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Report Highlights:

Germany is the largest market for food and beverages in the European Union importing USD 69 billion worth of consumer-oriented agricultural products in 2023. The food retail sector is saturated, highly consolidated, and competitive. There is good sales potential in Germany for U.S. exporters of beef, nuts, fish and seafood products, beer and wine, and food preparations. The German Farmers Union (DBV) estimates that 80 to 90 percent of consumed products in Germany are consumer-oriented processed products. The war in Ukraine raised prices for energy, feed, and fertilizer, and subsequently groceries. As a result, many German consumers have cut back spending on both essential and non-essential products.

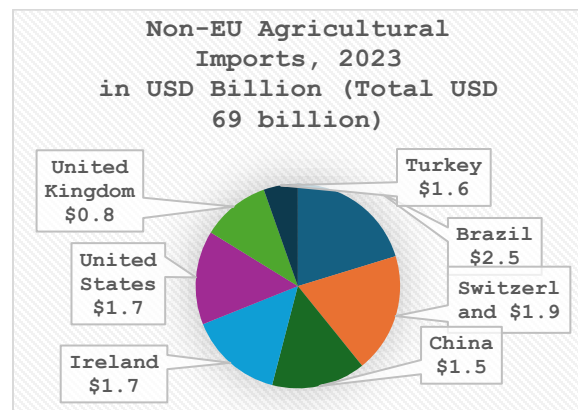
Market Fact Sheet: Germany

Executive Summary

Germany is the biggest market for food and beverages in the EU with more than 84 million consumers. In 2023, Germany's nominal GDP reached USD 4.6 trillion, making it the world's 4th largest economy. It is also the third largest importer of agricultural and related products. In 2023, agricultural imports reached USD 139 billion. While more than 80 percent of these imports originated from other EU member states the United States was the third largest supplier outside the bloc after Brazil and Switzerland. Imports of agricultural and related products from the United States totaled USD 2.9 billion in 2023. The macroeconomic situation and key data about the German economy can be found in the latest [Exporter Guide](#).

Imports of Consumer-Oriented Products

In 2023, Germany imported USD 69 billion worth of consumer-oriented agricultural products. The majority (85 percent) of these originated from other EU member states.



Food Service Industry

The 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 15.5 percent to USD 87.8 billion in 2022, compared to 2021.

Food Retail Industry

The sector is saturated, highly consolidated, and competitive. The top four retail groups together account for around 76 percent of the total revenue. In 2022, grocery retail sales reached an estimated USD 318.3 billion.

Food Processing Industry

In 2023, the German food processing industry employed around 636,000 people in 5,991 companies. The sector is dominated by small and medium size companies; 90 percent of which have less than 250 employees. In 2023, the sector generated a turnover of roughly USD 247 billion, accounting for 5.6 percent of the German GDP.

Quick Facts CY 2023

Imports of Consumer-Oriented Products

USD 69 billion (from USA: USD 1.7 billion)

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

Food Industry Gross Sales (USD billion)

Food Industry Revenues (Domestic market) USD 162.7

Top 10 Host Country Retailers

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

GDP/Population

Population (millions): 84.4

GDP (trillion USD): 4.6

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 0.9027 (September 2024)

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

SECTION I. MARKET SUMMARY

Germany has more than 84 million of the world's wealthiest consumers. This makes it the third largest importer of consumer-oriented agricultural products worldwide, and by far the most important European market for foreign producers. Germany is a net importer of all major categories of food products. In 2022, grocery retail sales reached an estimated [USD 318.3 billion](#) (EUR 287.3 billion). Imports of agricultural and related products increased by 1.9 percent from USD 136.3 billion in 2022 to USD 139 billion in 2023. Imports of consumer-oriented agricultural products totaled USD 69 billion in 2023.

