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Germany

Food Processing Ingredients Sector

Food Ingredients

2007

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Report Highlights:
In 2006, Germany produced an estimated $174 billion of processed food and drinks, marking a 3.4% increase over the previous year. Best product prospects for U.S. suppliers include specialized food ingredients, fish & seafood products, dried & processed fruits, vegetable oils and specialty meat products.

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

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I. Market Summary

The food processing industry is one of the most important sectors in the German economy and the second largest in the European Union. German food processors enjoy several competitive advantages over those in other EU countries. First, they serve a domestic market of over 82 million affluent consumers – the largest in the European Union. Secondly, being situated in center of Europe, German exporters utilize the nation's excellent logistics and transportation network to export their goods quickly and cheaply to other neighboring countries. The most important markets are the Benelux, France, Italy and Austria. Last year, Germany's processed food exports alone exceeded $40 billion.

Table 1: Key Processed Food and Drink Industry Data, Germany 2006[1]

	2006	Change over 2005
Processed food and beverage sales	€ 138.2 billion	+3.4%
Domestic sales	€ 106.1 billion	+1.8
Exports	€ 32.1 billion	+9.2%
Share of Exports in Total Sales	23.2%	+1.2%
Number of food processors	5.900	+0.9%
Number of employees	519.300	+0.4%

Conversion rates:

CY2006 = €1.00 = $1.25622	CY2003 = €1.00 = $1.13208
CY2005 = €1.00 = $1.24539	CY2002 = €1.00 = $0.94590
CY2004 = €1.00 = $1.24386	CY2001 = €1.00 = $0.89658

Profitability of the German food processing industry has grown steadily over the past five years with a compounded annual growth rate of 2.0 %. The industry growth has largely been driven by increased domestic demand and increased exports. Key food processing segments include meat products, dairy products, alcoholic beverages, confectionery, bakery products, fruits & vegetables and oils & fats.

Germany's food processing industry has benefited from EU expansion with approximately 80% of the country's agricultural exports going to other EU countries. The Federal Ministry of Food, Agriculture and Consumer Protection consider Eastern Europe a growth market for Germany's food exports[2]. German processed foods products are succeeding in these markets because consumers now have more disposable income to purchase more expensive foods produced in Western Europe. Technologically, some Eastern European countries have lesser-developed food processing sectors, thus, are more reliant on foreign manufacturers to process their raw materials into finished products. This has benefited many different sectors from brewers to confectionery producers.

Germany's fish and seafood sector is also growing. In 2006, this sector was valued at $ 2.3 billion.[3] The largest sub-sectors in Germany's fish & seafood sector include breaded & frozen fish filets and fish sticks, herring, fish salads, and Atlantic & Pacific salmon. Sub-sectors experiencing the largest value growth in 2006 included caviar replacement (101 %), crustaceans (25 %), frozen ocean fish (21 %) and foods containing crustacean products (19 %).

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[1] Source: BVE, DeStatis
[2] Dr. Gerd Müller, Press Release Nr. 176 Ausgabedatum 2. November 2007
[3] Source: Association of German Fish Industry and Fish Wholesalers

Imports of fish and seafood products from the United States reached a record level of $262 million in 2006[4], denoting the highest export level since calendar year 1970. The most important fish & seafood imports from the U.S. in 2006 included whole or eviscerated salmon ($ 17.5 million), surimi ($ 11.6 million) and roe & urchin ($ 5.0 million). Imports of miscellaneous edible fish and seafood products from the U.S. also reached a record sum of $ 227 million in 2006.

Advantages	Challenges
Europe's largest single market with 82 million affluent consumers.	USA exporters face competition from tariff-free products from other EU countries.
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.
The devaluation of the dollar has made imports from the USA cheaper, giving it a comparative advantage over other Euro zone suppliers	Ocean freight delivery times to Germany make it difficult for small U.S. exporters to meet client orders as quickly as their EU competitors.
The U.S. has a reputation as a reliable supplier of food inputs in terms of availability, delivery and quality	Some unapproved products of modern biotechnology are prohibited.
Germany is centrally located in Europe with excellent transportation channels. Food processors are well situated to export products to other EU countries.	

