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Germany

HRI Food Service Sector

Food Service Sector in Germany

2008

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Report Highlights:
The German food service sector is very fragmented and highly competitive. Total turnover of the German food service market amounted to €71.29 billion or $97.6 billion in 2007, an increase of three percent over 2006. The improving German economy, declining unemployment rates, and changing lifestyles also influence the food service sector and lead to increasing food & beverage consumption away from home.

Includes PSD Changes: No
Includes Trade Matrix: No
Annual Report
Berlin [GM1]
[GM]

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Currency Conversion Rates

The value of the dollar has been decreasing against the Euro since 2002. This report includes the dollar equivalents for the reader's convenience but all trends and analysis in this report refer to changes on a Euro basis.

Average Annual Currency Conversion Rates:[1]

2003	1 U.S. $ =	0.8840 Euro
2004	1 U.S. $ =	0.8051 Euro
2005	1 U.S. $ =	0.8078 Euro
2006	1 U.S. $ =	0.7970 Euro
2007	1 U.S. $ =	0.7308 Euro

I. MARKET OVERVIEW

Approximately 17 percent of the EU's total population calls Germany home, which amounts to more than 82 million people. It has the world's third largest economy after the U.S. and Japan, and is the leading market for food and beverages in the European Union. German consumers spent €188 billion (approximately US$ 258 billion) in 2007 on food and beverages or 14.4 percent of total national expenditures. 5.5 percent of total national expenditures or €71.3 billion (approximately $97.6 billion) was spent on hotel and gastronomy services.

Germany's reformed tax structure and increased consumer spending resulted in a 2.7 overall growth rate in 2007. The revitalized economy improved retail sales, including sales of food products. In 2007, total sales (turnover) by retailers of food and beverage in Germany were approximately €157.6 billion (or US$ 215.7 billion) compared to nearly € 155 billion (US$ 194.4 billion) in 2006. The € 157.6 billion generated in 2007 were primarily from the sale of food products. These items are usually sold by organized food retailers such as supermarkets, hypermarkets, discount stores, and small traditional retail stores. Bakeries, butcher shops, farmer's markets, drugstores, gas stations, and kiosks also play a key role in Germany's retail as well as food service sectors.

In 2007, Germany imported US$598 million worth of consumer-oriented agricultural products from the U.S., a 9-percent increase from a year earlier. The increase in imports was mainly in tree nuts, particularly almonds, hazelnuts, walnuts, and food preparations.

The major competitors in the consumer-oriented products market are from EU countries, most notably the Netherlands, France, Italy, Spain and Belgium. The U.S. is the fifth largest non-EU supplier of consumer-oriented products to Germany.

Key Demographic Trends

- Germany has one of the lowest birth rates in the world, with only 1.3 babies born per woman of childbearing age. This development is not expected to reverse in the foreseeable future. Currently, of Germany's 82.4 million inhabitants, 37.4 million, or almost 45 percent, are 45 years of age or older. [2]

- The number of women in the workplace is growing; currently 68 percent of women in the 15-65 age group work outside the home.[3]

[1] Federal Statistical Office Germany
[2] Federal Statistical Office Germany
[3] Federal Statistical Office Germany

- The high share of single-person households and the rising number of women in the workforce have led to strong growth in the demand for convenient foods and beverages such as frozen foods and snacks. Germans are increasingly eating on the run and skipping at least one meal a day, having snacks instead.

- More than a decade after reunification, an income gap still exists between the 67 million people living in the western German states and the 15 million in the former East Germany. Average incomes in the eastern states are still markedly lower than in the west and the unemployment rate in the east is more than twice as high as in the west.

- An estimated 7 million foreigners without German passports live in Germany, the majority have been in Germany more than 10 years. These foreign populations (i.e. Turkish, Lebanese, Chinese, Polish, etc.), with their special products and cuisines, have exerted considerable influence on the consumption patterns of the entire nation. The large immigrant population and the penchant by Germans to travel abroad have led to increased consumer preferences for certain foreign foods.

