



Federal Ministry  
of Food  
and Agriculture

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# PRESS KIT

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Official German Participation at CIIE 2019

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## 1. Introduction

Participation at leading and specialised international fairs is one of the most important and efficient export marketing activities of German agricultural companies as well as for the German food and beverage industry.

The German Federal Ministry of Food and Agriculture (BMEL) - through its program of international fairs and under the roof "made in Germany"- offers an opportunity for German SMEs to join an official German joint participation. Its objective is to support German companies to enter new markets and secure market share.

Within this context, BMEL is organising an official joint German participation at the trade fair CIIE for the first time.

„For many, German cuisine still conjures up images more hearty than haute. Yet, the reality is, that the German national diet is far more diverse than prevailing cliches would lead to believe.”<sup>1</sup>

## 2. Agriculture and food industry in Germany

### 1. Agriculture and food-based economy <sup>2</sup>

Germany is the second biggest agricultural producer in the European Union after France and produces 13 percent of the agricultural output of the European Union.

Germany is the biggest milk, pork and potato producer and the second biggest rape seed, sugar beet, cereal, beef and egg producer in the European Union.

89 percent of the German farms are run by individual enterprises. 48 percent of all agricultural companies' employees are family members. Their average farm size is 61,9 hectares.

### 2. Food industry <sup>3</sup>

In 2018, Germany's food industry was the biggest in Europe and the fourth biggest industry branch within the country.

In 2018, 6,119 companies employed 608,553 people and generated 179.6 billion Euro turnover.

The most important food industry categories in Germany in 2018 were meat and meat products with a 23.7 percent share of the domestic branch turnover, followed by dairy products, confectionery, long life bakery products/ ice cream

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<sup>1</sup> Lindel, D. (2018) Industry Overview. The Food & Beverage Industry in Germany [Online] Issue 2019/2020, Berlin, Germany Trade & Invest Gesellschaft für Außenwirtschaft und Standortmarketing mbH, Available: [https://www.gtai.de/GTAI/Content/EN/Invest/\\_SharedDocs/Downloads/GTAI/Industry-overviews/industry-overview-food-beverage-industry-en.pdf?v=7](https://www.gtai.de/GTAI/Content/EN/Invest/_SharedDocs/Downloads/GTAI/Industry-overviews/industry-overview-food-beverage-industry-en.pdf?v=7), Page 2 [Accessed 2 Oct 2019].

<sup>2</sup> Hemmerling, U./ Dr. Pascher, P.; Naß, S. (No year), Situationsbericht 2018/2019. Trends und Fakten zur Landwirtschaft [Online] Berlin, Deutscher Bauernverband e.V., Available: <https://www.bauernverband.de/situationsbericht-2018/19> [Accessed 2 Oct 2019].

<sup>3</sup> (No author) (No year) Jahresbericht 2018/2019 [Online] Berlin, Bundesvereinigung der Deutschen Ernährungsindustrie e.V., Available: <https://www.bve-online.de/download/bve-jahresbericht-ernaehrungsindustrie-2019> [Accessed 2 Oct 2019]; (No author) (No year) Ernährungsindustrie 2019 [Online] Berlin, Bundesvereinigung der Deutschen Ernährungsindustrie e.V., Available: <https://www.bve-online.de/download/bve-statistikbroschuere2019> [Accessed 2 Oct 2019].

and alcoholic beverages with 15.1 percent, 9.7 percent, 7.6 and 7.6 percent respectively.

Food and Beverages “made in Germany“ are sought after worldwide due to renowned quality, competitive pricing, reliability of supply and extensive product range.

Thus it is no surprise that in 2018 the export share of the total turnover of the German food industry increased from 17 percent in 1998 to 33 percent and the export value in Euro increased by 193 percent.

In 2018, the nominal turnover of the German food and drink industry generated overseas was 59,5 billion Euro, 1 percent less than in the year before. In 2018, Germany was the third biggest food and drink-exporting nation in the world.