II. Road Map for Market Entry

A. Entry Strategy

U.S. exporters who are successful in Germany usually conduct their research and generate a better understanding of the market. This can be done by reading FAS Attaché Reports and contacting FAS Berlin for clarification on specific questions. The USDA Foreign Agricultural Service offer USA suppliers a number of valuable services to assist with market entry. Once exporters have this background, they can use one of Germany's many FAS sponsored trade shows as a springboard into the market, helping them establish new trade contacts and gauge product interests. Exporters should also contact their respective U.S. State Regional Trade Groups (SRTG) to obtain additional market entry support, including tailored market research and importer introductions.

More detail on the four most valuable market entry assistance programs are as follows:

FAS Attaché Reports
New-to-market exporters should begin the entry process by studying the FAS Attaché reports on Germany, which are pertinent to their product category. The *Germany Exporter Guide* contains a general overview of the macro-economic situation, discusses demographic trends, food trends, offers exporter business tips and shares overviews of the food retail and HRI sectors.

[4] Source: FAS BICO Reports

Other helpful Attaché reports include the *EU Certification Guide*, which provides an overview of legally required health and origin certificates and the *European Union Report* which gives a complete overview of food laws currently in force in the European Union.

A complete selection of FAS reports can be viewed online at:

http://www.fas.usda.gov/scriptsw/attacherep/default.asp

Foreign Agricultural Service Berlin
The USDA Foreign Agricultural Service in Berlin can be contacted for assistance with questions regarding the German market, trade shows and other marketing or sales opportunities in Germany. Contact information for FAS Berlin is found at the end of this report.

State Regional Trade Groups
The State Regional Trade Groups (SRTG) are regionally located in the U.S. and non-profit trade development organizations that help U.S. food producers and processors sell their products overseas. They are funded by USDA's Foreign Agricultural Service (FAS), the State Departments of Agriculture and private industry.

They carry out promotional activities that increase exports of U.S. high-value food and agricultural products. Activities include participation in international trade exhibitions, overseas trade missions, reverse trade missions, export education, in-country research, and point-of-sale promotions in foreign food chains and restaurants in markets around the world.

The SRTGs also administer a cost-share funding program called the Brand program, which supports the promotion of brand name food and agricultural products in overseas markets. For more information, contact the state regional trade group responsible for your state:

Food Export USA - Northeast Member states: Connecticut, Delaware, Maine, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont E-mail: info@foodexport.org Web site: www.foodexportusa.org	***Southern United States Trade Association*** Member states: Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Maryland, Mississippi, North Carolina, Oklahoma, Puerto Rico, South Carolina, Tennessee, Texas, Virginia, West Virginia E-mail: susta@susta.org Web site: www.susta.org
Food Export Association of the Midwestern USA Member states: Indiana, Illinois, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, Wisconsin E-mail: info@foodexport.org Web site: www.foodexport.org	***Western U.S. Agricultural Trade Association*** Member states: Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington, Wyoming E-mail: export@wusata.org Web site: www.wusata.org

Participation in Trade Shows
Germany is a country that excels in organizing trade shows. In fact, many of the largest trade shows in the world take place here. It is an excellent location for U.S. exporters to make contact with potential business partners, conduct product introductions and gauge buyer interest. Additionally, many of Germany's trade shows cater to an international crowd, giving exporters access to a wide selection of interested buyers from around the word.

