USDA Foreign Agricultural Service GAIN Report Global Agricultural Information Network

Required Report - public distribution

Date: 8/29/2017

GAIN Report Number: GM17036

Germany

Exporter Guide

2017

Approved By:
Emily Scott
Prepared By:
Leif Erik Rehder\Emily Ruhm

Report Highlights:
Germany has 83 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 2016, U.S. exports of agricultural products to Germany reached USD 2.3 billion. Largest segments were soybeans, tree nuts, Alaskan pollock, wine, beef, dried fruits, food preparations, sauces and other consumer- oriented products. This report provides U.S. food and agriculture exporters with background information and suggestions for entering the German market.

Post:

Berlin

Section I. Market Overview

Macro-Economic Situation

Germany has 83 million of the world's wealthiest consumers and is by far the most populous and economically powerful of the European Union's 28 member states. Germany's population is increasing at a slow rate due to low birth rates but balanced to some extent by increased immigration. It is estimated that 50 percent of its population will be older than 47 years old in 2025 and by 2060 the population will have decreased to about 65 million.

The German economy continued to experience positive development in 2016. With a total GDP of USD 3.5 trillion in 2016, Germany remains the largest economy in Western Europe. It posted an average annual growth rate of 2 percent during the period 2010-2016, outperforming the EU average of 1.5 percent in constant terms during the same period. In 2016, German GDP grew by 1.9 percent compared to the previous year, reaching a per capita GDP of over $48,839 according to OECD. Inflation is almost zero.

In 2016, unemployment was 3.9 percent, reaching the lowest level since German reunification with a total of 45 million people employed. The government approved an increase of the minimum wage to €8.50 (US$9.40) per hour, which took effect in 2015. Consumer per capita expenditure amounted to €19,420 (US$22,609) last year, and this indicator is expected to grow by 1.5 percent in 2017 in real terms. Total consumer expenditure (in real terms) is expected to rise by 3.4 percent in 2017, representing 50.5 percent of GDP.

In 2016, German imports of agricultural products (including forest products) totaled USD 99 billion. Although there was an overall 1 percent increase in total imports in 2016, U.S. exports to Germany decreased slightly reaching USD 2.3 billion. The U.S. share of the German agricultural import market consists mostly of soybeans, almonds, walnuts, pistachios, Alaskan pollock, wine, beef, dried fruits, food preparations, sauces and other consumer-oriented products. Germany's main trading partners in the food sector are the other EU countries followed by Brazil, the United States, and China. In total, Germany is a net importer of food and feed. In the past ten years, food imports have steadily increased with the exception of 2015, underlying the rising demand for foreign as well as exotic foods. The decline in import volumes in 2015, however, appears to be a result of consumers developing a different attitude to and awareness of food consumption, rather than economic factors; namely, they are willing to consume less.

Section 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 German/EU 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
- Watch out for potential testing for unapproved biotech crops (e.g., there is a zero tolerance for some U.S. corn varieties)
- Invest time and money to develop the market, paying special attention to identify the right marketing channel for your product.
- Seriously consider participating in food trade shows.
- Explore marketing approaches that build on strong societal themes
- Highlight your particular industry's 'sustainability' attributes
- Consider including a certified organic, vegan, or vegetarian item in your product line
-

Market Access
If you are considering working through a distributor in another country (the Netherlands is common), you 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 that 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 USDA/FAS Food and Agricultural Import Regulations and Standards report on Germany. This report provides an overview of food laws in force in Germany that cover areas which are not yet harmonized and provides a link to more general EU import requirements.

Product Packaging
Exporting companies from the United States should be aware that product packaging is very important to German consumers since they are highly environmentally conscious. Manufacturers, importers, distributors, and retailers must make sure that their packaging materials for their food products comply with EU and German domestic regulations in terms of recycling and disposal. The German packaging law requires manufacturers to take care of the recycling or disposal of any packaging material they sell. The German industry set up a dual system of waste collection, which picks up household packaging in conjunction with the existing municipal waste-collection systems. There are several dual system companies licensed in Germany offering various waste disposal schemes. U.S. exporters are free to choose which dual system they join. However, it is not mandatory to display any dual system membership seal on sales packaging.

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 the import of food & beverages. 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, labeling and packaging, and 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 in order to place and promote their products successfully within Germany.

