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Canada



The Biscuit Market in Germany

February 1999

(Également disponible en français sous le titre,
Le marché des biscuits en Allemagne)

Prepared by the
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and the
Canadian Trade Commissioner Service

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The Government of Canada has prepared this report based on primary and secondary sources of information. Readers should take note that the Government of Canada does not guarantee the accuracy of any of the information contained in this report, nor does it necessarily endorse the organizations listed herein. Readers should independently verify the accuracy and reliability of the information. This report is intended as a concise overview of the market for those interested in its potential and is not intended to provide in-depth analysis which may be required by the individual exporter.

THE BISCUIT MARKET IN GERMANY



EXECUTIVE SUMMARY

The fourth-largest biscuit market in Europe, the German biscuit market was valued at nearly US\$1.3 billion in 1997. The largest share of sales is from sweet biscuits, which accounted for nearly 85% of total sales in 1997.

Between 1993 and 1997, biscuit sales increased by an annual average of 1.1%. However, between 1998 and 2002, sales are forecast to grow by 27%, to reach approximately US\$1.65 billion. Price and health concerns are expected to be driving forces in the market, which will therefore see an increase both in competitively priced private-label brands and in premium-quality biscuits, especially those that are low in fat, salt and sugar.

In 1997, Canadian biscuit exports to Germany totalled US\$27,000, or less than 1% of total German biscuit imports. However, the forecast growth of premium-quality products in the German market should translate into increased opportunities for Canadian biscuit producers. Forming joint ventures with German biscuit producers may provide the best means of entry in to the market.

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THE BISCUIT MARKET IN GERMANY



MARKET OVERVIEW

With a population of 82 million, Germany is the largest country in the European Union (EU) and has the third-largest economy in the world. German consumers are among the most affluent in the world. Food and beverage expenditures account for approximately 17% (US\$3,000 per year) of total annual consumer expenditures.

As a result of the recent recession, German consumers have become more price conscious, a factor that has led to the growth of competitively priced private-label brands. Although private-label brands have established themselves in the German biscuit market, the gradual economic recovery has now led to demand for more premium-quality or specialty biscuits.

The German biscuit market can be divided into sweet biscuits (cookies) and savoury biscuits (crackers). Sweet biscuits account for nearly 85% of total biscuit sales. Within the sweet biscuit sector, chocolate and butter cookies are the most popular products, while wafers tend to be the least popular.

Within the savoury biscuits sector, herb and salted biscuits account for over 75% of sales. This sector is forecast to increase by 30% between 1998 and 2002, with growth spurred by the demand for healthier products, such as wholewheat crackers and for relatively new products such as cheese and pizza biscuits. Between 1993 and 1997, sales of pizza and cheese biscuits, increasing respectively by 38% and 72%, showed the strongest growth in popularity.

Children's themed biscuits and light/diet biscuits are also gaining popularity in the German market. The market for these products is anticipated to grow by between 7% and 10% annually through 2001.

Families are currently the largest group of consumers of biscuits, while students and people over the age of 65 remain the lowest purchasers. Within families, women purchase biscuits at nearly twice the rate that men do, and biscuit purchases tend to be more common in households in which there are children.

Key Factors Shaping Market Growth

The rise in the number of working women and single-person households, for whom meal-times are less structured, has led to an increase in the consumption of snacking foods such as biscuits. As traditional meal structures have eroded, there has also been an increase in the number of impulse purchases of biscuits, a phenomenon that makes high visibility and point-of-sale marketing of a product extremely important.

In response to increased snacking, biscuit manufacturers have introduced single-serving packages of biscuits, which have proven to be quite popular with both school children and adults in the workplace.

Sales of savoury biscuits, as well as sweet biscuits low in fat, salt and sugar, have benefitted from a rise in health consciousness among consumers. While sales of healthier biscuits have steadily increased in recent years, many manufacturers produce their healthier biscuits with chocolate coverings in an attempt to make them appealing to consumers.