Some of the most important trade shows include:

Description	Frequency & Dates	Contact
ISM (International Sweets and Biscuit Show) Cologne, Germany The largest confectionery trade show worldwide catering to an international crowd. USA pavilion present.	Taking place annually in January/February Next shows: January 27-30, 2008 February 1-4, 2009	National Confectioners Association (NCA) Tel.: (703) 790 – 5750 Fax: (703) 790 – 5752 www.ism-cologne.com
ProSweets Cologne, Germany Takes place simultaneously with ISM (see above). Focusing on confectionery ingredients. No USA pavilion present.	Annually except when the show Interpack is held. Next show: February 1-4, 2009	Koelnmesse, Inc. Chicago Tel: (773) 326-9920 Fax: (773) 714-0063 www.koelnmessenafta.com www.prosweets-cologne.com
Fruit Logistica Berlin, Germany Europe's largest trade show for fresh produce, dried fruits and nuts catering to an international crowd. USA pavilion present.	Taking place annually in January Next show: February 7-9, 2008 February 5-7, 2009	B-For International Tel.: (540) 373 – 9935 Fax: (540) 372 – 1411 www.fruitlogistica.com http://www.b-for.com/fruitlogistica.html
BioFach Nuremberg, Germany The world's largest trade show for organic products catering to an international crowd. USA pavilion present.	Taking place annually in February. Next show: February 21-24, 2008	B-For International Tel.: (540) 373 – 9935 Fax: (540) 372 – 1411 www.biofach.de http://www.b-for.com/biofach.html
Interzoo Nuremberg, Germany The world's largest trade show for pet and pet food supplies catering to an international crowd. USA pavilion present.	Taking place every two years in May. Next show: May 22-25, 2008	Concord Expo Group Tel: (208) 265-1714 Fax: (208) 265-1713 www.interzoo.com www.concordexpogroup.com
ANUGA Cologne, Germany The world's largest trade show (5.000+ exhibitors) for foods & beverages catering to an international crowd. USA pavilion present.	Taking place every two years in October. Next show: October 10-14, 2009	Koelnmesse, Inc. Chicago Tel: (773) 326-9920 Fax: (773) 714-0063 www.koelnmessenafta.com www.anuga.com

Other European Trade Shows: Food Ingredients Europe and **Health Ingredients Europe** are the largest European trade shows held in alternate years in October/November.