Another successful way of finding the right distribution for products of U.S. food and beverages companies is to participate in the various food trade fairs taking place in Germany. Trade shows like ANUGA or BioFach that take place in Germany enjoy an exceptional reputation among industry experts worldwide. Participating in trade shows facilitates the direct contact with German food brokers, importers, and wholesalers. A listing of upcoming trade shows in Germany may be found at www.fas-europe.org/germany

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 in order to determine market acceptance.

Supporting Institutions

Currently, about 40 U.S. organizations operate USDA-funded marketing programs in Germany. Participants include American Soybean Association, Alaska Seafood Marketing Institute, Almond Board of California, California Walnut Commission, California Wine Institute, Cranberry Marketing Association, and U.S. Meat Export Federation.

For the full list of participating U.S. organizations, please visit www.fas-europe.org/partners

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

Section III. Market Sector Structure and Trends

Food Retail

According to Euromonitor International, in 2016, German grocery retailing has grown by 1% to USD 232 billion. Part of the demand is met with domestic products; however, overall Germany is a net importer of all major categories of food products.

The German food market is heavily dependent on imports to meet its customer demands. Last year, Germany imported USD 56.1 billion of consumer-oriented agricultural products. Somewhat declining import volumes, however, appear to be a result of consumers developing a different attitude towards and awareness of food consumption, rather than economic factors; namely, they are willing to consume less. By value, approximately one quarter of imported products came from the Netherlands. Spain (8 percent), France (7 percent), and Poland (6 percent) are the following major suppliers. The United States is the third largest non-EU supplier of consumer-oriented agricultural products valued at USD 1.0 billion after Switzerland and Turkey. However, there was a decrease by nearly 20% since 2015 mainly due to lower imports of walnuts and almonds. But, the US was and continues to be a strong partner because of particular products, including the major tree nuts, as well as food enzymes, food preparations, dried prunes, cranberries and dried grapes including raisins. Other important products were wine, meat of bovine animals, sauces, cocoa and peanuts.

Value of imports from Consumer Oriented and Fishery Products, billion USD

	2012	**2013**	**2014**	**2015**	**2016**
Imports of Consumer Oriented Agric. Products	56.3	60.9	62.1	55.4	56.2
Imports from the U.S.	0.9	1.0	1.2	1.2	1.0
Fishery products	4.8	5.2	5.7	4.8	4.4
Imports from the U.S.	0.2	0.2	0.2	0.2	0.2

Source: Global Trade Atlas

Consolidation, market saturation, strong competition and low prices are key characteristics of the German retail food market. Because of these factors, the market has experienced very strong stability, and the major chains face slim margins due to fierce competition in the sector as a result. This stability is potentially reaching its breaking point as stores battle increasingly for same store growth. The market is seeing the emergence of channel reinvention and new "channels." There has been a trend in consumer preference toward smaller grocery formats, including convenience stores, small grocery retailers, and independents. This also includes adapting to changing needs by focusing on the importance of proximity and online retail. Shoppers are increasingly focused on convenience, which requires new and faster ways to pay as well as demand for more products catered to their individual needs. The shopper-first mentality has becoming a growing concern of retailers because of this.

German consumers expect high quality food products. However, they are very price-sensitive. Germans are devoted to their discounters, and the country has, globally, the highest share of discounters in food retailing. This is one reason why margins at the retail level are so thin. A key factor in the future will be that Germany has one of the world's oldest populations. Food retailing in Germany will therefore face significant challenges due to changes in the demographic structure and consumer lifestyles. Demand for convenience, health, and wellness, as well as luxury products, will remain a consumer trend impacting food retailing into the future. Another trend is that German consumers take great pride in being green. Therefore German consumers are willing to pay more for "sustainable," "locally sourced," "free range," "natural," "organic," "fair trade," and "carbon neutral" products. In general, people were willing to pay more, but the price-performance ratio was one of the most important factors as Germans are very price-sensitive. Vegan and vegetarian foods (and lifestyles) are abundant in Germany, particularly in the larger cities. These trends are explored in depth in the report: Vegan Market is Cooking in Germany. Additional trends include sustainability, regional produce, convenience, health and wellness, Asian cuisine, and retail catering.

