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Report Highlights:

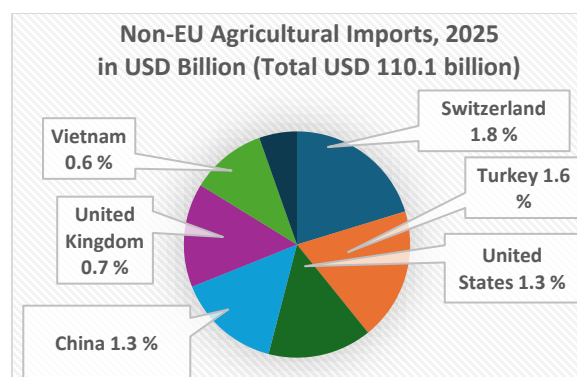
Germany represents Europe's largest consumer-oriented market, with retail food sales reaching USD 323.8 billion alongside a sharp rise in agricultural imports to USD 172.4 billion. U.S. exporters benefit from steady demand in key high-value categories, led by tree nuts (specifically pistachios, almonds, and walnuts), food preparations, distilled spirits, wine, and condiments. Tree nuts, with a 73 percent increase in value imported, remain a dominant consumer-oriented export from the United States, with pistachios serving as a key driver due to high consumer interest in healthy snacking and processing inputs. Despite persistent price sensitivity and high market saturation, wealthy German consumers are increasingly prioritizing value, health-conscious products, organic options, and premium private labels.

Executive Summary

Germany is the biggest market for food and beverages in the European Union (EU) with more than 84 million high income consumers. In 2025, Germany's nominal GDP reached USD 5.05 trillion, making it the 3rd largest economy in the world and the largest, most influential economy in the EU. It is also the third-largest importer of agricultural and related products. In 2025, agricultural imports reached USD 172.4 billion. While more than 80 percent of these imports originated from other EU member states, the United States was the second-largest supplier outside the bloc after Brazil. Imports of agricultural and related products from the United States totaled USD 3.1 billion in 2025. The macroeconomic situation and key data about the German economy can be found in the latest [Exporter Guide](#).

Imports of Consumer-Oriented Ag Products

In 2025, Germany imported USD 110.1 billion worth of consumer-oriented agricultural products. The majority (85 percent) of these originated from other EU member states.



Food Retail Industry

Germany's food retail sales reached USD 323.8 billion in 2025; a steep 10.7 percent increase compared to the previous year. The three largest retailers, the Edeka Group, the REWE Group and the Schwarz Group, represent about 65 percent of retail revenues.

Food Service Industry

Germany's food service sector is large and highly fragmented but can be divided into commercial (hotels, restaurants, fast food, and take-away outlets, bars, coffee shops etc.) and institutional (hospitals, universities, nursing homes, and cafeterias) food service markets. Sales increased by 2.4 percent, reaching USD 103 billion in 2025. The growth forecast for 2025 is projected to increase

slightly, driven by a rise out of home consumption patterns over the past year.

Quick Facts CY 2025

Imports of Consumer-Oriented Products:

USD 110.1 billion

List of Top 10 U.S. Growth Products in Germany

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

Food Industry by Channels (U.S. billion)

Retail Food Industry	\$324.5
Food Service-HRI	\$103
Food Processing	\$270.1
Food and Agriculture Exports	\$104.9

Top 10 Host Country Retailers (by sales)

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

GDP/Population

Population (millions): 84
GDP (trillions USD): 5,05
GDP per capita (USD): 60,440

Strengths/Weaknesses/Opportunities/Threats

Strengths	Weaknesses
Germany is the largest market in Europe with a high-income customer base	U.S. exporters face competition from tariff-free products from other EU member states and FTA partners
Opportunities	Threats
Germany has a large, well-developed food processing industry that requires 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.

