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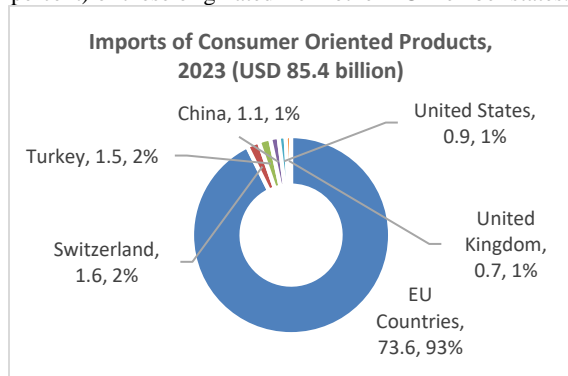
Germany has more than 84 million of the world's wealthiest consumers and is by far the biggest market in the European Union. The German market offers good opportunities for U.S. exporters of consumer-oriented agricultural products. In 2023, total U.S. exports of agricultural and related products to Germany reached USD 2.9 billion, a 3.5% increase as compared to 2022. The largest segments were – apart from soybeans – tree nuts, seafood products, whisky, wine, and condiments. This report provides U.S. exporters with background information and suggestions for entering the German market.

Executive Summary

Germany is the biggest market for food and beverages in the European Union with more than 84 million consumers. In 2023, Germany's nominal GDP reached USD 4.6 trillion, making it the world's 3rd largest economy in the world, following the U.S. and China. Germany is a major producer of food and agricultural products and a leading player in the global marketplace. It is also the third largest importer of agricultural and related products. In 2023, imports reached USD 139 billion. While more than 80 percent of these imports originated from other EU member states, the United States being the third largest supplier outside the bloc after Brazil and Switzerland. Imports of agricultural & related products from the United States reached USD 2.9 billion in 2023, which constitutes 2 percent of Germany's total agricultural imports.

Imports of Consumer-Oriented Products

In 2023, Germany imported USD 85.4 billion worth of consumer-oriented agricultural products. The majority (86 percent) of these originated from other EU member states.



Food Processing Industry

In 2023, the German food processing industry employed around 636,000 people in 5,991 companies. The sector is dominated by small and medium size companies; 90 percent of which have less than 250 employees. In 2023, the sector generated a turnover of roughly USD 247 billion, accounting for 5.6 percent of the German GDP. The largest subsectors by value were meat, dairy, bakery, confectionary, and pet food accounting for around 24, 17, 10, 9, and 7 percent, respectively.

Food Retail Industry

The sector is saturated, highly consolidated, and competitive. The top four retail groups together account for around 76 percent of the total revenue. Small neighborhood retailers continue to face strong competition from modern retailers. Online food sales grew during the pandemic and continue to record an increase. Germans are generally price sensitive, but wealthy consumers are willing to pay a higher price for premium quality products.

Quick Facts CY 2023

Imports of Consumer-Oriented Products

USD 69 billion

List of Top 10 Growth Products in Host Country

- | | |
|----------------------|----------------------|
| 1) Almonds | 2) Pistachios |
| 3) Walnuts | 4) Seafood Products |
| 5) Distilled Spirits | 6) Wine |
| 7) Food preparations | 8) Condiments/Sauces |
| 9) Peanuts | 10) Bakery Goods |

Food Industry by Channels (USD billion) 2023

Food Industry Output	249.6
Food Exports	86.9
Food Imports	76.9
Retail	211.9
Food Service	96.1

Food Industry Gross Sales (USD billion) 2023

Food Industry Revenues (Domestic market) USD 162.7

Top 10 Host Country Retailers

- | | |
|-----------------------------|--------------------|
| 1) Edeka/Netto | 6) Rossmann |
| 2) Rewe/Penny | 7) BartelsLangness |
| 3) Schwarz (Lidl/ Kaufland) | 8) Globus |
| 4) Aldi North/South | 9) Metro |
| 5) dm | 10) Transgourmet |

GDP/Population

Population (millions): 83.2

GDP (trillion USD): 4.6

GDP per capita (USD): 52,727

Exchange rate: USD 1.00 = EUR 0.9314 (June 2023)

Strengths/Weaknesses/Opportunities/Challenges

Strengths	Weaknesses
Germany is the biggest market in Europe with one of the highest income levels in the world.	U.S. exporters face competition from tariff-free products from other EU member states and FTA partners.
Opportunities	Threats
A large, well developed food processing industry requiring a wide range of ingredients, from low-value, unprocessed foods to high-value, highly processed ingredients.	Non-tariff barriers such as phytosanitary restrictions and traceability requirements can make exporting to Germany complicated.