Opportunities

The best opportunities for Canadian biscuit producers lie in the supply of high-end or specialty biscuits. This is because transportation costs, duties and other costs associated with exporting, along with the extremely price-competitive nature of this market, make higher-priced specialty biscuits one of the few areas in which Canadian products can be competitive.

Specific opportunities lie in the export of pizza and cheese biscuits, as well as in children's themed biscuits and light/diet biscuits.

Actual and Planned Projects

On January 1, 1999, Wal-mart completed its purchase of 74 Inter-Spar hypermarkets from Spar Handels Ag. Wal-mart is now estimated to be the fifth-largest operator of hypermarkets in Germany.

In November 1998, Metro AG, Germany's largest food and beverage retailer with an annual retail turnover of US\$36.7 billion, announced plans to sell a number of its smaller retail outlets. This sale follows Metro's purchase of Allkauf, Germany's tenth largest food and beverage retailer, in February of the same year.

Danone and Griesson Group have announced plans to join their biscuit operations in Germany. Griesson will control 60% of the new company -- Griesson-De Beukelaer -- which is anticipated to generate sales of nearly \$500 million annually.

When its new biscuit and confectionery factory in Wurzen is complete, the German confectionary and bakery company Stollwerck AG will have spent nearly \$100 million on construction of the site, which is expected to have a production capacity of 15 000 tonnes annually and a turnover of approximately \$100 million.

COMPETITIVE ENVIRONMENT

Local Capabilities

The German biscuit market, made up of a handful of large producers and many small producers, is quite fragmented. The majority of producers hold a minimal share (less than 2%) of the total market, and further competition has developed in recent years with the growth of private-label brands.

Currently, domestic production accounts for 77% of total biscuit sales.

In 1997, with 23% of total sales, Bahlsen Gruppe KG held the largest share of the German biscuit market. The company has averaged 3% annual growth since 1993, although much of this growth has been the result of company acquisitions, including the purchase of Biscuits Saint-Michel-Grellier SA in 1994 and some of Brandt Zwieback-Biskuits GmbH's baking facilities in 1995.

Other major manufacturers in the German biscuit market include Brandt Zwieback-Biskuits GmbH and Intersnack Knabbergebäck GmbH. Brandt currently accounts for 11% of total biscuit sales while Intersnack is a key player in the savoury biscuits market, accounting for 16% of savoury biscuit sales.

International Competition

In 1998, German biscuit imports accounted for 23% of total sales. General Biscuits GmbH (GBG), a subsidiary of Danone, is the largest foreign manufacturer in the German market, accounting for approximately 10% of total sweet biscuit sales and 6% of savoury biscuit sales. Location and preferential tariffs give other EU countries a considerable advantage over Canadian exporters. Major biscuit exporters include Switzerland, Poland and Turkey.

Although EU regulations ban government-funded promotions, France, Britain and Italy have restructured their promotional organizations in such a way as to continue to support their food producers. For example, the French promotional organization (SOPEXA) spends approximately US\$13 million annually promoting food products in the German market. The support which foreign producers receive helps make them even more competitive in the German market.

Canadian Position

In 1997, Canadian biscuit exports totalled US\$27,000, comprising less than 1% of the total German biscuit market. Biscuit exports have fluctuated significantly in recent years from US\$12,000 in 1995 to zero in 1996, however, they continue to account for less than 1% of the total German biscuit market.

Because of the highly competitive nature of the market, the best opportunities for Canadian exporters may lie in forming joint ventures with German biscuit producers. Canadian producers of new or specialty biscuits will may be able to find German partners who are interested in marketing these products in the German market.

Competitive Advantage through Canadian Government Policies and Initiatives

Export Development Corporation

The Export Development Corporation (EDC) offers export financing and insurance to Canadian exporters. Additionally, insurance can be provided for larger transactions that are subject to the terms and conditions established by the buyer. EDC prefers to work through letters of credit, banks credits or bank guarantees. Details and approval for financing will be considered case by case. For more information, please contact EDC.