Consumer behavior will continue to become more conscious and is expected to further develop in the direction of sustainable consumption. People are willing to consume less, but at the same time, they also have less time to shop and cook. German consumers are also very keen on ratings and verdicts of consumer organizations involved in investigating and comparing goods and services in an unbiased way, such as the Stiftung Warentest, an independent foundation under civil law and the stock company Öko-Test. Especially the former has a substantial impact on the consumers' buying behavior due to its established and very well-known reputation. The evaluation is so influential that positive valuations are often used in the marketing communications campaigns for both private labels and manufacturer's brands. In recent years, German retailers have increasingly included marketing communication strategies which focus on the conveying that a large proportion of their assortment includes high quality products manifested by positive test outcomes of consumer organizations.

For sustainability in particular, major retailers and producers are increasingly required to have private certification. Unilever, for example, has pledged to purchase 100 percent ‘sustainable’ products by 2020 and is already making strong progress toward that goal. For U.S. products, there is room to use high health, safety, and environmental standards governing production as a competitive advantage but is it important that they have a “story to tell” and are prepared to consider private sustainability certification.

The movement for organic food products has long since achieved mainstream status in Germany. More and more consumers are seeking to improve their sense of well-being, health, and even their performance levels, through the consumption of functional food products. An increasingly fast-paced society and the rising number of single households is driving demand for highly convenient foodstuffs including ready-to-eat meals, frozen foods, desserts, and baked goods. Other trends include sales of fair trade products, such as coffee and fruit juices.

For more information please see the FAS/USDA German Retail Foods report.

Selling direct
Direct sales to Germany’s leading retail companies are very difficult; however, it can be a desirable product-entry approach for a U.S. supplier. Due to their wide range of distribution, central buyers are generally flooded with offers from competing suppliers, and they are usually not interested in taking on added responsibility of importing products directly. This is especially the case for new-to-market products, which may not comply with German/EU import requirements, food laws, and packaging and labeling requirements. Retail buyers may only be interested in importing products directly if they are unique, possess some specific attribute, or offer significant advantages in terms of quality, price, or financial promotional support.

Each of Germany’s leading retail groups has a different business structure, purchasing, and distribution system. Many of the leading retailers have multiple retail chains, often with various types of retail formats such as large hypermarkets, discount and small neighborhood stores, or perhaps beverage and/or delicatessen outlets. Large retailers’ purchasing departments may also be divided by retail format and, sometimes, by region of the country.

New products on the German market may require up to 12 to 18 months of testing in order to gain market acceptance. Listing fees, equivalent to several thousand dollars or more per product, are common and do not ensure shelf space if a profitable turnover is not achieved rather quickly. The exception may be a retailer's desire to maintain a competitive edge by keeping a full range of products.

Hotel, Restaurant, and Institutional Sector (HRI)
The German food service sector is large and highly fragmented but can be divided into the commercial and institutional food service markets. The German commercial food service market includes hotels, restaurants, fast food and take-away outlets, bars, cafeterias, coffee shops, and similar channels. The institutional food service market is comprised of hospitals, universities, nursing homes, and cafeterias. The food service market sales increased by 2.4% to €80.9 billion in 2016, continuing the upward trend

of past years. The main reasons for growth are Germans' desire to consume more and Germany's status as a popular tourist destination.
Sales of consumer foodservice continued to be led by full-service restaurants, who are dominated by independent restaurants. Compared with other countries, chains still have a very low presence, but some are also becoming popular. International chains have a very strong position in fast food. The biggest players in the German food service market are McDonalds, Burger King, LSG, Autobahn, and Nordsee.

HRI purchases are fragmented and competitive. Few of them import products directly from other countries, except for items that they purchase in large quantities. Most HRI's would rather buy from central buyers/distributors importing food and beverages. In general, these wholesalers have specialized in products or product groups. Some are even experts in food products from a specific country of origin. Thus, specialized importers have an in-depth knowledge of importing requirements, such as product certification, labeling, and packaging. They also typically handle shipping, customs clearance, warehousing, and distribution of products within the country. The two mayor distribution channels for the German food service trade are Cash & Carry Wholesalers and Specialized Distributor/Wholesalers.

Cash & Carry wholesalers operate large stores with food and non-food products. They sell to retailers, restaurants, and other food service operators. C&C stores offer a variety of products at competitive prices. They are not open to the average consumer.