The retail market's key characteristics are consolidation, market saturation, strong competition, and low prices. Germany is an attractive and cost-efficient location in the center of the EU. While many consumers are very price sensitive, the market has many wealthy consumers who make purchasing decisions based on value-for-money. These consumers are looking for premium quality products and are willing to pay a higher price. In 2022, German citizens spent only [14.7 percent](#) of their income on food and beverage products.

Whereas Germans could rely on relatively inexpensive groceries in the past, the war in Ukraine raised prices for energy, feed, and fertilizer. Inflation reached two-digit numbers with increasing food prices being one of the main drivers besides energy. Food prices declined noticeably in fall 2023 but were still 6.4 percent higher year-on-year. Many German consumers have cut back spending on higher-cost foods such as organic, fair trade, regional products and meat substitutes, but also on essential products.

Key market drivers and consumption trends

- Increasingly high-paced society and a rising number of single households are driving the demand for convenient ready-to-eat meals, desserts, and baking mixes. [DBV](#) estimates that 80 to 90 percent of consumed products in Germany are convenience products.
- An aging population and increased health consciousness of consumers is fueling the demand for health and wellness products.
- There is a growing share of consumers who view their purchasing decisions as a political or life-style statement (non-GMO, only free-range eggs, vegetarian or vegan diet), and they demand traceability and information about production methods.
- On-demand grocery delivery platforms are flooding the market in Germany's major cities, offering food at prices that strongly compete with those of traditional supermarkets.
- Fair trade and organic products are increasingly prominent in the German grocery market. Germany is the second largest organic market in the world (behind the United States) and presents good prospects for exporters of organic products. However, in 2023 inflation somewhat reversed this trend. German consumers felt like they had to save money and changed shopping patterns. For more information, please see the GAIN report: [German Organic Market Takes a Dip](#).
- Consumers increasingly require traceability and information about production methods. According to a [report](#) from the German Federal Ministry of Food and Agriculture published in September 2023, labelling is becoming more important for consumers, especially the animal welfare label, the organic label, and the sustainable fishing label.

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

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

Source: FAS Berlin

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. FAS [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. This 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 the world's largest Food and Beverages Trade Show [ANUGA](#), which takes place in Cologne, October 04-10, 2025. ANUGA 2023 hosted the largest USA Pavilion in FAS history. With 188 American companies exhibiting at what was the largest ANUGA on record. The show attracted more than 140,000 visitors from 200 countries and over 7,900 exhibitors from 118 countries. U. S. exhibitors recorded more than \$27.4 million in on-site sales, and \$196 in 12-month projected sales.

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
BCB - Bar Convent Berlin October 14-16, 2024 https://www.barconvent.com/	International trade show for bars and beverages	Berlin
Food Ingredients Europe November 19-21, 2024 https://www.figlobal.com/fieurope/en/home.html	Leading trade show for food and health ingredients	Frankfurt
ISM February 2-5, 2025 https://www.ism-cologne.com/	World's largest show for snacks and confectionery products	Cologne
Fruit Logistica February 5-7, 2025 https://www.fruitlogistica.com/en/	World's leading trade fair for the fresh fruit and vegetable business	Berlin
BioFach February 11-14, 2025 https://www.biofach.de/en	Leading European tradeshow for organic food and non-food products	Nuremberg

Internorga March 14-18, 2025 https://www.internorga.com/	International trade show for hotel, restaurant, catering, baking, and confectionery trades	Hamburg
ProWein March 16-18, 2025 https://www.prowein.com/	International trade show for wine and spirits	Duesseldorf
ANUGA (every two years) October 4-8, 2025 https://www.anuga.com/	The leading food fair for the retail trade, and the food service, and catering market worldwide	Cologne
Interzoo (every two years) May 7-10, 2024 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 import provisions in individual cases.

