the weekend and during the week. People prefer salmon (31%) slightly more than during the week (29%). The same is true of prawns. For saithe and herring, the opposite is true.

But regardless of when and where - whether at home or away from home - who eats the most salmon in Germany? In fact, we were quite surprised: it is people aged 20 to 29 who eat salmon most frequently, be they male or female - and there is hardly any difference between the genders.

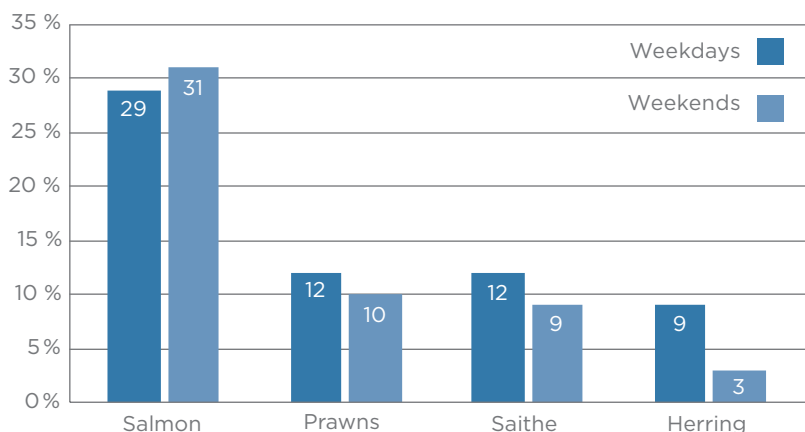
PREFERRED FISH SPECIES AT HOME AT THE WEEKEND



Question: If you are planning a weekend meal at home with fish/seafood, which types of fish or seafood do you prefer?

Figure 10: TNS Gallup/NSC, 2014

PREFERRED FISH SPECIES AT HOME WEEKDAYS VS WEEKENDS



Question: If you are planning a weekday or weekend meal at home with fish/seafood, which types of fish or seafood do you prefer? (consolidated question)

Figure 11: TNS Gallup/NSC, 2014

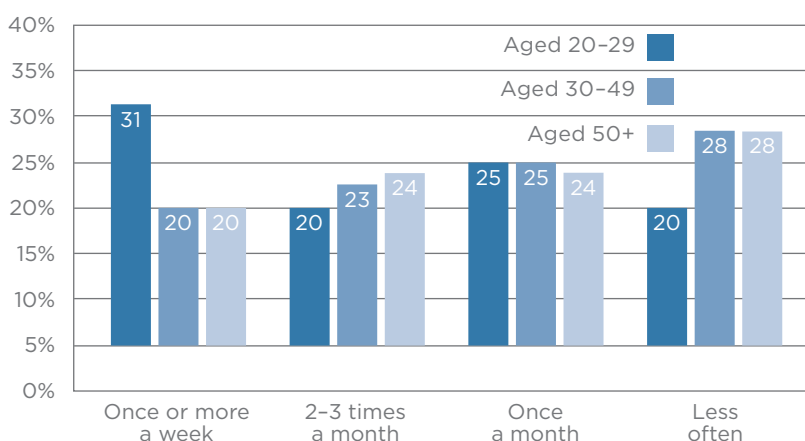
On average, Germans eat 2.1 kg of salmon (WFE) per capita each year. This includes 1.7 kg of Atlantic salmon and 0.4 kg of Pacific salmon.

Compared to other EU countries, this places Germany among the top third of consumers.

Norway, for instance, has average per capita consumption of 9.2 kg of salmon (WFE) a year, while in Sweden it is 5.8 kg (WFE).

Source: Euromonitor International/ Statistics Norway, processed by NSC, 2014

FREQUENCY OF SALMON CONSUMPTION - ALL MEALS



Question: How often do you eat salmon? Please think about all meals (breakfast, lunch and dinner) both at home and away from home.

Figure 12: TNS Gallup/NSC, 2014

1.3 FISH CONSUMPTION OUTSIDE OF THE HOME

Relatively speaking, German people eat out quite often at restaurants, bistros, cafés and canteens. More than a third (37%) say they dine at a restaurant once or twice a month. As many as 12% eat out at such places up to three times a week. Half of those surveyed (50%) claim to spend between 16 and 25 euros on average when they visit a restaurant or a similar establishment.¹²

And what can be said about the fish served to those who eat out in Germany?

Nine out of ten respondents say that they eat fish or seafood away from home at least once a year. Every other person (56%) orders something from the sea at least four times a year. Whereas one in three Germans (36%) consume fish away from home at least once a month, only 12% say that they never eat fish when dining out.

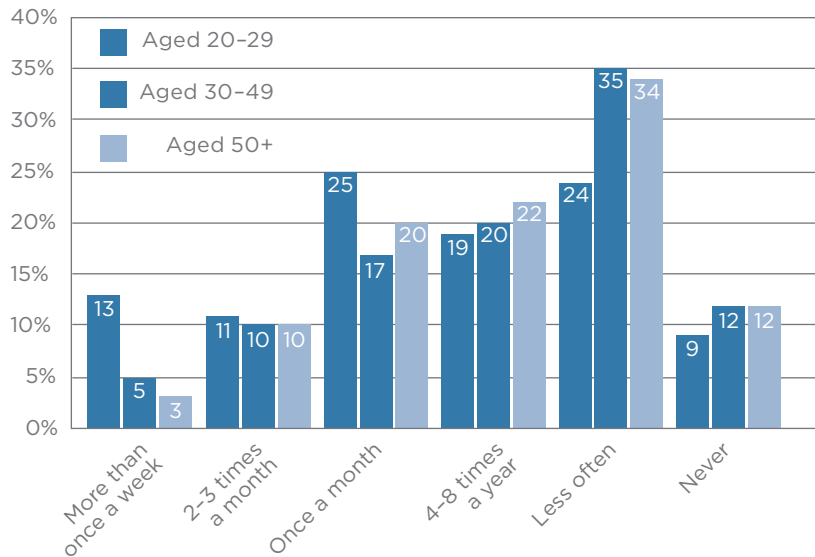
Fish consumption away from home in Germany has been broadly constant for the past three years. In 2011, 84% ate fish and seafood away from home at least once a year, and by 2014 this number had reached 89%.

It is people aged 20 to 29 who most often choose fish or seafood when dining out. They also are the people who most frequently go out to eat. People aged 30 to 49, many of whom share their home with children, eat out less often.

Just like for meals at home, salmon is the preferred type of fish for Germans eating out. Two out of ten prefer salmon when ordering fish at a restaurant.

Other popular choices are prawns, saithe, tuna, plaice, octopus, ocean perch and sole. The list is much longer than for meals prepared at home.

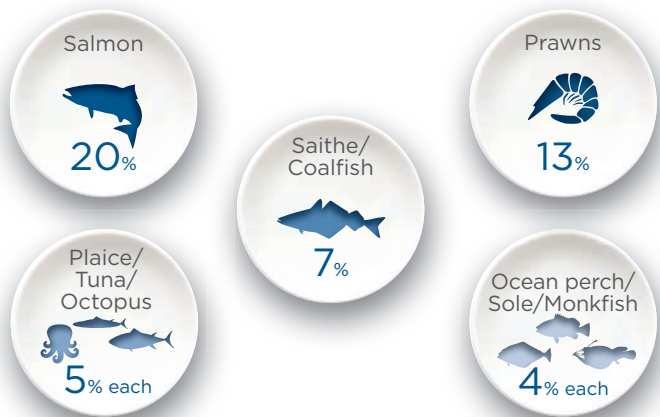
FREQUENCY OF FISH CONSUMPTION OUTSIDE OF THE HOME



Question: How often do you eat fish or seafood in a restaurant, café or similar establishment away from home?

Figure 13: TNS Gallup/NSC, 2014

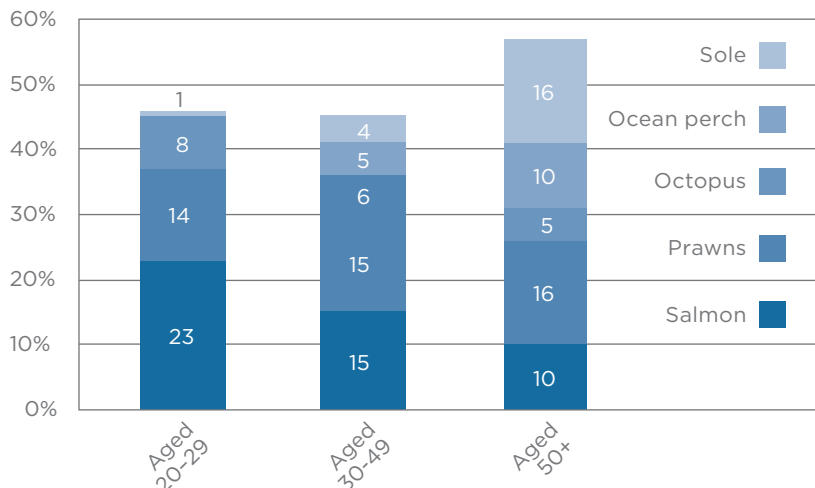
PREFERRED TYPES OF FISH IN RESTAURANTS



Question: Which type of fish or seafood would you order in a restaurant as first choice?

Figure 14: TNS Gallup/NSC, 2014

PREFERRED FISH SPECIES AWAY FROM HOME BY AGE



Question: Disregarding the season, which type of fish or seafood would you choose in a restaurant, café or similar establishment?

Figure 15: TNS Gallup/NSC, 2014

¹²Länderprofil, Norwegian Seafood Council, 2013

This indicates that many German diners like to order types of fish that they cannot find in their local supermarket or that they do not know how to prepare at home.

Looking at the list of preferred fish and seafood among Germans when eating away from home, salmon is always in first place, whatever the region. Similarly, prawns are consistently in second place. Only saithe and ocean perch switch places for out-of-home consumption in the new federal states. Specifically, ocean perch is the third most popular fish among people who dine out in former East Germany.

A breakdown of the preferred fish species of Germans when eating out by age group reveals that people aged 20 to 29 prefer salmon, whereas those aged 50 and over enjoy prawns and sole most of all.



1.4 SUSHI CONSUMPTION

A growing number of Germans are choosing tasty and healthy convenience food. The first sushi chain opened its doors back in 1990, and by 2014 there were over 800 shops of this kind in the country, many of which also offer a takeaway service and home delivery.

Today, a total of 18% of the German population eat sushi once or more a month. Of these people, around 27% are aged 20 to 29.

When people eat sushi in Germany, they normally do so away from home – by quite a wide margin. Some 64% of Germans eat sushi in a restaurant. Among those aged 20 to 29, the figure is as high as 79%.

Only 38% eat sushi at home, and 16% on the go. Most of this sushi comes from a takeaway (29%) or supermarket (18%).

Who buys sushi at the supermarket?

People aged 20-29:	7%
People aged 30-39:	19%
People aged 50 and over:	23%

The introduction of sushi boxes at low-price supermarkets in Germany led to a significant drop in the price of sushi in 2013 (11.8%) as well as product growth of 6%. Nevertheless, market penetration of sushi boxes purchased from a supermarket is only 1.6%.* This indicates that sushi still has high growth potential in the food retail sector.¹³

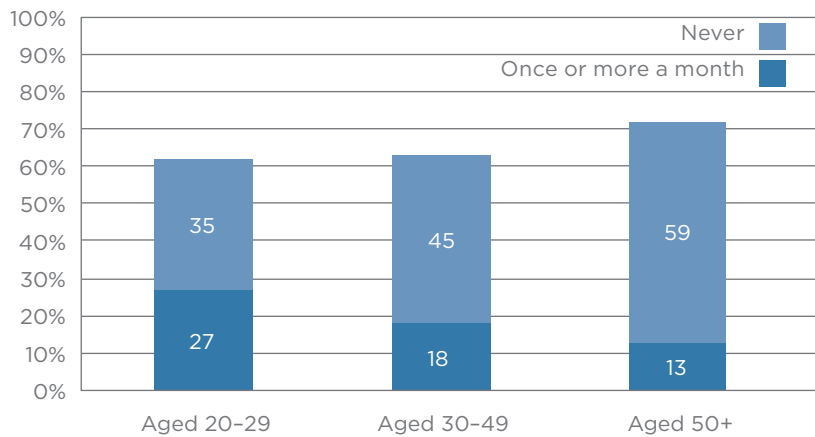
Only 6% of Germans prepare sushi themselves. Here no differences can be seen in terms of gender, age or income.

PREFERRED FISH SPECIES IN SUSHI

Salmon is not only the most popular type of fish among Germans at home and in restaurants; it also tops the table when it comes to sushi.

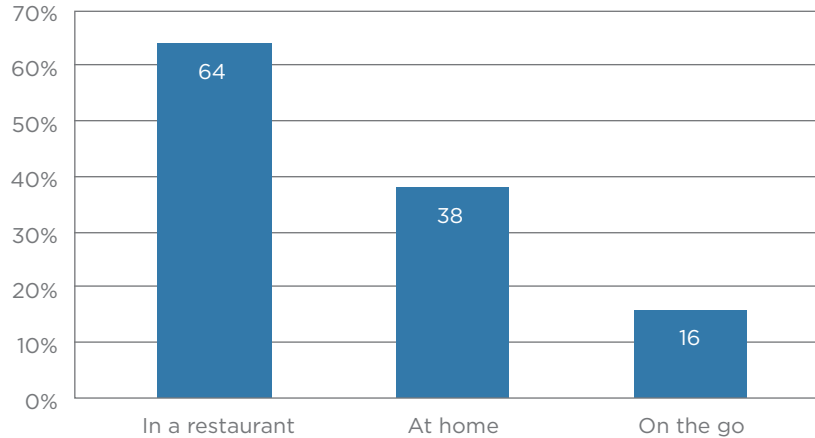
Almost half of those surveyed say that salmon is their preferred type of fish in sushi.

