USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

Required Report - public distribution

Date: 8/25/2014

GAIN Report Number: GM14028

Germany

Retail Foods

2014

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Report Highlights:
Germany is by far the biggest market in the European Union with good prospects for U.S. food products like tree nuts, wine, processed fruits and vegetables, fruit juices and others. The food retail market is fairly consolidated with discounters dominating the market. Food marketing trends in Germany show an increase in private labels and in demand for organic, convenience, health, sustainable, wellness, and new innovative as well as luxury products. The EU-U.S. Organic Equivalence Cooperation has created new export opportunities for U.S. companies.

Author Defined:

Section I. Market Summary

Germany has 82 million of the world's wealthiest consumers and it is by far the biggest market for food and beverages in the European Union. Based on data from Euromonitor, In 2013 grocery retailing grows by 2% in current value terms to nearly $250 billion. Part of demand is met with domestic products; however, overall Germany is a net importer of all major categories of food products.

Value of imports of consumer oriented agric. products and fishery products, billion USD

	2009	2010	2011	2012	2013
Consumer Oriented Agric. Products	51.5	52.5	59.0	56.3	59.6
Imports from the U.S.	0.6	0.7	0.8	0.9	1.0
Fishery products	4.4	4.5	5.2	4.8	5.1
Imports from the U.S.	0.2	0.2	0.3	0.2	0.2

Source: www.gtis.com

The German food market is heavily dependent on imports to meet its customer demands. Last year, Germany imported USD 59.6 billion of consumer-oriented agricultural products. By value, about one fourth came from the Netherlands. Italy (11%) and France (9%) are the following major suppliers. After Switzerland and Turkey, the U.S. is the third largest non EU-supplier of consumer-oriented agricultural products. In 2013, U.S. exports increased by 18.6% to $1,020 million. Main drivers for the increase were wine, almonds, pistachios, walnuts as well as dried prunes and grapes (including raisins). Other important products were tree nuts, food preparations, flour and dried onions.

Current situation

The German economy has improved markedly in recent years. The economy took a serious hit during the economic crisis. Because of the country's strong export dependency, GDP declined by more than 5 per cent in 2009. However, the recovery in 2010/11 was equally strong (4% and 3.2% respectively), resulting in a V-shaped recovery as pre-crisis real GDP was reached again in the second quarter of 2011. Growth has slowed more recently, mainly due to uncertainty in the Eurozone. GDP grew by 0.7% in 2012. In 2013 there was an increase of 0.4% compared to the previous year, reaching a GDP per capita of USD 43,000. Consumer spending recovered in line with the economy.

Consumer Expenditures Germany in USD Per Capita – Value at Current Prices

Consumer Expenditures	2009	2010	2011	2012	2013
Consumer Expenditures	22,706	22,398	24,582	23,225	24,538
Consumer Expenditures on food and non-alcoholic beverages	2,602	2,556	2,819	2,719	2,950
Consumer Expenditures on alcoholic beverages and tobacco	741	710	792	753	779

Source: Euromonitor

Consolidation, market saturation, strong competition and low prices are key characteristics of the German retail food market. The sector is dominated by five large retail companies. The major chains face slim margins due to fierce competition in the sector. However, in recent years, there has also been a trend in consumer preference toward smaller grocery formats, including convenience stores, small grocery retailers and independents.

Number of retail outlets in Germany

Type of Outlet	**2007**	**2010**	**2012**
Supermarkets/Hypermarkets	17,052	16,631	16,666
Independent Food Stores	22,671	21,812	20,657
Convenience Stores	15,256	15,484	15,654
Discounters	14.525	14,797	15,779

Source: Euromonitor International

In terms of sales, discounters are well established and dominate food retailing in Germany. After years of growth, the challenge faced by discounters is that growth cannot only be created by opening new stores. First, consumers are attracted by their low prices, but a low price policy alone does not confer a major edge, such that in recent times instead of just focusing on their private label brands German discounters have included more and more popular established brands such as Coca Cola, which are frequently subject to competitive bargains partly due to these retailers' market position and bulk buying capacities, thus attracting more brand-conscious customers. Second, food retailers, but especially discounters, have increased their marketing expenditures. However, supermarkets performed also well in recent years since they distinguish themselves and will continue to do so from other grocery channels by offering high-quality products located close to city centers. Sales in hypermarkets for 2013 are mediocre but they underlie a strong standard deviation between companies (Kaufland: +6.3%; Real: -4.7%). In response, hypermarkets expanded their own private label products and try to profit from the ongoing trend towards one-stop-shopping. Due to the sheer number of stores, the importance of independents is relatively high. With their combination of packaged, branded products and local, fresh products, independent food stores perform well, although their numbers are declining.

