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Report Highlights:

With more than 84 million of the world's wealthiest consumers, Germany is the largest market for food and agricultural products in the European Union. The German market offers good opportunities for U.S. exporters of consumer-oriented food and agriculture products, particularly nuts, fish and seafood products, dried fruits, bakery products, and pulses. The HRI sector is one of the sectors of Germany's economy that was hardest hit by the COVID-19 pandemic. Despite the end of COVID-19 restrictions, the sector's real turnover is still 10.8 percent below what it was in 2019, the last year before the pandemic hit, largely due to higher energy prices as well as rising costs for raw materials and personnel.

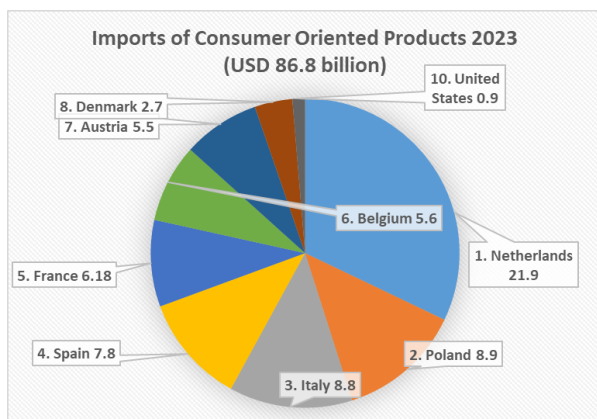
Market Fact Sheet: Germany

Executive Summary

Germany is the largest market for food and beverages in the EU with more than 84 million consumers. In 2023, [Germany's nominal GDP](#) reached USD 4.5 trillion, making it the world's 3rd largest economy. Germany is a major producer of food and agricultural products and a leading player in the global marketplace. It is also the third largest importer of agricultural and related products. In 2023, imports reached USD 140.9 billion. While more than 78 percent of these imports originated from other EU member states, the United States was the largest exporter outside the bloc before Brazil and China. Imports of agricultural & related products from the United States totaled USD 2.8 billion in 2023. More information regarding the macroeconomic situation and key data about the German economy can be found in the 2023 [Exporter Guide](#).

Imports of Consumer-Oriented Products

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



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

Exchange rate: USD 1.00 = EUR 0.9248 (Dec 2024)

Contact: FAS Berlin, Germany, AgBerlin@usda.

Food Processing Industry

In 2023, the German food processing industry employed around 644,454 people in 5,961 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 251.5 billion, accounting for 5.6 percent of German GDP. The largest subsectors by value were meat (22%), dairy (16%), bakery (10%), confectionary (8%), and prepared meals (7%).

Food Retail Industry

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

Quick Facts CY 2023

Imports of Consumer-Oriented Products

USD 86,805 (USD million)

List of Top 10 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	251.5
Food Exports	88.2
Food Imports	78.7
Retail	331.8
Food Service	91.3

Food Industry Gross Sales (USD Billion)

Food Industry Revenues (Domestic market) USD 163.3

Top 10 Host Country Retailers

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

Source: [Lebensmittel Praxis](#)

GDP/Population

Population (millions): [84.6](#)

GDP (trillion USD): 4.5

GDP per capita (USD): 52,727

Sources: TDM, BVE, Destatis

SECTION I. MARKET SUMMARY

The German food service sector is large and highly fragmented but can be divided into the commercial and institutional food service markets. The German commercial food service market includes hotels, restaurants, fast food and take-away outlets, bars, cafeterias, coffee shops, and similar channels. The institutional food service market consists of hospitals, universities, nursing homes, and cafeterias.

German food service sales¹ increased by 12.2 percent to USD 91.3 billion in 2023 (compared to USD 81.4 billion in 2022).

The HRI sector is one of the sectors of Germany's economy that was hardest hit by the COVID-19 pandemic. Germany loosened its pandemic control restrictions in February 2022 and lifted all restrictions in May 2022. This led to the recovery of the sector and an overall increase in sales and revenue. However, in 2023, the sector's real turnover is still 10.8 percent below what it was in 2019, the last year before the pandemic hit².

Consumer spending in the HRI sector has also been impacted by the war in Ukraine. Following Russia's invasion of Ukraine in February 2022, the entire sector suffered from a surge in energy prices as well as rising costs for raw materials and personnel.