Sources: Trade Data Monitor (TDM), World Bank, Lebensmittel Praxis, Federation of German Food and Drink Industries (BVE), Exchange rate: USD 1.00 = EUR 0.8603

Section 1: Market Summary

Germany has more than 84 million of the world's wealthiest consumers. This makes it the third-largest importer of consumer-oriented agricultural products worldwide, and by far the most important European market for foreign producers. Germany is a net importer of all major categories of food products. In 2024, grocery retail sales reached an estimated [USD 323.8 billion](#) (EUR 279.2 billion); a 10.7 percent increase compared to the previous year. Imports of agricultural and related products increased 18.4 percent from USD 145.6 billion in 2024 to USD 172.4 billion in 2025. Imports of consumer-oriented agricultural products totaled USD 110.1 billion in 2025, a 19.3 percent increase from USD 92.3 billion in 2024. Almost half of the German retail market consists of private label products.

The retail market's key characteristics are consolidation, market saturation, strong competition, and low prices. Germany is an attractive and cost-efficient location in the center of the EU with well-developed transportation networks to neighboring countries. While many consumers are very price-sensitive, the market has many wealthy consumers who make purchasing decisions based on value-for-money. These consumers are looking for premium quality products and are willing to pay a higher price. As per the latest numbers, German citizens spent only [14.2 percent](#) of their income on food and beverage products (in 2024).

Whereas Germans could rely on relatively inexpensive groceries in the past, the war in Ukraine raised prices for energy, feed, and fertilizer. Inflation reached double-digit numbers with increasing food prices ([12.4 percent in 2023](#)) being one of the main drivers alongside rising energy costs. Inflation in 2024 was at [2 percent](#) and is estimated at 2.2 percent in 2025 alongside 0.2 percent economic growth and a forecasted 0.9 percent of economic growth in 2026.

The rise in consumer food prices slowed in 2025. While food prices rose by 2.1 percent in the full year 2024 compared to the previous year, the prices rose only 1.2 percent through November 2025. For the entirety of 2023, the prices increased 12.4 percent. Prices for beef, pork, poultry, eggs, and dairy products had the highest increase while prices for fruits, vegetables, and potatoes declined. Since 2023, many German consumers have cut back spending on higher-cost foods such as organic, fair trade, regional products and meat substitutes, but also on essential products – leading to a more strategic and intentional purchasing behavior.

Key Market Drivers and Consumption Trends

- **Moderating Inflation and Real Wage Recovery:** Following the economic decline of prior years, food price inflation has settled back to low levels (1.2 percent through late 2025). Real wage growth and stabilizing energy markets are gradually supporting a return in purchasing power.
- **The "Savings Unlock":** Germany maintains the highest household savings rate ([20 percent in 2024](#)) in the EU. As consumer confidence slowly recovers, parts of these accumulated financial buffers might unlock, increasing consumption.
- **E-Commerce Evolution:** On-demand grocery delivery platforms are expanding rapidly in Germany's major cities, offering food at prices that closely rival traditional supermarkets. Simultaneously, ultra-low-cost e-commerce giants like *Temu* have launched drives to source fast-moving consumer goods and regional food products directly from European and German suppliers, reshaping competitive dynamics.