Although in 2018 the German food and drink industry generated a turnover of 78,5 percent within the European Union, Asia is by far the most important Non-European export market for the German food industry with an 8.4 percent export share or 5 billion Euro export value. China alone accounted for 1.9 billion Euro of German food and drink exports<sup>4</sup>, more than to the United States of America.

The most important export branches of the German food industry in 2018 were the meat industry (with an 17.7 percent export share), the dairy industry (14.4 percent) and the confectionary, long life bakery and ice cream industry (13.5 percent).

Among the biggest food and drink companies of German origin are “Tönnies” (meat), “Dr. Oetker” (convenience food) and “DMK” (dairy products).

However, most of German food and drink companies are small and medium sized. Some of them are looking back on a history of hundreds of years, combining a grown family tradition with specialised know-how and state-of-the-art technology, thus making them internationally very competitive.

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<sup>4</sup> Not including Hong Kong S.A.R., Macao S.A.R. and Taiwan, China.

## 1. Meat and Poultry <sup>5</sup>

In 2018, Germany produced

- 5.8 million tonnes of pork, making it the biggest pork producing country in the EU. The export quota of German pork is more than 58 percent. China is by far the biggest Non-EU export market for German pork with a volume of 365 thousand tonnes.
- 1.8 million tonnes of poultry, thus occupying a leading position in poultry meat production in the EU. The export quote of German poultry is 43 percent.

Thanks to their high quality, German meat and poultry is in great demand all over the world and exported to round about 120 countries worldwide.

## 2. Dairy products <sup>6</sup>

With a production of nearly 31.7 million tonnes of cow milk and a turnover of 26.2 billion Euro in 2018, Germany is Europe's largest cow milk producer by far. The cow milk export quota of the German dairy is 49 percent. 4.1 million milk cows, 61,087 milk producers, 38,411 workers at 158 German milk processing companies help make the German dairy industry the country's second most important food and beverage sector in terms of turnover.

With an export value of more than 539 million Euro, Asia is now by far the most important non-European export region for the German dairy industry with a bigger market share than all other non-European markets combined.

Dairy products significantly influence the lifestyle and nutritional patterns of German people. The average German consumes 50.6 kilograms of milk, 24.1

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<sup>5</sup> (No author) (No year) Deutsche Lieferanten, [Online], German Meat e.V., Available: <https://german-meat.org/products/de/suppliers/> [Accessed 2 Oct 2019]; (No author) (No year) Geflügelwirtschaft auf einen Blick, [Online], Zentralverband der Deutschen Geflügelwirtschaft e.V., Available: <https://zdg-online.de/#carousel-215> [Accessed 2 Oct 2019]; Kohlmüller, M., Koch, T. (2019) AMI Markt Bilanz Vieh und Fleisch 2019 [Online], AMI GmbH, Available against payment: [https://www.ami-informiert.de/ami-shop/shop/detail?ai%5Bd\\_name%5D=Markt\\_Bilanz\\_Vieh\\_und\\_Fleisch\\_2019&ai%5Bd\\_prodid%5D=233&ai%5Bd\\_pos%5D=4&ai%5Bcontroller%5D=Catalog&ai%5Baction%5D=detail](https://www.ami-informiert.de/ami-shop/shop/detail?ai%5Bd_name%5D=Markt_Bilanz_Vieh_und_Fleisch_2019&ai%5Bd_prodid%5D=233&ai%5Bd_pos%5D=4&ai%5Bcontroller%5D=Catalog&ai%5Baction%5D=detail), [Accessed 16 Oct 2019]. All statistical data from 2018 is preliminary.

