

Required Report: Required - Public Distribution

Date: March 30, 2026

Report Number: GM2026-0007

Report Name: Food Processing Ingredients Annual

Country: Germany

Post: Berlin

Report Category: Food Processing Ingredients

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Report Highlights:

Germany's food processing industry is the fourth-largest industrial sector in the country. According to the Federation of German Food and Drink Industries (BVE), Germany produced an estimated USD 270.1 billion (EUR 232.7 billion) in processed food and beverages in 2024, representing a decline of 0.6 percent compared to 2023. As the world's third-largest importer of consumer-oriented agricultural products, Germany remains the most important market in Europe for foreign suppliers. Products with strong sales potential in the German market include nuts, distilled spirits and wine, organic products, fish and seafood, highly processed ingredients, ready meals, and food preparations, particularly those aligned with long-term consumer trends such as convenience, health, and sustainability.

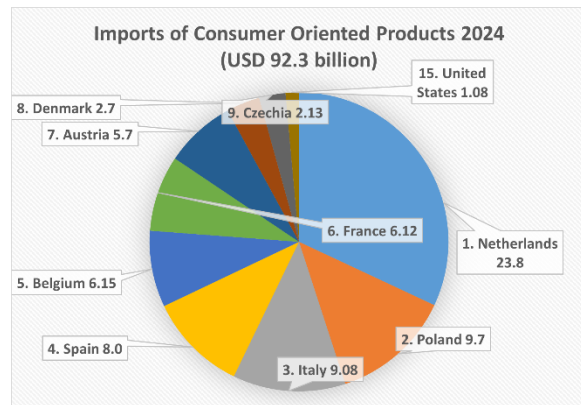
Market Fact Sheet: Germany

Executive Summary

Germany is by far the biggest market for food and beverages in the EU with 83.5 million consumers. In 2025, Germany's nominal GDP reached USD 5.2 trillion, positioning the country as the world's third-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 products after the United States and China. In 2024, imports of agricultural and related products reached USD 147 billion. While about 80 percent of these imports originated from other EU member states, the United States was the largest supplier outside the bloc after Brazil. Imports of agricultural and related products from the United States totaled USD 2.7 billion in 2024.

Consumer-Oriented Agricultural Products

In 2024, Germany imported consumer-oriented agricultural products worth USD 92 billion; the majority (85 percent) of these originated from other EU member states.



Food Service Industry

The food service sector is large and highly fragmented but can be divided into commercial and institutional food service markets. Germany's food service sales reached USD 93.7 billion in 2024 (compared to USD 91.3 billion in 2023).

Food Processing Industry

The sector is dominated by small and medium size companies; 90 percent of which have less than 250 employees. In 2024, the sector generated a turnover of roughly USD 251.8 billion, accounting for 5.3 percent of German GDP.

Food Retail Industry

The sector is saturated, highly consolidated, competitive, and dominated by low prices. The top five retail groups together account for around 76 percent of total revenue. Germany's food retail sales reached USD 293.1 billion in 2024.

Quick Facts CY 2025

Imports of Consumer-Oriented Agricultural Products
USD 92.3 billion

List of Top 10 U.S. Growth Products in Host Country

- | | |
|----------------------|-----------------------------|
| 1) Pistachios | 2) Almonds |
| 3) Walnuts | 4) Whiskies |
| 5) Alaska Seafood | 6) Peptones, other proteins |
| 7) Food preparations | 8) Wine |
| 9) Dextrins | 10) Hazelnuts |

Food Industry by Channels (USD billion)

| | |
|----------------------|-------|
| Food Industry Output | 270.1 |
| Food Exports | 97.5 |
| Food Imports | 87.9 |
| Retail | 314.4 |
| Food Service | 100.5 |

Food Industry Gross Sales (USD billion)

Food Industry Revenues (Domestic market) 172.6

Top 10 Host Country Retailers

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

GDP/Population

Population (million): 83.5

GDP (trillion USD): 5.2

GDP per capita (USD): 55,800

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 0.8616 (Mar 2026)

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

SECTION I. MARKET SUMMARY

Germany is by far the biggest market for food and beverage products in the European Union. The food processing industry represents the fourth-largest industry by revenue in Germany. In 2024, Germany produced an estimated USD 270.1 (EUR 232.7) billions of processed food and drinks.¹ That is a decrease of 0.6 percent from 2023. Roughly 90 percent of the industry is characterized by small and medium-sized companies (companies with less than 250 employees). More than 658,150 employees in around 5,991 companies provide consumers with high-quality and inexpensive food. On average, 36 percent of food and beverage products are exported.² The retail market's key characteristics are consolidation, market saturation, strong competition, and low prices, which result from high competition between discounters and the grocery retail sale segment. Being the third-largest importer and third-largest exporter of consumer oriented agricultural products worldwide, Germany represents the most important European market for foreign producers. When meeting EU standards, the following products have good sales potential on the German market: nuts, distilled spirits and wine, organic products, fish and seafood, highly processed ingredients, ready meals, and food preparations.

