



Deutsche See – A Cinderella Story and Its Implications for the HORECA Market in Germany

Hartwig Retzlaff – Sjóvarútvegsráðstefnan 2016, Hörpu, 24.-25. nóv.

It is a Cinderella story...



Key drivers in market growth for fresh fish are...

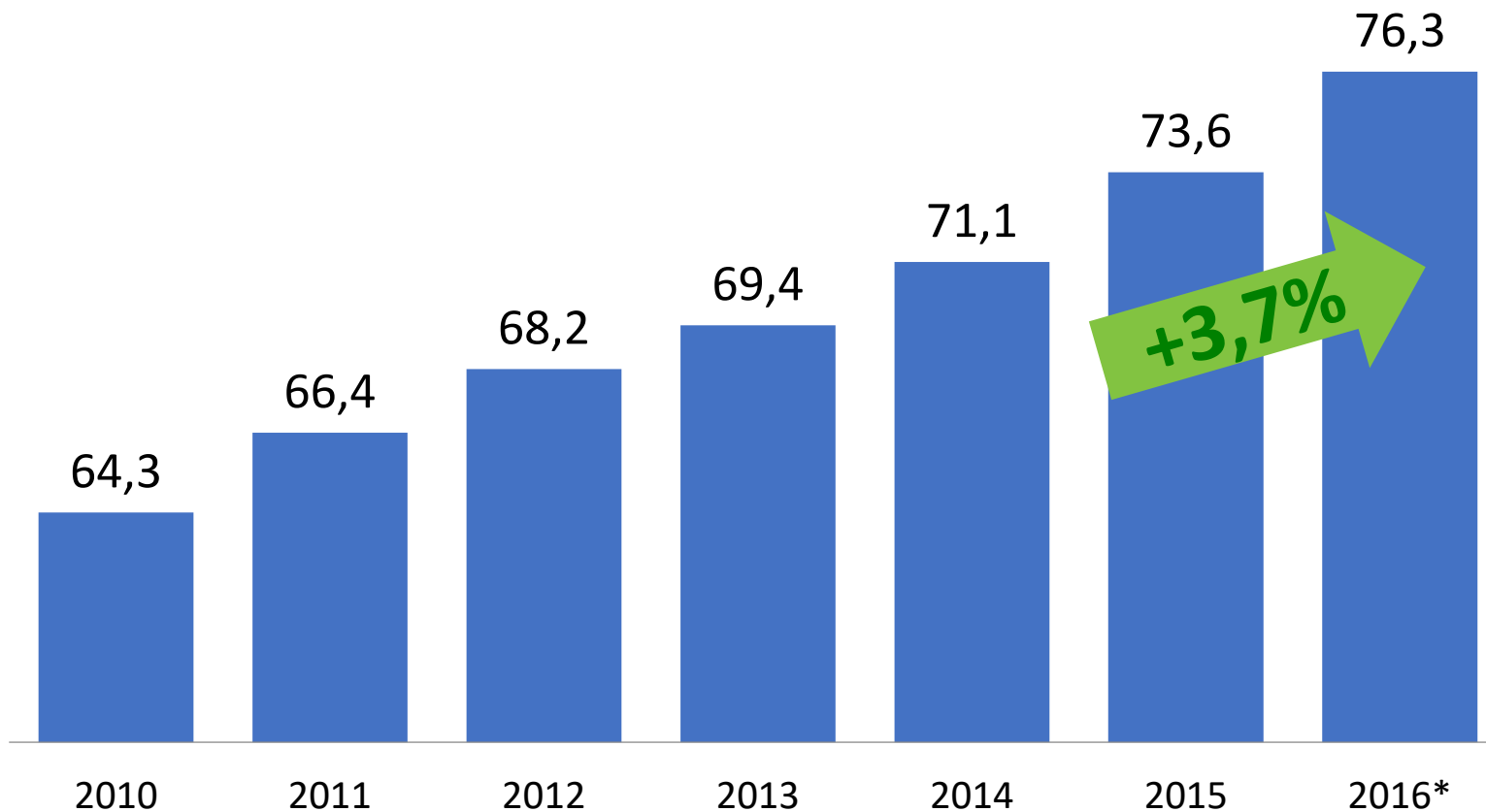
Good Taste

Health

“Best taste is fresh taste.”