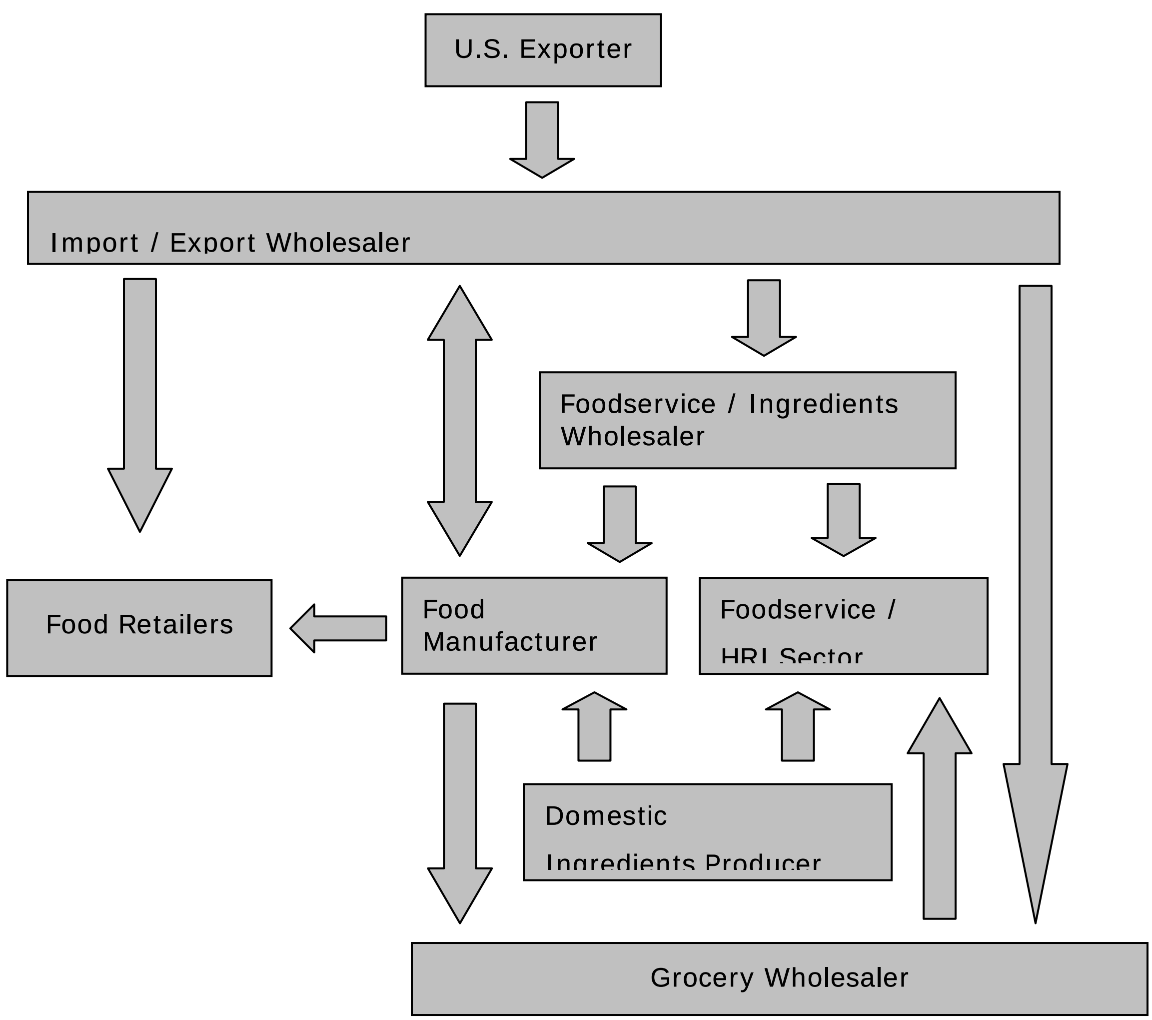
Location changes each year, often alternating between the cities of Frankfurt, London, Paris and Amsterdam. More information on these shows can be found at http://www.fi-events.com/.

B. Market Structure

German food processors generally purchase their ingredients from local producers and/or local importers. Only large processors import ingredients directly from foreign suppliers. Retailers usually purchase direct from the processor or from a buying organization (e.g. Markant). The HRI sector may purchase directly from the processor or from a wholesaler. Smaller HRI outlets generally purchase products from cash and carry operations.

U.S. exporters of food ingredients generally enter the German market through a specialized ingredient importer. A good importer will be your partner in promoting your product to his or her customers. Germany's food processing industry is well developed and has access to any food ingredient imaginable. U.S. products that have been successful in Germany in the past always have a competitive advantage over the competition. This could include a lower price, higher quality or a unique innovative quality. U.S. products not produced in the European Union or unavailable in large quantities usually fare well in Germany.

Diagram 1: Market Structure for Processing Ingredient Imports



C. Company Profiles

The following table includes a selection of food processors in Germany sorted by the types of products processed.

Table 2: Top Food Processors, Germany[5]