Germany still has some of the lowest food prices in Europe – German citizens spent only 14 percent of their income on food and beverage products in 2023.³ Unlike in previous years, where strong cost increases challenged the industry, raw material costs are slightly down in 2024, with the [HWWI raw materials price index](#) showing a slight decline in general, but an uptake in prices for food and beverage products, especially for cocoa and palm oil. However, other costs continue to grow, increasing costs to consumers. 2024 saw high prices for energy, transport, and packaging material. Germany has one of the highest prices for electricity in the world, due to grid infrastructure, taxes, and its reliance on imported energy.

Key Market Drivers and Consumption Trends

Germany remains a price-focused market, but the share of consumers who are willing to pay for quality is increasing. There is a strong and growing number of consumers who view their purchasing decisions as a political or life-style statement (non-GMO, free-range eggs, vegetarian or vegan diet), and they demand traceability and information about production methods. Ethnic foods, beauty and superfoods, clean label foods, “free from” products (e.g., gluten or lactose free), and locally grown are additional trends that are attracting more and more German consumers. Ethics and convenience are the main trends amongst German consumers.

For organic food, Germany is the world's second-largest market and the largest in Europe. Sales rebounded after a period of inflation-driven decline. In 2024, organic sales reached a record USD 20.14

¹ Latest available data from Trade Data Monitor, and Federation of German Food and Drink Industries (BVE)

² <https://www.ernaehrungsindustrie.de/publikation/bve-statistikbroschuere2025/>

³ Latest available data from DESTATIS:

https://www.destatis.de/DE/Presse/Pressemitteilungen/2025/12/PD25_438_639.html

billion (EUR 17 billion), up 5.7 percent from the previous year, and are projected to hit USD 22.15 (EUR 18.7 billion) in 2025. German consumers remain committed to organic products, though high inflation has shifted purchasing from specialty organic retailers to discount supermarkets and drugstores. The dry goods segment, particularly private label products, has seen the strongest growth, while fresh produce sales have been hampered by weather-related supply issues. Overall, Germany's organic sector is expected to continue outpacing the broader food market. For more information, please see the GAIN report: [Large Retail Chains Support Record Year for German Organic Sales](#).

Online food purchasing and delivery trends, as well as ready-made meals continued to expand. Grocery online retail revenue grew by 5.5 percent in 2025,⁴ from USD 4.5 billion (EUR 3.9 billion) in 2024 to USD 4.8 billion (EUR 4.1 billion) in 2025.⁵ The importance of e-commerce continuously grows. Online supermarkets operating in Germany's major cities, offer food at prices that strongly compete with those of traditional brick-and-mortar supermarkets. Most of the large supermarket chains, such as *Edeka* and *Rewe*, have their own delivery services. Discounter supermarkets on the other hand, which are very popular amongst German consumers, do not operate their own delivery services. Attempts by companies such as the Norwegian discounter delivery service *ODA* failed to attract customers. However, the Czech company *Rohlik* expanded to Germany in 2023 with their discount delivery service *Knuspr.de*, acquired *Bringmeister*, and gained substantial market share with a revenue of USD 1.29 billion (EUR 1.11 billion) by the end of 2025.⁶ Other delivery services include *amazon.de/fresh*, *picnic*, and *Flaschenpost*. A sub-category of delivery services is meal kits and cooking boxes. The biggest player among them is Hello Fresh with a worldwide revenue of USD 8.89 billion (EUR 7.66 billion) in 2024.⁷

Food labeling with special seals is very common in Germany and has a large impact on the industry. Various regional, organic, sustainability, and animal welfare labels have been introduced or are being discussed. On a federal level, and in an attempt to uniformly regulate the food labeling process in the EU, the German Ministry for Food and Agriculture introduced the WHO's "Nutri-Score" nutritional label. Most companies also have a sustainability strategy that demonstrates sustainability in the entire chain from cultivation all the way through to food processing.