As a result, the German government extended the reduced VAT rate of 7 percent for food consumed in restaurants that was originally introduced as a COVID-19 relief measure. This VAT reduction remained in place until December 31, 2023. On January 1st, 2024, the VAT on food consumed in restaurants was restored to 19 percent.

Table 1: Advantages and Challenges of the German Food Service Market

Sector Strengths & Market Opportunities	Sector Weaknesses & Competitive Threats
Germany is the biggest market in Europe with one of the highest income levels in the world.	Strong price sensitivity. German consumers demand quality but expect low prices.
Many German consumers are uninformed about U.S. sustainability, and there is still room to define a U.S. sustainability message.	Misconceptions about U.S. agriculture.
Germany is among the largest food-importing nations in the world.	EU import regulations and tariffs; EU gives preferential access to products from EU countries.
U.S. style is popular, especially among younger generations; good reputation for U.S. foods like dried fruits, seafood, and wine.	HRI companies rarely import products into Germany on their own, but rather utilize specialized wholesalers.
Germany is the largest EU market for U.S.	The quota only applies to beef from animals not

¹ Consumption of food prepared away from home

² Source: German Hotel and Restaurant Association (DEHOGA)

beef under the EU import quota for high quality beef, which was expanded in January 2020.	treated with growth-promoting hormones.
Large non-German 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.

SECTION II. ROAD MAP FOR MARKET ENTRY

a) Market Structure

Purchasing by hotels, restaurants, and institutions is fragmented and competitive. Few of these businesses import products directly from other countries, except for items that they purchase in large quantities. Most HRI companies would rather purchase from central buyers/distributors importing food and beverages. In general, these wholesalers specialize in products or product groups. Some are experts in food products from a specific country of origin. 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. The two major distribution channels for the German food service trade are “cash and carry” wholesalers and specialized distributors /wholesalers.

“Cash and carry” wholesalers operate large stores with food and non-food products. They sell to retailers, restaurants, and other food service operators. Cash and carry stores offer a variety of products at competitive prices and are not open to the average consumer.

Specialized distributors 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, during which their suppliers can showcase their products to potential customers. These shows are excellent opportunities for U.S. suppliers to enter the German food service market.

b) Entry Strategy

The German market offers good opportunities for U.S. exporters of consumer-oriented agricultural products. However, there are several challenges U.S. exporters face before exporting to the German market. Success in introducing food products depends largely on market knowledge and personal contact with key decision-makers. The U.S. supplier should analyze German and EU food law, packaging, and labeling requirements, business practices, trade-related laws and tariffs, potential importers, and the distribution system. The FAS Office of Agricultural Affairs (OAA) in Berlin offers guidelines on business practices and import regulations. Information can be found in the [latest Food and Agricultural Import Regulations and Standards report for Germany](#). The FAS Foreign Buyers List gives important information on German buyers of food and beverage products.

Participating in German food trade shows is a proven and cost-effective way to find the right distributor and facilitate direct contact with German food brokers, importers, and wholesalers. Germany offers a wide variety of trade show venues for food and beverage products. Trade shows like [Anuga](#) or [Internorga](#) enjoy an exceptional reputation and have a wide reach within the global food industry. U.S. exporters who are looking to sell to Germany should consider participating in or visiting the following trade shows.

Table 2: Upcoming International Trade Shows in the HRI Sector in Germany

Trade Show	Date	Description
Intergastra	February 7-11, 2025 Stuttgart	International trade fair for the gastronomy and hotel sector.
Nord Gastro & Hotel	February 10-11, 2025 Husum	Trade fair for hotels and catering.
Internorga	March 14-18, 2025 Hamburg	International trade show for hotel, restaurant, catering, baking, and confectionery trades.
Chefs Culinar	March 23-24, 2025 Berlin	Trade fair for wholesale food trade for restaurant, hotel, and community catering.
Anuga	October 4-8, 2025 Cologne	Worlds' largest trade show for food and beverages.
Bar Convent Berlin	October 6-8, 2025 Berlin	International trade show for bars and beverages.
Iss Gut! 2025	November 2-4, 2025 Leipzig	Trade fair for hospitality industry, butchers, and bakers.

c) Distribution and Sub-Sector Profiles

The German food service sector is highly fragmented and dominated by full-service restaurants. Full-service restaurants continue to lead in consumer food service sales, and they make up the largest type within the gastronomy branch of the sector. International chains like McDonald's, Burger King, and Yum! Restaurants (KFC, Pizza Hut) have a very strong position in the market. In comparison to 2019, real restaurant sales remain 12.2 percent lower in 2023.