Data and Information Sources:

Federal Statistical Office Germany (Destatis), Federation of German Food and Drink Industries (BVE), Trade Date Monitor (TDM), World Bank, Federal Ministry for Economy and Agriculture (BMEL), Lebensmittel Praxis

Contact: FAS Berlin, Germany, AgBerlin@usda.gov

I. MARKET SUMMARY

Germany's economy is not only one of the largest worldwide, it is also the [largest in Europe](#) and predicted to be among the countries with the [largest GDP by the year 2030](#). Germany is a major producer of food and agricultural products and a leading player in the global marketplace. It is also an attractive and cost-efficient location in the center of the EU. Subsequently, it also reports one of the highest trade surpluses worldwide and one of the lowest [unemployment rates in the European Union](#). The retail market's key characteristics are consolidation, market saturation, strong competition, and low prices.

In 2023, Germany imported USD 69 billion in consumer-oriented agricultural products. The majority of these imports originated from other EU member states. However, there is a trend toward imports from outside the EU. Imports of consumer-oriented agricultural products from the United States totaled USD 1.7 billion in 2023, consisting mostly of soybeans, tree nuts, fish & seafood, food preparations, wine, spirits, condiments, sauces, and beef. Germany's main trading partners of consumer-oriented agricultural products are other EU countries followed by Brazil, Switzerland, United States, China, Turkey, and the United Kingdom. In the past ten years, food imports have steadily increased underlying the rising demand for foreign and "exotic" foods.

Since 2022 continuous price increases for raw materials and energy, resulting from the Russian war in Ukraine, have caused the German economy to struggle. Food manufacturers are face challenges in all sub-sectors, having to constantly look for appropriate solutions, especially in exports. Following a brief stabilization, the consumer climate in Germany reached record lows in 2022. Rising inflation and skyrocketing energy prices significantly shrunk the purchasing power of German consumers. From April 2022 to April 2023, [food prices increased](#) by 17.2 percent across all food categories (as a comparison, between 2000 and 2019 the rate was below 1.5 percent). As a result, many German consumers have [cut back spending](#) even on essential products. However, overall food related expenses increased due to rising prices. In 2023, German citizens spent [15 percent](#) of their income on food and beverage products, roughly 4 percent more than in 2022.

According to the German Federal Statistical Office ([Destatis](#)), Germany's GDP in 2023 was 0.3% lower than the previous year, after adjusting for prices. This calendar-adjusted decline in economic output was 0.1%. Despite the decline, Germany's GDP was 0.7% higher in 2023 than in 2019, the year before the COVID-19 pandemic hit. Germany is still the third-largest economy in the world after the United States and China. While many consumers are very price sensitive, the market still has many wealthy consumers who follow value-for-money concepts. These consumers are looking for premium quality products and are willing to pay a higher price.

Table 1: Advantages and Challenges

Advantages	Challenges
Germany is the biggest market in Europe with one of the highest income levels in the world. Due to its central location in Europe and excellent transportation channels, Germany is a good base for exporting products to other EU countries.	German consumers demand quality and low prices. Clean label foods, "free from," and locally grown products attract more and more German consumers. Listing fees paid to retailers limit the introduction of new U.S. brands.