The German *Federal Office for Agriculture and Food's Federal Center for Nutrition* ([BFZE](#)) published its latest food pyramid in 2024. It focuses not only on nutrition but also on consumption trends, stating that sustainability should be a factor for food choices.

The non-government German Nutrition Society ([DGE](#)) publishes recommendations for consumption each year. Their [ten guidelines](#) include eating more nuts and grains. In 2024 they reduced the

⁴ <https://lebensmittelpraxis.de/handel-aktuell/47370-e-commerce-online-handel-waechst-auf-83-milliarden-euro.html>

⁵ <https://de.statista.com/statistik/daten/studie/894997/umfrage/umsatz-mit-lebensmitteln-im-deutschen-online-handel/>

⁶ <https://www.lebensmittelzeitung.net/handel/online-handel/knuspr-mutter-rohlik-knackt-umsatzgrenze-von-einer-milliarde-euro-186058>

⁷ <https://lebensmittelpraxis.de/handel-aktuell/43523-kochboxenversand-hello-fresh-erwartet-sinkende-umsaetze-und-baut-um.html#:~:text=AEBIT%2DErgebnis%20soll%20auf%20bis,bis%20250%20Millionen%20Euro%20an.>

recommended consumption of dairy products and meat to 400g and 300g per week, half of what was recommended in previous years. In delivering the new guidelines, DGE underscored that its decisions are not only based on what is healthy for humans but also on what is sustainable for the environment.

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. Additionally, listing fees paid to retailers limit the introduction of new U.S. brands. |
| The demand for sustainable food ingredients and sustainable foods is growing. | Private sector sustainability standards can act as barriers to trade. Looming misconceptions about U.S. agriculture persist amongst consumers. |
| 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. Non-tariff barriers such as phytosanitary restrictions and traceability requirements can make exporting to Germany complicated. |
| 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 beef import quota, 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. |

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. USDA [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, such as 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 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](#). The Germany 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 [Food Ingredients Europe](#). This show is endorsed by USDA and takes place alternately in Frankfurt and Paris. The next show will be hosted in Frankfurt from November 17 to 19, 2026. A new show on the annual calendar is [ISM Ingredients](#), held from January 31 to February 3, 2027, in Cologne, aimed at suppliers of base ingredients, fats and oils, aromas and flavorings, colors and dye, stabilizers, additives and functional ingredients for sweets and snack foods. 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 |
|--|--|----------------------------------|
| Internorga March 13-17, 2026 https://www.internorga.com/ | International trade show for hotel, restaurant, catering, baking, and confectionery trades | Hamburg |
| ProWein March 15-17, 2026 https://www.prowein.com/ | International trade show for wine and spirits | Duesseldorf |
| Interzoo (every two years) May 12-15, 2026 https://www.interzoo.com/en | Leading trade show for pet food and supplies | Nuremberg |
| BCB - Bar Convent Berlin October 12-14, 2026 https://www.barconvent.com/ | World's largest trade show for bars and beverages | Berlin |
| Food Ingredients Europe November 17-19, 2026 https://www.figlobal.com/europe/ | Leading trade show for food and health ingredients | Frankfurt (2026) Paris (2027) |
| ISM January 31-February 3, 2027 https://www.ism-cologne.com/ | World's largest show for snacks and confectionery products | Cologne |
| ISM Ingredients January 31-February 3, 2027 https://www.ism-cologne.com/trade-fair/ism-ingredients/ | New show for snacks and confectionery products ingredients | Cologne |
| Fruit Logistica February 3-5, 2027 https://www.fruitlogistica.com/en/ | World's leading trade fair for the fresh fruit and vegetable business | Berlin |
| BioFach February 16-19, 2027 https://www.biofach.de/en | Leading European tradeshow for organic food and non-food products | Nuremberg |

| | | |
|---|--|---------|
| ANUGA (every two years) October 9-13, 2027 https://www.anuga.com/ | World's largest food and beverage trade show, especially for the retail trade, food service, and catering market | Cologne |
|---|--|---------|

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 (SRTGs) 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 planned 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