Convenience stores took advantage of the trend towards convenience products and slowly increased their sales after the crisis. An ongoing development within this channel is a decrease in independent stores, but an increase in chain stores. Traditional open markets are increasingly taking advantage of the popularity of locally produced fresh foods. Weekly markets can be found in nearly all German cities, though they play only a minor role in terms of sales.

Sales in Grocery Retailing by Category in $billion

Type of Outlet	**2009**	**2010**	**2011**	**2012**	**2013**
Discounters	85.1	83.1	88.3	82.5	87.5
Supermarkets	65.5	64.7	70.3	65.6	69.1
Hypermarkets	46.9	44.8	45.6	43.1	44.7
Traditional Grocery Retailers	44.1	42.1	44.6	41.4	42.7
Forecourt Retailers	12.0	11.4	11.9	10.9	11.2
Convenience Stores	0.7	0.7	0.8	0.8	0.8

Source: Euromonitor International.

Wide Range of Private Label Products

In Germany, the market share for private label products has steadily increased to more than 40 percent in recent years. First focused on price, private label food products were part of the success of the discounters in the beginning. However, that has changed since nowadays there is not only price competitive standard private label products, but also more expensive high quality premium products. Consumers are discovering the high value for money that private label brands are offering and how they can be an actual alternative to established brands. Private label market share is expected to increase further, driven by the increase profitability it is giving to retailers.

Trends in food retailing

German consumers expect high quality food products. However they are very price-sensitive. Germans are devoted to their discounters and the country has, globally, the highest share of discounters in food retailing. This is one reason why margins at the retail level are so thin. A key factor in the future will be that Germany has one of the world's oldest populations. Food retailing in Germany will therefore face significant challenges due to changes in the demographic structure and consumer lifestyles. Demand for convenience, health, and wellness, as well as luxury products, will remain a consumer trend impacting food retailing into the future. Another trend is that German consumers take great pride in being green. Therefore German consumers are willing to pay more for "sustainable," "locally sourced," "free range," "natural," "organic," "fair trade" and "carbon neutral" products.

German consumers are also very keen on ratings and verdicts of consumer organizations involved in investigating and comparing goods and services in an unbiased way, such as the Stiftung Warentest, an independent foundation under civil law and the stock company Öko-Test. Especially the former has a substantial impact on the consumers' buying behavior, due to its established and very well-known reputation, such that positive valuations are often used in the marketing communications campaigns for both private labels and manufacturer's brands. In recent years German retailers have increasingly included marketing communication strategies which focuses on the conveying that a large proportion of their assortment includes high quality products manifested by positive test outcomes of consumer organizations.

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

Organic Food Retailing

After the United States, the German organic food market is the 2nd biggest market of the world. Sales of organic food in Germany have increased sharply over the last couple of years reached nearly $10 billion in 2013. That's nearly a third of the total organic food sales in the European Union and about 4% of the total food sales in Germany. Since 2000, sales of organic food in Germany have more than tripled but domestic production has failed to keep pace. Increasing demand has largely been covered through increased imports.

In contrast to the conventional food retail market, the organic food retail scene is neither consolidated, concentrated nor saturated. It is estimated that there are over 2,400 organic food retail shops in Germany. But just the company "denn's Biomarkt", as the biggest organic food retailer, is truly nationwide. Other big organic food chains are just regional and/or in some cities. Please see German GAIN report "Organic Food Retail" for more information.

In February 2012, the European Union and the United States announced an important new arrangement to expanded market access, reduce duplicative requirements, and lower certification costs for the trade in organic. Growing demand in Germany, supported by the arrangement, is creating new export opportunities for U.S. companies in the following market segments: tree nuts, fresh fruit, specialty grains, dried fruit, vegetables and processed food products. Please see GAIN report "The EU-U.S. Organic Equivalence Cooperation" for more information.