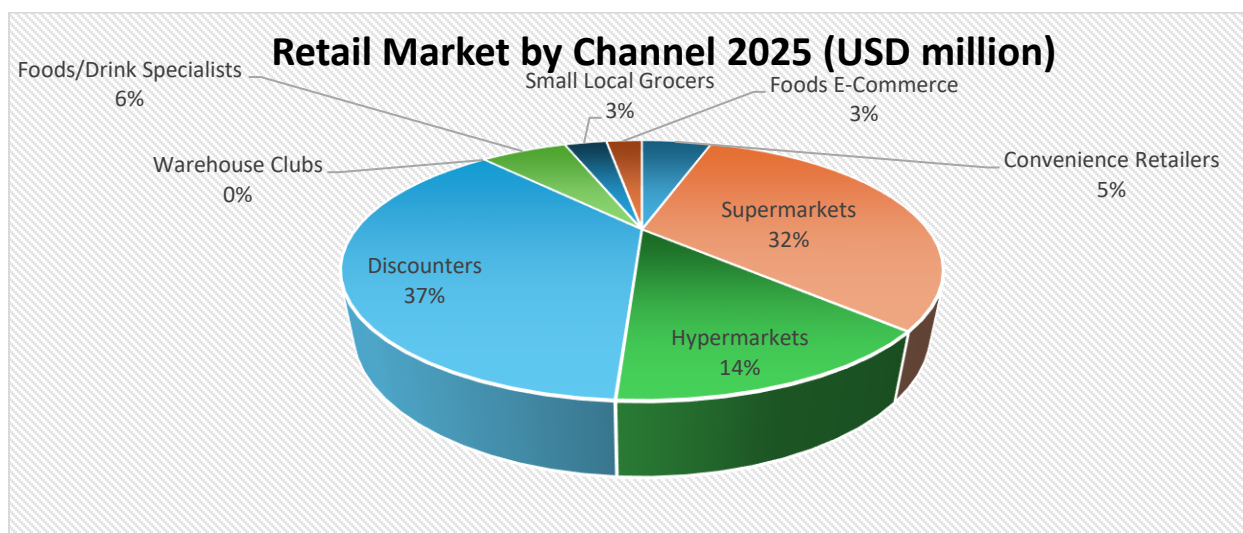
- **Private Label:** Because discounters like Aldi and Lidl make up 37 percent of the entire German grocery market—and rely overwhelmingly on private labels—store brands command massive volumes. These store brands are no longer just budget-tier alternatives. Growth is heavily concentrated in premium, organic, and specialized store-brand lines (such as *Rewe Feine Welt* or *Edeka Herzstücke*), which have posted double-digit growth. Private label shares are highest in categories like fresh meat, poultry, and canned goods, where they exceed [60 percent to 70 percent](#) of shelf turnover.
- **High Price Sensitivity and Polarized Spending:** Roughly [75 percent](#) of German consumers pay close attention to prices and promotions. While budget-conscious shoppers lean heavily on discounters (Aldi, Lidl, Netto etc.) and private labels, higher-income segments and younger demographics tend to trade up for premium or wellness-oriented goods.
- **Health Consciousness and Formulation Shifts:** An aging population and increased health awareness—particularly among Gen Z—are driving demand for health and wellness products. Concurrently, consumer demand for sugar reduction is immense: over [81 percent](#) of consumers want less sugar in processed products (with 10 percent favoring sweeteners and 8 percent wanting no change).
- **Convenience for Fast-Paced and Single Households:** A high-paced society and a growing number of single households are fueling high demand for convenient ready-to-eat meals, desserts, and baking mixes. According to the German Farmers Union (DBV), [80 to 90 percent](#) of consumed food products in Germany are now consumer-oriented processed products. Germany's food processing industry is the fourth-largest industrial sector in the country.
- **Political Purchasing and Labelling:** A growing segment views shopping decisions as lifestyle or political statements (e.g., vegan/vegetarian diets, non-GMO, free-range). According to the [German Federal Ministry of Food and Agriculture](#), labelling heavily dictates purchases: 77 percent base decisions on animal welfare labels, 77 percent on regional labels, and 70 percent on organic labels.
- **Organic Market and Diet Shifts:** Germany is the second-largest organic market globally behind the U.S. Organic products account for USD 20.14 billion (6.9 percent of retail sales) in 2024 and a projected USD 22.15 billion in 2025. Interestingly, while the vegetarian population is growing, the vegan consumer base has leveled off and meat production has risen for the first time since 2016 as consumers buy less quantity but higher quality. For more information, see the GAIN report: [Large Retail Chains Support Record Year for German Organic Sales](#).