Hotel sales were 4.7 percent below 2019 levels in 2023. The COVID-19 pandemic has increased the trend for regional tourism.

Institutions are the smallest sector in food service. Most of the institutional food service market is covered by caterers, of which Compass, Aramark, Sodexo, Klüh, and apetito are among the largest in

Germany. They usually cater to in-house company restaurants, hospitals, retirement homes, schools, and universities. The catering sector’s real turnover was 11.7 percent below what it was in 2019.

SECTION III. COMPETITION

Trade within the EU27 bloc is significantly easier for Germany than trading outside the bloc. As such, the top exporters of most products to Germany are typically other European countries. The United States ranked sixteenth of all countries from which Germany imported consumer-oriented agricultural products in 2023 (four ranks down compared to 2022), but among non-EU countries the United States is a much larger source for imported customer-oriented products. Key U.S. competitors for the German market include Switzerland, Turkey, and China which exported slightly more to Germany last year, and the United Kingdom, Vietnam, Argentina, and Brazil, who exported less than the United States.

Table 3: Overall Competitive Situation for Consumer-Oriented Products (2023)

Product category Total German Import	Main suppliers in percentage	Strengths of Key supply countries	Advantages and Disadvantages of Local Suppliers
Tree Nuts (HS 0801 +0802 +200819) MT 478,066 USD 2.9 billion	1. USA – 20.8% 2. Turkey – 19.9% 3. Netherlands – 10.1%	1) USA is the leading supplier of almonds, pistachios, and walnuts. 2) Turkey has the lead in hazelnuts. 3) Netherlands is a large re-exporter of cashew nuts.	Domestic production is minimal. Germany is a leading producer of marzipan.
Fish & Seafood (HS 03 + HS 16) MT 1.035 million USD 6.4 billion	1. Poland – 22.7% 2. Netherlands – 16.3% 3. Denmark – 9.8% 13. USA – 1.8%	1-3) Proximity and availability. 13) USA is Germany’s third largest supplier of Alaska Pollock fillets.	Tradition in seafood trading and processing. Fish is popular.
Wine & Beer (HS 2203, 2204, 2205, 2206) Liters: 1.986 billion USD 3.5 billion	1. Italy – 32.3% 2. France – 27.0% 3. Spain – 11.9% 7. 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) MT 466,004 USD 2.9 billion	1. Netherlands – 17.3% 2. Poland – 12.3% 3. Spain – 10.8.1% 19. USA – 0.9%	1-3) Proximity and availability.	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.
Dried Prunes (HS 0813 20)	1. Chile – 47.2% 2. Netherlands – 18.9%	1) Product pricing, zero duty access through EU-Chile	No local availability

MT 9,086 USD 46.8 million	3. USA – 12.9%	FTA 3) Good reputation for quality, California origin adds value	
Raisins (HS 0806 20) MT 67,060 USD 140.2 million	1. Turkey – 42.3% 2. South Africa – 28.4% 3. Netherlands – 7.9% 6. USA – 3.2%	1) Pricing	No local availability
Meat (HS 02) MT 2.044 million USD 8.4 billion	1. Netherlands – 26.7% 2. Poland – 14.8% 3. Belgium – 11.4% 21. USA - 0.13%	1-3) Proximity and availability. 21) U.S. imports consist of hormone-free beef under Hilton beef quota.	Focus on pork rather than beef production.
Sauces and Preparations (HS 2103) MT 404,458 USD 1.06 billion	1. Italy – 31.8% 2. Netherlands – 21.7% 3. Poland – 7.6% 10. USA – 2.1%	1-3) Proximity and availability. 10) USA is well known as a supplier of BBQ sauces.	Strong domestic food industry.
Snack Foods excl. nuts (HS 1905 + 1704) MT 1.3 million USD 4.9 billion	1. Poland – 17.8% 2. Netherlands – 17,6% 3. Italy – 11.5% 30. USA – 0.11%	1-3) Proximity and availability. 2) Volumes also consist of re-exports from China, Thailand, & USA.	Tradition in snack food production. Germany is one of the global market leaders in snack foods.