Canadian Commercial Corporation

The Canadian Commercial Corporation (CCC) also offers small and medium-sized Canadian companies access to financing and better payment terms under the Progress Payment Program (PPP). The PPP concept was developed as a partnership between major Canadian financial institutions and the CCC. It enables the exporter's bank to open a project line of credit for the exporter's benefit, based on CCC approval of the project and the exporter's ability to perform. For more information, please contact the CCC.

Program for Export Market Development

The Program for Export Market Development (PEMD) is the government's primary international business development program. The objective of PEMD is to increase export sales of Canadian goods and services by sharing the costs of activities that companies normally could not or would not undertake alone, thereby reducing risks involved in entering a foreign market. The PEMD refundable contribution is a minimum of \$5,000 and a maximum of \$50,000. Preference is given to companies with annual sales greater than \$250,000 and less than \$10 million, or with less than 100 employees for a firm in the manufacturing sector and 50 in the service industry. Eligible activities, the costs of which are shared on a 50/50 basis, include market visits, trade fairs, incoming buyers, product testing for market certification, legal fees for marketing agreements abroad, transportation costs of off-shore company trainees, product demonstration costs, promotional materials, and other costs necessary to execute the market development plan (Other components of the program deal with international bid preparation under Capital Project Bidding, and with Trade Associations when developing international marketing activities for their membership). For additional information, or to receive an application, please contact the International Trade Centre in your province.

MARKET LOGISTICS

Channels of Distribution

Germany has a highly efficient food and beverage distribution system, with a number of distribution channels to ensure speedy and safe delivery of products at a relatively low cost. The country's central location in Europe, combined with its efficient distribution channels, also makes it a good base from which to ship products to other European countries.

Like most food markets in Germany, the biscuit retail market is undergoing a trend away from smaller stores towards large discounters, hypermarkets and supermarkets. The recent popularity of large retail outlets is a result of both the recession and the reunification of the country. The recession and resulting increase in competition have forced many small and medium-sized retailers to join forces in order to avoid declaring bankruptcy, a phenomenon that has led to a decrease in the number of retail outlets (see Table 1). The number of retailers is forecast to continue to decline for the foreseeable future.

Table 1. Number of Food Retail Outlets in Germany, 1993-1997

	1993	1994	1995	1996	1997
Discounters	6 864	7 505	7 946	8 693	8 965
Hypermarkets	5 872	5 925	6 188	6 390	6 507
Supermarkets	4 962	4 898	4 890	4 978	4 916
Outlets under 400 sq. m.	65 002	60 672	57 376	54 239	51 911
Total Retailers	82 700	79 000	76 400	74 300	72 300

Source: Euromonitor, *Sweet and Savoury Biscuits*, December 1997.

The decline in and merging of smaller retailers have led to an increase in percentage of biscuit sales made by larger retailers. In 1997, the most popular outlets were discount stores (with over 50% of biscuit sales), followed by hypermarkets (with over 28% of total sales). Smaller, independent outlets accounted for only 12% of sales. The "Other outlets" category (in Table 2), which is primarily made up of gas stations and

small kiosks, increased its share of biscuit sales by more than 100% between 1993 and 1997, although overall it accounted for less than 2% of total sales.

Table 2. Sweet and Savoury Biscuit Sales by Retail Format, 1993-1997 (Percentage Share)

	1993	1994	1995	1996	1997
Discounters	53.2	53.1	53.1	53.0	53.0
Hypermarkets	25.5	26.5	27.1	27.8	28.3
Independent grocery stores	14.9	13.8	13.1	12.6	12.0
Supermarkets	4.7	4.6	4.3	4.1	4.1
Department stores	1.0	0.9	0.9	1.0	1.1
Other outlets	0.7	1.1	1.5	1.5	1.5

Source: Euromonitor, *Sweet and Savoury Biscuits in Germany*, December 1997.

