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Report Highlights:

Food processing is the fifth-largest industry in Germany. According to the Federation of German Food and Drink Industries (BVE), Germany produced \$252.1 (€ 232.6) billion of processed food and drinks in 2023, an increase of 6 percent from 2022. However, the German food industry continues to struggle with subdued private consumer spending, inflation, and rising production costs. The following U.S. products have good sales potential on the German market: nuts, ready meals and food preparations, condiments and sauces, processed fruits, beef, bakery products, and organic products.

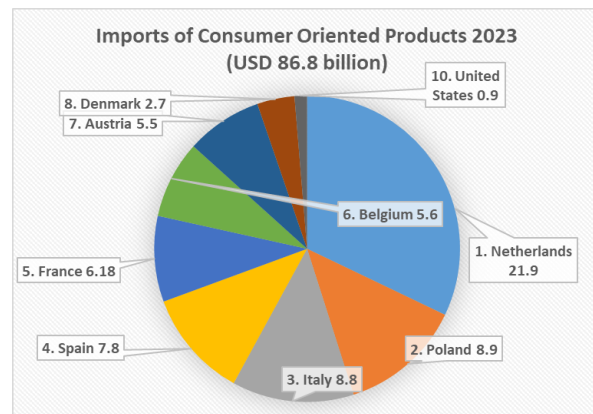
Market Fact Sheet: Germany

Executive Summary

Germany is by far the biggest market for food and beverages in the EU with 84 million consumers. In 2023, Germany's nominal GDP reached \$4.5 trillion, positioning the country as the world's 4th largest economy. 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 products after the United States and China. In 2023, imports of agricultural and related products reached \$141 billion. While 78 percent of these imports originated from other EU member states, the United States was the largest supplier outside the bloc before Brazil and China. Imports of agricultural products from the United States totaled \$2.8 billion in 2023.

Imports of Consumer-Oriented Products

In 2023, Germany imported consumer-oriented agricultural products worth \$86.8 billion; the majority (84 percent) of these originated from other EU member states.



Food Service Industry

The food service sector is large and highly fragmented but can be divided into commercial (hotels, restaurants, fast food and take-away outlets, bars, coffee shops etc.) and institutional (hospitals, universities, nursing homes, and cafeterias) food service markets. Sales increased by 12.2 percent to \$91.3 billion in 2023, compared to 2022. Despite this recovery, HRI turnover is still 10.8 percent below pre-pandemic levels, in 2019. Since the war in Ukraine, the sector has experienced a surge in energy prices, prices for raw materials, and personnel.

Food Retail Industry

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

Quick Facts CY 2023

Imports of Consumer-Oriented Products (USD billion)
86.8 (U.S. imports 0.9)

List of Top 10 U.S. 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)

Food Industry Output	252.1
Food Exports	88.4
Food Imports	78.7
Retail	331.8
Food Service	91.3

Food Industry Gross Sales (USD billion)

Food Industry Revenues (Domestic market) 163.3

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 (million): 84.6

GDP (trillion USD): 4.5

GDP per capita (USD): 52,727

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, Lebensmittel Praxis
Exchange rate: USD 1.00 = EUR 0.9227 (Mar 2025)

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

SECTION I. MARKET SUMMARY

Germany is by far the biggest market for food and beverage products in the European Union. The food processing industry represents the fifth-largest industry in Germany. In 2023, Germany produced an estimated \$252.1 (€232.6) billion of processed food and drinks.¹ That is an increase of 6 percent from 2022, which was \$238.9 (€218.5). Roughly 90 percent of the industry is characterized by small and medium-sized companies (companies with less than 250 employees). More than 644,450 employees in around 5,960 companies provide consumers with high-quality and inexpensive food. On average, 35 percent of food and beverage products are exported.² The retail market's key characteristics are consolidation, market saturation, strong competition, and low prices, which result from high competition between discounters and the grocery retail sale segment. Being the third-largest importer and fourth-largest exporter of consumer oriented agricultural products worldwide, Germany represents the most important European market for foreign producers. When meeting EU standards, the following products have good sales potential on the German market: nuts, distilled spirits and wine, organic products, fish and seafood, highly processed ingredients, ready meals, and bakery products.