Specialized distributors to the food service sector have dry and cold storage facilities with refrigerated/frozen trucks for deliveries. They buy from processing companies, importers, and occasionally, foreign exporters. To cover the entire German food service market, regional distributors have organized in groups, such as Intergast and Service Bund. Some of those distributors organize in-house food shows once or twice a year where their suppliers can demonstrate their products to potential customers. This is an excellent opportunity for U.S. suppliers of products ready to enter the German food service market.

For more information please see the latest FAS/USDA Food Service – Hotel Restaurant Institutional report for Germany.

Key Influences on Consumer Demands in Germany

- Influx of refugees, mostly from Syria, Afghanistan, and Northern Africa
    - Declining population with a birth rate of, only 1.43 babies born per woman of childbearing age
    - Aging population
- Number of single person households growing
- Smaller households
- Rise in number of working women
- International consumer tastes e.g. Chinese, Indian, Italian, Thai, Mexican, American
- Reduction in formal meal occasions, leading to an increase in snacking
- Healthier eating and lifestyle habits – organic, vegan, vegetarian, etc.
- Sustainability is the trend meeting consumer concerns about environment, obesity, safety of the food supply

Advantages and Challenges of the German Food Retail Market

Sector Strength & Market Opportunities	Sector Weaknesses & Competitive Threats
Germany is the biggest market in Europe with one of the highest income levels in the world	German consumers demand high quality and low prices
Many German consumers are uninformed about the details of sustainability, and there is yet room to define a U.S. sustainability message	No unified U.S. sustainability message in the German market
Germany is among the largest food importing nations in the world	EU import regulation and tariffs. EU gives preferential access to products from EU countries
Opportunities for healthy food products not sufficiently available on the local European market	Very competitive market with low growth in retail sales besides organic
Equivalency agreement on organics offers ample opportunities	Listing fees paid to retailers and money spent on creating brand awareness hamper the introduction of new U.S. brands
Germany has many, well established importers. Distribution system is well developed	Margins on food at retail level are very thin
U.S. style is popular, especially among the younger generation	Retailers rarely import products into Germany on their own
The size of the EU import quota for beef is rising to 48,200 tons and Germany is the largest EU market	Other – non-U.S. - countries gaining quota share; U.S. quota share decreasing. Quota applies only to beef from animals not treated with growth promoting hormones.
Good reputation for U.S. food like dried fruits, seafood, wine	Lack of familiarity with USDA organic program and label requirements
Large non-German population and German's inclination to travel abroad help fuel demand for foreign products	

Section IV. Best High-Value Product Prospects

U.S. products with the best export opportunities in the German market meet one or more of the following criteria:

- The basic product is not produced in Europe in sufficient quantities or the American quality is superior
- The product (usually fresh) is available on a counter seasonal basis
- The product is unique to the United States

The following products from the United States have good potential in Germany:

Product	Total	German	U.S.	Market attractiveness for USA

Category (in USD million)	German Imports 2016	Imports from the U.S.	Import Growth (2013-2016)	
Tree Nuts	2,594	525	+9%	The United States is the biggest supplier of tree nuts to Germany. Most tree nuts are used as ingredients by the food processing sector. Almonds are the most important commodity within this category. Further products with good sales potential include pistachios, pecans, and walnuts.
Fish and Seafood Products	4,426	270	-14%	The German market offers lucrative opportunities for fish and seafood products. Fish consumption is growing as consumers associate fishery products with a healthy diet. Best prospects for U.S. and seafood exports are salmon, shrimps, crabs, caviar substitutes, cuttlefish and squid, sea urchins, catfish, and scallops.
Wine and Beer	3,274	93	-7%	Germany has a high share of domestic wine production. However, good prospects exist for "New World wines" including those from the U.S. The U.S. has also steadily increased its beer exports to Germany.
Processed Fruits and Vegetables	5,103	59	-23%	Those products are mostly used as ingredients by the food processing sector for the production of pastries and cereals. Dried fruits and prepared nuts are also popular as a snack. Commodities with notable increasing sales are dried grapes (including raisins), dried prunes, dried onions, and dried mushrooms & truffles.
Red Meats Fresh/Chilled/ Frozen	4,947	30	-35%	Good opportunities for high-quality U.S. beef produced without growth hormones. Other – non-U.S. - countries gaining quota share; U.S. quota share decreasing.
Snack Foods (excl. Nuts)	3,677	10	14%	German demand for healthy, organic, innovative, and exotic snacks continues to grow. U.S. import growth expanded in this category predominately due to increasing imports of cocoa preparations

				and chocolate until 2016.
Pet Foods (Dog and Cat)	975	6	+87%	Sales of cat food have the biggest market share. U.S. exports are declining but potential exists for premium pet food.