Grocery e-retailing

Although eCommerce sales are gradually increasing, it is still very uncommon in Germany in relation to grocery shopping “offline”. More than 90% of Germans prefer to purchase food and beverages in traditional retail outlets rather than making use of the internet. The German online market share of food and beverages in 2013 was only 0.3%. Next to the German consumers' satisfaction with doing their grocery shopping in traditional food retail markets, uncertainty in relation to product quality and the fact that consumers cannot feel or touch the products and use them instantaneously after purchase are the key factors to the slow development of grocery e-commerce activity in Germany.

In relation to cross-border eCommerce, German online shoppers can hardly purchase any food and beverages directly from US online merchants. Most online retailers such as Amazon and Netgrocer.com, as well as “bricks and clicks” retailers such as Walmart do not provide the opportunity for consumers in Germany to purchase U.S. food and beverages from overseas. The Michigan-based grocery store chain Meijer offers shipping to Germany via their online store. German online shoppers can purchase food products directly from the United States via Ebay's platform. A small amount of online shops on eBay, such as C-M-Enterprises, offer shipment of various food and beverages to Germany. Another example is ExpatExpress, which is able to offer single item shopping and shipping to Germany. They all have in common that the products cannot be offered at a competitive price as compared to online retailers offering the same items from within the European Single Market.

Due to some of these constraints, German online shoppers can make use of package consolidation services, such as the Florida based service provider MyUS.com, that provides a physical US mailing address, to which the purchased items will be shipped and consolidated before they will be sent to the online shoppers preferred point of delivery. Further details on transit times, as well as duty/tax information on Germany can be viewed on their website. In most cases, online shoppers in Germany would prefer purchasing US food and beverages from online retailers located in Germany or within the European Single Market. There are specific online grocery stores who focus on food and beverages from the United States:

- http://www.usfoodz.de
- https://www.american-food.com
- http://www.usa-import-shop.de
- http://www.usa-food.de
- http://www.uslifestyle.de
- http://www.americanfood4u.de
- http://www.us-shop-berlin.de

Advantages and Challenges of the German Food Retail Market

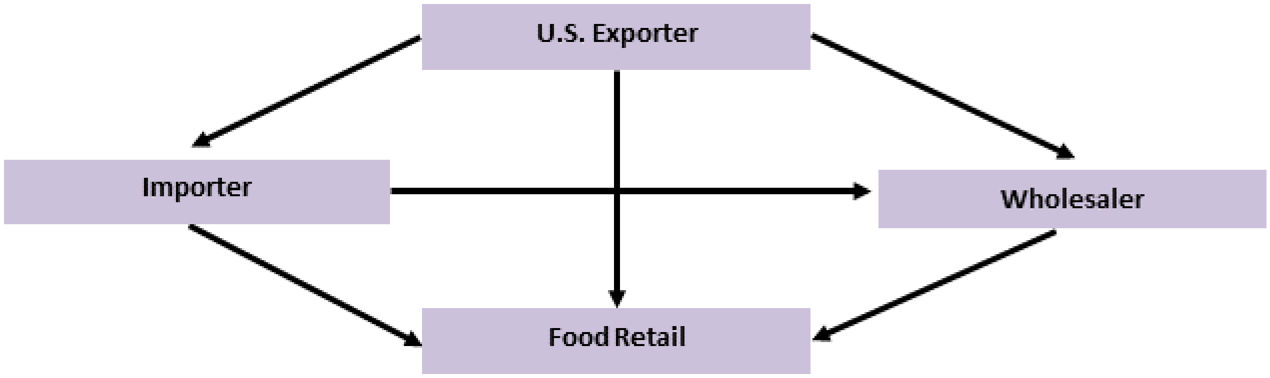
Sector Strength & Market Opportunities	**Sector Weaknesses & Competitive Threats**
Germany is the biggest market in Europe with	German consumers demand quality and

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

Section II. Road Map for Market Entry

The German market offers good opportunities for U.S. exporters of consumer-oriented agricultural products. However there are a number of challenges U.S. exporters must meet before exporting to the German market. Success in introducing food products depends mainly on knowledge of the market and personal contact. The U.S. supplier should analyze German/EU food law, packaging and labeling requirements, business practices and trade-related laws and tariffs, potential importers and the distribution system. The Office of Agricultural Affairs (OAA) offers guidelines on business practices and import regulations. The FAS's Foreign Buyers List gives important information on German buyers of food, fish, and seafood products.