Germany still has some of the lowest food prices in Europe – German citizens spent only 14.6 percent of their income on food and beverage products in 2022³. However, as in previous years, strong cost increases challenged the industry in 2023. The [HWWI raw materials price index](#) showed an increase of 91 percent in prices for food and beverage products, from January 2020 through January 2024. An increase was observed across all raw material groups, but particularly in the areas of oilseeds and oil, agricultural raw materials, and cereals. In addition, there were further burdens from sharp increases in the costs of energy, transport, and packaging material.

Key market drivers and consumption trends

Germany remains a price-focused market, but the share of consumers who are willing to pay for quality is increasing. There is a growing number of consumers who view their purchasing decisions as a political or life-style statement (non-GMO, free-range eggs, vegetarian or vegan diet), and they demand traceability and information about production methods. Ethnic foods, beauty and superfoods, clean label foods, “free from” products (e.g., gluten or lactose free), and locally grown are additional trends that are attracting more and more German consumers. Ethics and convenience are the main trends amongst German consumers.

For organic food, sales declined in 2022, but demand began to recover in 2023 and is estimated to continue to have grown moderately in 2024, largely due to decreasing inflation and increasing availability of low-cost store brands. Discount supermarkets (such as Lidl or ALDI) and drug stores played a large role in sales because German consumers were still wary of spending following years of very high inflation. Organic exports from the United States continue to be volatile. Organic milk, fruits and vegetables, coffee, and sauces are among the fastest growing product lines in supermarkets and benefit from increasing focus among Germans on health issues and sustainability. For

¹ Latest available data from Trade Data Monitor, and Federation of German Food and Drink Industries (BVE)

² <https://www.ernaehrungsindustrie.de/publikation/bve-statistikbroschuere2024/>

³ Latest available data from DESTATIS: <https://www.destatis.de/EN/Themes/Society-Environment/Income-Consumption-Living-Conditions/Consumption-Expenditure/Tables/private-consumption-d-lwr.html;jsessionid=EA3F07BE477C859236A1B1EF89B8DF70.live741>

more information, please see the GAIN report: [Organic Store Brands Drive Recovery of German Organic Market](#).

Online food purchasing and delivery trends, as well as ready-made meals continued to expand, growing by 5.5 percent in 2023⁴. The importance of e-commerce continues to grow. Online supermarkets are entering the market in Germany's major cities, offering food at prices that strongly compete with those of traditional brick-and-mortar supermarkets. Most of the large supermarket chains, such as *Edeka* and *Rewe*, have their own delivery services. Discounter supermarkets on the other hand, that are very popular amongst German consumers, do not operate their own delivery services. Attempts by companies such as the Norwegian discounter delivery service *ODA* failed to attract customers. After operating in Berlin for half a year in 2023, the company pulled out of the market. The Czech company *Rohlik* also expanded to Germany in 2023 with their discount delivery service *Knuspr.de*. Other delivery services include *amazon.de*, *picnic*, and *Flaschenpost*. A sub-category of delivery services is meal kits and cooking boxes. The biggest player among them is Hello Fresh with a worldwide revenue of \$8.24 billion in 2023⁵.

Food labeling with special seals is very common in Germany and has a large impact on the industry. Various regional, organic, sustainability, and animal welfare labels have been introduced or are being discussed. On a federal level, and in an attempt to uniformly regulate the food labeling process in the EU, the German Ministry for Food and Agriculture introduced the WHO's "Nutri-Score" nutritional label. Most companies also have a sustainability strategy that demonstrates sustainability in the entire chain from cultivation all the way through to food processing.