Source: Global Trade Atlas, U.S. Census Bureau Trade Data * values are subject to year-to-year exchange rate

Category A: Products Present in the Market That Have Good Sales Potential

- Tree nuts
- Wine
- Processed fruits and vegetables
- Fruit juices
- Snack foods
- Health food, organic food, sustainable food products
- Dried fruits

Category B: Products Not Present In Significant Quantities but Which Have Good Sales Potential

- High quality beef (produced without promoters)
- Cranberries and cranberry products
- Seafood and seafood products
- Game and exotic meat
- Innovative sauces, condiments, and confectionery products
- Products featuring 'sustainable' or other social issue-based marketing theme
- Sweet potatoes

Category C: Products Not Present Because They Face Significant Barriers

- Poultry (non-tariff barrier)
- Processed food with GMO ingredients, bleached flour

Competition for U.S. exports

Product category **Total World Import, 2016**	**Main suppliers in percentage, 2016**	**Strengths of Key supply countries**	**Advantages and Disadvantages of Local Suppliers**
PG 30 Breakfast Cereals Imports: 146,427 tons Value: US$ 308 million	1. Poland – 14.6% 2. Belgium – 14.0% 3. France – 13.8% 21. U.S. - 0.2%	Distance, availability, and regional products	Developed processed food industry
PG 31 Snack Foods (Excl. nuts) Imports: 863,299 tons Value: US$ 3,677 million	1. Belgium - 18.2% 2. Netherlands - 17.8% 3. Poland – 14.5%	Distance, availability, and regional products	Developed confectionary industry

	26. U.S. - 0.2%		
HS 02: Meat Imports: 2,589,978 tons Value: US$ 6,966 million	1. Netherlands – 25.4% 2. Belgium - 12.6% 3. Poland – 9.9% 18. U.S. - 0.3%	Distance and availability	Focus on dairy production instead of beef production. Genetics need improvement
HS 03: Fish & Crustaceans Imports: 866,757 tons Value: US$ 4,427 million	1. Poland – 18.4% 2. Denmark – 14.7% 3. Netherlands - 11.9% 6. U.S. – 4.1%	Distance and availability	Tradition in seafood trading and processing, fish is popular
HS 04: Dairy Produce; Birds Eggs and Natural Honey Value: US$ 7,616 million	1. Netherlands – 31.9% 2. France – 13.6% 3. Austria – 8.3% 31. U.S. - 0.1%	Proximity	Great tradition of milk and milk based products
HS 07: Edible vegetables Imports: 4,989,195 tons Value: US$ 6,494 million	1. Netherlands – 35.9% 2. Spain – 25.6% 3. Italy - 8.5% 20. U.S. - 0.2%	1: Proximity 2,3: Tradition, different climate/supply/taste/ varieties	Products not sufficiently available on local market
HS 08: Edible Fruits and Nuts Imports: 6,452,389 tons Value: US$ 10,365 million	1. Spain – 21.3% 2. Netherlands – 20.9% 3. Italy – 11.6% 5. U.S. – 6.3%	1,3: Tradition, different climate/supply/taste/ varieties 2: Proximity	Products not sufficiently available on local market
HS 09: Coffee, Tea, Mate and Spices Imports: 1,438,776 tons Value: US$ 4,595 million	1. Brazil – 22.3% 2. Vietnam – 13.2% 3. Honduras – 6.2% 36. U.S. - 0.2%	Trading tradition	Domestic availability is scarce, re-export
HS 16: Edible Preparations of Meat Fish, Crustaceans Imports:	1. Netherlands – 20.9% 2. Poland – 11.1% 3. Italy – 9.8%	Proximity	Not sufficiently domestically available