The demand for sustainable food ingredients and sustainable foods is growing. Many German consumers are still uninformed about the details of sustainability, and there is still room to voice the U.S.'s sustainability message.	Private sector sustainability standards can act as barriers to trade. Getting the audience's attention is amongst many competing actors can be challenging.
Germany is among the largest food importing nations in the world. It has a large, well-developed food processing industry requiring a wide range of ingredients, from low-value, unprocessed foods to high-value, highly processed ingredients.	U.S. exporters face competition from tariff-free products from other EU member states. The EU gives preferential access to products from EU countries.
The United States has a reputation as a reliable supplier of food inputs in terms of availability, delivery, and quality.	Some products of modern biotechnology are prohibited as they are not approved in the EU.
Germany is the largest EU market for U.S. beef under the EU import quota for high quality beef, which was expanded in 2022.	The beef import quota only applies to beef from animals not treated with growth-promoting hormones. New meat alternatives are becoming increasingly popular.
Large expat and immigrant population and Germans' inclination to travel abroad help fuel demand for foreign products. There is also increased preference for authentic regional cuisines in bigger cities.	The 'regional' trend can work for and against U.S. products.
U.S. style is popular, especially among the younger generations; good reputation for U.S. foods like dried fruits, seafood, and wine.	Non-tariff barriers such as phytosanitary restrictions and traceability requirements can make exporting to Germany complicated.

Source: FAS Berlin

II. EXPORTER BUSINESS TIPS

The German market offers good opportunities for U.S. exporters of consumer-oriented agricultural products. U.S. suppliers of consumer-ready foods and beverages interested in developing a market for their products in Germany must be prepared to:

- Offer a product that meets European Union and German food law, packaging, and labeling requirements
- Pay particular attention to animal product health certificates, many of which are now filed using a new electronic system ([VEHCS](#))
- Watch out for potential testing for unapproved biotech crops
- Invest time and money to develop the market, paying special attention to identify the right marketing channel for your product
- Participate in food, beverage, and industry trade shows
- Explore marketing approaches that build on strong societal themes
- Highlight a particular product or industries' sustainability attributes
- Consider including a certified organic, vegan, or vegetarian item in your portfolio

Market Access

If a potential exporter is considering working through a distributor in another country (the Netherlands is common), they should be aware that food imports from other countries within the European Union fall under the "free movement of goods" principle. This means that products, which are imported by other EU-countries, may be brought into Germany even if they do not meet German food laws. If this is the case, importers must obtain a permit from the Federal Office for Consumer Protection and Food Safety ([BVL](#)) in order to sell the product in Germany.

To determine current tariffs and other measures applied to imports into Germany and the EU in general, please see the TARIC, the [Online Customs Tariff Database](#).

There are a number of potential technical barriers to trade, thus exporters may want to consult with the latest Food and Agricultural Import Regulations and Standards ([FAIRS](#)) report on Germany. This report provides an overview of food laws in force in Germany that cover areas which are not yet harmonized.

U.S. companies seeking to export goods to Germany are advised to do thorough research to develop a good understanding of the market. FAS GAIN Reports are a good source for country specific information: <https://gain.fas.usda.gov/#/>. Please contact the USDA Foreign Agricultural Service (FAS) Office in Berlin for clarification on specific questions, for example, for information on veterinary and phytosanitary certificates. Contact information is provided at the end of this report.

Distribution Channels

The German food and beverage industry is highly fragmented and competitive. Few German retailers import products directly from other countries. Most food retailers prefer to buy from central buyers/distributors specialized in food and beverage importing. In general, these wholesalers specialize in products or product groups, and some are even experts in food products from a specific country of origin. These specialized importers have in-depth knowledge of all importing requirements, such as the necessary product certificates and, labeling and packaging. They also take care of the shipping, customs clearance, warehousing, and distribution of the products within the country. It is advisable that U.S. exporters find a local representative to place and promote their products successfully within Germany.

Another successful way of finding the right distribution for products of U.S. food and beverage companies is to participate in the various food trade fairs taking place in Germany. Trade shows, like ANUGA or BIOFACH, enjoy an exceptional reputation among industry experts worldwide. Participating in trade shows facilitates direct contact with German food brokers, importers, and wholesalers. A listing of upcoming trade shows in Germany may be found at <https://fas.usda.gov/topics/trade-shows>.

Germany is a potential market for those U.S. companies willing to invest the time and resources to cement contacts. New products on the German market may require up to 12 to 18 months of testing to determine market acceptance.

Supporting Institutions

U.S. exporters can also contact their respective U.S. State Regional Trade Groups (SRTG), their Commodity Cooperator Group, and their state Department of Agriculture to obtain additional support.