The non-government German Nutrition Society ([DGE](#)) publishes recommendations for consumption each year. Their [ten guidelines](#) include eating more nuts and grains. In 2024 they reduced the recommended consumption of dairy products and meat to 400g and 300g per week, half of what was recommended in previous years. In delivering the new guidelines, DGE underscored that its decisions are not only based on what is healthy for humans but also on what is sustainable for the environment.

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. Additionally, listing fees paid to retailers limit the introduction of new U.S. brands.
The demand for sustainable food ingredients and sustainable foods is growing.	Private sector sustainability standards can act as barriers to trade. Looming misconceptions about U.S. agriculture persist amongst consumers.
Germany is among the largest food importing nations in the world. It has a	U.S. exporters face competition from tariff-free products from other EU member states. Non-

⁴ <https://lebensmittelpraxis.de/handel-aktuell/42858-e-commerce-markt-onlinehandel-mit-lebensmitteln-boomt.html>

⁵ <https://www.statista.com/statistics/655060/hellofresh-net-revenue-worldwide/>

large, well-developed food processing industry requiring a wide range of ingredients, from low-value, unprocessed foods to high-value, highly processed ingredients.	tariff barriers such as phytosanitary restrictions and traceability requirements can make exporting to Germany complicated.
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 beef import quota, which was expanded in January 2020.	The beef import quota only applies to beef from animals not treated with growth-promoting hormones. New meat alternatives are becoming increasingly popular.

Source: FAS Berlin

SECTION II. ROAD MAP FOR MARKET ENTRY

U.S. companies seeking to export goods to Germany are advised to conduct thorough research to gain a good understanding of the market. USDA [GAIN Reports](#) are a good source for country specific information. 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.

Germany is a potential market for U.S. companies who are willing to invest the time and resources to cement contacts. New products in the German market may require up to 12 to 18 months of testing in order to determine market acceptance. There are a number of potential technical barriers to trade, thus exporters may want to consult the latest Food and Agricultural Import Regulations and Standards (FAIRS) report on [Germany](#) and the [European Union](#). The Germany report provides an overview of food laws in force in Germany that are not yet harmonized with the EU. Once U.S. companies have acquired this background information, they may consider attending or visiting one of the USDA endorsed trade shows and other trade shows in Europe, such as [Food Ingredients Europe](#). This show is endorsed by USDA and takes place alternately in Frankfurt and Paris. The next show will be held in Paris from December 2 to 4, 2025. Trade shows serve as a gateway into the market, helping companies to establish new trade contacts and gauge product interest. Germany hosts many of the largest trade shows in the world. Therefore, it is an excellent location for U.S. exporters to promote their products, to get in contact with potential business partners and buyers, and to run product introductions.

Table 2: Major Food Related Trade Shows in Germany

Trade Show	Description	Location
ANUGA (every two years) October 4-8, 2025 https://www.anuga.com/	World's largest food and beverage trade show, especially for the retail trade, food service, and catering market	Cologne

BCB - Bar Convent Berlin October 6-8, 2025 https://www.barconvent.com/	World's largest trade show for bars and beverages	Berlin
Food Ingredients Europe December 2-4, 2025 https://www.figlobal.com/fieurope/en/home.html	Leading trade show for food and health ingredients	Paris (2025), Frankfurt (2026)
ISM February 1-4, 2026 https://www.ism-cologne.com/	World's largest show for snacks and confectionery products	Cologne
Fruit Logistica February 4-6, 2026 https://www.fruitlogistica.com/en/	World's leading trade fair for the fresh fruit and vegetable business	Berlin
BioFach February 10-13, 2026 https://www.biofach.de/en	Leading European tradeshow for organic food and non-food products	Nuremberg
Internorga March 2026 https://www.internorga.com/	International trade show for hotel, restaurant, catering, baking, and confectionery trades	Hamburg
ProWein March 2026 https://www.prowein.com/	International trade show for wine and spirits	Duesseldorf
Interzoo (every two years) May 12-15, 2026 https://www.interzoo.com/en	Leading trade show for pet food and supplies	Nuremberg

Source: FAS Berlin

U.S. exporters can also contact their respective U.S. State Regional Trade Groups (SRTG), their Commodity Cooperator Group, or 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 sector. They carry out promotional activities to increase exports of U.S. high-value food and agricultural products. For more information, please contact the state regional trade group responsible for your state: <https://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 <https://usaedc.org/>. The Commodity Cooperator Groups regularly organize (reverse) trade missions, often organized around trade shows or other events. They also are 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/.