Table 1: Advantages and Challenges

ADVANTAGES	CHALLENGES
Germany is the biggest market in Europe with a high-income consumer base. Due to its central location in Europe and excellent transportation channels, Germany is a good base for exporting products to other EU countries.	German consumers demand quality and low prices. Clean label foods, “free from,” and locally grown products attract more and more German consumers. In addition, listing fees paid to retailers limit the introduction of new U.S. brands.
The demand for sustainable food ingredients and sustainable foods is growing. Many German consumers are still uninformed about the details of sustainability, leaving room to voice the U.S.’s sustainability message.	Private sector sustainability standards can act as barriers to trade. Getting the consumer’s attention amongst many competing actors can be challenging.
Germany is among the largest food importing nations in the world. It has a large, well-developed food processing industry requiring a wide range of ingredients, from low-value, unprocessed foods to high-value, highly processed ingredients.	U.S. exporters face competition from tariff-free products from other EU member states; EU gives preferential access to products from EU countries.
The United States has a reputation as a reliable supplier of food inputs in terms of availability, delivery, and quality.	Some products of modern biotechnology are prohibited as they are not approved in the EU.
Germany is the largest EU market for U.S. beef under the EU import quota for high-quality beef, which was expanded in January 2020.	The beef import quota only applies to beef from animals not treated with growth-promoting hormones. New meat alternatives are becoming increasingly popular.
A large expat and immigrant population and Germans’ inclination to travel abroad help fuel demand for foreign products. There is an increased preference for authentic regional cuisines in bigger cities.	The ‘regional’ trend can work against U.S. products, but also in favor of.
U.S. food trends are popular, especially among the younger generations; good reputation for U.S. foods like dried fruits, seafood, and wine.	Non-tariff barriers such as phytosanitary restrictions and traceability requirements can make exporting to Germany complicated.

Source: FAS Berlin

Chart 1: Retail Sales by Channel



Source: Euromonitor International

Section 2: Road Map for Market Entry

U.S. companies seeking to export goods to Germany are advised to conduct thorough research to gain a good understanding of the market. FAS [GAIN Reports](#) are a good source for country specific information. Please contact the USDA Foreign Agricultural Service (FAS) Office in Berlin for clarification on specific questions for example, for information on veterinary and phytosanitary certificates. Contact information is provided at the end of this report.

Germany is a potential market for U.S. companies who are willing to invest time and resources to cement contacts. New products in the German market may require up to 12 to 18 months of testing in order to determine market acceptance. There are a number of potential technical barriers to trade, thus exporters should consult the latest Food and Agricultural Import Regulations and Standards (FAIRS) report on [Germany](#) and the [European Union](#). The report about Germany provides an overview of food laws in force in country 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 or other trade shows in Europe, such as the world's largest Food and Beverages Trade Show [ANUGA](#), which takes place in Cologne, October 9-13, 2027. ANUGA 2025 hosted the largest USA Pavilion in FAS history, with 155 American companies exhibiting (178 American companies in total) at the largest ANUGA on record. The show attracted more than 145,000 visitors from over 190 countries and over 8,015 exhibitors from 110 countries. U. S. exhibitors recorded more than USD 16 million in on-site sales, and USD 232 million in 12-month projected sales.

Trade shows serve as a gateway into the market, helping companies 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 establish 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
ANUGA (every two years) October 9-13, 2027 https://www.anuga.com/	The leading food fair for the retail trade, the food service, and catering market worldwide	Cologne
Bar Convent Berlin (BCB) October 12-14, 2026 https://www.barconvent.com/berlin/en-gb.html	International trade show for bars and beverages	Berlin
ISM Snacks & Sweets, Ingredients January 31 - February 3, 2027 https://www.ism-cologne.com/	World's largest show for snacks and confectionery products, includes an ingredients section since 2026	Cologne
Fruit Logistica February 3-5, 2027 https://www.fruitlogistica.com/en	One of the leading trade fairs for the fresh fruit and vegetable business	Berlin
BioFach February 16-19, 2027 https://www.biofach.de/en	World's largest trade show for organic food and non-food products	Nuremberg
Internorga March 12-16, 2027 https://www.internorga.com/	International trade show for hotel, restaurant, catering, baking, and confectionery trades	Hamburg
ProWein March 7-9, 2027 https://www.prowein.com/	International trade show for wine and spirits	Dusseldorf
Interzoo (every two years) May 23-26, 2028 https://www.interzoo.com/en	World's largest trade show for pet food and supplies	Nuremberg

Source: FAS Berlin

U.S. exporters can also contact their respective U.S. State Regional Trade Groups (SRTG), their Commodity Cooperator Group, or their state Department of Agriculture to obtain additional support.