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 have 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 importing requirements, such as product certification, labeling and packaging. They also typically handle shipping, customs clearance, warehousing and distribution of products within the country.



Participating in German food trade shows is a proven way to find the right distributor and facilitates the direct contact with German food brokers, importers, and wholesalers. Trade shows like ANUGA, Green Week or the BioFach show in Germany enjoy an exceptional reputation within the global food industry and these shows outreach is, in many cases, global. For a current listing of German food trade shows, please see: www.usda-mideurope.com

Selling direct

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

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

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

Profiles of Leading Retail Companies

The German food retail sector is a typical oligopoly. The top 5 grocers amount to roughly 73% of the total market These retailers have increased their total turnover compared to 2012.

Source: Euromonitor, Lebensmittelzeitung, FAS Berlin

It is important to note, that although Edeka and Rewe are the largest food retailers in Germany, the Schwarz-Gruppe, as well as the Aldi-Gruppe had the highest turnover in 2013 due to their pronounced physical presence abroad, especially in other European countries.

Retailer Name and Outlet Type	**Food Sales ($mln/2013)**	**No. of Outlets** (2012)	**Locations**
Edeka-Group • Edeka (Supermarkets) • Netto (Discounter)	43,014 15,690	7,717 4,160	nationwide nationwide
Rewe-Group • Rewe (Supermarkets) • Penny (Discounter)	21,960 8,614	1,802 2,266	nationwide nationwide
Schwarz-Group • Lidl (Discounter) Kaufland (Hypermarkets)	19,489 13,716	3,375 625	nationwide nationwide
Aldi-Group	16,379 11,881	1,810 2,515	Southern Germany Northern Germany

• Aldi Süd (Discounter) • Aldi Nord (Discounter)			
Metro-Group • Real (Hypermarkets) • Metro (Cash & Carry)	8,154 5,299	331 123	nationwide nationwide
Lekkerland (Wholesaler)	10,683	19	nationwide
Tengelmann-Group Kaisers (Supermarket)	2,635	710	nationwide

Source: Euromonitor, Lebensmittelzeitung

Section III. Competition
Germany is increasingly dependent on supplies of bulk and intermediate products (like seafood, fruit juices, swine, fresh produce, nuts, etc) from other EU member states and third countries. Germany also depends especially on Southern Hemisphere countries for year-round supplies of fresh fruit and vegetables. Another reason why importers and food distributors turn to foreign markets is the search for unique products. U.S. beef, fruits, nuts, sweet potatoes, and a full range of specialty food products have gained popularity over the years.

Competition for U.S. exports

Product category Total Import in million US$, 2013	Main suppliers in percentage, 2013	Strengths of Key supply countries	Advantages and Disadvantages of Local Suppliers
PG 30 Breakfast Cereals 296	1. Belgium 16.7 2. France 15.4 3. Netherlands 13.4 18. U.S. 0.2	Distance, availability and regional products	Developed processed food industry
PG 31 Snack Foods (Excl. nuts) 3,487	1. Belgium 18.6 2. Netherlands 18.3 3. Poland 11.3 24. U.S. 0.2	Distance, availability and regional products	Developed confectionary industry
HS 02: Meat 2,385	1. Netherlands 24.5 2. Belgium 19.1 3. Denmark	Distance and availability	Focus on dairy production instead of beef production. Genetics need improvement