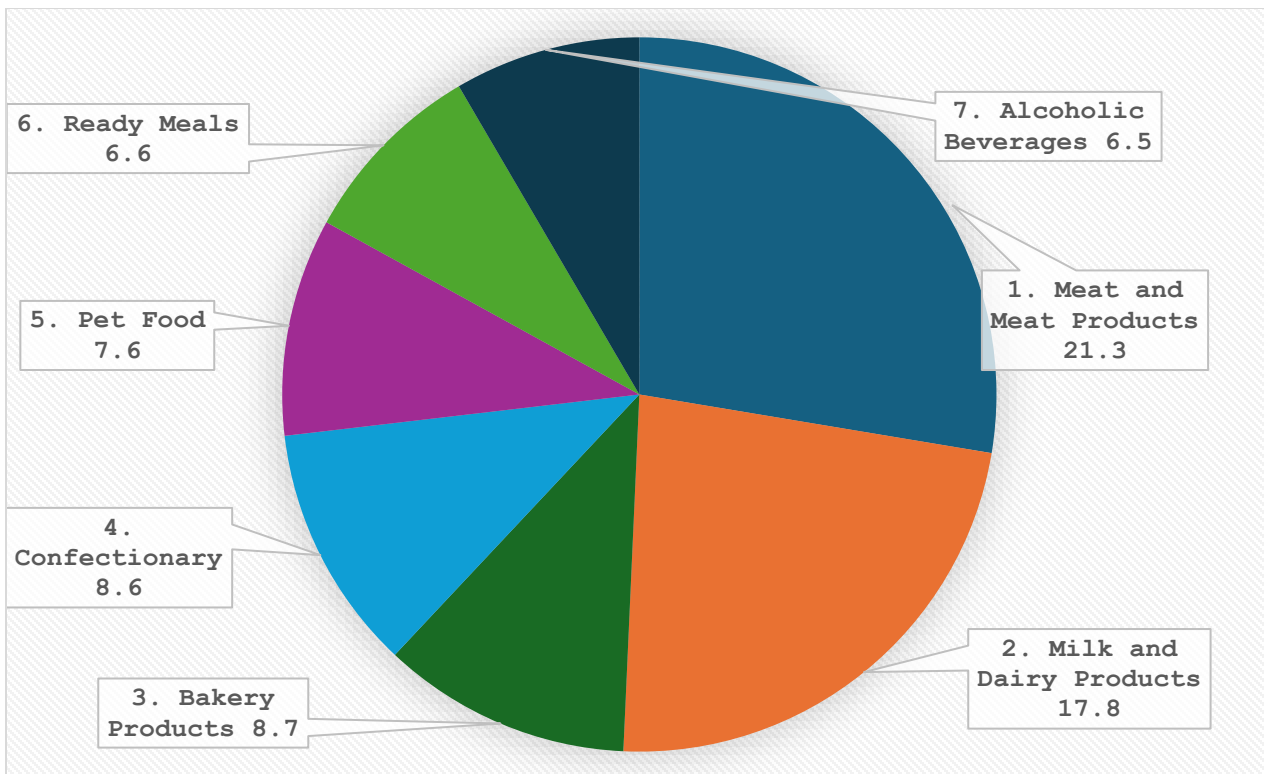
member state, for example the Netherlands, must clear customs there. No additional checks are carried out when crossing the border to Germany.

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, its origin, import certificate, composition, intended purpose, and presentation. Please contact FAS Berlin for clarification on questions concerning the interpretation and application of [German import provisions](#) in individual cases.

Market Structure

A key driver of the sector’s success is the close integration of the entire value chain within Germany as a competitive production and business location—from primary production and processing to logistics, marketing and sales, as well as research and development. Germany’s food processing industry is well developed and has access to various food ingredients. Generally, German food processors source their ingredients from local producers or local importers. Only large processors import ingredients directly from foreign suppliers. A good importer will be your partner in promoting your product to their customers.

Figure 1: Share of Major Segments in German Food Processing Industry (Percent in 2024)