Table 3. Germany's Top 10 Food Retailers, 1997 (Percentage of Sales)

1) Edeka/AVA Group	15.7	6) SPAR Group	7.0
2) Rewe Group	15.6	7) Lidl & Schwarz Group	6.7
3) Aldi Group	12.3	8) Schlecker	2.3
4) Metro AG	10.1	9) Dohle Group	1.7
5) Tengelmann Group	8.0	10) Allkauf Group	1.6

Source: U.S. Department of Agriculture. *Germany: Snapshot of the Retail Food Sector*, September 9, 1998.

Direct Sales

Direct sales are probably the most attractive, cost-effective distribution option for Canadian exporters. However, because of the significant number of requests received by large retail chains such as Rewe Ag, EDEKA/AWA-Group, and Aldi-Group, manufacturers often have to demonstrate specific advantages in price, quality or support in order to come to an agreement. Canadian producers, especially those with no previous presence in the German market, may find it difficult to convince retailers to import large quantities of their product, while foreign suppliers may provide similar products with better support and at a lower cost.

Distributors and Wholesalers

The most effective/feasible method for Canadian exporters to introduce new products to the German market is through German distributors or wholesalers. Distributors ensure that buyers receive the timely service and delivery to which they are accustomed. Moreover, distributors are legally required to ensure that all imported products adhere to German/EU food regulations. Canadian exporters may need to use more than one distributor or agent in order to gain access to multiple regions within Germany.

German distributors tend to specialize in specific products or product groups. As a result, distributors and wholesalers usually have in-depth knowledge of the market and of the necessary regulations. Distributors and wholesalers can also arrange for small shipments of a product to test its chances of success in the market. Choosing a good distributor or wholesaler can make the difference between success or failure in the German market.

When looking for a distributor, exporters are encouraged to consider the distributor's relationship with buyers and banks; the condition of their facilities, and their ability to keep inventory.

Agents and Sales Representatives

Using the services of an agent is a good way to introduce new products to the German market. Agents are independent contractors who tend to seek out long-lasting relationships with a manufacturer. Agents typically arrange contracts on behalf of the exporter they are representing, but do not take ownership over the products they sell.

When choosing an agent, exporters need to weigh a number of factors, such as the region(s) the agent covers; reputation; product knowledge; experience in handling the exported product; commission to be paid; what (if any) after sales service is provided; track record; and size and quality of staff. Germany has numerous agents who have extensive knowledge and experience of the local biscuit market.

Market-entry Considerations

Between January 1, 1999 and the year 2002, European national currencies will gradually be replaced by the new euro currency throughout most the European Union. Common use of the euro across the EU will help consumers to identify the lowest-cost products and will alleviate unfair pricing advantages that result from currency distortions.

Advertising practices in Germany differ considerably from those in Canada. Biscuit exporters are encouraged to discuss potential advertising campaigns with an advertising agency in Germany. The German Association of Advertising Agencies is a good place to begin.

German Association of Advertising Agencies
(Gesamtverband Werbeagenturen e.V.)
Friedensstr. 11
60311 Frankfurt a.M.
Tel: (49-69) 235-096

Suggested Business Practices

When it comes to business, Germans have a reputation for being extremely precise. All aspects of conducting business, from arriving on time for a meeting to carrying out all details of a contract, are considered of utmost importance. Personal relationships tend to be conducted separately from business relationships, and Canadian exporters may need years of contact with German counterparts before more personal relationships are developed.

A long-term commitment to the market is the key to success in Germany. Many German business people are wary of exporters from outside of the EU because of their perceived lack of commitment. New products introduced in Germany generally require 12 to 18 months before their success can be accurately assessed. Only by making a long-term commitment can Canadian producers overcome their geographical disadvantage with respect to other EU competitors. Such long-term commitment requires the provision of adequate after-sales support, as well as frequent visits to the country.