Source: Trade Date Monitor, Products ranked according to value of U.S. products (retrieved November 19, 2024)

SECTION IV. BEST PRODUCT PROSPECTS CATEGORIES

The following tables present products with good sales potential, good current sales, and products not available in the German market.

a) Products present in the market that have good sales potential

Product Category	Total German Imports 2023 [USD]	Total German Imports from the USA 2023 [USD]	% Change from 2022	% Change from 2019	Market Attractiveness for USA
Tree Nuts	\$2,919,865,652	\$607,991,423	-25.9%	-19%	The USA is consistently the leading exporter of almonds, pistachios, and walnuts to Germany. Demand is strong for tree nuts, particularly for snacking and confectionery uses.

Hops	\$80,235,987	\$32,545,018	-2.0%	-5.5%	German demand for imported hops has doubled between 2015 and 2020 and reached its peak in 2020 with the USA being the leading exporter.
Sweet Potatoes	\$64,137,887	\$1,395,028	+36.7%	-52.8%	German demand for imported sweet potatoes has more than doubled in the past ten years and peaked in 2020. Sweet potatoes are becoming more popular in processed snacks and in cooking.
Pulses	\$194,059,742	\$7,208,547	+15.2%	+49.5%	Increased interest in pulses as an alternative protein source.
Fish and Seafood	\$6,368,887,550	\$116,821,966	-28.9%	-49.7%	Good prospects for high-value products.
Whiskey	\$562,592,110	\$81,784,008	-26.3%	+8.7%	The USA is the third-largest exporter of whiskies to Germany, after the UK and the Netherlands.

Source: Trade Date Monitor (retrieved November 22, 2024)

b) Germany top 5 consumer-oriented products imported from the world

Product	Total German Imports 2023	Total German Imports from the USA (USD)	U.S. Import Growth (2022-2023)
Dairy	\$11,368,671,010	\$5,462,721	-27.3%
Fresh Fruit	\$8,644,465,085	\$41,190	-91.2%
Fresh Vegetables	\$7,125,183,326	\$411,601	+25.1%
Bakery Goods, Cereals, & Pasta	\$6,285,910,664	\$5,552,662	+13.9%
Processed Vegetables	\$4,679,711,719	\$7,440,047	+18.9%

Source: Trade Date Monitor (retrieved November 22, 2024)

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

- High-quality beef
- Cranberries and cranberry products
- Innovative sauces, condiments, and confectionery products
- Products featuring “sustainable” or other social issue-based marketing labels

d) Products not present because they face significant barriers

- Food additives not approved by the European Commission
- Red meat and meat products with hormones
- Most poultry and eggs (non-tariff barrier)
- GMO-derived products that are not approved in the EU

SECTION V: KEY CONTACTS AND FURTHER INFORMATION

Major Regulatory 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 Fax: +49-228 - 99-529-4262 Website: https://www.bmel.de/EN/Home	

<p>Bundesamt für Verbraucherschutz und Lebensmittelsicherheit (BVL) (Federal Office of Consumer Protection and Food Safety) Bundesallee 51 38116 Braunschweig</p>	<p>Tel: +49 30 18444-99999 Fax: +49 30 18444-99099 Mail: poststelle@bvl.bund.de Website: https://www.bvl.bund.de/EN/Home</p>	<p>The biotech division and the novel foods/feeds division of BVL are responsible for registration and approval of biotech products and novel foods.</p>
<p>Bundesanstalt für Landwirtschaft und Ernährung (BLE) (Federal Office for Agriculture & Food) Referat 521 Deichmanns Aue 29 53179 Bonn, Germany</p>	<p>Tel.: +49 228 6845 – 0 Fax: +49 228 6845-3444 Website: www.ble.de/EN/Home/home_node.html</p>	<p>BLE is the responsible German authority for organic import rules.</p>

Other Import Specialist [Technical Contacts](#) can be found in the [latest Food and Agricultural Import Regulations and Standards report for Germany](#).

Homepages of potential interest to U.S. food and beverage exporters are listed below:

- USDA/FAS Washington: <https://www.fas.usda.gov/>
- USDA/FAS U.S. Mission to the European Union: <http://www.usda-eu.org>

For U.S. exporters it might be helpful to access the [German business portal](#), which is provided by Germany Trade & Invest. Provided in English, it serves as a central contact platform that can steer inquiries into the right channel.

If you have questions or comments regarding this report, or need assistance exporting to Germany, please contact the U.S. Foreign Agricultural Service 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
Tel: (49) (30) 8305 – 1150
E-Mail: AgBerlin@usda.gov

Please view our [GAIN Country Reports](#) 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 Foreign Agricultural Service for use by U.S. exporters of U.S. food and beverage products.

Attachments:

No Attachments