



ÍSLANDSSTOFA
BUSINESS ICELAND

Icelandic Products at the German Market

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13 April 2021



Sendiráð Íslands
Berlín

Fish & Seafood

Brennivín

Fish & Seafood

Lamb Meat

Spirits

Craft Beer

Mineral Water

Sweets

Food Supplements

Past and Today



Fish & Seafood

Iceland is among the Top 10 fish suppliers to the German market

Germany is Iceland's biggest market for redfish and saithe, and ranking second for export of Arctic char. It is among the top 10 cod export markets.

Share of total export value in 2020
40% fresh vs. 30% frozen



Position Icelandic seafood at premium level

- Iceland sells
- Pure nature, sustainably managed fish stocks, innovation, tradition and hard working people who understand their business
- Reliable supply chain, also in difficult times as the pandemic. Aircargo worked out well
- Create stories and and communicate them to the consumers
- Bring key accounts over to Iceland and let them experience the origin
- Cooperation with dedicated people at the German market who speak German and are familiar with market, purchase procedures, price levels, and stakeholders




TRANS GOURMET
seafood



Transgourmet Seafood

“We have a strong focus on Icelandic fish and have built up great stories here at the market, which we convey to the customers”

“Every week we get fish by airfreight. The focus here is on cod loins, but also redfish, wolffish and saithe. Transgourmet and its sister company Frischeparadies intend to intensify their activities”

“Icelandic salmon has an absolute success story with us. In Cash & Carry Selgros, we were able to more than double sales volumes despite Corona. In the gastronomy we had losses due to Corona“

“Icelandic salmon is also used in various smoked varieties. For our Raknarök smoked salmon brand we received the Seafood Star award for the best smoked salmon in Germany in 2018”

“In the training to the certified Fish Sommelier, which is carried out in our Seafood Academy, the Icelandic salmon is now given a special position and the special features towards the Norwegian salmon are pointed out. We have been shooting videos in Iceland for the Seafood Academy”

“The same applies to the Arctic Char from Iceland. Here we sell and trade the product as QSFP own brand at Frischeparadies and sell it to Poland and also to Austria. A few years ago, the Arctic char was still quite unknown”