Producer	*Product Categories*	Sales in Germany In € Millions	Worldwide Sales In € Millions	End-Use Channels
Tchibo Holding AG	Coffee, Chocolate	4,356	8,788	Retail, HRI
Nestlé Gruppe Deutschland	Beverages, Cereals, Chocolate, Dried Convenience Products, Pasta	3,767	3,767	Retail, HRI
Voin N.V.	Meat, Convenience, Pet food	3,300	6,600	Retail, HRI
Dr. August Oetker KG	Baking ingredients, Yoghurt, Pizza, Muesli	2,721	7,029	Retail, HRI
Procter & Gamble GmbH	Pet food, Snack foods, prepared foods	2,600	6,400	Retail, HRI
Unilever Deutschland GmbH	Margarine, prepared foods, light products, oils, dairy products	2,500	2,500	Retail, HRI
Coca-Cola Organization	Beverages	2,200	2,200	Retail, HRI
Cobana Fruchtring GmbH & Co. KG	Fruit	2,050	2,284	Retail, HRI
Kraft Foods Deutschland GmbH	Drinks, Sweets, Condiments	1,800	1,800	Retail, HRI
InBev Deutschland GmbH	Beer	1,700	1,700	Retail, HRI
B+C Tönnies GmbH & Co KG	Meat, Convenience foods	1,630	2,500	Retail, HRI
Nordmilch Konzern	Milk Products	1,525	2,070	Retail, HRI
Humana Milchunion e.G.	Milk Products, Cheese, Yoghurt	1,500	1,900	Retail, HRI
Masterfoods GmbH	Rice, Sweets, Pet Food	1,500	1,500	Retail, HRI
Atlanta AG	Produce, Convenience, Nuts	1,500	1,500	Retail, HRI
Ferrero oHG mbH	Sweets	1,400	1,400	Retail
Theo Müller GmbH & Co KG	Milk Products	1,300	2,100	Retail, HRI
Pfeifer & Langen KG	Sugar, Syrup	1,290	2,160	Retail, HRI
Südzucker-Gruppe	Sugar	1,284	5,347	Retail, HRI
Westfleisch-Gruppe	Meat	1,230	1,599	Retail, HRI
Kamps AG	Bread, Bakery Products	1,090	1,210	Retail
Campina GmbH & Co. KG	Milk Products, Cheese, Drinks	1,080	1,080	Retail, HRI
Heristo AG	Meat, Sausage	1,050	1,227	Retail, HRI
PHW-Gruppe (Wiesenhof)	Pet Food	1,010	1,260	Retail, HRI

[5] Source: Lebensmittelzeitung. Data for 2005/06 financial years. Approximate figures.

Landgard eG	Fruit, Vegetables	960	1005	Retail, HRI
Bitburger Getränke Gruppe	Beer	950	950	Retail, HRI
Stute Nahrungsmittelwerke GmbH & Co.KG	Preserves, Drinks, Sweet Spreads	850	850	Retail, HRI
Hochwald Nahrungsmittel-Werke GmbH	Dairy products, Sausage	770	1020	Retail, HRI
August Storck KG	Confectionery	750	1200	Retail, HRI
Zur Mühlen Gruppe	Meats, Sausage	730	n.a.	Retail, HRI
Karlsberg Brauerei GmbH	Beer	690	690	Retail, HRI
Krüger GmbH & Co. KG	Coffee, Tea, Cacao	630	1359	Retail, HRI
Melitta Unternehmensguppe Bentz KG	Coffee	610	1113	Retail, HRI
Bayernland eG	Dairy Products	604	737	Retail, HRI
Brau Holding International AG	Beer	570	705	Retail, HRI
Krombacher Brauerei Bernhard Schadeberg GmbH & Co. KG	Beer	526	526	Retail, HRI
Warsteiner Brauerei Haus Cramer KG	Beer	510	510	Retail, HRI
Haribo GmbH & Co. KG	Confectionery	500	1400	Retail, HRI
Ehrmann AG	Dairy products, Desserts	484	620	Retail, HRI
Harry-Brot GmbH	Bread, Bakery Products	470	489	Retail, HRI
D&S Fleisch GmbH	Meat	470	470	Retail, HRI
Eckes AG	Beverages	460	960	Retail, HRI
Hochland AG	Dairy products, cheese	412	787	Retail, HRI

D. Sector Trends

Households are getting smaller, with more than two-thirds already consisting of just 1-2 persons. This has led to demands for smaller packaging. Germany's high standard of living and disposable income makes it possible to purchase premium and specialty products. Premium products currently command a 12.5% market share. [6]