- German consumers are adopting “healthier” eating habits and are increasing their purchases of natural and organically produced items. These habits include:

    - High consumption of fruits and vegetables, although it has leveled off during the past several years;
    - Increasing consumption of organic products. The estimated total value of the German organic market is approximately € 4.5 billion. The organic market has an estimated 2.8% market share of the total German food market;
    - Increased interest in functional foods;
    - Flat level of consumption of most alcoholic beverages; and,
    - High interest in fruit juices, and an increasing interest in lighter fruit-based beverages.

- Consumer concerns about the environment, obesity, and the safety of the food supply have led many to look for alternative or organic product sources, which they view as perhaps better for the environment, safer, and more nutritious.

Expenditures of German households in billion Euros (Dollars)			
	2005	**2006**	**2007**
Food, Beverages And Tobacco Products	185.52 ($231.04)	186.12 ($233.80)	188.30 ($258.11)
Hotel and Gastronomy Expenditures	67.60 ($83.68)	69.24 ($86.88)	71.29 ($97.55)

Source: Federal Statistical Office.

Food Service Sector Overview:

The German food service sector is large and highly fragmented. Total turnover of the German food service market amounted to €43.98 billion in 2007 ($ 60.2 billion), an increase of three percent over 2006. The Food Service or "Food-Away-From-Home" market consists of four segments (market share in 2007): Service Gastronomy (50.3 %), Fast Food/Snack Food (32.1 %), Workplace Catering (12.6 %), and Event Gastronomy (5.0 %). Not included in the above segments is the Care Market (hospitals and retirement homes) with a market volume of about €6 billion ($8.2 billion).

According to a study published annually by the ZMP (German Central Marketing and Price Agency) and the CMA (German Central Marketing Agency for Food and Agriculture), sales in the German food service market have developed as follows during the past 5 years:

Sales in the German Food Service Market

Calendar Year	**Total Sales**		**% Change to Previous Year**
	Billion Euro	**Billion $**	
2003	**41,167**	**46,569**	
2004	**41,199**	**51,173**	**+ 0**
2005	**41,453**	**51,316**	**+ 0.6**
2006	**42,697**	**53,572**	**+ 3.0**
2007	**43,980**	**60,181**	**+ 3.0**

Source: npdgroup Deutschland GmbH

All sectors of the German food service market have shown marked improvement in 2007. This can be attributed largely Germany's improved economy, higher income, and lower unemployment rate. Economists believe, however, that the upward trend may have reached its peak. Take away foods and hand-held snacks, the least expensive options for consumers, are viewed as trends with the most potential in the near future. This is also evident from the above-cited ZMP/CMZ study: while total food service sales in 2007 increased by 3% over 2006, snack food sales in bakeries increased by 5.2% and sales in Burger/Fish/Chicken fast food outlets increased even by 5.2%.

The upward trend in the German HRI food sector is also supported by data supplied by the German Hotel and Restaurant Association:

Annual Turnover in the German Hotel/Restaurant/Foodservice Sector

Turnover in Billion Euro (dollar)	**2005**	**2006**	**2007**
Hotels	**18.8 ($23.3)**	**19.5 ($24.4)**	**21.9 ($30.0)**
Restaurants & Fast Food Outlets	**32.5 ($40.2)**	**32.2 ($40.4)**	**38.8 ($40.23)**
Canteen & Caterers	**4.6 ($5.7)**	**4.7 ($5.9)**	**5.9 ($8.1)**
TOTAL	**55.8 ($69.1)**	**56.5 ($70.9)**	**66.7 ($91.3)**

Source: DEHOGA Deutscher Hotel- und Gaststaettenverband

Advantages/Opportunities and Challenges Facing U.S. Products in Germany

Advantages/Opportunities	Challenges
Germany's 82 million inhabitants have one of the highest average income levels in the world.	Germany has a very competitive market, particularly in retail operations.
Germany is among the largest food/beverage importing nations in the world.	German (EU) import tariffs on certain products are high. EU enlargement has given preferential access to products from accession countries.
There is a growing market for organic products. Private label products are popular.	German buyers demand quality, but also low prices; discounters are the fastest growing segment of retail market.
Germany has many well-established importers. The distribution system is well developed.	Retailers often charge high listing fees for products.
The "American-Way-of-Life" and U.S.-style foods are popular, principally among the affluent younger generation.	Retailers seldom import products into Germany (EU) on their own, preferring to purchase from central buyers.