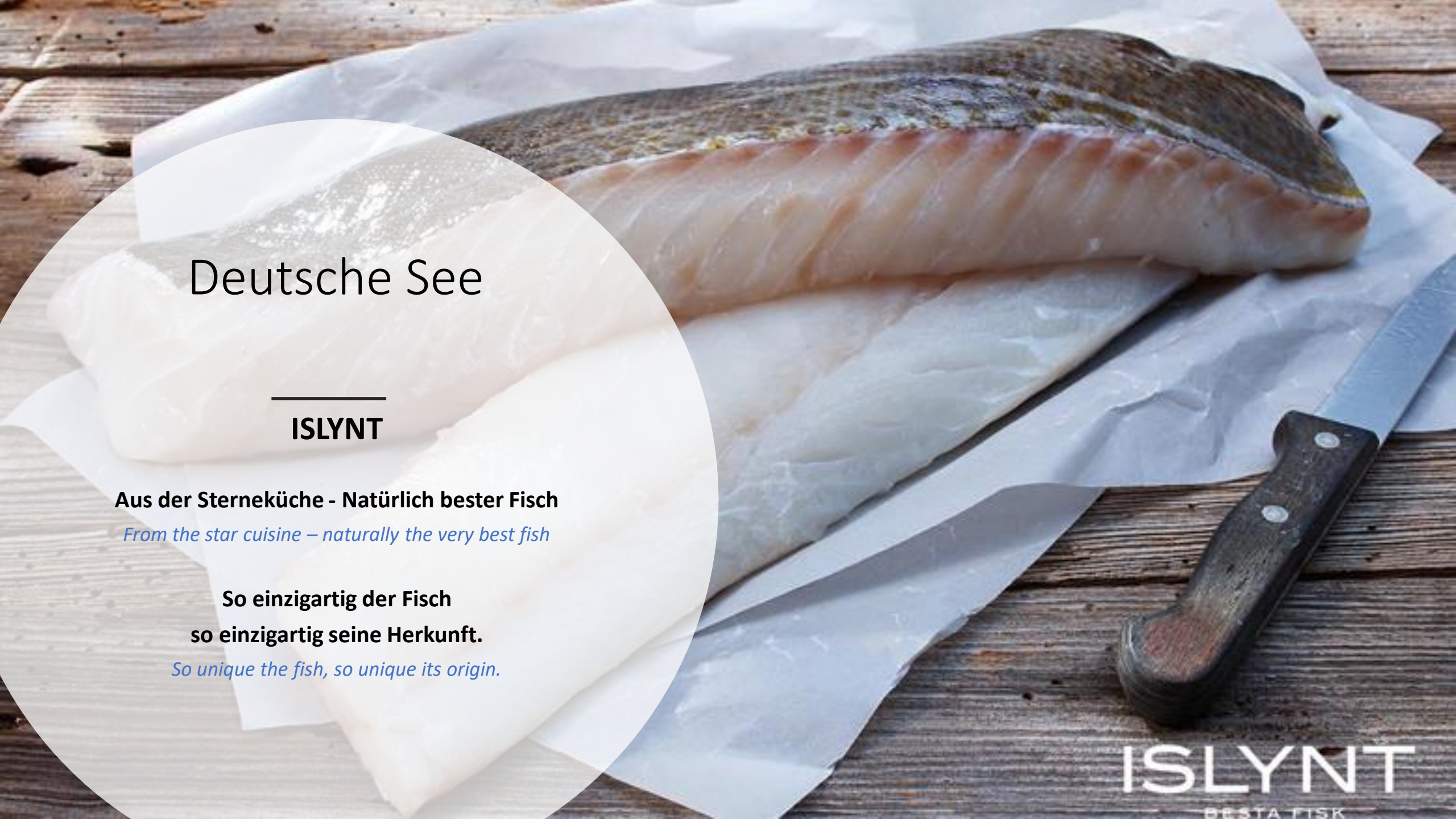


Transgourmet study trips to Iceland

“Our study trips to Iceland with on-site visits are extremely important for us. Customers get to know and appreciate Iceland. Chefs who have accompanied us on these trips become Iceland fans and then also buy the goods. We currently have a number of customers on the waiting list for the next study trip in September”



Frischeparadies Food Bloggers
visiting Iceland, Oct. 2018

A large piece of raw salmon fillet with its skin on, and a smaller piece of white fish fillet, possibly cod, are shown on a wooden surface. The fish is resting on white paper. A knife with a dark handle is visible in the lower right corner. The background is a rustic wooden table.

Deutsche See

ISLYNT

Aus der Sterneküche - Natürlich bester Fisch

From the star cuisine – naturally the very best fish

So einzigartig der Fisch

so einzigartig seine Herkunft.

So unique the fish, so unique its origin.

ISLYNT

BESTA FISK



el • 1/2 Bd. wilder Kerbel • 15 g schwarzer Knoblauch •
 t vakuumieren. Über Nacht ziehen lassen, dann bei 63° C
 ht beschwert ruhen lassen. Portionieren und in der Pfanne
 anbraten. Zerdrückten Knoblauch zugeben und mit Salz
 n. **Bärlauch, Liebstöckel, cremige Muschel-**
 nützen marinieren. Abwaschen und abtrocknen. In Sous-
 vartier • gehackter Liebstöckel
 hen und abgeben. Sahne um die Hälfte reduzieren und
 in Schluss die Butter zugeben und durch ein Spitzsieb
 ablassen
 abelau-Bottarga
 Ben. Es sollte etwa 400 g Muschelsaft ergeben. Muschel-
 ket erreicht ist. Mit geriebenem Kabeljau-Bottarga wür-

-BOTTARGA



Deutsche See German chefs study trips to Iceland, 2018 & 2016

Third time Deutsche See visited Iceland as part of their “Feuer und Eis – Kochseminare”

Íslandsstofa arranged visits at fish factories and a workshop with the Icelandic Culinary Team for the delegation (8 dishes)

Chefs learn about Icelandic raw materials and get recipes and information

Two journalists from Port Culinaire came along with the delegation, reporting about the visit in Iceland. 22 pages article published

Beverages

Einstök Craft Beer

Iceland Glacial water

Premium Spirits

Vodka

Gin

Whisky

Aquavit

Herb and other Liquer





Dedicated importer specialized on spirits and non- alcoholic drinks

Strong marketing campaign and promotions at key festivals

Personal stories and strong media coverage

It is all about Iceland

The essence of Glacier Gin is the pure Icelandic water. Iceland is best known for its clean nature and pure water. This makes the country the ideal location for the production of the finest gin.

Premium Salt from Iceland

Saltverk salt is the first salt in the world to be produced with craftsmanship and 100% geothermal energy.

Saltverk uses a 17th-century artisanal, sustainable and environmentally friendly method.