FREQUENCY OF SUSHI CONSUMPTION BY AGE



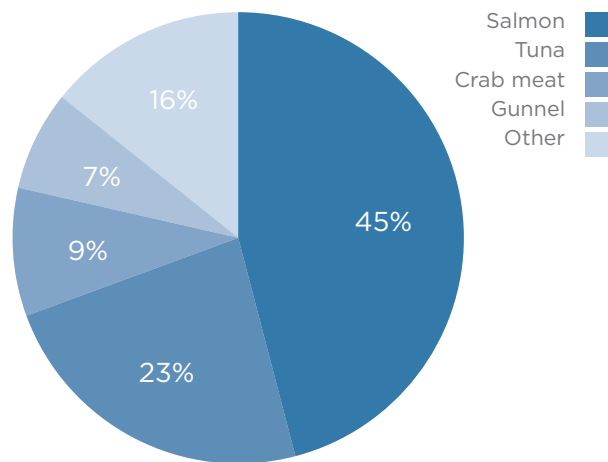
Question: How often do you eat sushi?
Figure 16: Ipsos/NSC, 2014

PREFERRED PLACES TO EAT SUSHI



Question: Where do you eat sushi?
Figure 17: Ipsos/NSC, 2014

PREFERRED FISH SPECIES IN SUSHI



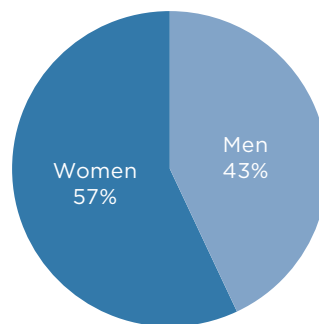
Question: Which type of fish do you prefer in sushi?
Figure 18: Ipsos/NSC, 2014

*Food retail.
**Number of shoppers who buy sushi boxes at least once a year.
¹³GfK Consumer Scan, GfK Germany, prepared for Fischwirtschaftsgipfel 2013, sample size: 13,000 households.

An examination of the results by gender reveals that women have a stronger preference for salmon sushi than men. One possible explanation for this is that women are more aware about what they eat, or that they perceive a relationship between healthy eating and salmon. We will see later that women think more about their health than men when choosing their meals.

„ Salmon is the winner.“

SALMON - FAVOURITE FISH SPECIES IN SUSHI BY GENDER



Question: Which type of fish do you prefer in sushi?

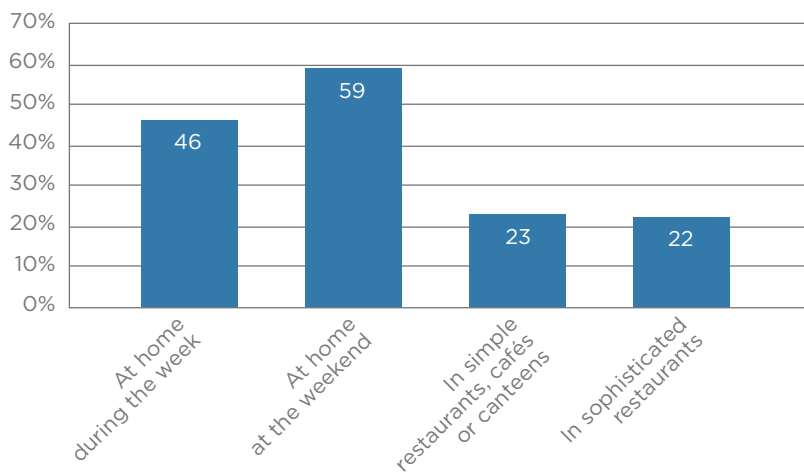
Figure 19: Ipsos/NSC, 2014

In total, 2,000 tonnes of salmon were used in the production of sushi and sashimi in Germany during 2013. While the overall consumption of salmon grew by 1.4% in the same year, consumption of salmon in sushi and sashimi was up by 8.3%.¹⁴ Nevertheless, not much salmon sushi is eaten in Germany compared to some other countries.



As noted above, salmon is the most popular fish species in all categories. However, we were also curious to find out where people eat most salmon – at home or in the food service industry.^{15*} No less than 68.8% of the volume is sold through the food retail sector. This product category grew by 2.5% in 2013, whereas salmon consumption away from home remained largely unchanged. It is therefore clear that salmon consumption at home is much higher than away from home.

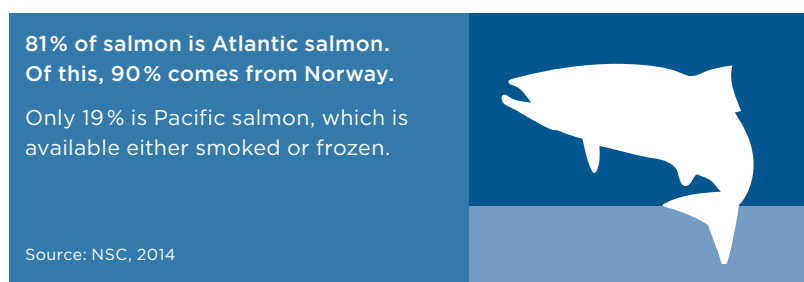
FAVOURITE PLACE TO EAT SALMON



Question: Where do you usually eat salmon? Please think about all meals.

Figure 20: TNS Gallup/NSC, 2014

Given constant levels of fish consumption and a parallel increase in salmon consumption, it is fair to say that salmon is the winner – it is being served more and more frequently at the dinner table in Germany.



* The HORECA food service industry, consisting of restaurants (60%), hotels (25%) and cafés (15%).

¹⁴ 'Analysis of salmon used to make sushi and sashimi', Euromonitor International for NSC, 2014.

¹⁵ ibid.

1.5 MAIN REASONS FOR FISH CONSUMPTION

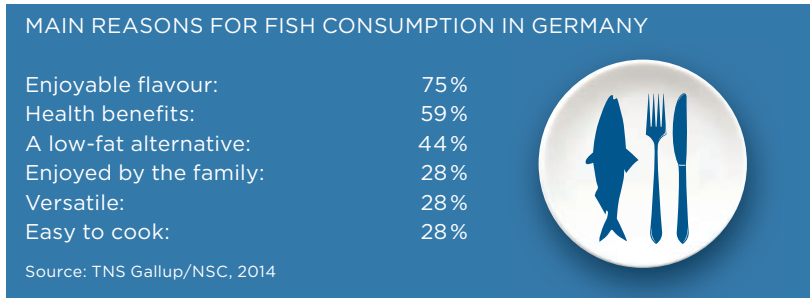
There are many good reasons to choose meals containing ingredients from the sea: fish and seafood is quick and easy to prepare, it tastes good, there are health benefits, and a wide variety of products are available today.

FLAVOUR AND HEALTH BENEFITS ARE THE MOST IMPORTANT REASONS

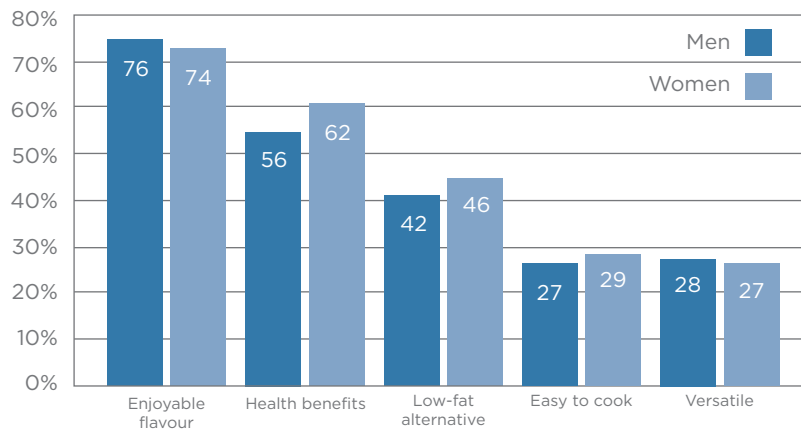
When German people choose to eat fish, there are two main reasons for their decision: flavour and health. More than seven out of ten respondents cite flavour as the most important reason.

For both men and women, flavour is the top reason for eating fish. Health benefits and a lower fat content are more important among women than men. For women, this applies to other food as much as it does to fish when they make decisions. Two out of three women say they 'always' or 'mostly' eat healthy food. For men, the figure is only 50%, while for the remaining half what matters most is a delicious flavour.¹⁶

We have dubbed the 30-49 age group as 'fish haters' because they buy fish less often than other groups. Looking at the reasons for fish consumption by age group, we see once again that flavour is the most important consideration. At the same time, it is apparent that other qualities are ranked low. This indicates a somewhat indifferent attitude towards fish compared to other age groups.

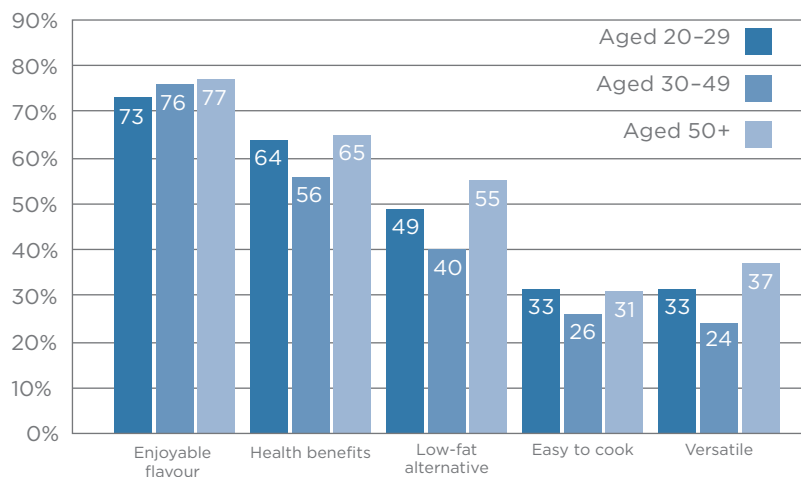


MAIN REASONS FOR FISH CONSUMPTION IN GERMANY BY GENDER



Question: What are the key reasons why you choose to eat fish or seafood?
Figure 21: TNS Gallup/NSC, 2014

MAIN REASONS FOR FISH CONSUMPTION IN GERMANY BY AGE



Question: What are the key reasons why you choose to eat fish or seafood?
Figure 22: TNS Gallup/NSC, 2014

¹⁶'Iss was, Deutschland?', Techniker Krankenkasse, 2013.

1.6 REASONS FOR LOW FISH CONSUMPTION

In order to identify factors that explain low fish consumption, we can begin by looking at general attitudes to food in Germany. In the age groups of people aged 20 to 29 and 30 to 49, many of whom share their home with children, flavour is the main consideration when it comes to food. The most important aspect: 'Food should be delicious.' Some 75% of Germans choose fish because of how it tastes. In that sense, fish provides an excellent fit for eating habits in Germany.

Those aged 20 to 29 buy convenience foods such as frozen pizza and similar products more often, but much less frequently ready meals containing fish.¹⁷ Their affinity for frozen ready meals is not matched by their fondness for fish.

The belief that children do not like fish is often cited as the reason why such products are rarely found on the weekly menu of German families. However, only 20% of respondents with children at home said that their youngsters did not like fish when providing reasons for low fish consumption.

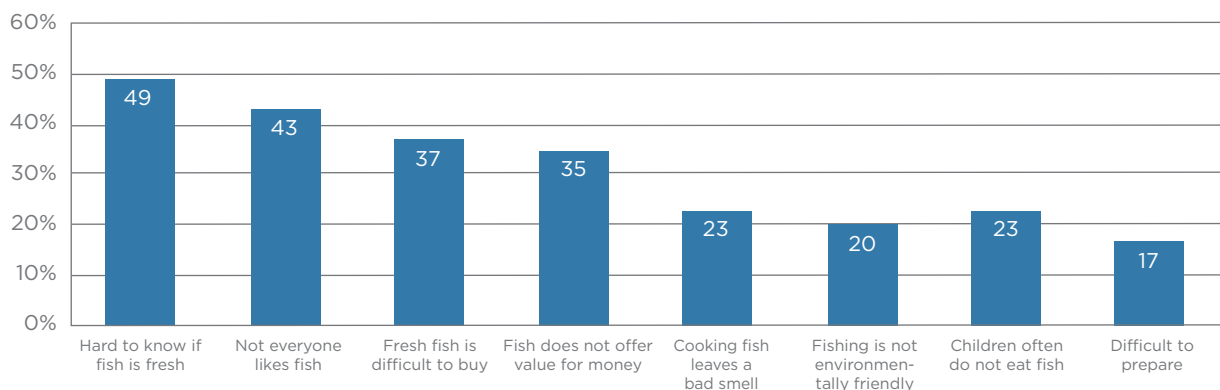
So what are the five main reasons why German consumers do not choose fish? The difficulty of knowing whether fish is really fresh and the argument that not everyone likes fish are the top two reasons. Next, people say that fish is hard to obtain. The common argument that fish does not provide good value for money only makes it into fourth place. It is surprising that only 17% of those surveyed say that fish is difficult to prepare.

We suspect that many respondents were thinking of frozen ready meal products, which are generally easy to cook. Neither the argument that there are too few frozen ready meals containing fish (12%) nor that German people traditionally eat a small amount of fish (11%) are convincing reasons for low fish consumption.

Looking at the main reasons for low fish consumption by age, one in two people aged 20 to 29 (54%) claim that not everyone likes fish, while 26% say that it is difficult to prepare fish.

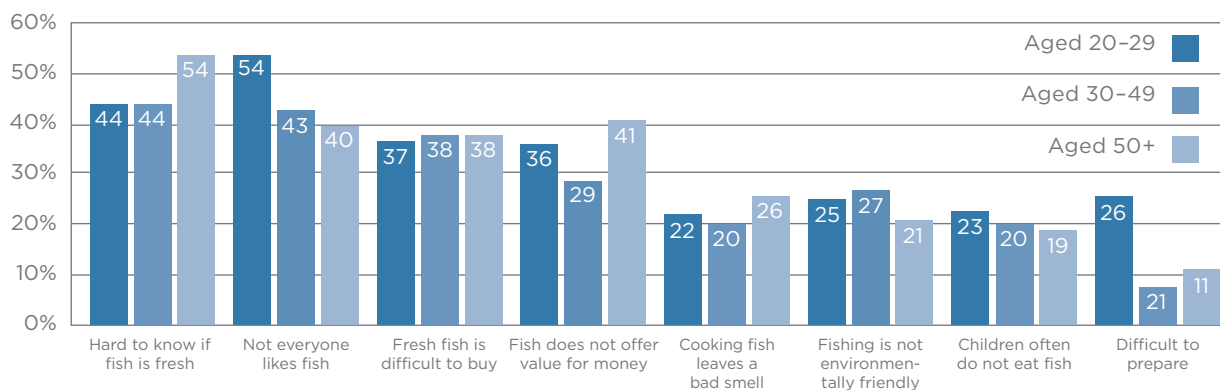
Those aged 50 and over clearly tend to think of chilled fish: significantly more respondents in this group refer to the difficulty of identifying freshness when citing the main reason for low consumption.