Demographic and lifestyle changes are shaping consumption trends in Germany. The population is getting older, resulting in an increased demand for healthy and functional foods and nutraceuticals. Organic products are growing in importance. Industry sources estimate Germany's organic sector totaling € 4.8 billion in 2006.[7]

The number of working women is also increasing, which has sparked demand for convenience and prepared foods primarily because of the decreased time spent at home. Currently, this segment is the most dynamic of all food categories. Fresh products have also benefited from this trend because they are not only convenient, but they are viewed by many consumers as being healthier than heavily processed foods.

[6] GfK "Consumer's Choice" Study
[7] Source: GfK

According to a consumer study "Consumers' Choice" conducted by the research institute GfK, while the entire food and beverage sector grew by a moderate 6% from 2002-2005, sales among the three trend sectors of premium products, health/wellness and convenience grew by 38%.

III. Competition

The main competitors for U.S. suppliers include producers in other European Union countries such as the Netherlands, Italy, France, Austria and Belgium. Key country competitors listed by product category can be found in the following table.

Table 3: Imports of Select Agricultural Products 2006[8]

HS Code and Product Category	Imports in € Mio.	Top 4 Countries of Origins [+ USA]	Strengths of Key Supply Countries
Total	**45,704**		
08 Fruits & Nuts	5,593	Spain: 18% Netherlands: 16% Italy: 15% Belgium: 10% [USA: 5 %]	All top countries members of EU. Spain & Italy grow much of their own fruits & nuts due to Mediterranean climate. Many USA products competitive.
04 Dairy, eggs, honey, etc.	4,778	Netherlands: 27%, France: 17%, Denmark: 9%, Austria: 8% [USA: > 0.5 %]	All top countries members of EU. Strong protective import barriers affect USA exporters. Top countries of origin all direct neighbours.
22 Beverages	4,481	France: 26% Italy: 21% Spain: 8% Netherlands: 6% [USA: 3 %]	All top countries members of EU. Top countries of origin are all located near Germany, saving on transport costs which are high when shipping heavy beverages.
02 Meats	4,138	Netherlands: 20% Belgium: 18% Denmark: 13% France: 7% [USA: > 0.5 %]	All top countries members of EU. Strong protective import barriers affect USA exporters. Top countries of origin all direct neighbours.
07 Vegetables	3,880	Netherlands: 39% Spain: 21% Italy: 10% Belgium: 8% [USA: > 0.5 %]	All top countries members of EU. Moderate protective import barriers affect USA exporters. Spain is an important producer of citrus and produce in cooler months.
20 Preserved foods	3,531	Netherlands: 25% Italy: 12% Turkey: 12% Belgium: 7% [USA: > 0.5 %]	All top countries except Turkey are members of EU. High import tariffs often affect USA exporters. Turkish product very price competitive.
15 Fats & oils	2,769	Netherlands: 33% Indonesia: 11% Italy: 9% Poland: 5% [USA: 2 %]	All top countries except Indonesia are members of EU and neighbouring countries. Indonesia an important origin of tropical oils such as palm oil.
03 Fish & seafood	2,305	Denmark: 15%	All top countries except China are