Structure of the German Foodservice Sector

The German food service sector can be divided into commercial and institutional food service:

Commercial Foodservice:

The German commercial foodservice market includes hotels, restaurants, fast food & take out outlets, bars, cafeterias, coffee shops, and similar outlets.

The 5 key sectors in the commercial foodservice sector were:

Sector	% of total sales in 2007	Increase in sales over 2006
Fast food	51.0 %	7.3 %
Travel	24.4 %	4.7 %
Full service	6.8 %	5.0 %
Retail	7.6 %	1.4 %
Leisure	5.8 %	7.7 %

Developments in the individual sectors were as follows:

Fast Food Sector:
Total sales in the German fast food sector amounted to €5.05 billion ($6.92 billion) in 2007, which is 7.3 percent more than in 2006. The total number of outlets increased by 4.0 percent to 9,490. The top 5 players in the German fast food sector were:

	2007 turnover (in million)		
Company	**Euros**	**Dollars**	**Outlets**
McDonald's	2,699.0	$ 3,699.0	1,301
Burger King*	710.0	$ 973.1	607
Nordsee	295.0	$ 404.3	354
Subway	142.0	$ 194.6	542
YUM!	133.9	$ 183.5	125
TOTAL Fast Food	**5,053.5**	**$ 6,926.8**	**9,490**

*-estimated

Travel Gastronomy:
Total sales in the German travel gastronomy sector in 2007 amounted to €2.41 billion ($3.30 billion), which was 4.7 percent more than in 2006. The number of outlets increased by 0.8 percent to 5,015. The top 5 players in the German travel food service sector were:

	2007 turnover (in million)		
Company	**Euros**	**Dollars**	**Outlets**
Lufthansa LSG	720.0	$ 986.0	43
Tank & Rast*	570.0	$ 781.2	387
Aral	176.0	$ 242.0	1,238
SSP	136.0	$ 186.4	194
Gate Gourmet	106.0	$ 145.2	10
TOTAL Travel	**2,410.7**	**$ 3,304.3**	**5,015**

*-estimated

Full Service Gastronomy:
Total 2007 sales in Germany's full service sector amounted to €676.1 million ($926.7 million), which is 5.0 percent more than in 2006. The number of outlets decreased by 5.3 percent to 322. The top 5 players in the German full service sector were:

	2007 turnover (in million)		
Company	**Euros**	**Dollars**	**Outlets**
Moevenpick*	138.0	$ 189.1	43
Maredo	99.4	$ 136.2	60
Kuffler	98.7	$ 135.2	36
Block House	98.3	$ 134.7	43
Haberl	35.5	$ 48.6	11
TOTAL Full Service	**676.1**	**$ 926.7**	**322**

*-estimated

Retail Gastronomy:
Total sales in the retail foodservice sector in Germany amounted to €750.2 million in 2007 ($1.0 billion), which is 1.4 percent more than in 2006. The number of outlets decreased by 6.1 percent to 571. The top 5 players in the German retail food service sector were:

	2007 turnover (in million)		
Company	**Euros**	**Dollars**	**Outlets**
Metro	258.0	$ 354.3	272
Karstadt	203.7	$ 279.2	149
Ikea	172.0	$ 235.7	43
Globus	47.9	$ 65.6	37
Kaufland*	25.0	$ 34.2	31
TOTAL Retail	**750.2**	**$1028.2**	**571**

*-estimated

Leisure Gastronomy:
In 2007, total sales in Germany's leisure sector amounted to €576.7 million ($790.4 million), which is 7.7 percent more than in 2006. The number of outlets increased by 2.1 percent to 593. The top 5 players in the German leisure sector were:

	2007 turnover (in million)		
Company	**Euros**	**Dollars**	**Outlets**
Europa Park	59.4	$ 81.4	41
Mitchells & Butlers	58.6	$ 80.3	44
Enchilada	45.3	$ 62.0	45
G & T Eurogast	44.8	$ 61.4	39
Greater Union	42.6	$ 58.3	85
TOTAL Leisure	**576.7**	**$ 790.4**	**593**