<sup>6</sup> (No author) (2018) Die Milch im Überblick: Die wichtigsten Daten und Fakten [Online] (No place of publication) Milchindustrieverband e.V., Available: [https://milchindustrie.de/wp-content/uploads/2017/10/Daten\\_Fakten\\_Deutschlandkarte\\_2018-2019\\_Homepage.pdf](https://milchindustrie.de/wp-content/uploads/2017/10/Daten_Fakten_Deutschlandkarte_2018-2019_Homepage.pdf) [Accessed 03 Oct 2019]; (No author) (No year) Exporte der deutschen Milchwirtschaft nach Zielregionen in 2018 (Euro) [Online] (No place of publication) Milchindustrieverband e.V., Available: [https://milchindustrie.de/wp-content/uploads/2017/10/Weltkarte-Deutsche-Exporte-Zielregion\\_2018.pdf](https://milchindustrie.de/wp-content/uploads/2017/10/Weltkarte-Deutsche-Exporte-Zielregion_2018.pdf) [Accessed 3 Oct 2019].

kilograms of cheese, 5.8 kilograms butter and 5.6 kilograms of whipped cream per year.

### 3. Cereal-based products <sup>7</sup>

The cereal production in Germany is modern, centralised and efficient. Only 196 mills with an output of at least 1,000 tonnes per year mill 8.91 million tons of wheat and rye. A mill in Germany is serving 385,000 people per day on average and an average German consumes 70 kg of flour and meal products a year.

Germany is well known for its bread and bakery products. Until now, 3,176 different kinds of bread have been documented in the official German bread register and German bakery crafts have already been declared a UNESCO immaterial cultural heritage in 2014.

270,400 bakers work in the early hours in 10,926 companies with 46,000 POS and generate a turnover of 14,67 billion Euro.

The average annual household consumption of bread in Germany is 42,2 kilogram.

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<sup>7</sup> (No author) (2018) Weniger Mühlen verarbeiten mehr Getreide – vielfältige Branche [Online] (No place of publication) VDM, Available: [https://www.muehlen.org/presse-service/pressemitteilungen/presse/?tx\\_news\\_pi1%5Bnews%5D=431&cHash=62af441142b4c4683a67776ffccdad17](https://www.muehlen.org/presse-service/pressemitteilungen/presse/?tx_news_pi1%5Bnews%5D=431&cHash=62af441142b4c4683a67776ffccdad17) [Accessed 3 Oct 2019]; (No author) (No year) Die Bedeutung der Mühlenwirtschaft in der Wertschöpfungskette in Deutschland (WJ 2014/2015) [Online] (No place of publication) VDM, Available: [http://www.muehlen.org/fileadmin/Dateien/8\\_Presse\\_Service/2\\_Fotos\\_Infografiken/VDM\\_Grafik\\_Bedeutung\\_der\\_Muehlenwirtschaft\\_2016.pdf](http://www.muehlen.org/fileadmin/Dateien/8_Presse_Service/2_Fotos_Infografiken/VDM_Grafik_Bedeutung_der_Muehlenwirtschaft_2016.pdf) [Accessed 3 Oct 2019]; (No author) (2018) Ein Blick in den Einkaufskorb [Online] (No place of publication) VDM, Available: <http://www.baeckerhandwerk.de/baeckerhandwerk/zahlen-fakten/brotverbrauch-und-brotkorb-der-deutschen/> [Accessed 3 Oct 2019]; (No author) (No year) Wirtschaftsfaktor Bäckerhandwerk [Online] Berlin, Zentralverband des deutschen Bäckerhandwerks e.V., Available: <http://www.baeckerhandwerk.de/baeckerhandwerk/zahlen-fakten/> [Accessed 3 Oct 2019]; (No author) (No year) Die deutsche Brotkultur [Online] Berlin, Zentralverband des deutschen Bäckerhandwerks e.V., Available: <https://www.baeckerhandwerk.de/baeckerhandwerk/die-deutsche-brotkultur/> [Accessed 3 Oct 2019].