MAIN REASONS FOR LOW FISH CONSUMPTION IN GERMANY



Question: There are many possible reasons why consumers do not eat much fish (in any form). Please select up to five reasons from the following list that you believe could prevent fish consumption from being higher.
Figure 23: Ipsos/NSC, 2014

MAIN REASONS FOR LOW FISH CONSUMPTION IN GERMANY BY AGE



Question: There are many possible reasons why consumers do not eat much fish (in any form). Please select up to five reasons from the following list that you believe could prevent fish consumption from being higher.
Figure 24: Ipsos/NSC, 2014

¹⁷Iss was, Deutschland?, Techniker Krankenkasse, 2013, sample size: 1,000 respondents.





2. FISH AND SEAFOOD: SHOPPING, PREPARATION AND EATING HABITS

There are almost countless ways to cook fish. Fried, pickled, poached, steamed, grilled or raw – fish is highly versatile. What goes on in German kitchens? How do people prefer to cook fish? What are the most popular dishes? How do people in Germany rate their cooking skills?

These and many other questions are answered in this section.

2.1 FRESH OR FROZEN FISH?

When people in Germany buy seafood products, they tend to prefer frozen options to fresh fish. Three times as many purchases are made from the freezer section than the fishmonger.

In total, 13% of fish consumption at home includes fresh fish, while 35% is accounted for by frozen products.*

These figures have not changed significantly for many years.¹⁸

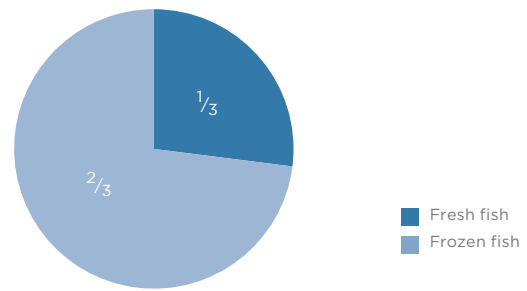
Seven out of ten people buy frozen fish at least once a month. What is striking here is that people in all groups buy frozen fish just as frequently, be they young and old, male or female, or with a lower or higher income. Frozen fish therefore appears to be a product for everyone.

Making the same observation for fresh fish, we can see a much wider range of shopping habits. People tend to buy fresh fish more often the older they are. Unlike frozen products, the purchase of fresh fish increases in line with income. If price were the main barrier to fresh fish consumption, the differences by income would be more pronounced.

People in Germany eat fish in a significantly different way. In most European countries, fresh fish is bought most often. The reason for this is closely related to the domestic food retail sector. Before 2013, fresh fish could only be found in 5% of food retail stores.¹⁹ Things have since changed with fresh fish becoming available even in low-cost supermarkets.

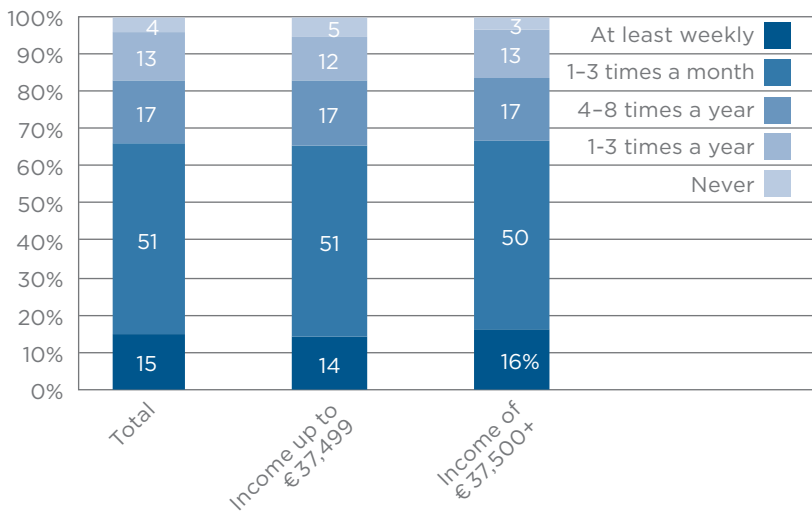
Eight out of ten respondents (82%) say they have already bought pre-packaged fresh fish from the refrigerator section of a low-cost retailer. Such new levels of availability lead to greater purchase volumes and thus increased consumption. More

THE RATIO BETWEEN FRESH FISH AND FROZEN FISH



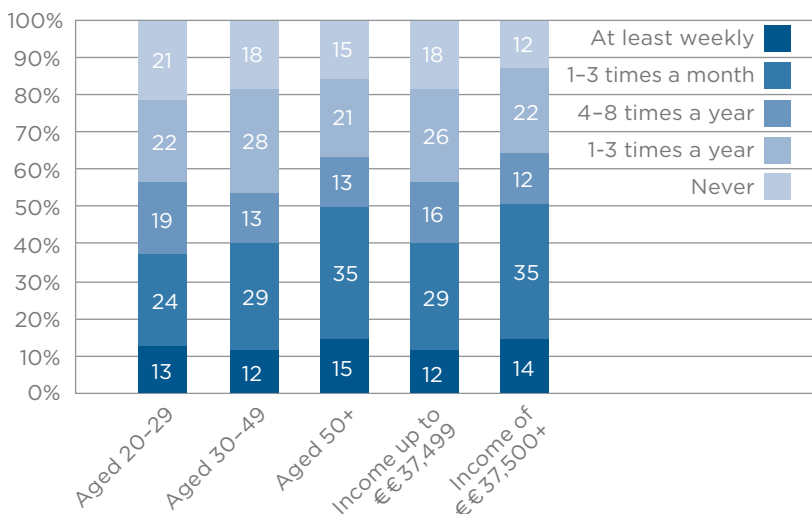
Question: Please indicate how often you buy each of the products listed.
Figure 25: Ipsos/NSC, 2014

FREQUENCY OF FROZEN FISH CONSUMPTION BY INCOME



Question: Please indicate how often you buy each of the products listed below.
Figure 26: Ipsos/NSC, 2014

FREQUENCY OF FROZEN FISH CONSUMPTION BY AGE AND INCOME



Question: Please indicate how often you buy each of the products listed below.
Figure 27: Ipsos/NSC, 2014

*Die restlichen Konsumanteile zu Hause teilen sich Marinaden, Konserven, Räucherfisch, Krebstiere und Sonstige.

¹⁸GfK Panel Services, GfK Deutschland, veröffentlicht von FIZ Deutschland, Januar 2014, aufbereitet von NSC Deutschland, 2014.

¹⁹„Angaben zu LEH-Ketten“, Planet Retail - Powering Retail Decisions, 2013, URL: <http://www1.planetretail.net/>, Stand: November 2014.

than half (56%) of those who buy fresh fish from a low-cost supermarket say they now eat a little more or considerably more fresh fish.

Now let us turn to the reasons offered by consumers who say they do not buy fresh fish from low-cost supermarkets. The main reason is usually that they are used to buying frozen products, followed by quality concerns and a lack of knowledge that fresh fish is even available from such retailers.

The consumption of fresh salmon at home has risen by 50% over the

last twelve months thanks to its introduction at low-price supermarkets. Overall, more people now buy salmon. The number of shoppers who buy salmon at least once a month has already doubled compared to 2010: market penetration is now 2% following this definition. At the same time, people are buying salmon more often than before.

As a result of this development, we anticipate increased salmon consumption of up to 3 kg per capita per year.

Looking at household consumption of salmon, probably the most important product in low-cost supermarkets, a very different picture emerges to that for fish in general.

SALMON CONSUMPTION AT HOME

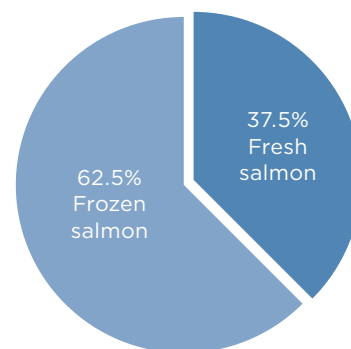
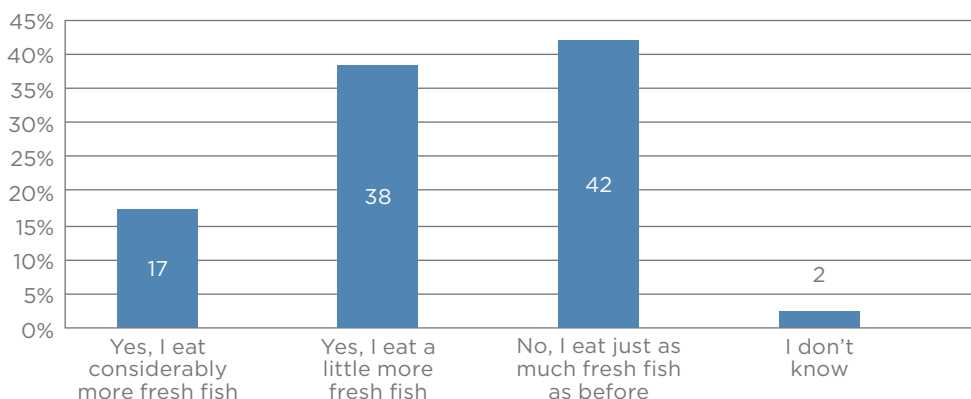


Figure 28: Euromonitor/NSC, 2014

„ Eight out of ten people have already bought fresh fish from a low-cost supermarket. “

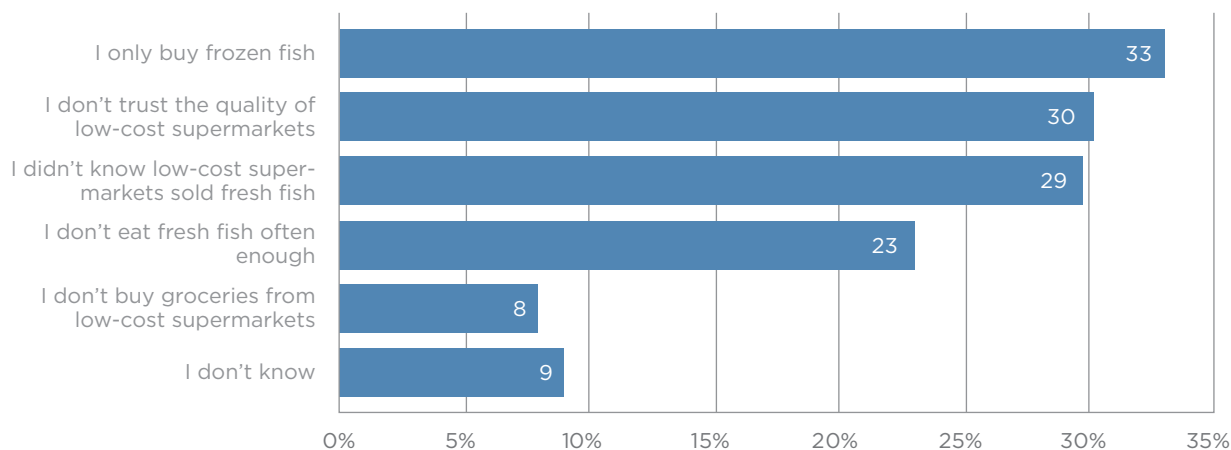
INCREASED FRESH FISH CONSUMPTION DUE TO LOW-COST FOOD RETAILERS



Question: On the whole, do you now buy more fresh fish such as salmon than you used to because it is also available from low-cost supermarkets?

Figure 29: Mediaplus/Toluna/NSC, 2014

MOST FREQUENTLY GIVEN REASONS FOR NOT BUYING FRESH FISH FROM A LOW-COST FOOD RETAILER



Question: You stated that you have never bought fresh fish from a low-cost supermarket. Why haven't you ever purchased pre-packaged fresh fish from the refrigerator aisles?

Figure 30: Mediaplus/Toluna/NSC, 2014

It would appear that many more people would like to eat fresh fish. After all, two of the main reasons offered by those who consume little fresh fish are that it is hard to obtain and does not provide good value for money. Both of these barriers are eliminated by the availability of fresh fish in modified atmosphere packaging (MAP).

Real differences can be seen between income groups. Availability is the main barrier for those with an income over €37,499 (49%), while the desire for better value for money comes second by a substantial margin (39%). Among those with a low income, the reasons are reversed.

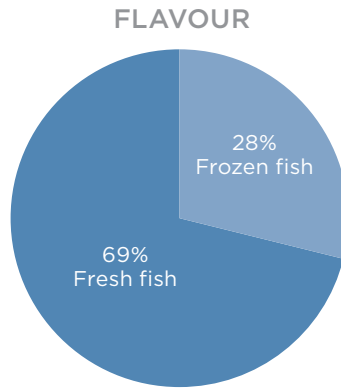
Some 32% say they would eat more fresh fish if it was easier to identify whether such products were environmentally friendly. However, when asked to provide reasons in favour of buying fresh fish, only 9% of respondents state that it has to be easy to tell whether this fish is sustainable. It would seem that either sustainability is used as a reason or justification for low fish consumption or consumers are not familiar with the label. More on this topic later.

WHAT WOULD MAKE MORE PEOPLE EAT FRESH FISH?

- Greater availability of fresh fish with more fish counters in supermarkets: 43%
- Better value for money: 42%
- Easier ways of seeing whether fresh fish has been caught or produced in a sustainable manner: 32%
- A wider range of products that are almost ready to eat: 26%

Source: Ipsos/NSC, 2014

This is consistent with the observations of qualitative studies by the rheingold institute in Cologne, Germany. People who buy fresh fish have a stronger interest in food and recipes, and they place more importance on flavour. People who buy frozen products have a more pragmatic approach to food.