Top 20 German Gastro Service Companies

Rank	Company	Type */ No. of outlets	Turnover – 2007 Million EUR	Million USD	Growth rate 2006/07 (in %)
1	Mc Donald's Deutschland Inc., Munich	FF 1,301	2699.0	3658.3	4.7
2	LSG Lufthansa Service Europe/Africa GmbH, Neu-Isenburg	VG 43	720.0	986.9	2.8
3	Burger King GmbH, Munich*	FF 607	710.0	973.1	9.2
4	Autobahn Tank & Rast GmbH Bonn*	VG 387	570.0	781.2	3.5
5	Nordsee Fischspezialitaeten GmbH & Co.KG, Bremerhaven	FF 354	295.0	404.3	-1.6
6	Metro AG, Duesseldorf	HG 272	258.5	354.3	0.5
7	Karstadt Quelle AG, Essen	HG 149	203.7	279.2	-2.7
8	Ikea Deutschland GmbH & Co.KG, Hofheim-Wallau	VG 43	172.0	233.8	11.0
9	Aral AG, Bochum	HG1238	170.6	235.7	4.5
10	Subway International B.V., Koeln	FF 542	142.0	215.2	25.4
11	Movenpick Gesellschaften Deutschland, Stuttgart*	AS 43	138.0	212.0	5.8
12	SSP Deutschland GmbH, Deutschland, Eschborn	VG 194	136.6	198.9	5.1
13	YUM! Restaurants International Ltd. & Co.KG, Duesseldorf	FF 125	133.9	195.2	5.5
14	Edeka Zentrale AG & Co. KG, Hamburg*	VG 2400	130.0	178.2	3.8
15	Gate Gourmet, GmbH Deutschland, Neu-Isenburg	VG 10	106.0	159.5	0.9
16	Stockheim Unternehmensgruppe, Duesseldorf	VG 27	105.5	153.2	-2.4
17	Maredo (Whitbread) Restaurants Holding GmbH, Duesseldorf	AS 60	99.4	152.1	2.3
18	Kuffler Gruppe, Munich	AS 36	98.7	139.7	12.0
19	Block House Gruppe, Munich	FF 43	98.3	138.4	11.1
20	Kamps Bakeries GmbH, Schwalmtal	FF 930	92.0	135.7	10.9
	*-estimated				
	Total turnover TOP 20		**7,079.2**	**9,703.5**	**4.9**
	Total turnover TOP 100		**9,904.7**	**13,576.3**	**5.4**

*** Categories:**

AS – Full service gastronomy

FF – Fast food, snacks, home delivery

FZ – Leisure gastronomy

HG – Retail gastronomy

VG – Transportation & trade show gastronomy

Source: Food-Service

Institutional Foodservice:

The majority of the institutional foodservice market is covered by caterers. The 5 key sectors in the institutional foodservice sector are:

Sector	Market share in % sales in 2007
Company restaurants/Cafeterias	51.7
Hospitals	24.0
Nursing/Retirement Homes	14.4
New Markets (Event Catering)	5.2
Schools, Universities	4.7

Developments in the individual sectors were as follows:

Company Restaurants /Cafeterias -	2007 Sales in millions		
Top 5 players	Euro	Dollar	% change to 2006
Compass*	505.0	692.2	3.1
Aramark*	275.0	376.9	2.6
Sodexho	136.0	186.4	7.8
Dussmann*	123.0	191.7	4.2
Apetito	63.4	86.9	13.2
TOTAL	**1,590.6**	**2,180.2**	**4.9**

*-estimated

Hospitals –	2007 Sales in millions		
Top 5 players	Euro	Dollar	% change to 2006
Dussman*	138.0	189.1	12.2
Schubert	133.0	182.3	0.8
Klueh Service	116.0	159.0	9.4
Compass*	50.0	68.5	-5.7
SV	26.0	35.6	20.9
TOTAL	**737.9**	**1,011.4**	**10.0**