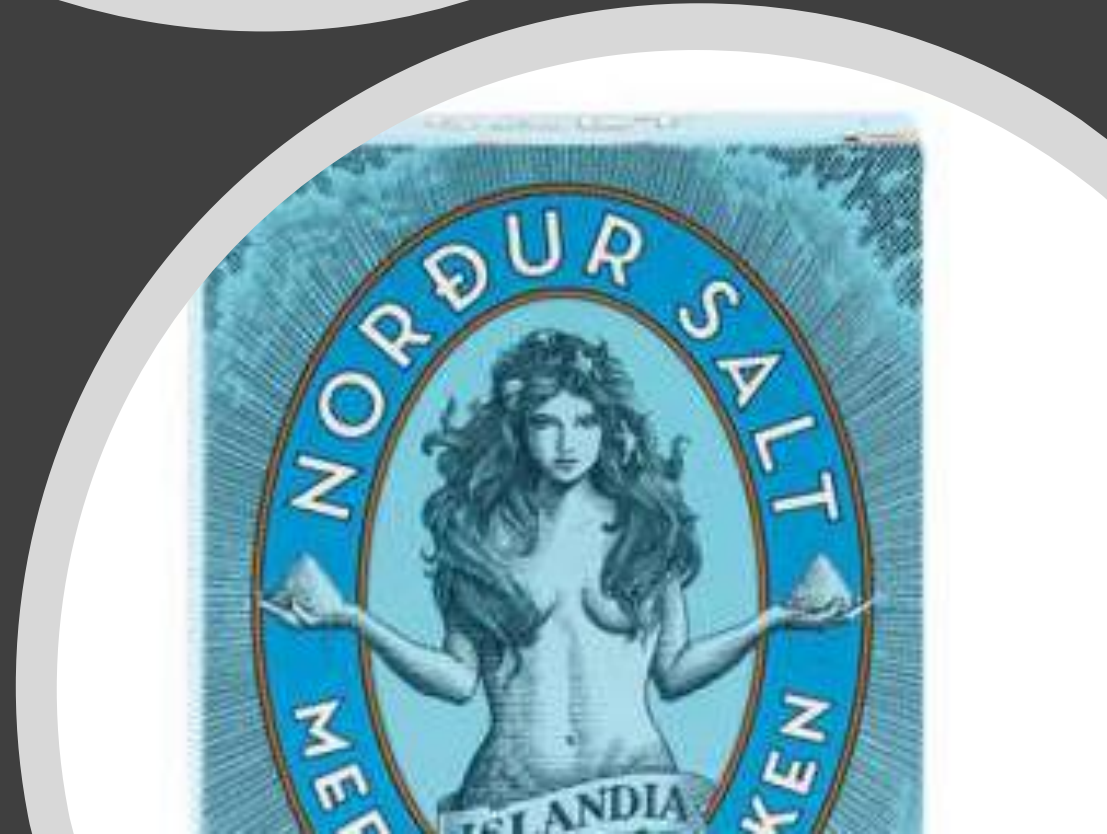
Saltverk Salt is a completely regional, sustainable product.



Norðursalt

The gentle manufacturing process, which was introduced in Iceland as early as 1753 but was then forgotten for centuries, guarantees the optimal moisture content of each individual flake. Fresh seawater from the Arctic Ocean, exclusively geothermal energy and a lot of manual work, the manufacturing process is environmentally friendly and sustainable. This process does not cause pollution or greenhouse gases – only fresh, pure and crispy premium sea salt flakes.

The packaging with a refined folding technique that does not require adhesives was awarded the Red Dot Award in 2014.



Chocolate and Sweets

successfully
distributed at
premium
delicatessen and
specialised sweet
shops and webshops

OMNOM „handmade chocolate from Reykjavik, made from the very best ingredients“

Nói Sírius „has a long company tradition and has become Iceland's largest confectionery producer since 1920“

Freyja „This is cult from Iceland!“

Goa “Bingo Lakkrískúllur is one of Iceland's liquorice classics”

Food Supplements

NATURAL WAY TO IMPROVE QUALITY OF LIFE

Alfred Gíslason -THW Kiel 2019:
“Vertraut auf Benecta” - one of the most popular innovative natural supplements in Iceland. Benecta is the result of more than 15 years of research and development.

LÝSI - Icelanders are known worldwide for their long-life expectancy. This is most popularly attributed to the liver tran.

GeoSilica Pure combines originality, naturalness, expertise and high effectiveness in a wonderful, innovative and sustainably obtained product.



There are opportunities for new and innovative products

Germany has the biggest slow food movement. Interest in cooking increased during times of lockdown and home office, as the skills to cook. Germans are interested in nature, in regional and healthy products.

Germany is a tough market indeed, and the new normal will not be the same as before the pandemic. This causes challenges but also opportunities.

Innovative products from the sea and countryside: algae, herbs, berries, new ingredients, and smart innovative food products and high convenience products



How can we assist you

Study trips to trade fairs, with store visits and expert meetings.

Food promotions at the Icelandic residence and the Nordic Embassies.