U.S. exporters 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 ([BVLH](#)), and from the different food market segments industry associations.

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.

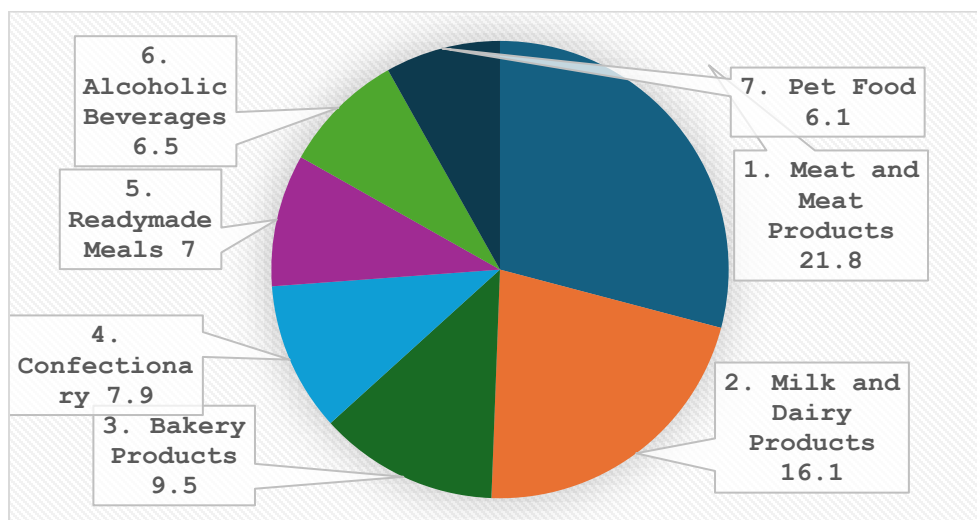
Importers represent the first link in the domestic sales chain and are consequently responsible for the compliance of imported products with national and [EU regulations](#). The European Commission has published the following guidance document which refers to key community law requirements: "[Guidance document – Key questions related to import requirements and the new rules on food hygiene and official food controls](#)." Once imported goods are cleared in one member state, they can move freely throughout the territory of the EU. This means U.S. products coming into Germany via another EU member state, for example the Netherlands, must clear customs there. No additional checks are carried out when crossing the border to Germany.

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

Market Structure

Germany's food processing industry is well developed and has access to various food ingredients. Generally, German food processors source their ingredients from local producers or local importers. Only large processors import ingredients directly from foreign suppliers. A good importer will be your partner in promoting your product to their customers.

Figure 1: Share of Major Segments in German Food Processing Industry (Percent in 2023)