*-estimated

Nursing/Retirement Homes –	2007 Sales in millions		
Top 5 players	Euro	Dollar	% change to 2006
Klueh Service	80.0	109.6	1.3
Schubert	53.7	73.6	4.9
Victor's	49.3	67.5	1.2
Dussman*	46.8	64.1	-14.9
Apetito	40.0	54.8	25.0
TOTAL	**442.4**	**606.3**	**6.6**

*-estimated

New Markets /Event Catering – Top 5 players	2007 Sales in millions Euro	Dollar	% change to 2006
Aramark*	50.0	68.5	-15.3
Bayer	33.4	45.7	-2.9
Compass*	33.0	43.1	14.2
Schubert	13.0	17.8	1.6
Gastromenue*	6.0	8.2	7.1
TOTAL	**163.0**	**223.4**	**-3.5**

*-estimated

Schools, Universities – Top 5 players	2007 Sales in millions Euro	Dollar	% change to 2006
Sodexho	74.2	101.6	9.8
Dussmann*	22.0	30.1	29.4
Apetito	15.0	20.5	7.1
Hoffmann*	11.0	15.0	19.6
GVL	6.6	9.0	0.0
TOTAL	**143.6**	**196.8**	**11.3**

*-estimated

Top 10 German Caterers

		Turnover in million Euro ($)		% Change
Company	Area of Business	2007	2006	
Compass Group, Eschborn	Company Restaurants Hospitals Nursing/Retirement New Markets	602.0 ($ 1,103.2)	587.0 ($ 944.2)	2.6
Aramark Holdings Neu-Isenburg	Company Restaurants Hospitals Nursing/Retirement Schools, Universities New Markets	370.0 ($ 491.4)	360.0 ($ 370.2)	2.8
Dussmann AG Berlin	Company Restaurants Hospitals Nursing/Retirement Schools, Universities New Markets	335.3 ($ 490.3)	324.0 ($376.5)	3.5
Sodexho Catering Hochheim	Company Restaurants Hospitals Nursing/Retirement Schools, Universities	241.3 ($ 276.4)	225.5 ($ 208.4)	7.0
Klueh Service Duesseldorf	Hospitals Nursing/Retirement Schools, Universities New Markets	202.2 ($ 260.4)	190.7 ($ 156.8)	6.0
Schubert Group Duesseldorf	Company Restaurants Hospitals Nursing/Retirement Schools, Universities	202.0 ($ 237.82)	198.1 ($ 138.3)	2.0
Apetito Catering Rheine	Company Restaurants Hospitals Nursing/Retirement Schools, Universities	143.4 ($ 170.65)	123.0 ($ 120.2)	16.6
SV GmbH Langenfeld	Company Restaurants Hospitals Nursing/Retirement Schools, Universities New Markets	95.0 ($ 156.9)	88.0 ($ 109.6)	8.0
Bayer Leverkusen	Company Restaurants	62.4 ($ 117.8)	63.3 ($ 102.1)	-1.4
DB Gastronomie Frankfurt	Company Restaurants New Markets	58.5 ($ 94.0)	57.6 ($ 67.1)	1.6

Source: gv-praxis

II. ROAD MAP FOR MARKET ENTRY

A. Entry Strategy

German food service operators rarely import products directly from third (non-EU) countries, because of

- Quantities needed
- Complex import procedures
- Language
- Time difference
- Availability of specialized importers who take potential risks

To ensure that the products they use meet all sanitary and health requirements, major operators from the institutional catering sector often buy through central buying offices. Large caterers may occasionally import directly or ask their importers or brokers to import products they are especially interested in.

All food products imported must comply with German/EU food law requirements. For details see the Food and Agricultural Import Regulations & Standards (FAIRS) report on the FAS Home Page - http://www.fas.usda.gov

The two major distribution channels for the German food service trade are:
Cash & Carry Wholesalers and Specialized Distributor/Wholesalers.

Cash & Carry (C&C) 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 during extended operating hours. They are not open to the average consumer.