State Regional Trade Groups (SRTG) are non-profit trade development organizations that help U.S. food producers and processors to enter overseas markets. They are funded by USDA/FAS and the private sector. They carry out promotional activities to increase exports of U.S. high-value food and agricultural products. For more information, please contact the state regional trade group responsible for your state at <https://www.fas.usda.gov/topics/getting-started/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 visit <https://usaedc.org/>. The Commodity Cooperator Groups regularly organize (reverse) trade missions, often organized around trade shows or other events. They also are excellent platforms for U.S. suppliers of food ingredients to meet with foreign buyers. Currently, about 40 U.S. Cooperator

organizations operate USDA-funded marketing programs in Germany. For the full list of participating U.S. organizations, please see <https://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 segment 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 sixteen federal states (Länder). Whether a specific product complies with the legal requirements is evaluated by considering the product in its entirety, including its origin, import certificate, composition, intended purpose, and presentation. Please contact FAS Berlin for clarification on questions concerning the interpretation and application of import provisions in individual cases.

German food retailers' purchasing process 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 buy from central buyers/distributors which import food and beverages. In general, these wholesalers specialize in specific products or product groups, and some focus on food products from a specific country of origin. Specialized importers often have in-depth knowledge of import requirements, such as product certification, labeling, and packaging. They also typically handle shipping, customs clearance, warehousing, and distribution of products within the country.

Market Structure

Consolidation, market saturation, strong competition, and low prices are key characteristics of the German retail food market. The top three grocers account for over 65 percent of the total market. Almost half of the German retail market is private label served. The German market is largely dominated by domestic players. This is particularly true for hypermarkets, supermarkets, and discounters. German consumers are very particular about what they like and what they do not like in their grocery retailers, and grocery retailers can count on a strong base of loyal customers. Foreign players are met with skepticism regarding their ability to offer high quality at low prices. The failure of Walmart to establish itself in Germany over a decade ago shows how hard it is for international players to successfully enter the German market.

Table 3: Profiles of Top Food Retailers in Germany

Retailer Name and Outlet Type	Total Sales 2025 (USD million)	Revenue 2025, compared to 2024 (Percentage)	Locations
1. Edeka-Group - Edeka (Supermarkets) - Netto (Discounter)	97,694	+2.7	Nation-wide Nation-wide
2. Rewe-Group - Rewe (Supermarkets) - Penny (Discounter)	81,480	+3.6	Nation-wide Nation-wide
3. Schwarz-Group - Lidl (Discounter) - Kaufland (Hypermarkets)	70,772	+3.3	Nation-wide Nation-wide
4. Aldi-Group - Aldi Süd (Discounter) - Aldi Nord (Discounter)	42,578	+2.9	Southern Germany Northern Germany
5. dm (retail chain specialized in cosmetics, healthcare items, household products, and health food, similar to RiteAid/CVS)	15,312	+6.4	Nation-wide
6. Rossmann (retail chain specialized in cosmetics, healthcare items, household products, and health food, similar to RiteAid/CVS)	12,116	+6.1	Nation-wide
7. Bartels-Langness-Gruppe	8,383	+4.0	Northern Germany
8. Globus	7,676	-0.2	Nation-wide
9. Metro	6,773	+1.3	Nation-wide
10. Transgourmet	5,841	+2.6	Nation-wide

Source: [Lebensmittel Praxis](#)