Question: There are many good reasons to buy fresh fish. Which of the statements listed do you believe to be good reasons?

Figure 31: Ipsos/NSC, 2014

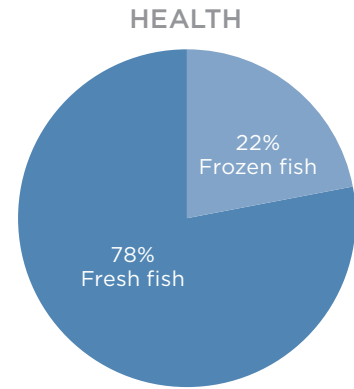
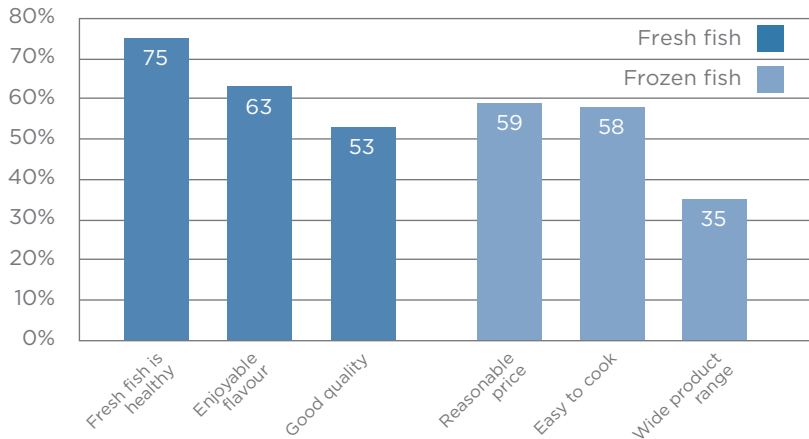


Figure 32: Ipsos/NSC, 2014

Looking at the reasons for buying fresh fish compared to frozen fish, it is apparent that people choose fresh fish for its flavour and health benefits, while price and convenience encourage people to head to the freezer aisles.

Only 28% agree that an enjoyable flavour is a good reason to choose frozen products. Whereas health aspects are the most important argument in favour of fresh fish, only 20% apply the same logic to frozen fish.

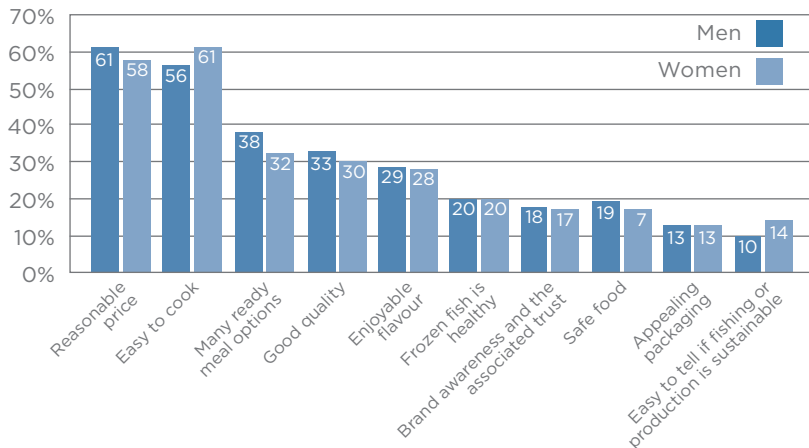
MOST FREQUENTLY GIVEN REASONS FOR BUYING FRESH AND FROZEN FISH



Question: There are many good reasons to buy fresh fish. Which of the statements listed do you believe to be good reasons?

Figure 33: Ipsos/NSC, 2014

REASONS FOR BUYING FROZEN FISH BY GENDER



Question: Please indicate how you most often prepare each of the products listed in the first column of the table.

Figure 34: Ipsos/NSC, 2014

There are no major differences between men and women when it comes to frozen fish products. The variety of frozen food is more important to men than to women. For both genders, brand awareness and the associated trust play a remarkably small role for frozen products, with no more than 18% of respondents acknowledging these factors.

Looking at the results by age group, it is clear that people aged 20 to 29 choose frozen fish because of the wide variety of ready meal products (42%), while quality is a more important consideration for those aged 30 to 49 or 50+. For the latter group, brand awareness is significantly more important than for the other two age groups. Only 13% of those aged 20 to 29 cite healthy eating as a reason to buy frozen fish. Bearing in mind that this age group frequently consumes frozen fish, the health aspect is not of central importance.

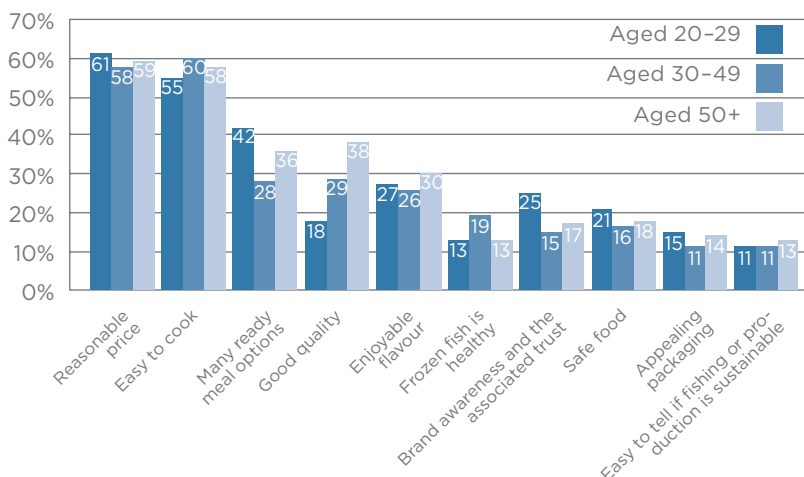
COOKING METHODS ARE DIFFERENT FOR FRESH AND FROZEN FISH

For most people (53%), fresh fish ends up in the frying pan. Only 13% of respondents say they usually bake fish in the oven. Fish is steamed even less frequently. On the other hand, almost the same number of consumers cook frozen fish in the oven (40%) as fry it in a pan (46%).

Especially among those aged 30 to 49, fish is cooked more often in the oven compared to the population as a whole: 17% prefer this method for fresh fish, and 47% for frozen fish – the highest figure for any group. Such people have households with children, where simplicity and convenience are important criteria for the cooking method.

Men and women generally prepare fresh fish and frozen fish in the same way. The only difference is that men grill it more often.

REASONS FOR BUYING FROZEN FISH - BY AGE



Question: Please indicate how you most often prepare each of the products listed in the first column of the table.
Figure 35: Ipsos/NSC, 2014

„ The main reason for choosing fresh fish is its flavour.“

„ Health considerations play no role in the purchase of frozen fish today.“

HOW PEOPLE IN GERMANY COOK FRESH FISH:

In the pan:	53 %
In the oven:	13 %
Steamed:	9 %
On the barbecue:	9 %
In the wok:	8 %

Source: Ipsos/NSC, 2014

HOW PEOPLE IN GERMANY COOK FROZEN FISH:

In the pan:	46 %
In the oven:	40 %
Steamed:	5 %
On the barbecue:	2 %
In the microwave:	1 %

Source: Ipsos/NSC, 2014

2.2 SMOKED FISH AND MARINATED FISH

Some 43% of fish consumption at home in Germany is accounted for by the product group of smoked and marinated fish.²⁰ Whereas the consumption of smoked fish has increased slightly in recent years, the consumption of canned and marinated products continues to fall year after year. Herring is the main species used in canned foods, salads and marinated fish. As a result, the consumption of herring is also decreasing overall. In recent years, household consumption of herring has declined in all age groups.

This type of fish is usually eaten at home. The ratio between consumption at home and in hotels, restaurants and cafés is 80:20. Herring consumption has also fallen steadily in the out-of-home segment over the past few years. In 2013, out-of-home consumption was down by 5%.

As many as 22% of respondents say they eat less herring than they used to. Primarily, we would have expected the younger age group to agree with this statement more than the others. However, we see no difference between the age groups: between 21% and 22% eat less of this fish across the board.

These figures show that it is incorrect to assume that older people eat more herring. If this were the case, we would see an increase from those aged 40 and over. But there is no such evidence. One in three people under the age of 49 eat no herring at all.

People in all age groups agree on the main reason for their lower consumption: today there are similar fish products that taste better. There are two more important reasons in the younger age group: a third (32%) say there are few appropriate occasions to eat herring, and the same proportion claim it is an out-of-date option.

Marinated fish experienced a price increase of 4.5% in 2013. For the younger age group (20–29 years), poor value for money is not a reason for lower consumption.

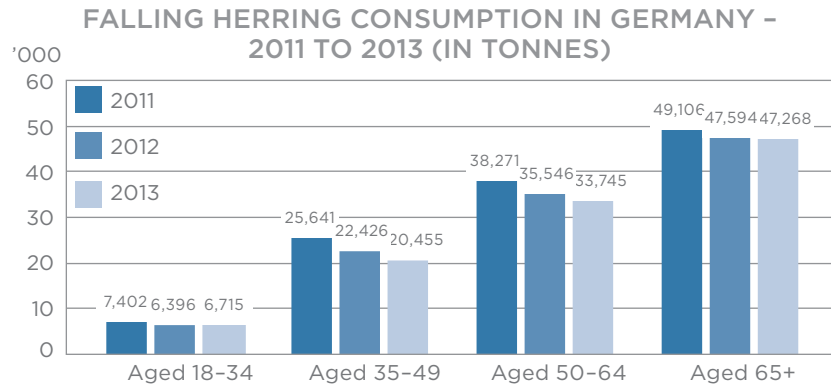
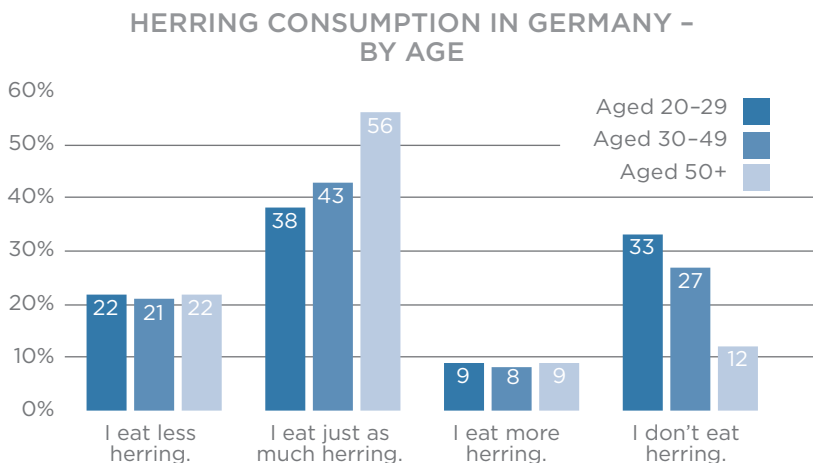
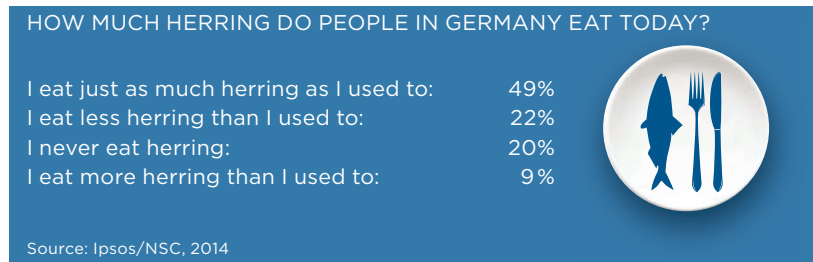
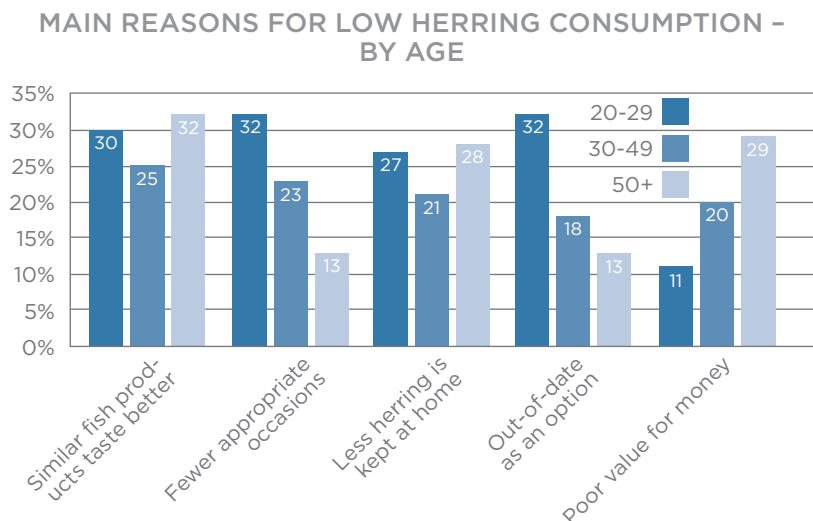


Figure 36: Euromonitor/NSC, 2014



Question: Do you eat less, more, or the same amount of herring as you used to?

Figure 37: Ipsos/NSC, 2014



Question: Why do you eat less herring today?

Figure 38: Ipsos/NSC, 2014

The same cannot be said for those aged 50 and over. Nevertheless, the main reason offered by this group is also that today there are similar fish products that taste better. It follows that price can be ruled out as an important factor for the decline in consumption.

2.3 FISH DISHES

When fish is prepared in German homes, there are two main methods: breaded fish cooked in the pan (62%) and ready meals containing fish cooked in the oven (40%).

Looking at the question as to which fish dish people like most, we can once again see a preference for fish in breadcrumbs. Some 24% of respondents say that breaded fish (baked or fried in a batter crust) is their favourite fish dish. Next on the list is fried saithe. It seems likely that this result concerns fish fingers. What follow are classic recipes like trout meunière and soused herring. On the whole, not much information has been gathered about Germany's favourite fish dishes. It would seem there are no strong opinions on the subject, most likely due to low fish consumption in general.

Those aged 20 to 29 are especially fond of breaded fish (33%), while those aged 50 and over appreciate soused herring a little more than the rest (14%). No major differences can be seen between men and women when it comes to preferred fish dishes.