Top 10 German C&C wholesalers, covering almost 99 percent of the market:

Company	**Turnover 2007 in million Euros**	**Dollars**
Metro C+C	**6,300**	**8,621**
Rewe	**1,750**	**2,395**
Edeka-Group	**1,329**	**1,819**
Intergast/Gafateam	**984**	**1,346**
Handelshof	**546**	**747**
Stroetmann	**80**	**109**
Mattfeld	**72**	**99**
Service-Bund	**52**	**71**
Frische-Paradies	**43**	**59**
Total Top 10	**11,198**	**15,323**
Grand Total	**11,314**	**15,482**

Source: Food-Service

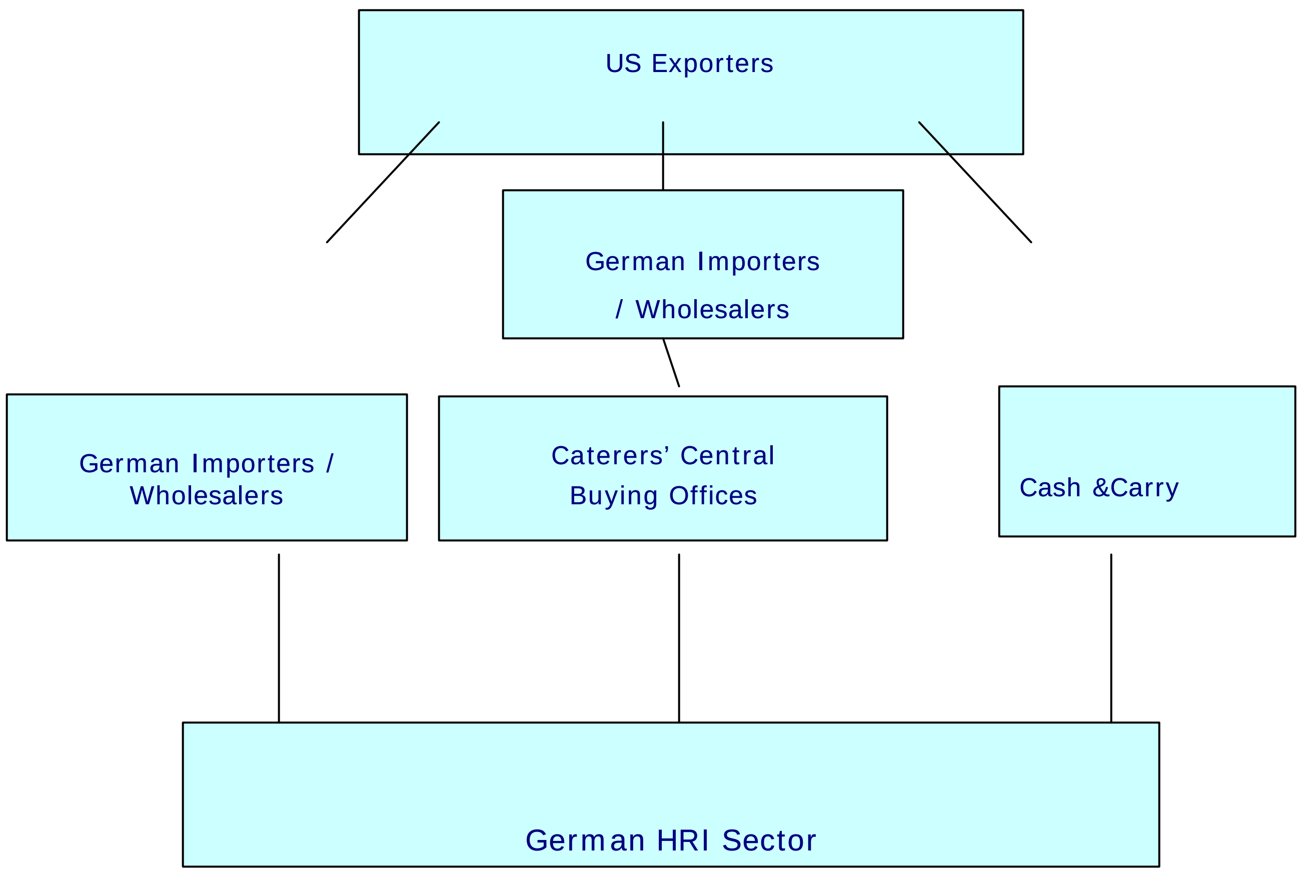
Specialized distributors (GV) to the food service sector have dry and cold storage facilities with refrigerated/frozen trucks for deliveries. They buy from processing companies, importers and, occasionally, foreign exporters. To cover the entire German food service market, regional distributors have 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.