#### 4. Confectionery <sup>8</sup>

Sugar in Germany is mainly derived from beet roots. 26,571 sugar producing farms deliver to 20 German sugar refining facilities belonging to only 4 big companies. Only 11.7 percent of the German sugar is sold to the private consumer, while 88.3 percent is used - among others - in the confectionery industry.

About 51,868 employees of the highly innovative confectionery industry produce 3,682 million tonnes of confectionery and generate an inland production of more than 12.2 billion Euro. The export share stands at 53 percent of production volume - or 2.18 million tonnes - and 61 percent of production value - or 8.3 billion Euro. Germany has been the confectionery export champion for more than 40 years - no other country in the world exports so much confectionery.

Chocolate confectionery is the most important product and export category both in volume and value.

An average German consumes 30.6 kilograms of confectionery a year, mostly chocolate and chocolate confectionery (9.08 kilograms), biscuits and sugar confectionery.

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<sup>8</sup> (No author) (2019) Zuckermarkt Deutschland [Online] (Berlin) Available: <http://www.zuckerverbaende.de/zuckermarkt/zahlen-und-fakten/zuckermarkt-deutschland.html> [Accessed 2 Oct 2019]; (No author) (No year) Standorte des Zuckerrübenbaus und der Zuckerfabriken [Online] (Berlin) Available: <http://www.zuckerverbaende.de/zuckermarkt/zahlen-und-fakten/zuckermarkt-deutschland/standorte.html> [Accessed 2 Oct 2019]; (No author) (No year) Süßwarenindustrie auf einen Blick [Online] (Berlin), BDSI, Available: [https://www.bdsi.de/fileadmin/redaktion/Grafik\\_\\_\\_Statistik/20190801-S%C3%BC%C3%9Fwarenindustrie\\_auf\\_einen\\_Blick\\_2018.jpg](https://www.bdsi.de/fileadmin/redaktion/Grafik___Statistik/20190801-S%C3%BC%C3%9Fwarenindustrie_auf_einen_Blick_2018.jpg) [Accessed 2 Oct 2019]; (No author) (No year) Produktion von Süßwaren gesamt 2018 [Online] (Berlin) BDSI, Available: [https://www.bdsi.de/fileadmin/redaktion/Grafik\\_\\_\\_Statistik/Produktion\\_S%C3%BC%C3%9Fwaren\\_gesamt\\_2018\\_korr\\_m.jpg](https://www.bdsi.de/fileadmin/redaktion/Grafik___Statistik/Produktion_S%C3%BC%C3%9Fwaren_gesamt_2018_korr_m.jpg) [Accessed 2 Oct 2019]; (No author) (No year) Ausfuhr von Süßwaren gesamt 2018 [Online] (Berlin) BDSI, Available: [https://www.bdsi.de/fileadmin/redaktion/Grafik\\_\\_\\_Statistik/Ausfuhr\\_S%C3%BC%C3%9Fwaren\\_gesamt\\_2018\\_korr\\_m.jpg](https://www.bdsi.de/fileadmin/redaktion/Grafik___Statistik/Ausfuhr_S%C3%BC%C3%9Fwaren_gesamt_2018_korr_m.jpg) [Accessed 2 Oct 2019]; (No author) (No year) Pro-Kopf-Verbrauch von Süßwaren 2018 [Online] (Berlin) BDSI, Available: [https://www.bdsi.de/fileadmin/redaktion/Grafik\\_\\_\\_Statistik/Pro-Kopf-Verbrauch\\_2018\\_korr\\_m.jpg](https://www.bdsi.de/fileadmin/redaktion/Grafik___Statistik/Pro-Kopf-Verbrauch_2018_korr_m.jpg) [Accessed 2 Oct 2019]; (No author) (No year) 2018: German confectionery - popular around the world [Online] (Berlin) BDSI, Available: [https://www.bdsi.de/index.php?eID=tx\\_cms\\_showpic&file=5261&md5=0eb3b6b3f7053db848df223385b21ce543adb4b2&parameters%5B0%5D=YTo0OntzOjU6IndpZHRoljtzOjQ6IjgwMG0iO3M6NjoiaGVpZ2h0IjtzOjQ6IjYw&parameters%5B1%5D=MG0iO3M6NzoiYm9keVRhZyI7czo0MToiPGJvZlZkZ3R5bGU9Im1hcmdpbgowOyBi&parameters%5B2%5D=YWNrZ3JvdW5kOiNmZmY7Ij4iO3M6NDoid3JhcCI7czo0NzoiPGEgaHJlZj0iamF2&parameters%5B3%5D=YXNjcmIwdDpjbG9zZSgpOyl%2BIHwgPC9hPill7fQ%3D%3D](https://www.bdsi.de/index.php?eID=tx_cms_showpic&file=5261&md5=0eb3b6b3f7053db848df223385b21ce543adb4b2&parameters%5B0%5D=YTo0OntzOjU6IndpZHRoljtzOjQ6IjgwMG0iO3M6NjoiaGVpZ2h0IjtzOjQ6IjYw&parameters%5B1%5D=MG0iO3M6NzoiYm9keVRhZyI7czo0MToiPGJvZlZkZ3R5bGU9Im1hcmdpbgowOyBi&parameters%5B2%5D=YWNrZ3JvdW5kOiNmZmY7Ij4iO3M6NDoid3JhcCI7czo0NzoiPGEgaHJlZj0iamF2&parameters%5B3%5D=YXNjcmIwdDpjbG9zZSgpOyl%2BIHwgPC9hPill7fQ%3D%3D) [Accessed 2 Oct 2019].