Import Regulations

The German Federal Ministry of Health, in the German Ministry of Agriculture, is responsible for ensuring that imported foods conform to German food law regulations. For more information, exporters are encouraged to contact:

German Federal Ministry of Health
(Bundesministerium fuer Gesundheit)
Abteilung 4
Am Probsthof 78a
D-53121 Bonn, Germany
Tel: (49-228) 941-0
Fax: (49-228) 941-4900

Official registration of food products is not required in Germany.

As a member of the European Union, Germany follows the Community Integrated Tariff (TARIC) system, which applies duties to all imports from non-EU countries. EU/German import regulations, duties, and tariff-rate-quotas protect domestic industries by limiting the range of foreign products entering the market. Tariffs on biscuits vary considerably, from 10.3% to 27.8%, depending on the sugar content, fillings, coatings, etc..

Local Standards, Certificates or Registrations

Import/export permits and licences for agricultural products are issued by the following two organizations:

Federal Office for Foodstuffs and Forestry
(Bundesamt für Ernährung und Forstwirtschaft)
Postfach 18 02 03, D-60083 Frankfurt/Main
Adickesallee 40, D-60322 Frankfurt/Main
Tel: (49-69) 1-56-40
Fax: (49-69) 1-56-44-45

Federal Institute for Agricultural Market Regulation
(Bundesanstalt für Landwirtschaftliche Marktordnung)
Postfach 18 01 07, D-60082 Frankfurt/Main
Adickesallee 40, D-60322 Frankfurt/Main
Tel: (49-69) 1-56-40
Fax: (49-69) 15-64-7-90-95

All products exported to Germany must be accompanied by a standard set of shipping documents. It is recommended that all documents be completed in both German and English in order to avoid unnecessary delays. In addition, Canadian exporters should request any other required information from the importer before goods are shipped in order to ensure that the product meets all German/EU regulations.

Commercial Invoice

The commercial invoice serves as a bill to the buyer from the exporter. The invoice should be thoroughly checked, since any errors or omissions can result in serious delays, fines, or even confiscation of goods. While no special form is required, the invoice should be written in both German and English, and should include:

- place and date of issue;
- names and addresses of importer and exporter;
- detailed description of merchandise, including identifying marks, quantities (in units customary to international trade), quality, and kinds;
- method of shipment;
- signature of the responsible officer, along with name and title;
- all freight and insurance charges; and
- shipper's invoice number and customer's order number.

Several copies of the commercial invoice should be sent, along with any company promotional information.

Certificate of Origin

A certificate of origin verifies that the goods originate in Canada and therefore are subject to all duties or taxes that apply to Canadian products. Although certificates of origin are not required for all products, exporters are advised to complete them anyway, in order to avoid any possible problems or delays.

Packaging and Labelling

Currently, food label registration, review, clearance and approval are not regulated by any official agency. Although German inspection agencies located at the point of entry may conduct further inspections in order to verify that imported foods are safe for consumers, most initial inspections are conducted by private food laboratories (see "Key Contacts and Support Services" for a select list). German importers are legally responsible for ensuring that all imported foods have been tested, and they are therefore generally very cooperative in working with foreign manufacturers to make sure that products meet all import and

marketing requirements.

Exporters are encouraged to examine both German and EU regulations regarding packaging and labelling standards. Labels of all imported biscuits must be written in German and must include the following:

- name of the product;
- identification of the product;
- expiry date and any storage requirements;
- country of origin;
- manufacturer's lot or batch number;
- all nutritional information;
- list of ingredients and weights in metric units; and
- list of additives, preservatives, or colouring used.