[8] Source: European Union Trade Statistics

		China: 12% Netherlands: 10% Poland: 10% [USA: 6 %]	members of EU and neighbouring countries. China is price competitive in seafood sector. USA seafood also competitive in price and quality.
09 Spices, coffee & tea	2,189	Brazil: 23% Vietnam: 10% Colombia: 8% Peru: 6% [USA: > 0.5 %]	Top countries all come from tropical and subtropical climates.
21 Misc. Foods	2,146	Ireland: 26 % Netherlands: 16% France: 10 % Switzerland: 9% [USA: 1 %]	All top countries members of EU except Switzerland, with whom Germany has traditional close ties. Strong protective import barriers affect USA exporters.
19 Baking related	2,101	Italy: 22% France: 16%, Netherlands: 13% Belgium: 12% [USA: > 0.5 %]	All top countries members of EU. Top countries of origin are all located near Germany, saving on transport costs which are high when shipping high volume baked goods.
12 Grain, seed & fruit	1,867	Netherlands: 24% France: 16% USA: 13% Brazil: 11%	USA traditionally a major supplier of grains & seeds.
18 Cocoa	1,821	Netherlands: 37% Belgium: 16% France: 9% Austria: 5% [USA: > 0.5 %]	Primary cocoa supplies members of EU. Top three supplying countries have former colonies where cocoa plants are grown.
16 Prepared meat & fish	1,601	Netherlands: 16% Brazil: 12% Denmark: 10% Austria: 9% [USA: 1 %]	All top countries members of EU. Top countries except Brazil are neighbours. Brazil a major beef producer. Protective barriers substantially hinder USA meat imports.
17 Sugar	1,218	France: 20% Netherlands: 15% Belgium: 14% Austria: 5% [USA: 1 %]	All top countries members of EU. Top countries are neighbours. High sugar tariffs substantially hinder USA imports.
10 Cereals	958	France: 32% Czech Rep.: 12% Netherlands: 8% Italy: 8% [USA: 2 %]	All top countries members of EU. Top countries of origin are all located near Germany.
11 Milling, malt & starch	306	France: 37% Netherlands: 24% Austria: 8% Belgium: 7% [USA: 2 %]	All top countries members of EU. Top countries are neighbours.

IV. Best Product Prospects

Products present in the market which have good sales potential

- Fish & Seafood: Salmon, surimi, roe & urchin, misc. fish and seafood products
- Nuts: Almonds, hazelnuts, pecans, pistachios, walnuts
- Dried & Processed Fruit: Cranberries, prunes, sour cherries, wild blueberries

- Fruit juice concentrates: Cranberry, grapefruit, prune
- Vegetable oils
- Beef & Game: Hormone-free beef, bison meat, exotic meat and exotic processed meat products
- Organic products
- Seeds: Sunflower seeds

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

Food ingredients unavailable in Germany, but which have good sales potential, include nutraceuticals and specialized food ingredients, etc.

Because Germany is a free market economy with a well-developed food manufacturing industry, shortages of food ingredients are rare. Occasional opportunities for U.S. exporters arise when crop yields in Europe are below average or when market prices dramatically increase, making U.S. products more price competitive vis-a-vis European products.

The most recent example is connected with weather related conditions. Earlier this year, Germany experienced a relatively warm and dry April, followed by an abnormally wet summer. This negatively impacted Germany's agricultural sector and has been responsible for increased costs of select raw materials and food ingredients such as grains and cereals. As a result, some of these products may have to be imported from third countries, thereby, opening up new opportunities for U.S. food exporters, at least in the short term.

Products not present because they face significant barriers

U.S. exporters offering the following product categories face significant barriers due to European Union regulations:

- Food additives not approved by the European Commission
- Red meat & meat products produced with hormones
- Most poultry & eggs
- Biotech derived products

V. Post Contact and Further Information

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

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 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
Retail Guide	GM 7043	September 2007
Exporter Guide	GM 7039	August 2007
FAIRS Report	GM 7031	August 2007