## 5. Beer<sup>9</sup>

The German beer purity law from 1516 is the oldest food quality law in the world that is still valid today. This means that today only 4 ingredients can be used for beer: Malt, hops, yeast and water. The legacy of this law is the proverbial purity and quality of German beer appreciated worldwide.

Germany is by far the biggest beer producing country in the European Union. 27,233 employees in 1,539 mostly medium-sized German breweries produce 93,7 million hectolitres of 6000 different kinds of beer and export 16,8 percent or 15.8 million hectolitres, more than twice the volume of beer imports.

Germans are only the third most “passionate” beer drinkers in the world with 102 litres annual per-capita consumption after the Czech with 138 litres and Austria.

## 6. Wine<sup>10</sup>

Wine has been cultivated in Germany since Roman times 2,000 years ago.

There are 13 wine producing regions in Germany growing almost 140 different varieties of grapes. Germany produces 66 percent white wine and 34 percent red wine. Germans drink 20.2 litres of wine per person per year.

Many of the 15,931 viticultural enterprises have hundreds of years of tradition while producing with up-to-date know-how and cutting-edge technology.

Germany is the 10th biggest wine producer and 8th biggest wine exporter worldwide. In Europe it holds fourth place after Italy, France and Spain. Germany produced 7.7 million hectolitres of wine, generated an export volume of 3.8 million hectolitres, and an export value of 308 million Euro.

Especially Riesling, the most important grape variety in Germany is enjoying growing popularity in China as it fits the local cuisine and palate. Germany is the biggest Riesling producer worldwide.

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<sup>9</sup> (No author) (2019) Deutsche Brauwirtschaft in Zahlen [Online] (Berlin) Deutscher Brauer-Bund e.V., Available: <https://www.brauer-bund.de/download/Archiv/PDF/statistiken/STATIST%202018.pdf> [Accessed 2 Oct 2019]; (No author) (2019) Bierkonsum pro Kopf in Europa nach Ländern im Jahr 2017 (in Liter) [Online] (No place of publication) Statista Inc., Available: <https://de.statista.com/statistik/daten/studie/29727/umfrage/pro-kopf-verbrauch-an-bier-in-europa/> [Accessed 2 Oct 2019].