State Regional Trade Groups (SRTG) are non-profit trade development organizations that help U.S. food producers and processors to enter overseas markets. They are funded by USDA/FAS and the private industry.

They carry out promotional activities to increase exports of U.S. high-value food and agricultural products. For more information, contact the State Regional Trade Group responsible for your state: www.fas.usda.gov/state-regional-trade-groups

The **U.S. Agricultural Export Development Council** is composed of U.S. commodity trade associations and other organizations, in addition to the SRTGs, with an interest in promoting U.S. agricultural exports. For an overview and additional information on the various commodity groups, you can go to <http://www.usaedc.org/>. The [Commodity Cooperator Groups](#) regularly organize trade missions, which often take place around trade shows or other events. They are also excellent platforms for U.S. suppliers of food ingredients to meet with foreign buyers. Currently, about 40 U.S. Cooperator organizations operate USDA-funded marketing programs in Germany. For the full list of participating U.S. organizations, please visit www.delicious-usa.com/trade-associations/.

Foreign companies looking for German food importers, wholesalers, or distributors can obtain reliable information from the Foreign Agricultural Service ([FAS](#)) based in Berlin, the Federation of German Food and Drink Industries ([BVE](#)), the Federal Association of the German Retail Grocery Trade ([BVLH](#)), and from the different food market segments industry associations.

III. IMPORT FOOD STANDARDS & REGULATIONS AND IMPORT PROCEDURES

As a member of the EU, Germany follows all EU directives, regulations, and obligations where available. Since the EU is a customs union, all Member States apply the same import duties on goods imported from outside the EU based on tariff classification of goods and the customs value. For details on the EU legislation and import duties, please see the [EU FAIRS report](#) for further information.

Incoming goods go either to customs storage (small shipments) or to a freight forwarder's facility. Storing and removal from storage is carried out under the terminal's supervision by a customs officer who compares the documents with the commodities. Later, the invoice for the import duty is issued. Food inspectors at the port of entry's storage area do not routinely check packaged foods. However, the customs officer may take samples to double check for ingredients (sugar, milk powder, alcohol) as they are responsible for the correct assessment of customs duties.

Once imported goods are cleared in one Member State, they can move freely throughout the EU territory. This means U.S. products coming into Germany via another EU member state, for example the Netherlands, must clear customs there. No additional inspections are carried out when crossing the border into Germany. For more information on import food standards and import procedures which are not yet harmonized with EU legislation please consult the relevant FAIRS reports.

Import Procedures

Importers represent the first link in the domestic sales chain and are consequently responsible for the compliance of imported products to national and EU regulations. The European Commission has published the following guidance documents which refer to key EU rules: "[Guidance document – Key questions related to import requirements and the new rules on food hygiene and official food controls.](#)"

The responsibility for enforcing food law provisions in Germany lies with its federal states (*Laender*). Whether a specific product complies with the legal requirements is evaluated by considering the actual product in its entirety, taking into account its origin, import certificate, composition, intended purpose, and presentation. Please contact FAS Berlin for clarification on questions concerning the interpretation and application of import provisions in individual cases.

Purchasing by German food retailers is fragmented and competitive. Few German retailers import products directly from other countries, except for items that they purchase in large quantities. Most food retailers would rather buy from central buyers/distributors importing food and beverages. In general, these wholesalers are specialized in products or product groups, and some are even experts in food products from a specific country of origin. Thus, specialized importers have an in-depth knowledge of import requirements, such as product certification, labeling, and packaging. They also typically handle shipping, customs clearance, warehousing, and distribution of products within the country.

IV. MARKET SECTOR STRUCTURE AND TRENDS

[Trade within the EU27](#) bloc is significantly easier for Germany than trading outside the bloc, so it comes as no surprise that the top exporters of most products to Germany are typically other European competitors to the United States. The United States ranked sixteenth of all countries in exports of consumer-oriented agricultural products to Germany in 2023 (three ranks down compared to 2022), but when accounting for the single market EU27, the United States is a much larger source for imported customer-oriented products. Therefore, the biggest competition for German market share is with Switzerland, China, and Turkey which exported slightly more to Germany last year, and the United Kingdom, and Vietnam who exported less than the United States.