	17.2 21. U.S. 0.2		
HS 03: Fish and Crustaceans 4,120	1. Poland 18.9 2. Denmark 12.8 3. Netherlands 11.0 6. U.S. 4.0	1,2: Distance and availability 3: Price/quality ratio	Tradition in seafood trading and processing, fish is popular
HS 04: Dairy Produce; Birds Eggs and Natural Honey 8,876	1. Netherlands 32.2 2. France 13.0 3. Austria 7.6 39. U.S. 0.05	Proximity	Great tradition of milk and milk based products
HS 07: Edible vegetables 6,867	1. Netherlands 37.0 2. Spain 22.6 3. Italy 8.9 20. U.S. 0.2	1: Proximity 2,3: Tradition, different climate/ supply/ taste/ varieties	Products not sufficiently available on local market
HS 08: Edible Fruits and Nuts 10,088	1. Spain 21.5 2. Netherlands 18.9 3. Italy 12.4 5. U.S. 6.3	1,3: Tradition, different climate/ supply/ taste/ varieties 2: Proximity	Products not sufficiently available on local market
HS 09: Coffee, Tea, Mate and Spices 4,750	1. Brazil 20.9 2. Vietnam 12.0 3. Honduras 6.24 37. U.S. 0.15	Trading tradition	Domestic availability is scarce, Re-export
HS 16: Edible Preparations of Meat Fish, Crustaceans 3,073	1. Netherlands 15.6 2. Austria 10.8 3. Italy 9.6 26. U.S. 0.6	1,3: Proximity 3: Price/quality ratio	Not sufficiently domestically available
HS 19:	1. Italy	Proximity and re-	Not sufficiently

Preparation off Cereals, Flour, Starch or Milk 4,076	19.8 2. France 15.0 3. Netherlands 12.9 20. U.S. 0.2	export	domestically available
HS 20: Preparations of Vegetables, fruits, Nuts 5,521	1. Netherlands 23.5 2. Italy 13.4 3. Turkey 7.8 23. U.S. 0.4	Proximity	Not sufficiently domestically available
HS 21: Miscellaneous Edible Preparations 3,417	1. Netherlands 18.9 2. France 11.0 3. Switzerland 8.9 11. U.S. 1.6	Proximity and re-export	Not sufficiently domestically available
HS 22: Beverages, Spirits, Wine and Vinegar 8,713	1. Italy 19.9 2. France 19.3 3. Netherlands 8.5 7. U.S. 5.4	Excellent regional products	Not sufficiently domestically available

Source: www.gtis.com

Section IV. Best Product Prospects

Product Category (in USD million)	**Total German Imports 2013**	**German Imports from the U.S.**	**U.S. Import Growth (2009-13)**	**Market attractiveness for USA**
Tree Nuts	2,100	575	124.6%	The United States is the biggest supplier of tree nuts to Germany. Most tree nuts are used as ingredients by the food processing sector. Almonds are the most important commodity within this category. Further products with good sales potential include pistachios, pecans and walnuts.

Fish and Seafood Products	5,064	171	-17.0%	The German market offers lucrative opportunities for fish and seafood products. Fish consumption is growing as consumers associate fishery products with a healthy diet. Best prospects for U.S. and seafood exports are salmon, shrimps, crabs, caviar substitutes, cuttle fish and squid, sea urchins catfish and scallops.
Wine and Beer	3,973	105	66.7%	Germany has a high share of domestic wine production. However, good prospects exist for “new world wines” including those from the U.S. The U.S. has also steadily increased its exports to Germany regarding beer made from malt.
Processed Fruits and Vegetables	5,685	92	12.2%	German imports are slowly increasing. Those products are mostly used as ingredients by the food processing sector for the production of pastries and cereals. Dried fruits and prepared nuts are also popular as a snack. Commodities with notable increasing sales are dried grapes (including raisins), dried prunes, dried onions and dried mushrooms & truffles.
Red Meats Fresh/Chilled/ Frozen	5,318	69	2364.3%	Good opportunities for U.S. high quality beef produced without growth hormones. The EU quota size and administration system have recently seen changes.
Snack Foods (excl. Nuts)	3,478	8	14.1%	German demand for healthy, organic, innovative, and exotic snacks continues to grow. U.S. import growth has expanded in this category predominately due to increasing imports of cocoa preparations and chocolate.
Pet Foods (Dog and Cat)	944	2	-22.6%	Sales of cat food have the biggest market share. U.S. exports are declining but potential exists for premium pet food.

www.gtis.com;

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

- Tree nuts
- Wine
- Processed fruits and vegetables
- Fruit juices

- Snack foods
- Health food, organic food, sustainable food products
- Dried fruits

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

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

Category C: Products Not Present Because They Face Significant Barriers

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

Section V. Post Contact and Further Information

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

USDA/FAS Berlin U.S. Mission to the European Union FAS/Washington European Importer Directory	www.usda-mideurope.com http://www.usda-eu.org/ www.fas.usda.gov www.american-foods.org