Top 10 German food service delivery wholesalers, covering 90 percent of the market:

Company	Turnover 2007 in million Euros	Turnover 2007 in million Dollars
Rewe	1,057	1,446
GV-Partner	905	1,238
Intergast/Gafateam	806	1,103
Como	541	740
Service-Bund	528	722
Edeka-Group	426	583
Deutsche See	300	411
Vierlande	194	265
Dewender	134	183
Frische Paradies	116	159
Total Top 10	5,007	6,851
Grand Total	5,535	7,574

Source: Food-Service

The diagram below indicates product flow in this market segment.



III. COMPETITION

Local food and beverage products dominate the German food service market. However, U.S.-origin ingredients could be contained in locally produced foods, such as nuts & dried fruits, or seafood. The majority of imported product originates from other EU countries. The table below gives an overview of foods and beverages imported from the U.S. and major competitors in 2007:

Product Category	Major Supply Sources	Strength of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
Meat and Meat Products Net imports: $ 5.3 billion	1. Belgium – 18.0% 2. Netherlands - 16.2% USA - Minor supplier (0.1% share)	Proximity to the market. No duties and less stringent veterinary requirements. Outside EU-25, Brazil and New Zealand are major suppliers.	Chefs in high-class gastronomy prefer to buy from local suppliers. High quality beef and game products are not available in sufficient quantities.
Fish and Fish Products Net imports: $ 3.0 billion	1. Denmark – 13.1% 2. Netherlands – 16.2% USA – 6.42%	Proximity to the local markets. Aggressive marketing and highly competitive prices.	Germany does not produce saltwater fish and seafood in sufficient quantities.
Rice Net imports: $ 174.6 million	1. Italy – 32.69% 2. Netherlands – 16.9% 3. USA - 2.2%	Proximity to market. No duties as an EU-member country (Italy).	Germany does not produce rice. Detection of of biotech rice has adversely impacted U.S. rice imports.
Pulses Net imports: $ 38.6 million	1. Turkey – 20.8 % 2. Canada – 20.5 % USA – 8.9%	Aggressive marketing. Established contacts to importers and distributors.	German production of pulses is negligible.
Tree Nuts Net imports: $ 1.4 billion	1. USA – 22.9% 2. Turkey – 18.1% 3. Netherlands – 11.2%	Traditional, established business contacts.	Product is not grown locally (such as pistachios) or not in sufficient quantities (walnuts, hazelnuts, etc.).
Wine, incl. sparkling wine Net imports: $ 2.31 billion	1. Italy - 33.2% 2. France – 30.3% USA – 2.48%	U.S. wines mainly compete with “New World” wines, e.g. Chile and Australia.	Germany is a large wine producer, but also depends on imports.

IV. BEST PRODUCT PROSPECTS

Despite the existence of a “single” EU market, consumer demand and the structure of the food and beverage market vary substantially between the individual member-countries of the EU, as well as between north, south, east, and west Germany. Generally, those U.S. products with the best export opportunities in the German market meet one or more of the following criteria:
- product is not grown/produced in Europe
- the basic product is not produced in Europe in sufficient quantities or quality
- a fresh product is not currently in season
- the product is specifically unique to the U.S. or to a region within the U.S.