Key market drivers and consumption trends

- Fair trade and organic products are increasingly prominent in the German grocery market. Germany is the second largest organic market in the world (behind the United States) and presents good prospects for exporters of organic products. However, in 2023 inflation somewhat reversed this trend. German consumers felt like they had to save money and changed shopping patterns. For more information, please see the GAIN report: [German Organic Market Takes a Dip](#).
- An aging population and increased health consciousness of consumers is fueling the demand for health and wellness products and functional food products.
- Increasingly high-paced society and a rising number of single households are driving the demand for convenient ready-to-eat meals, desserts, and baking mixes.
- There is a growing share of consumers who view their purchasing decisions as a political or life-style statement (non-GMO, only free-range eggs, vegetarian, or vegan diet), and they demand traceability and information about production methods.
- Germany remains a price-focused market, but the share of consumers who are willing to pay for quality is increasing in most cities. On-demand grocery delivery platforms are flooding the market in Germany's major cities, offering food at prices that strongly compete with those of traditional supermarkets.
- Two and a half years of COVID-19 related lock-down and physical distancing measures heavily impacted the German food sector and consumer shopping and consumption patterns. With the closure of schools and most shops and services, and many people working in a home-office setting, much of the demand for food and agricultural products shifted from the restaurant and food service sector to food retail and/or was significantly reduced. Germany is still recovering, especially due to employee shortages in the hospitality and service sectors.
- Prices for food [increased 17.2](#) percent from April 2022 to April 2023 (while the increase from 2000 to 2019 was 1.5 percent). On top, disruptions on international trade as a result of Russia's invasion of Ukraine currently impact the German market substantially, as well as a sharp increase in energy costs.
- Consumers increasingly require traceability and information about production methods. According to a [report](#) from the German Federal Ministry of Food and Agriculture published in September 2023, labelling is becoming more important for consumers, especially the animal welfare label, the organic label, and the sustainable fishing label.

- Innovative manufacturing and processing technologies bring new products to the market and give good old products a new taste. Vegan and meat alternatives are becoming increasingly popular, especially among younger Germans.

V. AGRICULTURAL AND FOOD IMPORTS

Germany’s agricultural and related product imports from the United States totaled USD 2.8 billion in 2022, an increase of 15 percent from 2021. The largest segments were – apart from soybeans – tree nuts, seafood products, wine, beef, and condiments. Germany also offers a good market for processed food products like sauces, snacks, condiments, confectionery products, distilled spirits, wine, craft beer, bread, pastry, cakes, products with a special certification, and health food snacks from the United States. The following tables present products with good sales potential, good current sales, and products not available in the German market.

Products present in the market that have good sales potential

Product Category	Total German Imports 2022 [USD]	Total German Imports from the USA 2023 [USD]	% Change from 2021	Market Attractiveness for USA
Tree Nuts	\$821,165,300	\$610,187,779	-25,7%	The USA is consistently the leading exporter of almonds, pistachios, and walnuts to Germany. Demand is strong for tree nuts, particularly for snacking and confectionery.
Hops	\$61,300,000	\$44,548,000	-27%	German demand for imported hops has doubled in the past six years, with the USA being the leading exporter.
Sweet Potatoes	\$915,000	\$957,000	+4.5%	German demand for imported sweet potatoes has doubled in the past ten years and peaked in 2021. Sweet potatoes are becoming more popular in processed snacks and in cooking.
Pulses	\$6,258,280	\$7,202,895	+15%	Increased interest in pulses as an alternative protein source.
Fish and Seafood	\$163,471,059	\$116,211,361	-28%	Demand in Germany is growing each year. Good prospects for high-value products.
Whiskey	\$111,004,112	\$81,784,008	-27%	The USA is the second-largest exporter of whiskies to Germany, after the UK.