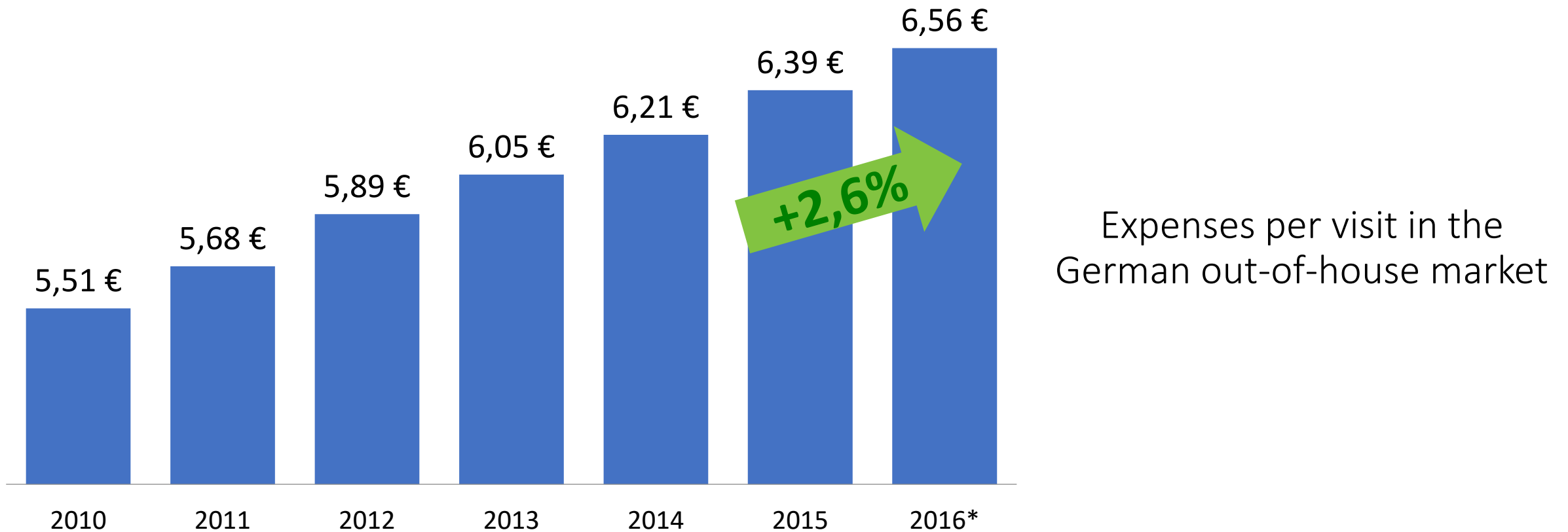
Low Fat

Consumers spent almost three billion Euros more in gastronomy than in the previous year