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@fas.usda.gov
Home Page: www.usda-mideurope.com

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:

Exporter Guide	GM 13019	May 2013
FAIRS Report	GM 14001	January 2014

Organic Food Retail	GM 14006	January 2014
Biotech Report	GM 14017	April 2014

Attachment I
KEY GERMAN CONTACTS FOR THE FOOD RETAIL TRADE
Note: While it is impractical to provide a complete list, this partial list is for your information only with the understanding that no discrimination is intended and no guarantee of reliability implied.

Aldi Einkauf GmbH & Co. oHG - Sued **Burgstrasse 37** **45476 Muelheim/Ruhr, Germany** Fax: (0049) 1803 252722 Homepage: www.aldisued.de	**Lekkerland GmbH & Co. KG** **Europaallee 57** **50226 Frechen, Germany** Tel: (49-2234) 182 10 Fax: (49-2234) 182 14 45 Homepage: www.lekkerland.de
Aldi Einkauf GmbH & Co. oHG - Nord **Eckenbergstrasse 16** **45307 Essen, Germany** Fax: (49-201) 859 33 19 Homepage: www.aldi-essen.de	**Lidl Stiftung & Co. KG** **Einkauf International** **Stiftsbergstrasse 1** **74167 Neckarsulm, Germany** Tel: (49-7132) 94-2000 Homepage: www.lidl.com
EDEKA Zentrale AG & Co. KG **New-York-Ring 6** **22297 Hamburg, Germany** Tel: (49-40) 63 770 Fax: (49-40) 63 77 22 31 Homepage: www.edeka.de	**Markant Handels und Service GmbH** **ZHG Ware** **Hanns-Martin-Schleyer-Strasse 2** **77656 Offenburg, Germany** Tel: (49-781) 61 60 Fax: (49-781) 616166 Homepage: www.markant.com
EHI Retail Institute e.V. **Spichernstrasse 55** **50672 Koeln, Germany** Tel: (49-221) 57 99 30 Fax: (49-221) 57 99 345 *Organization representing the retail sectors; German counterpart of FMI.* Homepage: www.ehi.org	**MGB METRO Group Buying GmbH** **Schlueterstrasse 1** **40235 Duesseldorf, Germany** Tel: (49-211) 68860 Fax: (49-211) 6886-2000 Homepage: www.metrogroup.de
Globus SB Warenhaus Geschaeftsfuehrungs-GmbH	**REWE-Zentral AG**

Leipziger Strasse 8 **66606 St. Wendel, Germany** Tel: (49-6851) 90 90 Fax: (49-6851) 90 96 00 Homepage: www.globus.de	**Foreign Trade Dept. - HWA -** **Domstrasse 20** **50668 Koeln, Germany** Tel: (49-221) 1490 Fax: (49-221) 149 93 71 Homepage: www.rewe-group.com
KaDeWe Kaufhaus des Westens **Tauentzienstrasse 21-24** **10789 Berlin, Germany** Tel: (49-30) 212 10 Fax: (49-30) 211 01 90 *KaDeWe is the flagship of the Karstadt department store chain. It is comparable to Harrods in London and claims to have the biggest food & delicatessen department in Europe.* Homepage: www.kadewe.de	**Tengelmann Warenhandelsgesellschaft** **Unternehmenszentrale** **Wissollstrasse 5-43** **45478 Muelheim/Ruhr, Germany** Tel: (49-208) 580 60 Fax: (49-208) 5806-6401 Homepage: www.tengelmann.de
Dennree GmbH **Hofer Strasse 11** **95183 Toepen, Germany** Tel: (49-9295) 18 0 Fax: (49-9295) 18 8001 *Largest wholesaler of organic groceries and parent company of the organic retail store chain denn's Biomarkt GmbH* Homepage: http://www.dennree-biohandelshaus.de/home	**Alnatura Produktions- und Handels GmbH** **Darmstaedter Strasse 63** **64404 Bickenbach** Tel: (49 6257) 93 22 0 Fax: (49 6257) 93 22 688 *Major retail chain for organic groceries.* Homepage: www.alnatura.de