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

Market Structure

Consolidation, market saturation, strong competition, and low prices are key characteristics of the German retail food market. The top four grocers account for around 76 percent of the total market. The German market is largely dominated by domestic players. This is particularly true for hypermarkets, supermarkets, and discounters. German consumers are very particular about what they like and what they do not like in their grocery retailers, and grocery retailers can count on a strong base of loyal customers. The failure of Walmart to establish itself in Germany over a decade ago shows how hard it is for international players to successfully enter the German market.

Table 3: Profiles of Top Food Retailers in Germany

Retailer Name and Outlet Type	Total Sales 2023 (USD million)	Revenue 2023 compared to 2022 (Percentage)	Locations
1. Edeka-Group <ul style="list-style-type: none"> • Edeka (Supermarkets) • Netto (Discounter) 	86,054	+6.7	nationwide nationwide
2. Rewe-Group <ul style="list-style-type: none"> • Rewe (Supermarkets) • Penny (Discounter) 	71,564	+8.6	nationwide nationwide
3. Schwarz-Group		+9.4	

<ul style="list-style-type: none"> Lidl (Discounter) Kaufland (Hypermarkets) 	62,647		nationwide nationwide
4. Aldi-Group <ul style="list-style-type: none"> Aldi Süd (Discounter) Aldi Nord (Discounter) 	38,437	+8.2	Southern Germany Northern Germany
5. dm (retail chain specialized in cosmetics, healthcare items, household products, and health food, similar to RiteAid/ CVS)	12,610	+14.7	nationwide
6. Rossmann (retail chain specialized in cosmetics, healthcare items, household products, and health food, similar to RiteAid/ CVS)	10,303	+10.1	nationwide
7. Bartels-Langness Group	7,376	+9.9	Northern Germany
8. Globus	7,162	+10.6	nationwide
9. Metro	6,154	+3.5	nationwide
10. Transgourmet	5,216	+11.6	nationwide

Source: [Lebensmittel Praxis](#)

Large grocery retailers in Germany are mainly driven by competition between each other. They are very well-established and compete mostly on price, outlet networks, and consumer trust, which, amongst other factors, requires them to maintain their standards in terms of quality. Retailers also try to differentiate themselves through additional services and standards which add value to their original value proposition.

The growth of discounters is slowing because of market saturation and the continuing trend towards shopping at supermarkets in convenient city locations. As urbanization is growing and consumers' lifestyles are changing, more and more people seek convenience when doing their grocery shopping. To counter the trend, discounters are also attempting to adapt and expand in hopes of differentiation. Additionally, they are focusing more on quality and choice rather than price with new concepts and the introduction of more premium and convenience foods, online stores and premium locations.

Whereas e-commerce sales grew during the pandemic, online food purchases have decreased by 6.8 percent in 2023. The total number of food and beverages shopped online is at [USD 4.102 million](#) (EUR 3.703 million).

The pandemic has also accelerated the rise of on-demand grocery delivery platforms, such as [Flink](#), which deliver groceries within minutes of ordering for a small delivery fee, also known as quick

commerce. The sector has seen significant competition with several apps launching in 2021. Today, after a wave of consolidation, only one large-scale player remains. The Berlin-based startup Flink is owned by Rewe-Group and operates in over 60 major cities across Europe with about 10 million customers.

SECTION III. COMPETITION

The main competitors for U.S. suppliers include domestic producers and producers from other EU member states, such as the Netherlands, Italy, Poland, France, and Belgium. However, for dried fruits and nuts the main competitors are Turkey, Chile, and South Africa. 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.