GERMANY'S FAVOURITE FISH DISHES:

Breaded fish	24 %
Fried saithe	19 %
Trout meunière	11 %
Home-made soused herring	11 %
Fried fish with potatoes	5 %

Source: Ipsos/NSC, 2014

THE GERMANS LOVE A BARBECUE. BUT WHAT ABOUT BARBECUED FISH?

One thing is clear: meat is put on the barbecue more than anything else in Germany. In the high season (May to September), two thirds of Germans barbecue meat at least once a month. As many as one in three people (31%) cook meat on the grill once a week or more.

By way of comparison, only four in ten (38%) barbecue fish more than once a month, and only one out of ten (12%) do so once a week or more. There is great potential for barbecued fish, not least because

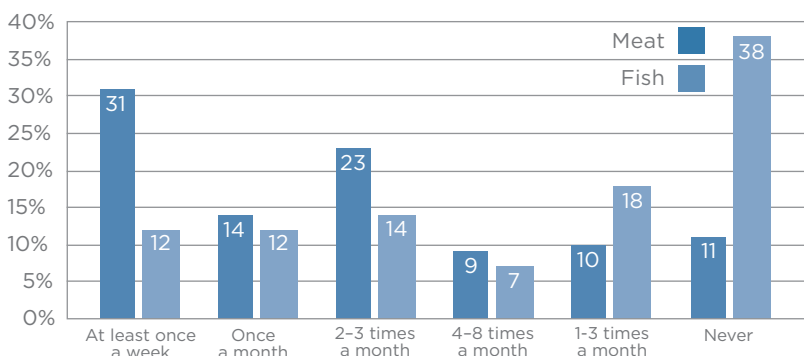
four out of ten people in Germany (38%) never put a fillet of fish on the barbecue.

The younger age group reveals a positive outlook for the future: 16% of those aged 20 to 29 barbecue fish at least once a week.

When fish does make it onto the barbecue, both men and women agree that it should be trout or salmon.

Looking at the results by age group, salmon is the fish of choice for those aged 20 to 29 and 30 to 49. Trout takes first place among those aged 50 and over.

FREQUENCY OF FISH AND MEAT BARBECUES



Question: How often do you have a barbecue with the following ingredients during the warm months of the year (from May to September)?

Figure 39: Ipsos/NSC, 2014

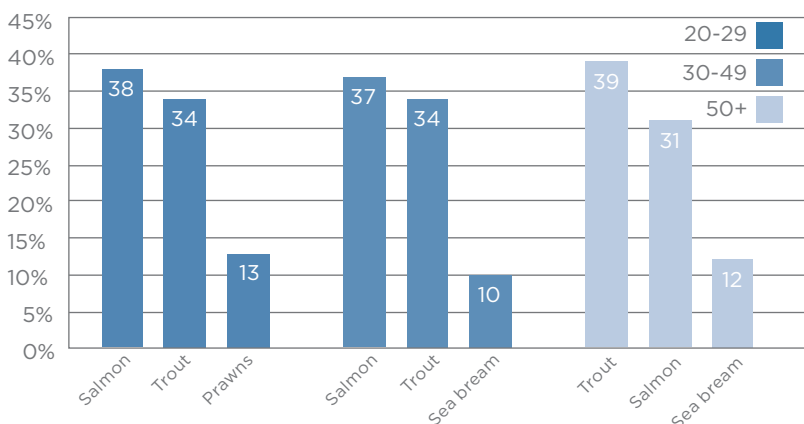
FAVOURITE FISH SPECIES FOR BARBECUES:

Trout:	36 %	Prawns:	8 %
Salmon:	34 %	Tuna:	5 %
Sea bream:	10 %		



Source: Ipsos/NSC, 2014

MOST POPULAR FISH SPECIES FOR BARBECUES - BY AGE



Question: How often do you have a barbecue with the following ingredients during the warm months of the year (from May to September)?

Figure 40: Ipsos/NSC, 2014

2.4 FOOD PREPARATION IN GENERAL AND FOR FISH

Many of those in work have precious little time on their hands to prepare a hot lunch or dinner. Especially in families with children, people often ask themselves: ‘What shall I cook?’ and ‘How much time do I have?’ So is it true that fewer and fewer hot meals are being cooked at home? And what about the question of time? Do most people turn to the microwave and other ready meal options, or do they still cook from scratch?

The good news is that people still like to prepare hot meals during the week. Only 4% say they do not cook a hot meal.

Two-thirds (66%) claim to spend more than 30 minutes preparing a hot meal. Most take between 31 and 45 minutes (49%). But how do these figures change when fish is cooked as a meal?

Time cannot be the reason for low fish consumption because cooking a fish dish takes no longer than cooking a meal with meat.

On average, women spend more time in the kitchen than men. Whereas 54% of females spend between 31 and 45 minutes a day preparing a hot meal in the kitchen during the week, only 44% of males do the same.

When it comes to fish, there are no significant differences between the proportion of men (44%) and women (48%) who spend 31 to 45 minutes in the kitchen.

An examination of the results by age group reveals that those aged 30 to 49 devote the least time to cooking during the week. As many as 35% spend less than 30 minutes a day preparing a hot meal in the kitchen. Habits are exactly the same when it comes to fish.

Bearing in mind that 26% of respondents say they would cook with fresh fish more often if there were more ‘almost-ready-to-eat’ products

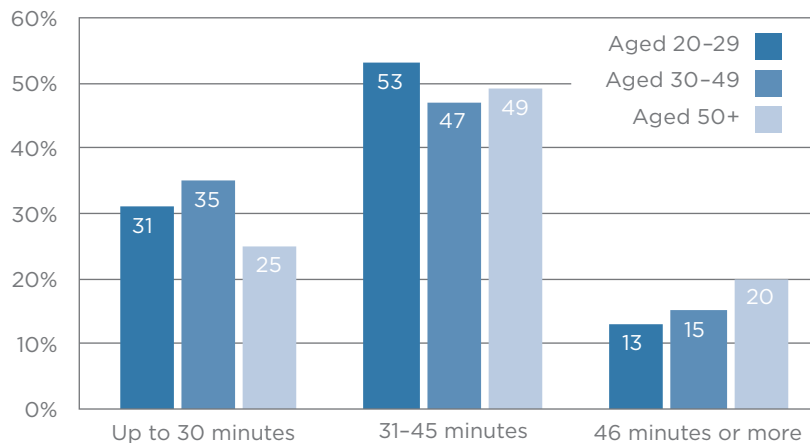
„ Cooking fish and meat takes the same amount of time. “

HOW MUCH TIME DO THE GERMANS SPEND COOKING DURING THE WEEK?

COOKING IN GENERAL:		COOKING WITH FISH:
Up to 30 minutes:	29%	32%
31 to 45 minutes:	49%	46%
46 minutes or more:	17%	13%
No hot meals are cooked during the week:	4%	8%

Source: Ipsos/NSC, 2014

PREPARATION TIME FOR A HOT WEEKDAY MEAL - BY AGE



Question: On average, how much time does it take you to cook a hot meal during the week?
Figure 41: Ipsos/NSC, 2014

available at the fish counter, this could be a way of increasing consumption – especially among the 30–49 age group, so important for the retail sector, who in many cases share their home with children. After all, 60% of those surveyed refer to easy preparation when giving reasons in favour of buying frozen fish. Here, ‘easy’ is very often synonymous with ‘quick’.

2.5 COOKING SKILLS IN GENERAL AND FOR FISH

The amount of coverage given to food and cooking has never been higher. More and more food magazines continue to appear, and the number of cookery programmes is growing all the time.

So what can be said about the cooking skills of people in Germany? As many as 61% of Germans rate their own culinary skills as good or very good. Only one in a hundred claim to be a lost cause in the kitchen.

Although the number of enthusiastic cooks has certainly increased among men in recent years and men now have their own food magazine, they rate their ability in the kitchen much lower than women do. This may simply be because it is still women who do the cooking at home: around 80% of women cook at home, while for men the figure is a modest 35%.²¹

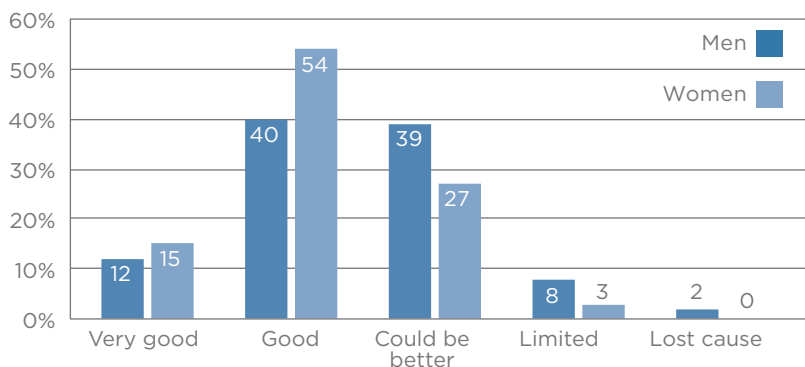
What bodes well for the future is that younger people are also gaining confidence in their cooking skills. Some 47% of those aged 20 to 29 rate their ability in the kitchen as good.

And what can be said of cooking skills when it comes to fresh fish? Here we encounter a significant barrier: most people claim that their skills in this area are limited or leave something to be desired. And 7% claim to be a lost cause.

Looking at cooking skills with fresh fish by age, it quickly becomes clear that the younger people are, the less able they are to prepare fresh fish. At the same time, in Section 1.3 concerning the consumption of fish in restaurants, we found that people in this age group like to order fish very much, and they do so most frequently (48% once a month or more). This is also the reason why a good 28% of those in this age group say they would buy more fresh fish if there were products that were almost ready to eat. One in five people in this age group would like more tips on how to prepare fresh fish.

If they do cook dishes with fish, they tend to prefer less variation than when the main ingredient is meat, vegetables or pasta. The statistics give the impression that people choose to make the same dishes time after time. Some 66% regularly cook only one, two or three different dishes containing fish. Only 27% of

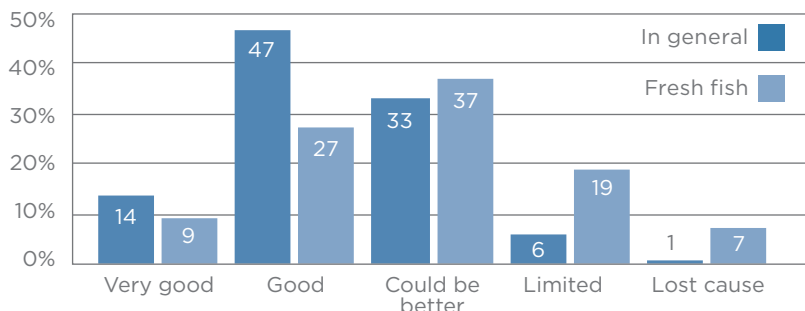
COOKING SKILLS OF PEOPLE IN GERMANY - BY GENDER



Question: How do you rate your own cooking skills?

Figure 42: Ipsos/NSC, 2014

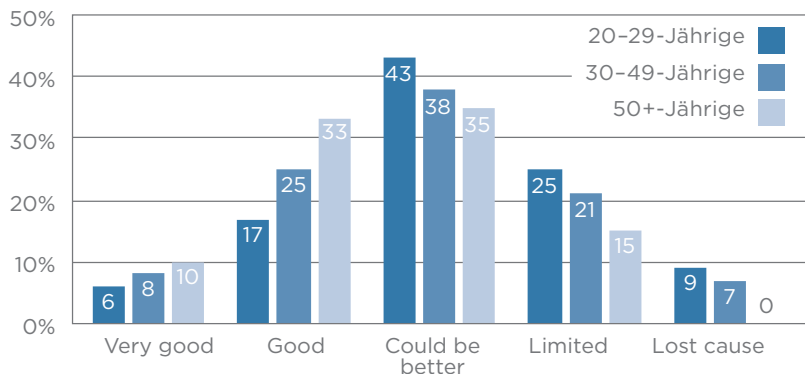
EVALUATION OF COOKING SKILLS IN GENERAL AND FOR FRESH FISH



Question: How do you rate your own cooking skills when it comes to fresh fish?

Figure 43: Ipsos/NSC, 2014

KOCHFÄHIGKEITEN DER DEUTSCHEN BEI FRISCHFISCH NACH ALTER



Question: How do you rate your own cooking skills when it comes to fresh fish?

Figure 44: Ipsos/NSC, 2014

²¹Ipsos was, Deutschland?, Techniker Krankenkasse, 2013, sample size: 1,000 respondents.

respondents have a repertoire of more than four dishes. When the Germans cook with main ingredients such as chicken, pork and pasta, they vary their dishes more than they do with fish.

There are two possible explanations for this. The first is simple: limited fish cooking skills mean that people always cook dishes that were a success in the past.

The second conceivable explanation is that 66% of the population buy fish in frozen form. When fish is cooked as a main ingredient, it is usually a frozen product – and most likely convenience food from the freezer. Here there is a wide range of favourite products that people eat time and again.

2.6 FISH AND FAMILIES WITH CHILDREN

Fish enjoys a high level of popularity among families with children. Eight out of ten parents say their children like eating fish. However, there is a common misconception that children do not like fish. Only 14% of respondents agree with this.

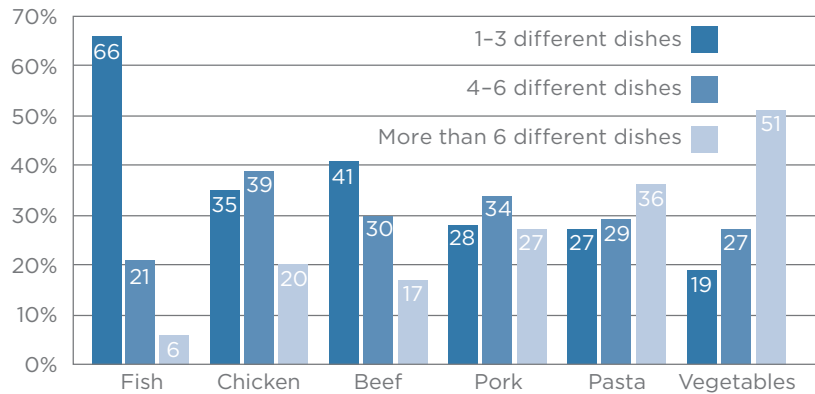
When the parents of children who do not like fish are asked to explain the reasons for this, they mention a dislike of the flavour first, before the smell.