B2B workshops for key accounts with Icelandic chefs

Market information and assistance in partner search

Alert German media about new innovative products



Iceland food promotions
at the Icelandic residence and downtown Berlin



Iceland Festival in Bremerhaven 2019 Seafood Workshop



Iceland Festival in Bremerhaven – Iceland Fish Auction

Trade fairs and few magazines

ANUGA, Cologne, October 2021

Internorga, Hamburg, March 2022

Intergastra, Stuttgart, Feb 202

Spirits: Bar Convent, Berlin, October 2021

Sweets: ISM, Cologne, Feb 2022

Food supplements: Vita Foods, Geneva,
October 2021

Beer: Craft Beer Arena at Internorga, and
regional craft beer festivals

Few B2C Magazines & Blogs:

Feinschmecker

Port Culinaire

eat smarter

Food & Travel

Slow Food Magazine

Best Chefs

Beast Kitchen

Few B2B Media:

Küche

Rolling Pin

Fish purchase by sales channels and regions

Wo werden welche Fischprodukte gekauft?

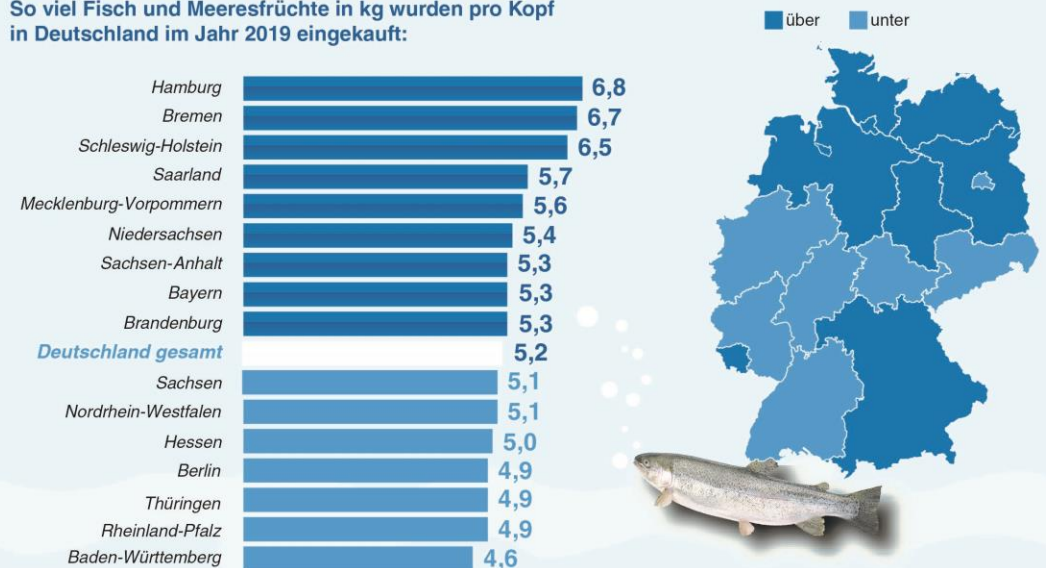
Anteile in % im Jahr 2019



Quelle: GfK Panel Services, bearbeitet vom FIZ

Fischeinkauf nach Bundesländern

So viel Fisch und Meeresfrüchte in kg wurden pro Kopf in Deutschland im Jahr 2019 eingekauft:



Quelle: GfK Panel Services, bearbeitet vom FIZ

Effects of the pandemic for the food service

Few figures for 2020

- Out of home market: decline by 35 %
- Gastro/restaurants: decline by 40%
- Delivery services: growth by 20%
- Drive through: growth by 60%
- Strong growth of curbside pickup
- Growth of webshops and online platforms
- Health care market: 30% less patients, decline by 20 %
- Company canteens: up to 70% of employees at home office, decline by 50-60%

Polls – ranking of what people miss the most

- 1) go to restaurant
- 2) meet friends for dining

The pandemic is a catalyst for new concepts in food service

- competition to delivery is the retail business - delivery is an extension of the gastro.
- homing wins. The pandemic was a catalyst: 8 million new consumers are new delivery guests; order for the first time via app or online
- webshops & apps: lower barriers for market entry, virtual brand can be built up more cost-effectively, new market segments can be more easily reached, loyalty programs via apps result in suppliers having all customer data and can control directly
- high convenience products are expected to boom in times of kitchen staff shortage
- change in the world of work: more work from home. Outlook predicts 15% of jobs moving to the home office permanently
- large canteens loose up to every second guest. Caterers develop new concepts, including food boxes, regional city-share gastro.
- gastro market gets slightly smaller after pandemic, due to insolvencies, and unemployment. Though gastro plays a major role in the re-start. Many people still have enough money to afford the luxury
- travel tourism will change. Private travel will rise quickly. Less business travel also in the long term. Guests will have new expectations and goals. More leisure, less business. Nature, Adventure, Safety, Recreation.
- sustainability is not a priority for guests these days, but could become more important again

Kærar þakkir

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