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

The growth of discounters is slowing because of market saturation and the continuing trend towards shopping at supermarkets in convenient city locations. As urbanization increases and consumers' lifestyles are changing, more people seek convenience when doing their grocery shopping. To counter

the trend, discounters are also attempting to adapt and expand in hopes of differentiation. Additionally, they are focusing more on quality and choice rather than price with new concepts and the introduction of more premium and convenience foods, online stores and premium locations. Aldi, who is significantly bolder in foreign markets such as the USA or China, remains a distinct exception within the retail segment, operating without a consumer loyalty program or mobile application. Demonstrating its commitment to traditional brick-and-mortar operations, Aldi permanently discontinued its online retail platform in September 2025 following a four-year operational period.

Today, [36,565](#) grocery stores, among them 15,976 discounter stores, all over Germany supply customers with fresh food and beverages. Within ten years, the number of grocery stores has declined by 5 percent. There is a trend toward consolidating stores and maximizing space.

Whereas e-commerce sales grew during the pandemic, they saw a dip of 7 percent in 2023, they grew again by 8.2 percent in 2024. Food and beverages purchased online in 2025 totaled USD 4.755 million (EUR 4.121 million), which is an overall market share of 3 percent as per Euromonitor (see chart 1).

The online grocery delivery market in Germany is highly competitive and has recently consolidated around traditional retail giants and specialized delivery networks.

Traditional and Omnichannel Supermarkets

These services offer the largest item selection, exact price parity with brick-and-mortar stores, and scheduled delivery windows.

- [REWE Lieferservice](#): The nationwide market leader in full-range online grocery delivery. They operate their own vast fulfillment infrastructure, offering everything from fresh produce to household staples in major German cities.
- [Amazon Fresh](#): Integrated closely with Prime memberships, Amazon is a relevant player providing scheduled same-day delivery slots across major metropolitan hubs.

E-Supermarkets and Milkman Models

Instead of broad and rapid deliveries, these companies focus on optimized routing and regional sourcing to keep costs low.

- [Picnic](#): Operating as a strategic partnership heavily backed by the Edeka Group, Picnic utilizes a "milkman model". Electric vans drive fixed, highly predictable neighborhood routes daily. It has secured a leading market position across several German regions like North Rhine-Westphalia.
- [Knuspr](#): A premium online-only supermarket operating in major cities like Berlin, Frankfurt, and Munich. They specialize in bringing local farm shop produce and artisan brands to customers' doors alongside mainstream groceries.

Quick-Commerce and Delivery Apps

Following the collapse or buyout of many independent instant-delivery startups, these platforms focus on smaller baskets, top-up items, and instant local commerce.

- [Flink](#): Germany's primary surviving quick-commerce brand. Rather than competing alone, Flink has tightly embedded itself into traditional retail structures (partnering with Rewe for sourcing) to serve within 10-to-30-minutes.
- [Wolt](#) and [Lieferando](#): Initially food delivery apps, they have rapidly scaled into "local marketplace commerce". They partner directly with local Rewe or Edeka storefronts (as well as their own "Wolt Market" micro-hubs) to fulfill grocery orders within an hour.

Beverage Specialists

- [Flaschenpost](#): Part of the Oetker Group, this is the dominant app for heavy drink crate deliveries (beer, water, soft drinks).

Section 3: Competition

The main competitors for U.S. suppliers include domestic producers and producers from other EU member states, such as the Netherlands, Italy, Poland, France, and Belgium. The U.S. industry's advantages include a good reputation for consistent quality and stable supply. The main advantages of competitors are proximity and price.