Top 5 German imports from United States, in Million USD

Product Category	Total German Imports 2022 [USD]	Total German Imports from the USA 2023 [USD]	% Change from 2022
Soybeans	\$951,918,524	\$1,232,270,806	+29%
Tree Nuts	\$821,071,422	\$607,991,423	-26%
Fish and Seafood Products	\$164,513,061	\$116,821,966	-29%
Whiskey	\$111,006,844	\$81,784,008	-24%
Wine	\$35,103,429	\$36,959,203	+5%

Source: Trade Date Monitor

Top 5 German consumer-oriented imports from the world

Product	Total German Imports 2023 (USD)	Total German Imports from the USA 2023 (USD)	% Change from 2022
Dairy	\$11,168,399,379	\$7,519,531	-26.7%
Fresh Fruit	\$8,498,190,432	\$469,434	-91%
Fresh Vegetables	\$6,841,454,570	\$328,824	+25.2%
Bakery Goods, Cereals, & Pasta	\$6,229,139,110	\$4,921,473	+15.3%
Chocolate & Cocoa Products	\$4,478,851,635	\$2,182,335	-28.8%

Source: Trade Date Monitor

Products not present in significant quantities but which have good sales potential

- High-quality beef
- Cranberries and cranberry products
- Innovative sauces, condiments, and confectionery products
- Products featuring “sustainable” or other social issue-based marketing labels

Products not present because they face significant barriers

- Food additives not approved by the European Commission
- Red meat and meat products with hormones
- Most poultry and eggs (non-tariff barrier)
- GMO-derived products that are not approved in the EU

For sector specific information about U.S. exports of consumer-oriented products check out the following FAS Berlin reports:

Hotel, Restaurant and Institutional: [Food Service Report 2023](#)

Retailers and Retail food: [Food Retail Report 2023](#)

Food Processing: [FPI Report 2024](#)

VI. KEY CONTACTS AND FURTHER INFORMATION

Major Regulatory Agencies

Name	Contact	Info
Bundesministerium für Ernährung und Landwirtschaft (BMEL) (Federal Ministry of Food & Agriculture) Rochusstr. 1, 53123 Bonn, Germany	Tel: +49-228 – 99 -529-0 Fax: +49-228 - 99-529-4262 Website: https://www.bmel.de/EN/Home	
Bundesamt für Verbraucherschutz und Lebensmittelsicherheit (BVL) (Federal Office of Consumer Protection and Food Safety) Bundesallee 51 38116 Braunschweig	Tel: +49 30 18444-99999 Fax: +49 30 18444-99099 Mail: poststelle@bvl.bund.de Website: https://www.bvl.bund.de/EN/Home	The biotech division and the novel foods/feeds division of BVL are responsible for registration and approval of biotech products and novel foods.
Bundesanstalt für Landwirtschaft und Ernährung (BLE) (Federal Office for Agriculture & Food) Referat 521 Deichmanns Aue 29 53179 Bonn, Germany	Tel.: +49 228 6845 – 0 Fax: +49 228 6845-3444 Website: www.ble.de/EN/Home/home_node.html	BLE is the responsible German authority for organic import rules.

Other [Import Specialist Technical Contacts](#) can be found in the latest Food and Agricultural Import Regulations and Standards report for Germany.

Homepages of potential interest to U.S. food and beverage exporters are listed below:

- USDA/FAS Washington: <https://www.fas.usda.gov/>
- USDA/FAS U.S. Mission to the European Union: <http://www.usda-eu.org>

For U.S. exporters it might be helpful to access the German business portal [IXPOS](#), which is maintained by the Ministry of Economics and Technology (Germany Trade & Invest). Provided in English, it serves as a central contact platform that can steer inquiries into the right channel.

If you have questions or comments regarding this report, or need assistance exporting to Germany, please contact the U.S. Foreign Agricultural Service Office in Berlin at the following address:

Foreign Agricultural Service

U.S. Department of Agriculture
Embassy of United States of America
Clayallee 170, 14195 Berlin
Tel: (49) (30) 8305 – 1150
E-Mail: AgBerlin@usda.gov
Twitter: [@FASEurope](https://twitter.com/FASEurope)

Please view our [Country](#) Page for more information on exporting U.S. food and beverage products to Germany, including market and product “briefs” available on specific topics of interest to U.S. exporters. Importer listings are available from the Foreign Agricultural Service for use by U.S. exporters of U.S. food and beverage products.

Attachments:

No Attachments