Source: German Association of Food and Drink Industry (BE), Destatis

Sector Trends

- Sustainable and healthy convenience foods: German consumers are not only looking for groceries that conveniently fit into their busy everyday lives, but those that also meet the high demands of sustainability and health, all while not compromising taste. The share of convenience and ready-to-eat products as well as smaller packaging sizes is increasing, while the share of milk and dairy products, alcoholic beverages, and sugar is declining.
- Takeout products and snacks are also on the rise. Every third German consumer no longer has breakfast at home, and every second person is not eating lunch at home. Snacks and ready-to-eat products have become everyday companions. In Germany, sales of on-the-go products are significantly higher as compared to other EU countries. Since 2019, the market share of snacks and on-the-go products rose by 11 percent. The snack food market is projected to grow by more than five percent in the next four years.⁶
- Innovative manufacturing and processing technologies bring new products to the market and give established products a new taste. Berlin is spearheading the trend of novel food consumption, and other German cities are following its lead. In 2021, the German food industry welcomed the first edible insect to be approved for food use in the European Union (EU), a big step towards a more transparent legal environment and marketing opportunities for the relatively new industry sector. Currently, four insects are approved by the [European Commission](#). For more information on this topic, please see the GAIN report: [Edible Insects Invade the German Food Sector_Berlin_Germany_05-10-2021](#)
- The popularity of ‘Cooking boxes’ subscriptions has sharply increased since the beginning of the COVID-19 pandemic and continues to grow. It is seen as cost-efficient and environmentally friendly, reducing food waste and over-consumption and is gaining ground against traditional ready meals and convenience foods. Consumers can select recipes for the entire week and receive a customized box of fresh produce with a complete list of ingredients. In Germany, the number of newly introduced “Cooking box” providers increased by 17 percent over the past five years. Among them are local farms, who offer boxes with local fruits and vegetables, e.g. *die Gemuesekiste*, *Maerkische Kiste*, and *CrowdFarming*.
- Vegan and meat alternatives are becoming increasingly popular, especially among younger Germans. Some Germans have raised concerns regarding the sustainability of high meat consumption in the German diet and meat-free or meat-reduced diets are now trending, with many new meat alternatives (e.g. soy or peas) entering the market.
- Austerity: Germany remains a price-focused market. With rising inflation and prices (especially for energy and food), German consumers are shopping less and more sustainably. Shoppers choose products that keep them full over expensive products. Some consumers deliberately avoid purchasing expensive products, such as avocados and certain nuts.

⁶ <https://www.statista.com/outlook/cmo/food/confectionery-snacks/snack-food/germany#revenue>

SECTION III. COMPETITION

The United States ranked tenth worldwide in exports of consumer-oriented agricultural products to Germany in 2023, but when accounting for the single EU market, the United States is a much larger source of imported consumer-oriented products. The main competitors for U.S. suppliers include domestic producers and producers from other EU member states, such as the Netherlands, Poland, Italy, Belgium, France, and Spain. However, for dried fruits and nuts the United States is by far the largest importer. The main competitors are Turkey (hazelnuts and prunes), Vietnam (coconuts and cashews), Chile (prunes and coconuts), China (coconuts and prunes), and Iran (cashew nuts and prunes). The U.S. industry's advantages include a good reputation for consistent quality and stable supply. The main advantages of competitors are proximity and price.

SECTION IV. BEST PRODUCT PROSPECTS CATEGORIES

Products in the market that have good sales potential

- Nuts: Almonds, hazelnuts, pecans, pistachios, walnuts.
- Organic products.
- Products featuring “sustainable” or other social issue-based marketing labels.
- Fish and Seafood: Salmon, surimi, roe and urchin, miscellaneous fish products.
- Dextrins, peptones, enzymes, lecithin, and protein concentrates.
- Dried and Processed Fruit: Raisins, prunes, cranberries, sour cherries, wild berries.
- Fruit juice concentrates: Cranberry, grapefruit, prune.
- Beef and Game: Hormone-free beef, bison meat, exotic meat, and processed meat products.

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

- Ingredients for the natural and healthy foods industry.
- Ready to eat meals.
- Bakery products.
- Pulses.
- High quality beef.
- Innovative sauces, condiments, and confectionary products.

Products not present because they face significant boundaries

- Food additives not approved by the European Commission.
- Red meat and meat products with hormones.
- Most poultry and eggs.
- Biotech-derived products that are not approved in the EU.

SECTION V. KEY CONTACTS AND FURTHER INFORMATION

If you have questions regarding this report, or need assistance exporting to Germany, please contact the Foreign Agricultural Service in Berlin. Importer listings are available from the Foreign Agricultural Service for use by U.S. exporters of U.S. food and beverage products.

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Attachments:

No Attachments