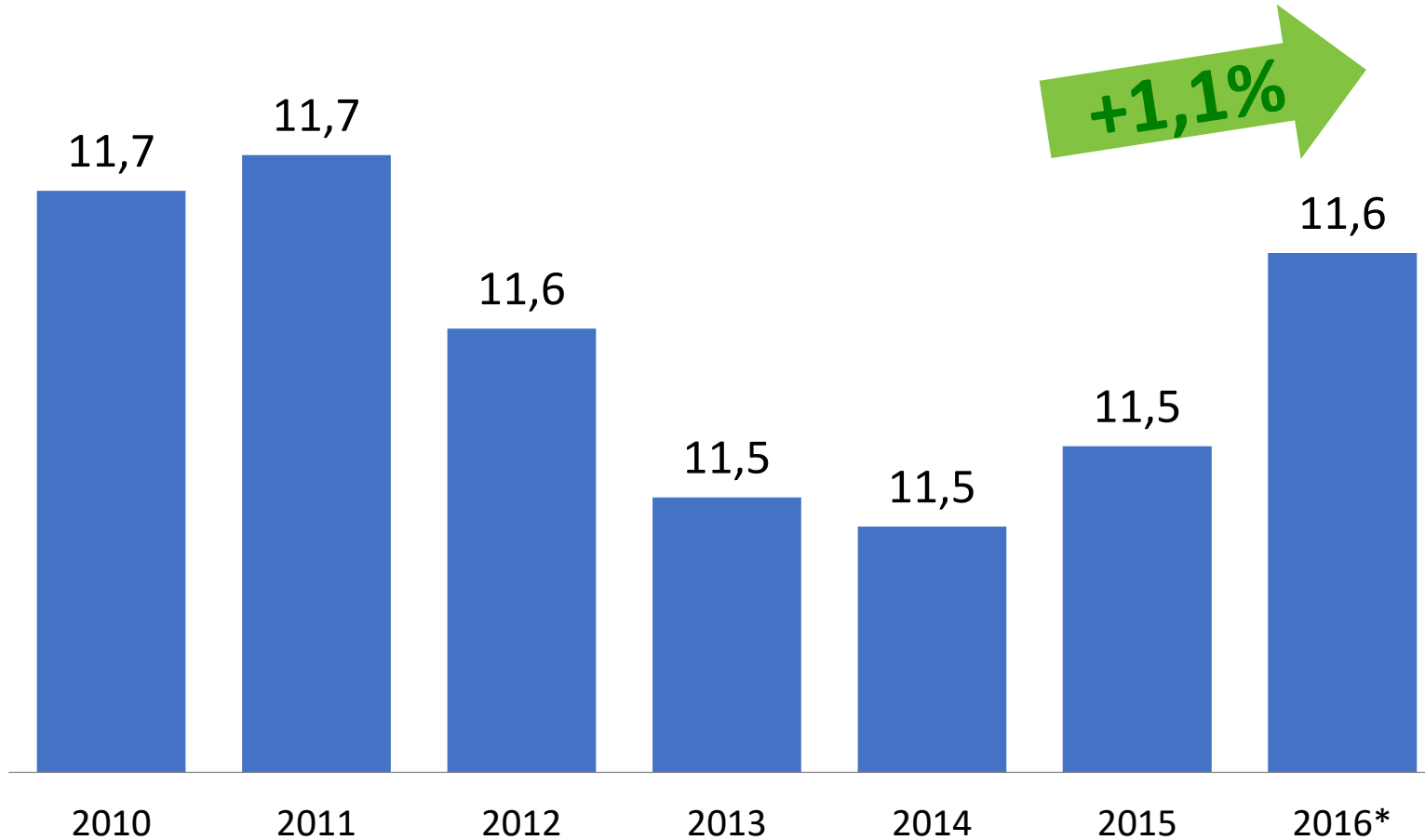


Total German consumer expenditures in out-of-home market (billions of Euros)

More spending per visit provided the largest increase



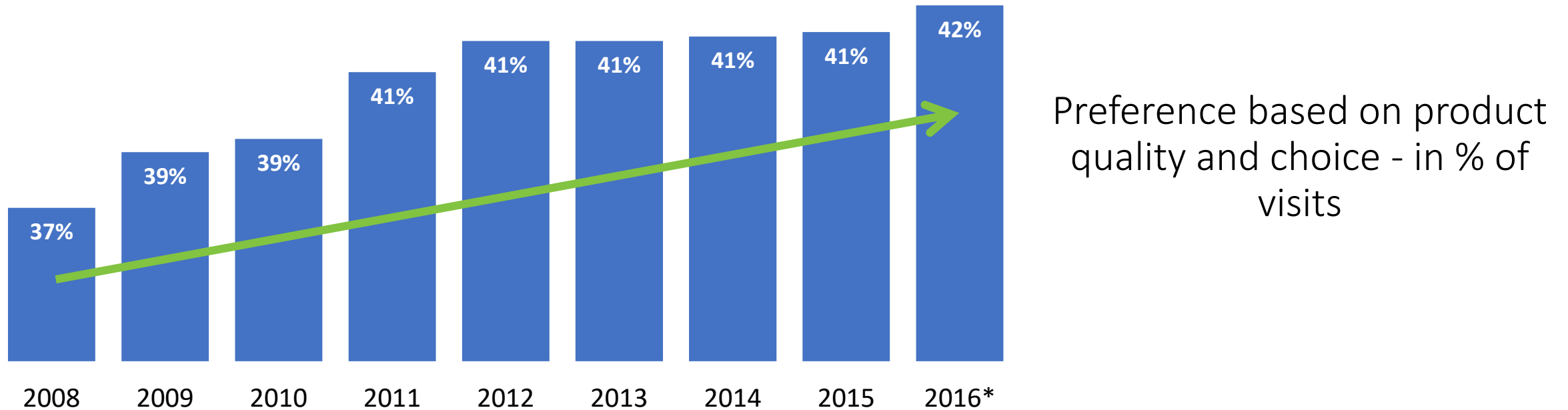
Fortunately, the number of visitors is also increasing again