Table 4: Overall Competitive Situation for Consumer-Oriented Products (2025)

Product Category and Total Imports	Main Suppliers (Value) in Percentage	Strengths of Key Suppliers	Advantages and Disadvantages of Local Suppliers
Meat (HS 02) MT 2.120 USD 10.4 billion	1. Netherlands – 27.3 2. Poland – 19.4 3. Belgium – 9.9 24. USA – 0.11	1-3) Proximity and availability. 24) U.S. imports consist of hormone-free beef under the Hilton beef quota.	Germany focusses on pork rather than on beef production.
Fish and Seafood (HS 03 + HS 16) MT 1.4 million USD 9.9 billion	1. Poland – 21.6 2. Netherlands – 18 3. Denmark – 7.8 10.USA – 2.6	1-3) Proximity and availability. 10) USA is Germany's third largest supplier of Alaska Pollock fillets after China and Russia (sanction exempt).	Tradition in fish and seafood trading and processing. Fish is popular.
Snack Foods excl. nuts (HS 1905 +1704) MT 1.4 million USD 5.9 billion	1. Poland – 17.2 2. Netherlands – 15.7 3. Italy – 12.3 26. USA – 0.3	1&3) Proximity and availability. 2) Volumes mainly consist of re-exports from China, Thailand, and USA. 26) Many snack food trends originate in the USA.	Tradition in snack food production. Germany is one of the global market leaders in snack foods.
Beer and Wine (HS 2203, 2204,	1. Italy – 33.1 2. France – 26.6	1-3) Proximity, reputation, climatic conditions for wine	Wine only grows in the southern part of

2205, 2206) Liters 1.95 billion USD 3.70 billion	3. Spain – 12 11. USA – 1.1	growing. 11) USA is known for premium and craft quality.	the country. Insufficient domestic supply, especially for red wine.
Tree Nuts (HS 0801 +0802 +200819) MT 570,379 USD 4.5 billion	1. USA – 25.7 2. Turkey – 14.7 3. Netherlands – 8.9	1) USA is the leading supplier of almonds, pistachios, and walnuts. 73 percent increase in imported value compared to 2024. 2) Turkey produces 70 percent of the world’s hazelnut supply. 3) The Netherlands is a large re-exporter of cashew nuts.	Domestic production is minimal. Germany is a leading producer of marzipan and has high demand for processing almonds and lately high demand for pistachios.
Food Preparations (HS 210690) N/A USD 4.04 billion	1. Netherlands – 22.8 2. Poland – 13.9 3. Austria – 11.3 17. USA – 1.2	1-3) Proximity and availability. 17) Reputation for trend setting products. 58 percent increase in imported value compared to 2024.	Strong domestic food processing industry.
Sauces and Preparations (HS 2103) N/A USD 1.32 billion	1. Italy – 26.9 2. Netherlands – 22.9 3. Poland – 10.1 12.USA – 1.7	1-3) Proximity and availability. 12) USA is a well-known supplier of barbeque sauces.	Strong domestic food processing industry.
Peanuts (HS 1202) MT 130,528 USD 245.2 million	1. Netherlands – 60.5 2. Argentina – 10.7 3. Belgium – 7.6 5. USA – 5.6	1) Volumes consist of re-exported peanuts from Argentina, the USA, and Brazil. 2) Large exporter of peanuts. 3) Re-exported peanuts. 5) High quality and sustainability practices.	No local availability, high demand from well-established snack food industry.
Raisins (HS 080620) MT 69,720 USD 234.9 million	1. South Africa – 29.6 2. Turkey – 19.4 3. Netherlands – 12.7 9. USA – 2.9	1) Strong exports to the EU and UK of Thompson seedless. 2) Low prices. 3) Proximity and re-exports. 9) High quality and consistency.	No local availability.
Dried Prunes (HS 0813 20) MT 10,573 USD 47.9 million	1. Chile – 50.9 2. USA – 18.2 3. France – 11.7 4. Poland – 5.6	1) Product pricing, zero duty access through EU-Chile FTA. 2) Good reputation for quality, California origin adds value.	No local availability.

		3) Proximity and re-exports. 4) Proximity and quality.	
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Source: Trade Date Monitor, Products ranked according to value of products (last update: September 16, 2026)

Section 4: Best Product Prospects

Product selection in Germany comprises more than 170,000 food and beverage products. A solid 40,000 new products expand the range every year and also give rise to new market segments. On average, only 13,000 of these manage to hold their ground for more than two years, while the rest give way to new trends.