<sup>10</sup> Abele, E. (No year) 2018/2019 Deutscher Wein. Statistik [Online] (Bodenheim) Deutsches Weininstitut GmbH, Available: [https://www.deutscheweine.de/fileadmin/user\\_upload/Website/Service/Downloads/Statistik\\_2018-2019.pdf](https://www.deutscheweine.de/fileadmin/user_upload/Website/Service/Downloads/Statistik_2018-2019.pdf) [Accessed 2 Oct 2019]; (No author) (No year) Rebsorten [Online] (Bodenheim) Deutsches Weininstitut GmbH, Available: <https://www.deutscheweine.de/wissen/rebsorten/> [Accessed 2 Oct 2019]. The number of companies only includes those with a vineyard area of more than 0.5 hectares.

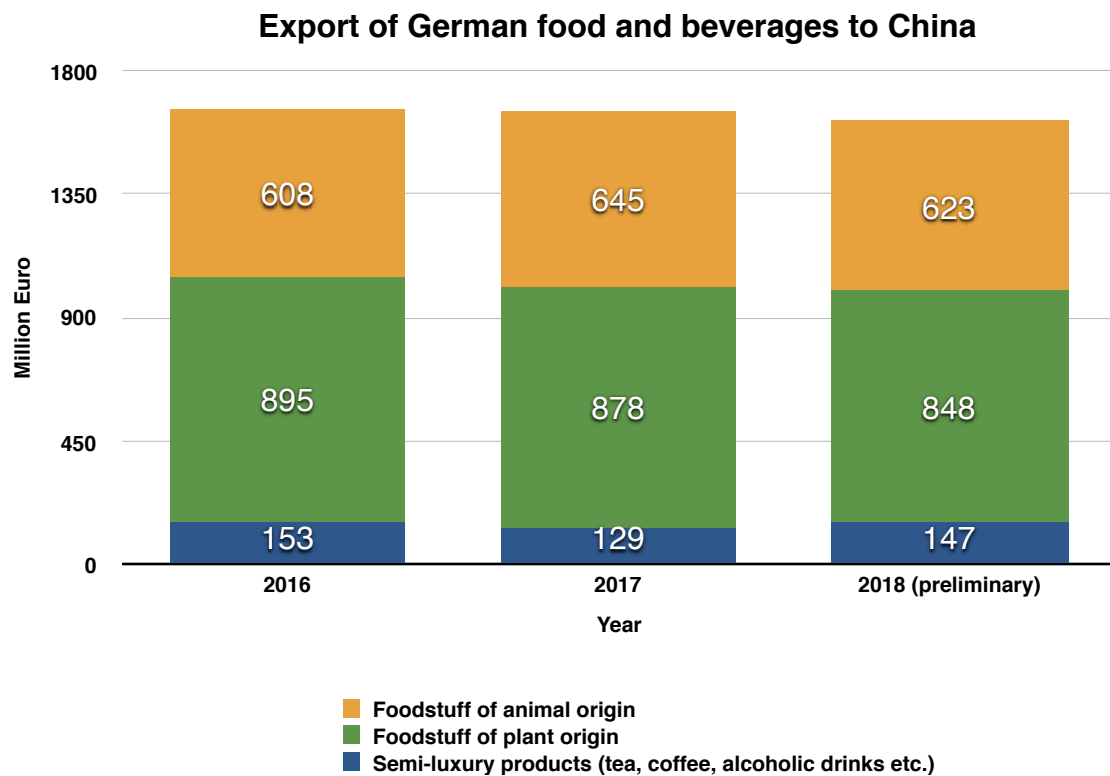
### 3. Links

- Association of the German Confectionary Industry (BDSI)
- Federation of German Food and Drink Industries (Bundesvereinigung der Deutschen Ernährungsindustrie e.V. (BVE))
- German Farmer's Association (Deutscher Bauernverband e.V. (DBV))
- German Wine Institute (Deutsches Weininstitut GmbH)
- "Association of German Mills (Registered Association)" (Verband Deutscher Mühlen e.V. (VDM))
- "Association of the German Dairy Industry (Registered Association)" (Milchindustrie-Verband e.V. (MIV))
- "Business Federation Sugar (Registered Association)" (Wirtschaftliche Vereinigung Zucker (WVZ))/ "Association of the Sugar Industries (Registered Association)" ("Verein der Zuckerindustrie e.V. (VDZ))
- "Central Association of the German Baker Crafts (Registered Association)" (Zentralverband des Deutschen Bäckerhandwerks e.V. (ZDB))
- German Poultry Association (Zentralverband der Deutschen Geflügelwirtschaft e.V.)
- "German Breweries Association" (Deutscher Brauerbund e.V. (DBB))
- "German Meat Limited" (German Meat GmbH)
- "German Sweets Sweets Export Promotion (Registered Association)" (German Sweets Süßwarenexportförderung e.V.)
- "Germany Trade and Invest Society for Foreign Trade Investment Marketing Limited" (Germany Trade and Invest Gesellschaft für Außenwirtschaft und Standortmarketing mbH (GTAI))

### 3. The market for German food and beverages in China

#### 1. Export statistics <sup>11</sup>

Between 2016 and 2018 total food and beverage exports from Germany to China have decreased by 2.4 percent. 2018 year-on-year they decreased by 2.1 percent from 1,652 billion Euro to 1618 billion Euro.



	2016 (Million Euro)	2017 (Million Euro)	2018 (million Euro, preli- minary)	Percent share of total exports in percent	Change 17/18 yoy in percent (, = .)
<b>Total food and beverages export (without living animals)</b>	1657	1652	1618	100	-2,1
<b>Including: food and beverages of animal origin</b>	608	645	623	38	-3,4
<b>Including: food and beverages of plant origin</b>	895	878	848	52	-3,5