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

Best Product Prospects	Tips/Facts
Specialty Items	Specialty food items and products, particularly those with little or no competition from European production, have good sales potential in Germany. These products include: delicatessen and snack foods, novelty products, food products germane to the United States, spices, dried vegetables, wild rice, and nutritional foods and supplements.
Ethnic Foods	One of the fastest growing segments of the German food service sector is ethnic food. European ethnic foods, for example Italian, Greek, and Spanish foods, have been popular in Germany for years. Recently, Asian, Mexican or Tex-Mex, and Middle-Eastern foods have experienced increasing popularity due in part to the extensive international travel by Germans and a growing immigrant population. These ethnic products have become so popular, and sold in sufficient quantities, that they are now being produced by the German/European food industry and adapted to local tastes. Such domestically produced products can often be sold at lower prices than imports, which require higher mark-ups due to transportation costs and import duties.
Tree Nuts	Germany imports significant quantities of a wide assortment of tree nuts, as well as peanuts and sunflower seeds. In Germany, most tree nuts are used as ingredients by the food processing sector, for ice cream, confectionery, breakfast cereals, and baked goods. Sunflower seeds are also used mostly as a food ingredient, particularly in very popular sunflower seed bread and bread rolls. The German food service industry offers good opportunities for U.S. exporters of almonds, walnuts, hazelnuts, pecans, pistachios, as well as peanuts and confectionery quality sunflower seeds.
High Quality Beef and Game Products	Limited opportunities exist for hormone-free, high quality beef, game, and exotic meat products. Although these products are normally very expensive, they have found a market in German gourmet restaurants. All meat must originate from plants certified and approved by EU authorities before it can be shipped to or sold in the German market.

V. POST CONTACT AND FURTHER INFORMATION

German Trade Shows for Foodservice-Oriented Products

Participating or simply attending a trade show can be a very cost-effective way to test the German market, introduce a product or to expand sales. Germany offers a wide variety of trade show venues for food and beverage products. The following table provides details on major trade shows for food, beverages, and other agricultural and related industries taking place in Germany.

German Trade Shows for the Foodservice Industry		
Name and Location of Show	**Date**	**Contact**
InterCool / InterMopro / InterMeat hogatec Duesseldorf, Germany, (Interval: 2 years)	September 29-October 1, 2008	www.messe-duesseldorf.de
BRAU Beviale Nuremberg, Germany, (Interval: yearly)	November 12-14, 2008	www.nuernbergmesse.de
*** ISM (International Sweets and Biscuit Show)** Cologne, Germany (Interval: yearly)	February 1-4, 2009	www.koelnmesse.de
*** Fruit Logistica / FRESHCONEX** Berlin, Germany (Interval: yearly)	February 4-6, 2009	www.messe-berlin.de
*** Bio Fach** Nuremberg, Germany (Interval: yearly)	February 19-22, 2009	www.nuernbergmesse.de
Internorga Hamburg, Germany, (Interval: yearly)	March 13-18, 2009	www.hamburg-messe.de
*** ProWein** Duesseldorf, Germany, (Interval: yearly)	March 29-31, 2009	www.messe-duesseldorf.de
*** ANUGA** Cologne, Germany, (Interval: 2 years)	October 10-14, 2009	www.koelnmesse.de
GAESTE Leipzig, Germany, (Interval: 2 years)	November 8-11, 2009	www.leipziger-messe.de

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

SECTION VI. KEY CONTACTS AND FURTHER INFORMATION

Internet Home Pages

Internet home pages of potential interest to U.S. food and beverage exporters are listed below:

U.S. Mission to the European Union	http://useu.usmission.gov/agri/usda.html
FAS/Washington	www.fas.usda.gov
European Importer Directory	www.american-foods.org
FAS/Berlin	http://germany.usembassy.gov/germany/fas/index.html
Ausstellungs und Messe-Ausschuss (AUMA)	www.auma-messen.de

If you have questions or comments regarding this report, or need assistance exporting to Germany, please contact the U.S. Agricultural Affairs 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, Germany

Tel: (49) (30) 8305 - 1150
Fax: (49) (30) 8431 - 1935
Email: AgBerlin@usda.gov
Home Page: http://germany.usembassy.gov/germany/fas/index.html

Importer listings are available from the Agricultural Affairs Office 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	Report Number	Month Report was written
Exporter Guide	GM 7039	August 2007
Retail Guide	GM 7043	September 2007
Food Processing Ingredients Report	GM 7057	December 2007
FAIRS Report	GM 8032	July 2008

For more information on exporting U.S. agricultural products to other countries, please visit the Foreign Agricultural Service Home Page at http://www.fas.usda.gov