Top Consumer-Oriented Products Germany Imports from the World (2025):

- Dairy products: Cheese, milk and cream, butter,
- Fresh fruit (fresh, unless other specified): Grapes, fresh or dried bananas, avocados, apples, cranberries, blueberries, oranges,
- Chocolate and cocoa products,
- Fresh vegetables (fresh or chilled): Tomatoes, fruits from capsicum or pimenta genus, cucumbers and gherkins,
- Bakery goods, cereals and pasta: bread, pastry, cakes, biscuits, cookies, pasta.

Top Consumer-Oriented Products Germany Imports from the United States (2025):

- Tree nuts: Pistachios, almonds, walnuts, hazelnuts, pecans,
- Distilled spirits: Whiskies, liqueurs and cordials, rum, gin,
- Wine and related products,
- Food preparations,
- Condiments and sauces.

Products Present in Market with Good Sales Potential:

- Tree nuts: Pistachios, almonds, walnuts, hazelnuts, pecans,
- Fish and seafood products,
- Beef and game: Hormone-free beef, bison meat, exotic meat, and processed meat products,
- Dried fruits: Prunes, raisins, mangoes, dates,
- Fruit juice concentrates: Cranberry, grapefruit, prune,
- Highly processed ingredients: Dextrins, peptones, enzymes, lecithin, and protein concentrates,
- Organic products,
- Dog and cat food.

Products Not Present in Significant Quantities, but have Good Sales Potential:

- Ingredients for the natural and healthy foods industry,
- Ready-to-eat meals,
- Snack foods,
- Bakery products,
- Pulses,
- High-quality beef,
- Innovative sauces, condiments, and confectionary products.

Products Not Present in Market due to Significant Barriers:

- 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 5: 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.

Table: Major Government Regulatory Agencies

Name	Contact
Bundesministerium für Landwirtschaft, Ernährung, und Heimat (BMLEH) (Federal Ministry of Agriculture, Food & Regional Identity) Rochusstr. 1, 53123 Bonn, Germany	Tel: +49-228 – 99 -529-0 Fax: +49-228 - 99-529-4262 Website: https://www.bmleh.de/EN/Home/home_node.html
Bundesamt für Verbraucherschutz und Lebensmittelsicherheit (BVL) (Federal Office of Consumer Protection and Food Safety) Bundesallee 51, 38116 Braunschweig, Germany	Tel: +49 30 18444-99999 Fax: +49 30 18444-9998 Mail: poststelle@bvl.bund.de Website: https://www.bvl.bund.de/EN/Home/home_node.html
Bundesanstalt für Landwirtschaft und Ernährung (BLE) (Federal Office for Agriculture and Food) Deichmanns Aue 29, 53179 Bonn, Germany	Tel.: +49 228 6845 – 0 Fax: +49 228 6845-3444 Website: https://www.ble.de/EN/Home/home_node.html

Other Government Sources for Data:

- Deutsches Patent- und Markenamt (German Patent and Trademark Office):
<https://www.dpma.de/english/index.html>
- A list of other Import Specialists and Technical Contacts can be found in the latest Food and Agricultural Import Regulations and Standards Report for Germany:
<https://www.fas.usda.gov/data/gain/2026/05/germany-fairs-country-report-annual>

U.S. Department of Agriculture
Foreign Agricultural Service

Phone: +49- 30- 8305 ext.1150

Physical Address:
Clayallee 170
14195 Berlin, Germany

Email: agberlin@usda.gov

Website: <http://www.fas.usda.gov>

FAS Berlin market and commodity reports can be found in the Global Agricultural Information Network (GAIN) at: <https://gain.fas.usda.gov/#/home>

FAS Berlin DelicioUS! Market Promotion Program: <https://delicious-usa.com/>

Attachments:

No Attachments