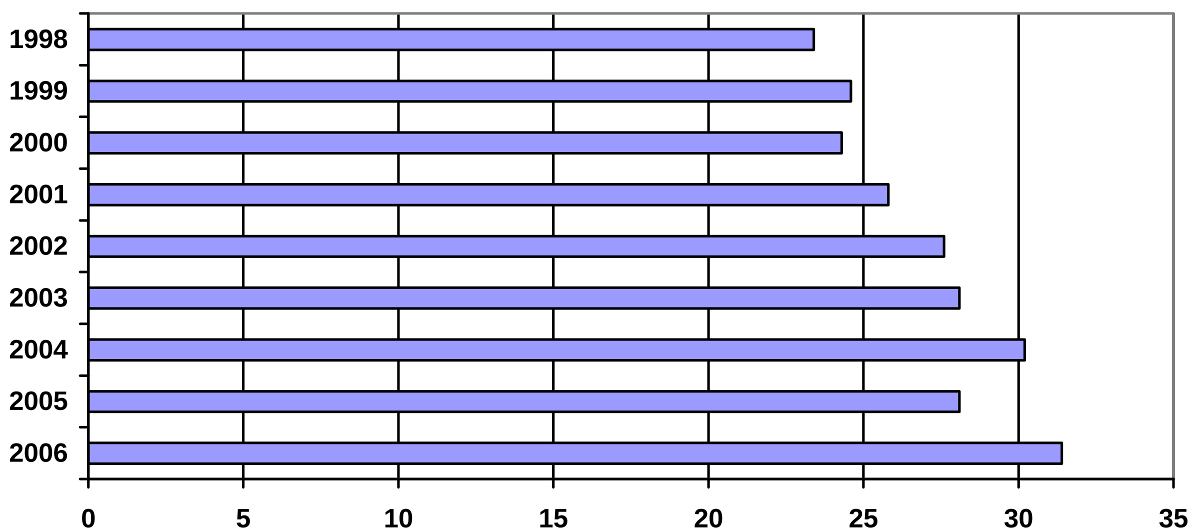
For more information on exporting U.S. agricultural products to other countries, please visit the Foreign Agricultural Service Home Page at www.fas.usda.gov

APPENDIX/ STATISTICS

Table 4: Branch Share of Processed Foods and Beverage Sector, Germany 2006[9]

Branch	Share in %
Meat products	22.1
Dairy Products	16.0
Alcoholic Beverages	9.3
Confectionery	8.4
Bakery Products	8.3
Fruit and Vegetables	5.9
Mineral Water	4.7
Oils and Fats	3.9
Milling and Starch Industry	3.3
Condiments and Seasonings	3.0
Coffee and Tea	2.9
Sugar	2.2

Figure 1.3.
Processed Foods and Beverage Imports, Germany (in € billions)[10]



[9] Source: BVE, DeStatis
[10] Source: BVE, DeStatis

Table 5: Import Sales of Processed Foods and Beverage Sector, Germany 2006[11]

Branch	**Imports in € Billions**
Fruit and Vegetables	3.38
Oils and Fats	2.46
Meat products	4.57
Bakery Products	1.87
Alcoholic Beverages	3.30
Dairy Products	4.17
Coffee and Tea	2.06
Sugar, Confectionery	1.08
Eggs	0.41

Table 6: Imports/Exports of Processed Foods and Beverage Sector by Country 2006[12]

Trading Partner	**Share of Total Imports in %**	**Share of Total Exports in %**
Netherlands	18.0	12.9
Italy	8.4	10.9
France	9.7	9.8
Austria	3.3	6.8
Belgium	5.1	4.8
North America	3.8	3.3
Central & South America	8.1	0.4
Asia	4.8	4.0
Africa & Middle East	2.8	3.7
Australia, New Zealand, Oceana	1.6	0.3

[11] Source: BVE, DeStatis
[12] Source: BVE, DeStatis

Table 7: Development of Germany's Processed Foods and Beverage Sector[13]

Year	Total Sales in € billions	Domestic Sales in € Billions	Export Sales in € Billions
1998	116.9	96.6	20.3
1999	116.6	96.8	19.8
2000	120.4	98.4	22.0
2001	126.7	102.6	24.1
2002	125.2	100.4	24.8
2003	127.9	101.5	26.4
2004	130.2	102.5	27.7
2005	133.6	104.2	29.4
2006	138.2	106.1	32.1

[13] Source: BVE, DeStatis