Source: German Association of Food and Drink Industry (BE), Destatis

Sector Trends

- Sustainable and healthy convenience foods: German consumers are not only looking for groceries that conveniently fit into their busy everyday lives, but those that also meet the high demands of sustainability and health, all while not compromising taste. The share of convenience and ready-to-eat products as well as smaller packaging sizes is increasing, while the share of milk and dairy products, alcoholic beverages, and sugar is declining.
- Takeout products and snacks: Every third German consumer no longer has breakfast at home, and every second person is not eating lunch at home. Snacks and ready-to-eat products have become everyday companions. In Germany, sales of on-the-go products are significantly higher as compared to other EU countries. Since 2019, the market share of snacks and on-the-go products rose by 11 percent. The snack food market is projected to grow by more than five percent in the next four years.⁸
- Innovative manufacturing and processing technologies: They bring new products to the market and give established products a new taste. Berlin is spearheading the trend of novel food consumption, and other German cities are following its lead. In 2021, the German food industry welcomed the first edible insect to be approved for food use in the European Union (EU), a big step towards a more transparent legal environment and marketing opportunities for the relatively new industry sector. Other key trends include meat and dairy substitutes, and functional foods, with the German government investing USD 43.8 million (EUR 38 million) to promote alternative or so called “future” proteins in 2024.
- Vegan and meat alternatives: They are becoming increasingly popular, especially among younger Germans. Some Germans have raised concerns regarding the sustainability of high meat consumption in the German diet and meat-free or meat-reduced diets are now trending, with many new meat alternatives (e.g. soy or peas) entering the market.
- Austerity: Germany remains a price-focused market. With rising inflation and prices (especially for energy and food), German consumers are shopping less and more sustainably. Shoppers choose products that keep them full over expensive products. Some consumers deliberately avoid purchasing expensive products, such as avocados, certain nuts, and expensive meat cuts.
- Longevity: German consumers have historically relied on statutory health insurance to cover healthcare costs, including preventive services. However, there are emerging signs of a shift toward greater out-of-pocket spending on personal health and wellness products. According to market research firm YouGov, consumers are increasingly investing in items such as protein powders and dietary supplements, reflecting the growing influence of the longevity trend. Interest in pharmaceutical weight-loss treatments is also increasing. Survey data

⁸ <https://www.statista.com/outlook/cmo/food/confectionery-snacks/snack-food/germany#revenue>.

suggest that younger households in particular show a higher level of interest in such products as health optimization and lifestyle improvement play a more prominent role among these demographic groups.

- **GLP-1 Friendly:** The weight-loss-injection trend is still in its early stages in Germany, but the category is expected to expand significantly if medication prices decline. As a result, consumer behavior may shift, as it can be currently witnessed in the USA, toward what industry observers describe as a “smaller appetite” consumption pattern, in which consumers eat less overall but place greater emphasis on higher-quality and often more expensive products. Demand for protein—already a strong market trend—is expected to increase further. In addition, nutrient density is becoming a growing focus. Consumers who reduce overall food intake may seek products that provide higher levels of essential nutrients such as iron, magnesium, and other key micronutrients. Because a common side effect of GLP-1 medications is slower digestion, users may also increasingly turn to foods that support digestive health, including whole-grain products and psyllium husk-based foods. In the beverage segment, products that help maintain electrolyte and mineral balance may benefit from this trend, such as vitamin-fortified waters with mild flavors. Overall, the shift may create new opportunities for reduced-calorie, functional, and “better-for-you” food and beverage products, as consumers increasingly prioritize health, well-being, and efficiency in their dietary choices.

SECTION III. COMPETITION

The United States ranked fifteenth worldwide in exports of consumer-oriented agricultural products to Germany in 2024, but when accounting for the single EU market, the United States ranks higher as a source of imported consumer-oriented products. The main competitors for U.S. suppliers include domestic producers and producers from other EU member states, such as the Netherlands, Poland, Italy, Belgium, Spain and France. However, for dried fruits and nuts the United States is by far the largest importer. The main competitors are Turkey (cashew nuts and raisins), Vietnam (cashews, coconuts, and peanuts), China (peanuts, raisins, and walnuts) and Chile (prunes and walnuts), and Iran (prunes and raisins). 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.

SECTION IV. BEST PRODUCT PROSPECTS CATEGORIES

Products in the market that have good sales potential

- Nuts: Almonds, hazelnuts, pecans, pistachios, walnuts,
- Distilled Spirits, especially whiskey,
- Fish and Seafood: Salmon, surimi, roe and urchin, miscellaneous fish products,
- Dextrin, peptones, enzymes, lecithin, and protein concentrates,
- Dried and Processed Fruit: Raisins, prunes, cranberries, sour cherries, wild berries,

- Beef and Game: Hormone-free beef, bison meat, exotic meat, and processed meat products,
- Products featuring “sustainable” or other social issue-based marketing labels,
- Organic products.

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

- Ingredients for the natural and healthy foods industry,
- Premium cheeses,
- Ready to eat meals,
- Bakery products,
- Pulses,
- High quality beef,
- Premium condiments: Innovative sauces, crafted 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

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