670,298 tons Value: US$ 2,793 million	22. U.S. – 0.8%		
HS 19: Preparation off Cereals, Flour, Starch or Milk Imports: 1,918,640 tons Value: US$ 4,414 million	1. Italy – 17.3% 2. Poland – 13.4% 3. Netherlands – 12.7% 26. U.S. – 0.2%	Proximity and re-export	Not sufficiently domestically available
HS 20: Preparations of Vegetables, fruits, Nuts Imports: 3,481,930 tons Value: US$ 5,103 million	1. Netherlands – 26.3% 2. Italy – 13.0% 3. Turkey – 9.1% 22. U.S. – 0.5%	Proximity	Not sufficiently domestically available
HS 21: Miscellaneous Edible Preparations Value: US$ 3,434 million	1. Netherlands - 20.8% 2. France -9.8% 3. Italy – 9.1% 14. U.S. – 1.6%	Proximity and re-export	Not sufficiently domestically available
HS 22: Beverages, Spirits, Wine and Vinegar Value: US$ 7,506 million	1. Italy – 19.5% 2. France – 19.1% 3. Austria – 8.3% 8. U.S. – 5.1%	Excellent regional products	Not sufficiently domestically available

Source: Global Trade Atlas

Section V.

Key Contacts and Further Information

Participating or simply attending a trade show can be a very cost-effective way to test the German market, to introduce a product, or to expand sales. Germany offers a wide variety of trade show venues for food and beverage products. Trade shows like ANUGA, Fruit Logistica or the BioFach show in Germany enjoy an exceptional reputation within the global food industry and these shows outreach is, in many cases, global. U.S. exporters should consider participating or visiting the upcoming trade shows in 2017:

Trade Show	Information
ANUGA (every two years) October 7-11, 2017	One of the leading food fairs for the retail trade, and the food service, and catering

www.anuga.com	market
Bar Convent October 10-11, 2017 https://www.barconvent.com/	International trade show for bars and beverages
Food Ingredients Europe November 28-30, 2017 http://www.figlobal.com/fieurope/	World's leading trade show on food ingredients
Heimtextil January 9-12, 2018 http://heimtextil.messefrankfurt.com	World's largest trade fair for domestic and commercial textiles
IPM – International Plant Show January 23-26, 2018 http://www.ipm-essen.de/	European trade fair for the horticultural and nursery industry
ISM (International Sweets and Biscuit Show) January 28-31, 2018 www.ism-cologne.com	World's largest show for snacks and confectionery products
Fruit Logistica February 7-9, 2018 www.fruitlogistica.com	World's leading trade fair for the fresh fruit and vegetable business
BIOFACH February 14-17, 2018 www.biofach.com	Leading European tradeshow for organic food and non-food products
Internorga March 9-13, 3018 www.internorga.com	International tradeshow for hotel, restaurant, catering, baking, and confectionery trades
ProWein March 18-20, 2018 www.prowein.com	International trade show for wine and spirits
Interzoo (every two years) May 8-11, 2018 www.interzoo.com	Leading trade show for pet food and supplies
Equitana (every two years) March 9-17, 2019 http://www.equitana.com	Leading European tradeshow for the equestrian market

More information about these and other German exhibitions and trade shows can be found under the following Internet address: www.auma-messen.de.

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

Foreign Agricultural Service Berlin Foreign Agricultural Service Washington USDA/FAS/Europe U.S. Mission to the European Union	https://de.usembassy.gov/about-fas/ http://www.fas-usda.gov _ http://www.fas-europe.org http://www.usda-eu.org http://www.american-foods.org/

European Importer Directory	

One tip for U.S. exporters is to access the German business portal, which is maintained by the Ministry of Economics and Technology. Provided in English, it serves as a central contact platform that can steer inquiries into the right channel. More information about the food and beverage sector can be found here.

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@fas.usda.gov
Homepage: www.fas-europe.org

Please view our Home 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.

Recent reports of interests to U.S. exporters interested in the German Market include:

Report Title	Time of Publication	Report number
Vegan Market is Cooking	August 2017	GM17024
Retail Foods	July 2017	GM17025
FAIRS Report	July 2017	GM17015
Food Service – Hotel Restaurant Institutional	July 2017	GM17021
Food Processing Ingredients	July 2017	GM17020
Opportunities for U.S. organics	January 2017	GM17002
Biotech Annual	November 2016	GM16011