When parents cook fish meals for their children, one dish clearly dominates the statistics. Unsurprisingly, fish fingers are much more popular than all other dishes: six out of ten fish meals for children contain fish fingers.

Looking at the reasons for low fish consumption (Section 1.5), 20% of respondents in the general population claim that children do not like fish.

If this were true, no fish would be eaten in the 8.1 million German households with minors.* What is more likely is that people resort to the cliché that children do not like fish in order to explain their own low fish consumption.

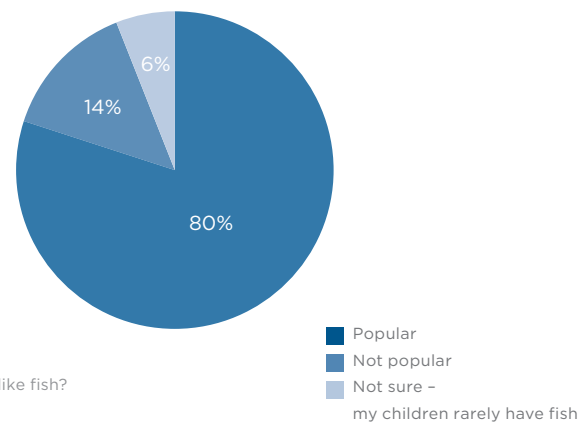
NUMBER OF DIFFERENT DISHES



Question: How many different dishes do you regularly prepare with the following main ingredients?

Figure 45: Ipsos/NSC, 2014

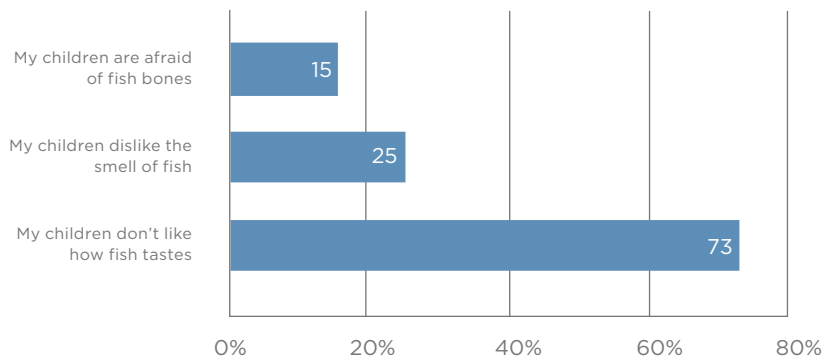
POPULARITY OF FISH AMONG CHILDREN



Question: Do your children like fish?

Figure 46: Ipsos/NSC, 2014

REASONS WHY CHILDREN DISLIKE FISH



Question: Why don't your children like fish?

Figure 47: Ipsos/NSC, 2014

THE MOST FREQUENTLY SERVED FISH DISHES FOR CHILDREN

Fish fingers	60%
Breaded fish with potatoes or chips	15%
Fish with pasta	7%

Source: Ipsos/NSC, 2014

*Calculation: there are around 40 million households in Germany. Among those respondents who live with children, 20% say they do not eat fish because their children dislike it. This equates to about 8 million households.







3. CONSUMER OPINION ON ORIGIN AND SUSTAINABILITY

Where does the food come from? How is it produced? Is it a regional product? And, crucially, is it environmentally friendly? Such questions constantly appear in the media. However, what really matters to consumers when it comes to fish? That is the subject of this section.

3.1 ORIGIN

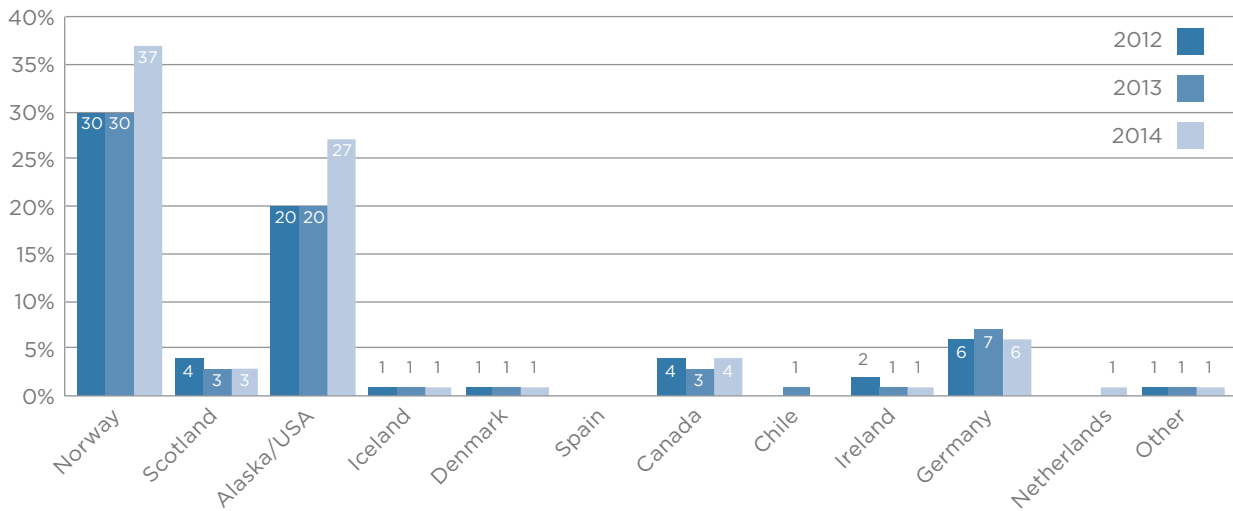
German people like to know where their fish comes from: 57% say that this information is important or even very important. Only 15% attach no significance to origin. Knowing where fish comes from matters more to women (54%) than to men (39%). However, we see no significant difference when it comes to age.

HOW IMPORTANT IS THE ORIGIN OF FISH FOR GERMAN CONSUMERS?

Extremely important:	5%
Very important or important:	52%
Somewhat important:	28%
Unimportant:	15%

Source: Ipsos/NSC, 2014

PREFERRED COUNTRY OF ORIGIN FOR SALMON 2012 TO 2014



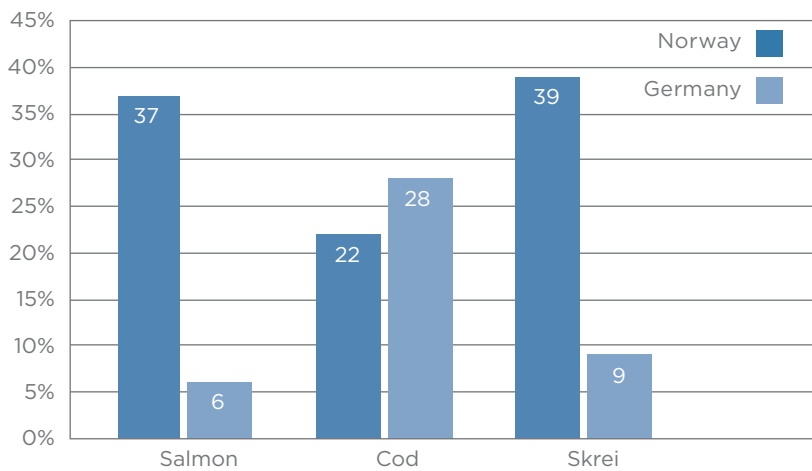
Question: Which is your preferred country of origin when purchasing salmon?
Figure 48: TNS Gallup/NSC, 2014

NORWEGIAN SALMON, GERMAN COD

So if the origin of fish is an important consideration for German consumers, what should the origin be? The answer to this question is that it depends on the species. For salmon, people prefer Norway (37%), followed by Alaska (26%). The chart above indicates a growing preference major fish exporting countries. This suggests a greater awareness of origin among German consumers as far as salmon is concerned.

When it comes to cod, however, the fish should come from German waters. For skrei - late winter cod from the Norwegian Arctic - Norway is again the country of preference. Generally speaking, consumers like to see that a product comes from their own country if the species in question can be found in domestic waters.

PREFERRED COUNTRY OF ORIGIN FOR SALMON, COD AND SKREI



Question: Which is your preferred country of origin when purchasing salmon, cod and skrei?
Figure 49: TNS Gallup/NSC, 2014

3.2 SUSTAINABILITY

When asked to name the main reasons for low fish consumption in Germany, consumers put the argument that fish is not environmentally friendly in sixth place (23%).

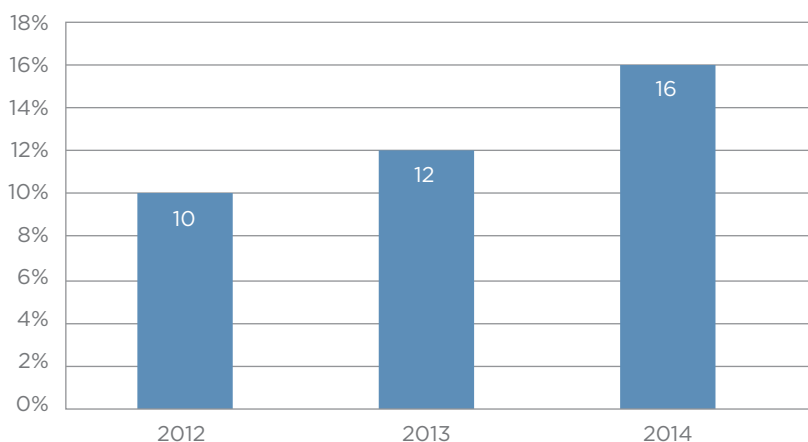
Other studies commissioned by the NSC show that wishing to be environmentally friendly is by no means

a dominant factor when buying fish. However, such considerations have become slightly more important over the last three years.

At the same, 9% of respondents claim that a clear indication as to whether fish is sustainable plays an important role when they are shopping for fresh fish. For frozen fish, 12% of respondents say that such a label matters.

Here we can see a discrepancy between words and actions. Or are there other factors at play? It would still appear that only a small number of consumers value sustainability. Apparently they do not understand the concept. A deep psychological study carried out by NSC Germany in 2012 together with the rheingold institute led to the following conclusion: 'Sustainability remains a term for insiders. Among the general public, few people are familiar with it, and even fewer fully understand it.'

THE GROWING IMPORTANCE OF SUSTAINABLE PRODUCTION/FISHING AMONG FISH CONSUMERS

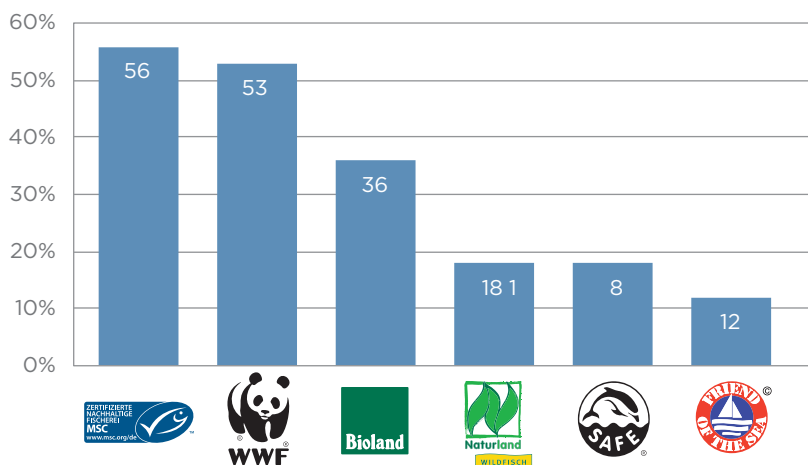


Question: What are the key reasons why you choose to eat fish or seafood?
Figure 50: TNS Gallup/NSC, 2014

„ When buying fish, the question of origin is more important than environmental aspects.“

Recent survey results confirm this. German consumers today understand the environmental reasons, but other factors such as flavour, health and value for money are much more important.

RECOGNITION OF QUALITY SEALS FOR FISH AND FISH PRODUCTS



Question: Which quality seals for fish and fish products are familiar?
Figure 51: Ipsos/NSC, 2014

This also explains why only 19% of respondents were able to name a quality seal for fish off the top of their heads. The most well known seal is the Marine Stewardship Council (MSC) ecolabel. Recognition of seals presented to those surveyed is shown in Figure 51.



4. FISH IN THE FUTURE: HOW CAN WE PUT MORE FISH ON THE TABLE?

Looking at the current situation, the findings of this study show there is still much work to do. People in Germany do not know a great deal about fish, and there are many barriers that prevent them from buying and cooking fish.

One result is especially clear: if we want to see more fish on the table, the main issue today is not healthy eating, but enjoyment and convenience. The same pattern can be seen in many countries.

It follows that there are two starting points in order to make fish more attractive:

fresh fish has to be perceived as convenient. Similarly, the enjoyable aspect of frozen fish needs to be emphasised.



4.1 FRESH FISH AND FISH COUNTERS

For fresh fish, we have seen that many consumers want more products that are almost ready to eat, and cooking skills with this ingredient are significantly lower than in general. Fish counters continue to offer whole fish and fillets more than anything else. There are rarely products that make preparation easier, such as fish kebabs with vegetables, raw fishcakes, ready-made fish soup and oven-ready dishes with fresh fish and vegetables. A stronger focus on such fresh fish dishes would overcome the barrier of limited cooking skills. In the same way, oven-ready dishes with fresh fish would solve the problem of an unpleasant odour in the home.

This study has found that many consumers want tips on how to prepare fish because of their limited ability in the kitchen; there is a need for practical advice on how to cook the fish. Such material is not available today at fish counters and in shops where fish is sold. This would be an easy way to lift the barrier presented by not knowing how to cook fish.

Fresh fish is healthy – this is an important consideration for consumers who choose fresh fish. Fish counters could use this to their advantage by confirming the purchase decisions of consumers and encouraging them visit the fish counter on a regular basis. At present, there are no measures in place such as a ‘good choice’ strategy or an ‘eat fish twice a week’ campaign that could increase the frequency of consumption.