Visits in German out-of-house market (in billions)

*Stand: YE Jun 2016

Restaurant choice is increasingly determined by product quality





Step 1



Kickoff in 1998...

DS DEUTSCHE SEE

...no strategic focus





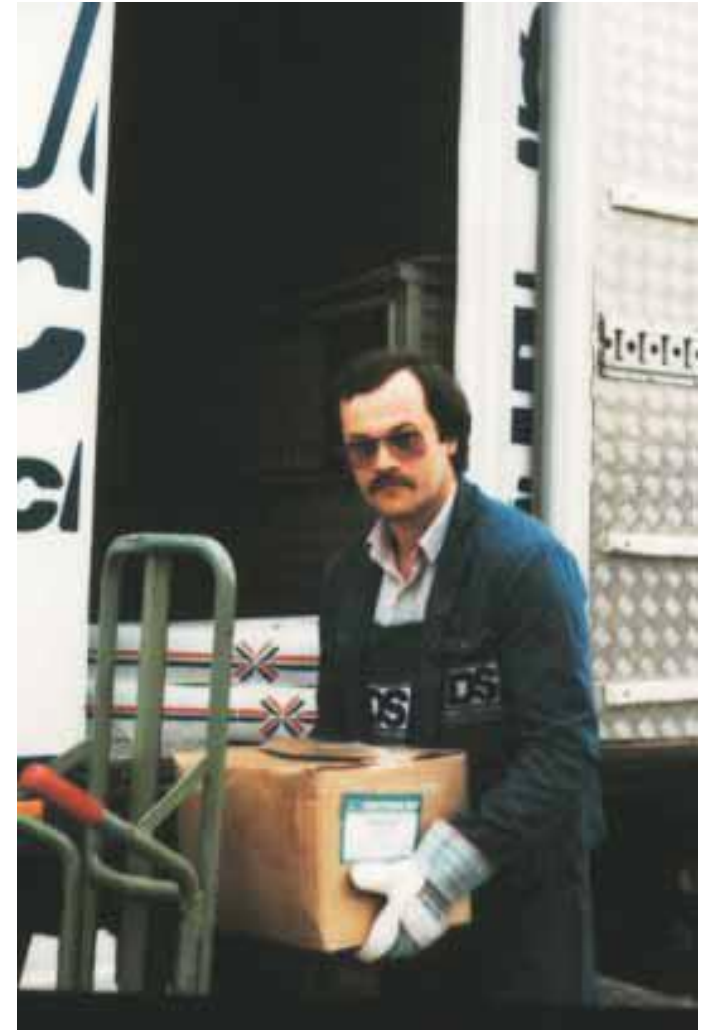
Step 2: Learning best quality from top chefs and top fishermen



Step 3: Freshness is our DNA – the logistical approach



Back in 1998:



People Business

Key figures

- Manufacturing plants in Bremerhaven
- 20 subsidiaries across Germany
- 3,500 products offered overall
- 1,700 employees throughout the whole of Germany, from lorry drivers and supervisors to smokehouse experts and subsidiary managers
- 35,000 customers based in Germany



Our business card



Leverage

1 COMPANY

35.000 CLIENTS

1.500.000 PAYING CUSTOMERS
in Germany !!!

Step 4: Transforming the company while growing from top to midmarket



Who's who in our Cinderella story?

- The good are the consumers
- The bad (in a way) are the discounters
- The ugly are the food critics

Cinderella – last take



ICELAND






Designing the fish image shift

Ever more fish and ever
less fish!



frisch 
für dich!

...on the other hand, mega-convenient!