Table 4: Overall Competitive Situation for Consumer-Oriented Products (2023)

Product Category Total German Import	Main Suppliers (Value) in Percentage	Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
Fish and Seafood (HS 03 + HS 16) MT 1.3 million USD 9.03 billion	1. Poland – 19.8% 2. Netherlands – 17.8% 3. Denmark – 9.6% 15. USA – 1.3%	1-3) Proximity and availability. 15) USA is Germany’s third largest supplier of Alaska Pollock fillets after China and Russia.	Tradition in seafood trading and processing. Fish is popular.
Meat (HS 02) MT 2.073 million USD 8.6 billion	1. Netherlands – 26.5% 2. Poland – 14.9% 3. Belgium – 11.5% 21. USA - 0.1%	1-3) Proximity and availability. 25) U.S. imports consist of hormone-free beef under the Hilton beef quota.	Focus on pork rather than beef production.
Snack Foods excl. nuts (HS 1905 + 1704) MT 1.3 million USD 4.96 billion	1. Poland – 17.9% 2. Netherlands – 17,5% 3. Italy – 11.6% 30. USA – 0.12%	1-3) Proximity and availability. 2) Volumes also consist of re-exports from China, Thailand, and USA.	Tradition in snack food production. Germany is one of the global market leaders in snack foods.
Beer and Wine (HS 2203, 2204, 2205, 2206) Liters 1.9 billion USD 3.5 billion	1. Italy – 32.3% 2. France – 27% 3. Spain – 11.9% 8. USA – 1.7%	1-3) Proximity, reputation, climatic conditions for wine growing.	Wine only grows in southern part of country. Insufficient domestic supply.
Food Preparations (HS 210690) n/a USD 2.9 billion	1. Netherlands – 17.3% 2. Poland – 12.3% 3. Spain – 10.8% 19. USA – 0.9%	1-3) Proximity and availability.	Strong domestic food industry.
Tree Nuts (HS 0801 +0802)	1. USA – 20.8% 2. Turkey – 19.9%	1) USA is the leading supplier of almonds,	Domestic production is minimal. Germany

+200819) MT 478,057 USD 2.9 billion	3. Netherlands – 10%	pistachios, and walnuts. 2) France currently has the lead in hazelnuts. 3) Netherlands is a large re-exporter of cashew nuts.	is a leading producer of marzipan and has high demand for almonds.
Sauces and Preparations (HS 2103) MT n/a USD 1.034 billion	1. Italy – 32.6% 2. Netherlands – 20.6% 3. Poland – 7.8% 10. USA – 2.2%	1-3) Proximity and availability. 10) USA is well known as supplier of BBQ sauces.	Strong domestic food industry.
Peanuts (HS 1202) MT 124,511 USD 225.9 million	1. Netherlands – 57.1% 2. Belgium – 9.8% 3. USA – 8.9%	1) Volumes consist of re-exported peanuts from Argentina, USA, Brazil	No local availability, high demand from well-established snack food industry.
Raisins (HS 080620) MT 67,038 USD 140 million	1. Turkey – 42.4% 2. South Africa – 28.4% 3. Netherlands – 7.8% 6. USA – 3.3%	1) Pricing	No local availability.
Dried Prunes (HS 0813 20) MT 9,065 USD 46.7 million	1. Chile – 47.4% 2. Netherlands – 19% 3. USA – 12.9%	1) Product pricing, zero duty access through EU-Chile FTA 2) Good reputation for quality, California origin adds value	No local availability.

Source: Trade Date Monitor, Products ranked according to value of products (last update: September 19, 2024)

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, misc. fish products
- Highly processed ingredients (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

Government Agencies

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

Retail Sector Associations

Name	Contact
Handelsverband Deutschland (HDE) (German Retail Association) Am Weidendamm 1A, 10117 Berlin, Germany	Tel. +49-030 / 72 62 50-0 E-Mail: hde@einzelhandel.de
Bundesverband Großhandel, Außenhandel, Dienstleistungen e. V. (BGA) (German Wholesale Association) Am Weidendamm 1 A, 10117 Berlin, Germany	Tel.: +49-30-59 00 99 5-0 E-Mail: info@bga.de Website: www.bga.de
Bundesverband E-Commerce und Versandhandel Deutschland (BEVH) (German E-Commerce Association) Friedrichstr. 60, 10117 Berlin, Germany	Tel: +49-30-2061385-20 E-Mail: info@bevh.org Website: www.bevh.org

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