Many studies show that 80% of people only decide at the point of sale – in the supermarket – what they will eat in the days ahead. One reason why fresh fish goes into the shopping basket less often is that people do not decide what will appear on the menu until they are buying food. Unless fish is already established as part of a planned meal, it is very likely consumers will switch to autopilot and simply visit the usual supermarket aisles. In many cases, they head to the freezer section or the meat counter. The average German consumer visits

the fresh fish counter only four or five times a year. In other words, this part of the store is not on their radar. If retailers in Germany want to take advantage of the opportunity to generate more revenue through their fish counters, one of the first measures could be to inspire consumers in-store. They could provide simple recipe cards or fish tips at the entrance or elsewhere (but not only at the fish counter). A promising approach might be to offer recipe cards showing a number of ingredients and indicating where these can be found in the same supermarket. These would be handy tools for shoppers with busy lives, directing them to visit the fish counter.

There are many products that make food preparation easier during the week, from convenience food in bags and seasonings in jars to ready-made sauces for pasta and salad. Things are different for fish – there are hardly any helpful little ideas. The absence of such products makes it harder to cook with fish, and it also further reduces the visibility of fish at the point of sale.

Given the current level of fish consumption, such items would not generate extra sales, which is why they are not developed or listed. However, if fresh fish grew as a category following appropriate measures in the food retail sector, this subsidiary area would also expand.

4.2 FRESH FISH AND MODERN AVAILABILITY

In this study we have seen that a lack of availability is a more important reason for the low consumption of fresh fish than price. This barrier has been lifted by the expansion of distribution channels thanks to low-cost supermarkets. We have also seen that this has already led to positive results for salmon. In addition to the lack of availability, another factor that prevents people from buying fish is therefore eliminated: consumers like to be able to tell whether fish is fresh according to the study. Some 20% agree that not being able to identify freshness is an important

reason for low consumption. Furthermore, 21% say that the absence of an expiry date was a reason for low consumption. Modified atmosphere packaging (MAP) for fish removes these barriers.

This opens up great potential. Since 2010, when fresh salmon in MAP was introduced to the Norwegian market, monthly penetration has doubled and now stands at 5–6%. As a result, salmon consumption amounts to 9 kg per capita per year. During the same period, we have also seen market penetration double in Germany (1% to 2%). The present level of availability in many thousands of low-cost supermarkets and the corresponding product developments mean it is very likely that salmon consumption in Germany will rise in the next two or three years to more than 3 kg per capita per year.

Such an increase will not only be the result of greater availability. In other markets, we have seen the range of product variants (marinated fish, barbecue kebabs, diced fish, etc.) expand after two or three years. In Norway, there are already more than six different salmon products in the refrigerator aisles, and the number is growing. In Germany, the increasing trend towards chilled convenience foods – especially popular among younger target groups – has so far been monopolised by soup, fresh pizza and the like. With MAP, this will change when the right fresh fish products for consumers appear in the refrigerator section.

4.3 TAKEAWAY FISH

More and more people are eating on the go. Nowadays, many millions of people in Germany no longer eat lunch at home. At the same time, it is apparent that more and more fish is being eaten as a snack on the go – and even at home. However, there are still too few products on offer with fish to accommodate this new trend. It is mainly people in the 20–29 age group that eat out often. They are fond of fast food and frequently visit informal restaurants or buy snacks and meals on the go. To drive fish consumption in

the future, it is important to put fish where the target audience is – with new innovative concepts. In addition to traditional fast food options, there are now ‘soups to go’ and ‘greens to go’ but there is very little fish to take away. Street food presents younger people with new trends, but there is no fish here either.

Many of the above statements also apply to herring, where there is a lack of products that taste good enough for consumers to rate them as highly as other fish products. We need modern products developed for a young target group as well as premium lines that increase the perceived value for money of fish. These are just some of many possibilities.

4.4 CHILDREN ARE NOT A BARRIER; CHILDREN ARE THE FUTURE

When asked to give reasons for low fish consumption in Germany, some 20% of adults say that their children do not like fish. At the same, it was apparent that when fish is served at the dinner table, parents are mostly giving their children fish fingers cooked from frozen or fried fish from the freezer with chips. Although these dishes contain fish, they do not allow children to experience how fresh fish tastes because the dominant flavour comes from the bread-crumbs rather than the fish itself.

Additionally, these products typically have a high fat content. They therefore offer no health benefits to the customer.

Many parents in Germany today say that their children dislike the smell and flavour of fish. This may well be true when it comes to fresh fish, and for many reasons.

Children are twice as likely to try something new if their parents also eat something new. They learn through imitation. If fresh fish is cooked on very rare occasions, eating such dishes cannot be imitated. Parents are not leading by example in such cases. In the age group where children are still living at home, one in five respondents say they only buy fresh fish between one and three times a year, or not at all. Even at playgroup, children do not become familiar with the taste of fish. Here, too, there is potential for learning by imitation because children also like to copy behaviour they see in other children.

No child is born with a dislike of fish or any food. Up to the age of 18 months, they eat everything* and can get used to new flavours. After this, it is up to the parents. Anyone who has travelled in Japan will have seen that even small children eat raw fish.

So what can be done? The same question was asked in Norway when it was discovered in 2007 that children and teenagers con-

sume less fish than adults. All the main ministries and organisations at the national and regional levels joined forces to establish a countrywide nutritional programme called “Fiskeprell” (‘wriggling fish’) with the aim of increasing overall fish consumption and the consumption of oily fish. The results were so positive that the same programme is still running today. Among the staff of nurseries and playgroups that took part in the survey, 58% say that the programme led to greater consumption of fish.²²



TEILNEHMER DES „FISKEPRELL“-PROGRAMMS

6.000	Kindergartenangestellte
1.500	Lehrer
960	Schulen
900	Kindergärten
500.000	Schüler

A similar measure in Germany would most likely achieve the same positive results.

We have already mentioned the relevance of convenience products in the fresh fish segment. There is also a good opportunity here to develop products especially for children. Most of those with children want to be good parents and give their youngsters something tasty to eat. However, fresh fish counters do not offer fresh fish fingers, funny characters or similar concepts. Much depends on the presentation. Role models for children could inspire an interest in fish. After all, there is a big difference between saying, ‘We’re having fish tonight’ and ‘We’re having Vicky the Viking fish tonight – it will make you strong!’

SEELACHS ALS FISCHSTÄBCHEN

Pro 100 Gramm:

192	Kilokalorien
16,9 g	Kohlenhydrate
7,7 g	Fett

Quelle: Fddb Internetportale GmbH, Fischstäbchen, 2007

SEELACHS ALS FRISCHFISCHFILET

Pro 100 Gramm:

73	Kilokalorien
0 g	Kohlenhydrate
0,6 g	Fett

Quelle: Fddb Internetportale GmbH, Alaska-Seelachsfilet natur, 2007

*Das ist die Phase der Neophobie.

²²„Fiskeprell“-Programm, Questback für NSC Zentrale Norwegen, Online-Erhebung, 2013.

4.5 FISH - FROM THE MARGIN TOWARDS A STRONGER PRESENCE

Given that fish is barely visible on the streets, in the media, in supermarkets and on menus, it is hardly surprising that more people choose meat than fish. This also explains why fish is put on the barbecue significantly less often than meat, although it is relatively popular in the warmer months. The most visible form of seafood is sushi, both on the streets and in the food retail sector. There is a growing market for sushi, and its high visibility is doubtlessly a reason for this.

The fact that fish is an integral part of a healthy diet is rarely mentioned in the media. In Norway, new dietary advice appears on the front pages of major newspapers, while in Germany it is still necessary to come up with a relevant nutritional recommendation.

The relationship between fish and meat in cooking portals highlights the lower visibility of seafood: for every fish recipe there are five involving meat as a main ingredient.²³ Actually, it would be beneficial for this statistic to be reversed because, as we found out when asking about mealtimes, most people serve the same fish dish over and over again.

Fish is also under-represented in food and lifestyle media. There are cooking magazines for Italian food, traditional food, regional food, vegetarian food and much more. It is a long list, but no magazine is devoted exclusively to fish dishes or tips for preparing fish. When fish does appear, it is usually in a recipe surrounded by a large number of non-fish recipes. Similarly, there is no school for fish offering simple tips – something that consumers appear to want.

If fish is to become part of the 'relevant set', greater visibility in any form is an absolute must.

CLOSING REMARKS

The aim of this study was to generate greater knowledge about fish consumption, consumer behaviour and the reasons for a relatively low level of fish consumption in Germany. Over the course of the study, it became clear that there is still a long way to go. German people are not very aware of fish, and they have limited cooking skills, preferring to buy ready-made products in many cases. At the same time, the study identified a variety of ways to change the current situation. This will not happen without innovation and a wider range of fresh fish products in food retail stores, including options for the barbecue.

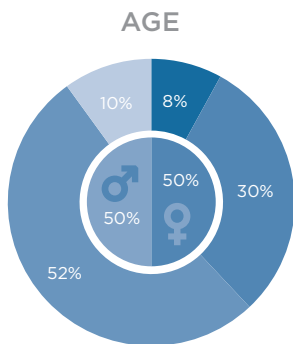


*The range of products and brands that consumers are aware of. The selection process entails various stages, starting with all available products and brands; followed by those that are familiar, trusted and accepted; and ending with preferred options.

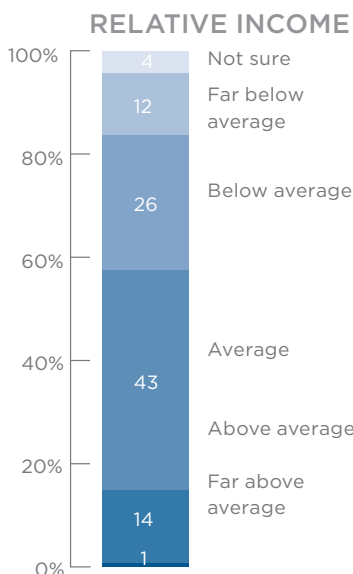
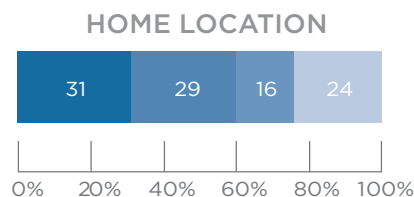
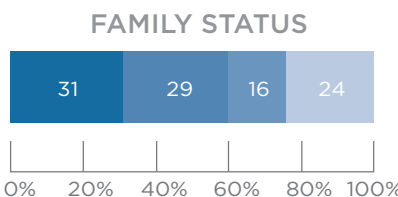
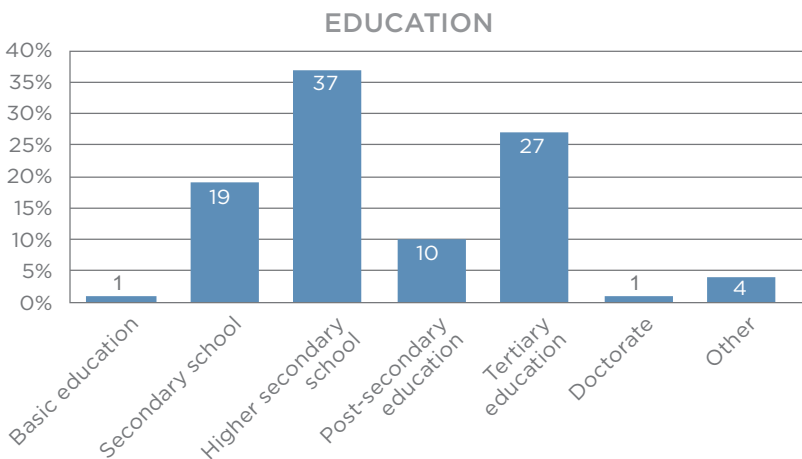
²³chefkoch.de, Pixelhouse GmbH and Gruner + Jahr, www.chefkoch.de, accessed: 15 December 2014.

STUDY DESIGN

Both the present seafood study and the SCI study by TNS Gallup are based on the following study design:

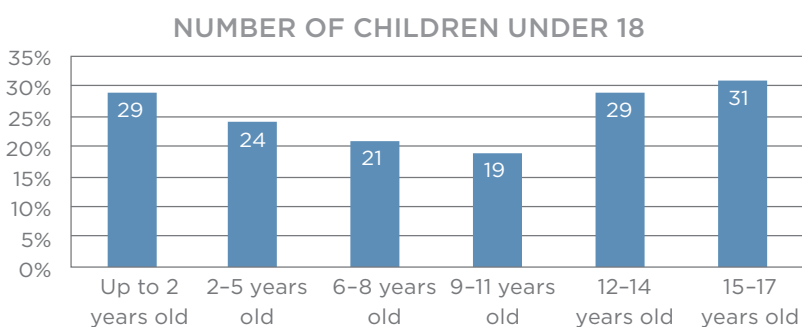
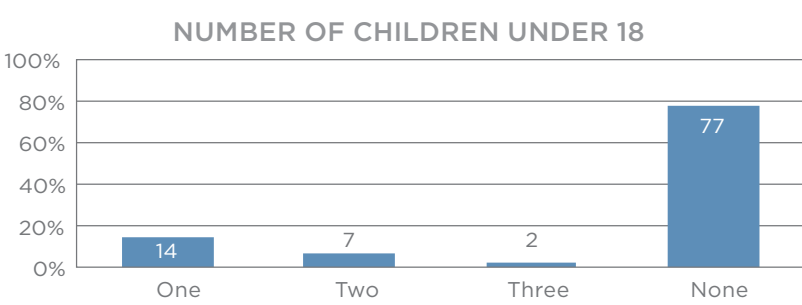
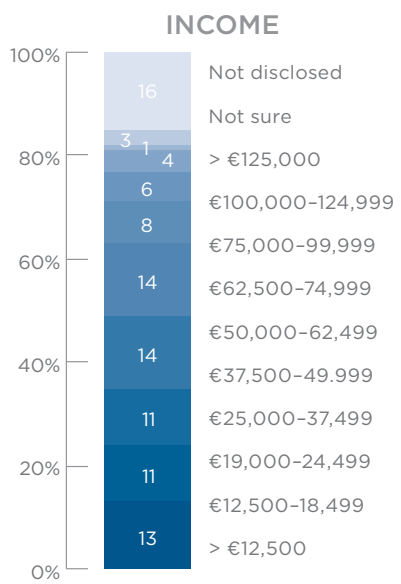
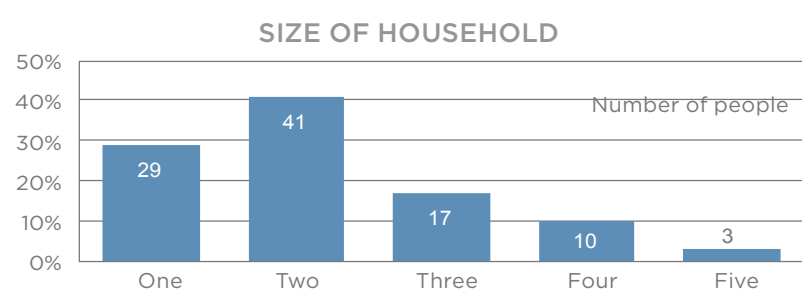