<b>Including: Semi-luxury products</b>	153	129	147	9	14,0

<sup>11</sup> Source of statistics: (No author) (No year) Deutscher Außenhandel mit China [Not online] (No place of publication) BMEL, Not available. Export figures have been commercially rounded to Million Euro and percent figures have been commercially rounded to full numbers or numbers with one decimal digit. Figures for 2018 are preliminary. Not including Hong Kong S.A.R., Macao S.A.R. and Taiwan, China.

In 2018, Product exports of animal origin - especially pork (by-) products - decreased by 3.4 percent from 645 to 623 million Euro. With a 52 percent share of the total food export this is the second biggest export category.

The export of food of plant origin - notably baking products - decreased by 3.5 percent from 878 to 848 million Euro. With a 50 percent share of the total food export this is the biggest export category.

The export of food semi-luxury products - notably beer - increased by 14.0 percent from 129 to 147 million Euro. With a 9 percent share of the total food export this is the smallest export category.

## 2. Strengths and potential for German Food and Beverages in China

The strengths of Germany are:

- being the biggest food and drink producer and exporter in Europe and the third biggest worldwide and thus being a reliable supplier for all quantities China needs.
- being able to supply products of superior quality at a reasonable price and the proverbial German quality. Among these are products that China - because of climatic and industry-structural reasons - cannot deliver to the customer at the same price as Germany.

In the Chinese market there is huge potential for the following German food and drink categories:

- Meat (products): Due to partially different meat consumption preferences, Germany can supply the China consumer with high-quality products at competitive prices, for example pork by-products.
- Dairy: From skimmed milk powder to UHT milk to (drink) yoghurts. Due to the rising health consumer awareness and the changing dietary patterns of children and elderly alike.
- Beer, hops and malt: Due to the rising thirst of consumers for imported beer from Germany.
- Wine: Due to the rising appreciation for German white wines (especially Rieslings) among consumers.

- Food ingredients, flour preparations and other baking products: Due to the rich expertise in Germany with this food category and the big supply of highly qualitative products.

These food categories and many more will be present at the official German Joint Participation.

## 4. Contact



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