■ 20-25 years ■ 40-59 years
■ 26-39 years ■ 60-65 years



■ Married or civil partnership
■ Single
■ Cohabiting
■ Separated, widowed or divorced

■ Large town
■ Small town
■ Suburbs
■ Countryside



LIST OF ILLUSTRATIONS

- 1 HOW OFTEN THE GERMANS EAT FISH**
Study question: How often do you eat fish or seafood?
Source: TNS Gallup for NSC Norway, SCI, 2014, n = 1,011 respondents
- 2 FREQUENCY OF FISH CONSUMPTION BY AGE (ALL MEALS, WEEKDAYS ONLY)**
Study question: How often do you eat fish or seafood?
Source: TNS Gallup/NSC, Seafood Consumer Insight (SCI), 2014, Country: Germany, sample size: 1,011 respondents
- 3 THE MOST POPULAR TYPES OF FISH IN GERMANY**
Source: TNS Gallup for NSC Norway, SCI, 2014, n = 1,011 respondents
- 4 MEALS PER PERSON PER YEAR**
Source: Norwegian Seafood Council, 2014
- 5 SEAFOOD CONSUMPTION DURING THE WEEK BY GENDER**
Study question: At which meals do you usually eat fish and/or seafood?
Source: TNS Gallup for NSC Norway, SCI, 2014, n = 1,011 respondents
- 6 PREFERRED TYPES OF FISH FOR MEALS AT HOME DURING THE WEEK**
Study question: If you are planning a weekday meal (Monday to Friday) at home with fish/seafood, which types of fish or seafood do you prefer?
Source: TNS Gallup/NSC, Seafood Consumer Insight (SCI), 2014, Country: Germany, sample size: 1,011 respondents
- 7 PREFERRED TYPES OF FISH FOR MEALS AT HOME DURING THE WEEK BY AGE**
Study question: What types of fish/seafood do you usually prefer for a weekday meal (Monday to Friday)?
Source: TNS Gallup/NSC, Seafood Consumer Insight (SCI), 2014, Country: Germany, sample size: 1,011 respondents
- 8 PREFERRED TYPES OF FISH FOR BREAKFAST AT THE WEEKEND**
Study question: If you eat fish for breakfast at the weekend, what is your favourite fish dish?
Source: Ipsos/NSC, 2014, Country: Germany, sample size: 1,011 respondents
- 9 PREFERRED FISH DISH FOR BREAKFAST AT THE WEEKEND BY AGE**
Study question: If you eat fish for breakfast at the weekend, what is your favourite fish dish?
Source: Ipsos/NSC, 2014, Country: Germany, sample size: 1,011 respondents
- 10 TOP SIX TYPES OF FISH AT THE WEEKEND**
Study question: If you are planning a weekend meal at home with fish/seafood, which types of fish or seafood do you prefer?
Source: TNS Gallup/NSC, Seafood Consumer Insight (SCI), 2014, Country: Germany, sample size: 1,011 respondents
- 11 PREFERRED TYPES OF FISH AT HOME**
Study question: If you are planning a weekday or weekend meal at home with fish/seafood, which types of fish or seafood do you prefer?
Source: TNS Gallup/NSC, Seafood Consumer Insight (SCI), 2014, Country: Germany, sample size: 1,011 respondents
- 12 FREQUENCY OF SALMON CONSUMPTION - ALL MEALS**
Study question: How often do you eat salmon? Please think about all meals (breakfast, lunch and dinner) both at home and away from home.
Source: TNS Gallup/NSC, Seafood Consumer Insight (SCI), 2014, Country: Germany, sample size: 1,011 respondents
- 13 FREQUENCY OF FISH CONSUMPTION OUT OF HOME**
Study question: How often do you eat fish or seafood in a restaurant, café or similar establishment away from home?
Source: TNS Gallup/NSC, Seafood Consumer Insight (SCI), 2014, Country: Germany, sample size: 1,011 respondents
- 14 PREFERRED TYPES OF FISH IN RESTAURANTS**
Source: TNS Gallup/NSC, Seafood Consumer Insight (SCI), 2014, Country: Germany, sample size: 1,011 respondents
- 15 PREFERRED TYPES OF FISH AWAY FROM HOME BY AGE**
Study question: Disregarding the season, which type of fish or seafood would you choose in a restaurant, café or similar establishment?
Source: TNS Gallup/NSC, Seafood Consumer Insight (SCI), 2014, Country: Germany, sample size: 1,011 respondents
- 16 FREQUENCY OF SUSHI CONSUMPTION BY AGE**
Study question: How often do you eat sushi?
Source: Ipsos for NSC Germany, 2014, sample size: 1,011 respondents
- 17 PREFERRED PLACES TO EAT SUSHI**
Study question: Where do you eat sushi?
Source: Ipsos for NSC Germany, 2014, sample size: 502 respondents
- 18 PREFERRED TYPES OF FISH IN SUSHI**
Study question: Which type of fish do you prefer in sushi?
Source: Ipsos for NSC Germany, 2014, sample size: 502 respondents
- 19 SALMON - FAVOURITE TYPES OF FISH IN SUSHI BY GENDER**
Study question: Which type of fish do you prefer in sushi?
Source: Ipsos for NSC Germany, 2014, sample size: 502 respondents
- 20 FAVOURITE PLACES TO EAT SALMON**
Study question: Where do you usually eat salmon? Please think about all meals.
Source: TNS Gallup/NSC, Seafood Consumer Insight (SCI), 2014, Country: Germany, sample size: 1,011 respondents
- 21 MAIN REASONS FOR FISH CONSUMPTION IN GERMANY BY GENDER**
Study question: What are the key reasons why you choose to eat fish or seafood?
Source: TNS Gallup/NSC, Seafood Consumer Insight (SCI), 2014, Country: Germany, sample size: 1,011 respondents
- 22 MAIN REASONS FOR FISH CONSUMPTION IN GERMANY BY AGE**
Study question: What are the key reasons why you choose to eat fish or seafood?
Source: TNS Gallup/NSC, Seafood Consumer Insight (SCI), 2014, Country: Germany, sample size: 1,011 respondents
- 23 MAIN REASONS FOR LOW FISH CONSUMPTION IN GERMANY**
Study question: There are many possible reasons why consumers do not eat much fish (in any form). Please select up to five reasons from the following list that you believe could prevent fish consumption from being higher.
Source: Ipsos for NSC Germany, 2014, sample size: 1,011 respondents
- 24 MAIN REASONS FOR LOW FISH CONSUMPTION IN GERMANY BY AGE**
Study question: There are many possible reasons why consumers do not eat much fish (in any form). Please select up to five reasons from the following list that you believe could prevent fish consumption from being higher.
Source: Ipsos for NSC Germany, 2014, sample size: 1,011 respondents
- 25 FISH CONSUMPTION IN GERMAN HOUSEHOLDS - FRESH FISH VS FROZEN FISH**
Study question: Please indicate how often you buy each of the products listed below.
Source: Ipsos for NSC Germany, 2014, sample size: 1,011 respondents
- 26 FREQUENCY OF FROZEN FISH CONSUMPTION - BY INCOME**
Study question: Please indicate how often you buy each of the products listed below.
Source: Ipsos for NSC Germany, 2014, sample size: 1,011 respondents

- 27 FREQUENCY OF FRESH FISH CONSUMPTION - BY AGE AND INCOME**
Study question: Please indicate how often you buy each of the products listed below.
Source: Ipsos for NSC Germany, 2014, sample size: 1,011 respondents
- 28 SALMON CONSUMPTION AT HOME**
Source: Euromonitor International for NSC head office in Norway, Country: Germany, 2014, static data collection
- 29 INCREASED FRESH FISH CONSUMPTION DUE TO LOW-COST FOOD RETAILERS**
Study question: On the whole, do you now buy more fresh fish such as salmon than you used to because it is also available from low-cost supermarkets?
Source: Mediaplus/Toluna for NSC Germany, 2014, sample size: 854 respondents
- 30 MOST FREQUENTLY GIVEN REASONS AGAINST BUYING FRESH FISH FROM A LOW-COST FOOD RETAILER**
Study question: You stated that you have never bought fresh fish from a low-cost supermarket. Why haven't you ever purchased pre-packaged fresh fish from the refrigerator aisles?
Source: Mediaplus/Toluna for NSC Germany, 2014, sample size: 225 respondents
- 31 FLAVOUR**
Source: Ipsos/NSC, 2014, Country: Germany, sample size: 1,011 respondents
- 32 HEALTH**
Source: Ipsos/NSC, 2014, Country: Germany, sample size: 1,011 respondents
- 33 MOST FREQUENTLY GIVEN REASONS FOR BUYING FRESH AND FROZEN FISH**
Study question: There are many good reasons to buy fresh fish. Which of the statements listed do you believe to be good reasons?
Source: Ipsos/NSC, 2014, Country: Germany, sample size: 1,011 respondents
- 34 REASONS FOR BUYING FROZEN FISH BY GENDER**
Study question: Please indicate how you most often prepare each of the products listed in the first column of the table.
Source: Ipsos/NSC, 2014, Country: Germany, sample size: 1,011 respondents
- 35 REASONS FOR BUYING FROZEN FISH BY AGE**
Study question: Please indicate how you most often prepare each of the products listed in the first column of the table.
Source: Ipsos/NSC, 2014, Country: Germany, sample size: 1,011 respondents
- 36 FALLING HERRING CONSUMPTION IN GERMANY - 2011 TO 2013**
Source: 'Analysis of salmon and herring markets in Europe', Euromonitor International for NSC head office in Norway, Country: Germany, filter: 2011-2013
- 37 HERRING CONSUMPTION IN GERMANY - BY AGE**
Study question: Do you eat less, more, or the same amount of herring as you used to?
Source: Ipsos/NSC, 2014, Country: Germany, sample size: 1,011 respondents
- 38 MAIN REASONS FOR LOW HERRING CONSUMPTION BY AGE**
Study question: Why do you eat less herring today?
Source: Ipsos for NSC Germany, 2014, sample size: 221 respondents
- 39 FREQUENCY OF FISH AND MEAT BARBECUES**
Study question: How often do you have a barbecue with the following ingredients during the warm months of the year (from May to September)?
Source: Ipsos for NSC Germany, 2014, sample size: 1,011 respondents
- 40 MOST POPULAR TYPES OF FISH FOR BARBECUES BY AGE**
Study question: How often do you have a barbecue with the following ingredients during the warm months of the year (from May to September)?
Source: Ipsos for NSC Germany, 2014, sample size: 1,011 respondents
- 41 PREPARATION TIME FOR A HOT WEEKDAY MEAL**
Study question: On average, how much time does it take you to cook a hot meal during the week?
Source: Ipsos for NSC Germany, 2014, sample size: 1,011 respondents
- 42 COOKING SKILLS OF PEOPLE IN GERMANY - BY GENDER**
Study question: How do you rate your own cooking skills?
Source: Ipsos for NSC Germany, 2014, sample size: 1,011 respondents
- 43 EVALUATION OF COOKING SKILLS IN GENERAL AND FOR FRESH FISH**
Study question: How do you rate your own cooking skills when it comes to fresh fish?
Source: Ipsos for NSC Germany, 2014, sample size: 1,011 respondents
- 44 FRESH FISH COOKING SKILLS OF PEOPLE IN GERMANY BY AGE**
Study question: How do you rate your own cooking skills when it comes to fresh fish?
Source: Ipsos for NSC Germany, 2014, sample size: 1,011 respondents
- 45 NUMBER OF DIFFERENT DISHES**
Study question: How many different dishes do you regularly prepare with the following main ingredients?
Source: Ipsos for NSC Germany, 2014, sample size: 1,011 respondents
- 46 POPULARITY OF FISH AMONG CHILDREN**
Study question: Do your children like fish?
Source: Ipsos for NSC Germany, 2014, sample size: 1,011 respondents
- 47 REASONS WHY CHILDREN DISLIKE FISH**
Study question: Why don't your children like fish?
Source: Ipsos for NSC Germany, 2014, sample size: 1,011 respondents
- 48 PREFERRED COUNTRY OF ORIGIN FOR SALMON, 2012 TO 2014**
Study question: Which is your preferred country of origin when purchasing salmon?
Source: TNS Gallup/NSC, Seafood Consumer Insight (SCI), 2012-2014, Country: Germany, sample size: 3,012 respondents
- 49 PREFERRED COUNTRY OF ORIGIN FOR SALMON, COD AND SKREI**
Study question: Which is your preferred country of origin when purchasing salmon, cod and skref?
Source: TNS Gallup/NSC, Seafood Consumer Insight (SCI), 2014, Country: Germany, sample size: 1,011 respondents
- 50 THE GROWING IMPORTANCE OF SUSTAINABLE PRODUCTION/FISHING AMONG FISH CONSUMERS**
Study question: What are the key reasons why you choose to eat fish or seafood?
Source: TNS Gallup/NSC, Seafood Consumer Insight (SCI), 2012-2014, Country: Germany, filter: Sustainable fishing/production, sample size: 3,012 respondents
- 51 RECOGNITION OF QUALITY SEALS FOR FISH AND FISH PRODUCTS**
Study question: Which quality seals for fish and fish products are familiar?
Source: Ipsos for NSC Germany, 2014, sample size: 1,011 respondents

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