Germany is considered to be among the most advanced European countries in its environmental legislation. Public demands for the minimization of packaging materials have led to the implementation of many new packaging laws, including a 1993 law stipulating that all packaging for locally produced products must have the "Green Dot" recycling symbol to indicate that the packaging is made out of recycled material. Licences for use of the Green Dot symbol are issued to German producers by the "Duales System Deutschland" (DSD).

While the "Green Dot" symbol is not legally required for imported products, its absence makes the sale of imported products extremely difficult. Technical restrictions concerning weight, volume, and labelling are also applied. Canadian exporters should work closely with German importers, who are responsible for obtaining a licence and for paying the associated costs.

For more information about the Green Dot symbol and its associated recycling program, Canadian exporters should contact their German importer or the DSD.

Duales System Deutschland GmbH
Frankfurter Strasse 720-726
D-51145 Koeln, Germany
Tel: (49-2203) 937-0
Fax: (49-2203) 937-190

In recent years, in an attempt to reduce costs while complying with environmental standards, German manufacturers have significantly changed the composition of their biscuit packaging. In comparison with many other European markets, Germany has a large proportion of biscuits packed in cartons or thermoformed trays with film overwraps. Many manufacturers have changed their packaging from pvc thermoformed trays to polypropylene with a PP overwrap film in response to environmental concerns.

For more information regarding export promotion, labelling, packaging, agents and distributors, exporters are invited to contact:

Stephan Rung
Commercial Officer
Consulate of Canada
Benrather Strasse 8
D-40213 Düsseldorf, Germany
Tel: (49-211) 172-1718
Fax: (49-211) 359-165

For more information on regulatory matters, exporters are invited to contact:

J. Peter Otto
Commercial Officer
Embassy of Canada
Friedrich-Wilhelm-Str. 18
53113 Bonn, Germany
Tel: (49-228) 968-3323
Fax: (49-228) 968-3900

Authentication of documents

Documents requiring authentication, such as certificates of sale and letters authorizing an exporter's local agent or importer to act on their behalf, must first be notarized in Canada. Notarized documents can then be authenticated, at no cost to the exporter, by forwarding them to:

Department of Foreign Affairs and International Trade
 Authentication and Service of Documents (JLAC)
 125 Sussex Dr.
 Ottawa, ON K1A 0G2
 Tel: (613) 992-6602
 Fax: (613) 992-2467

Export Credit Risks, Restrictions on Letters of Credit or Currency Controls

Since increased competition in the market has led to an increased number of mergers or bankruptcies, Canadian exporters wishing to enter the German biscuit market should thoroughly analyze the financial position and long-term plans of any potential German business associates. The growth of private label brands as well as new businesses has increased competition in this market. This situation is anticipated to stabilize as the number of producers decreases.

PROMOTIONAL EVENTS

Participating in German trade fairs is a highly effective way of establishing business contacts. Trade fairs are a common occurrence in Germany, and they tend to attract buyers from around the world, which may provide Canadian exporters with other sales leads. Germany has three of the five largest fairgrounds in the world, which play host to numerous shows, including ANUGA, the world's largest international food fair.

Event / Description**Organizer****ISM (International Sweets and Biscuit Show)**

January 30 - February 3, 2000
 Cologne, Germany
 World's largest show for snacks and confectionary products.

Messe- und Ausstellungs-GmbH

Messeplatz 1
 50679 Köln, Germany
 Tel: (49-221) 821-0
 Fax: (49-221) 821-2574
 Internet: <http://www.koelnmesse.de/>

ANUGA 1999

October 9-14, 1999
 Cologne, Germany
 International trade show for food & beverages.

Messe- und Ausstellungs-GmbH

Messeplatz 1
 50679 Köln, Germany
 Tel: (49-221) 821-0
 Fax: (49-221) 821-574
 Internet: <http://www.koelnmesse.de/>

KEY CONTACTS AND SUPPORT SERVICES

Canadian Embassy in Bonn

Friedrich-Wilhelm-Strasse 18
53113 Bonn, Germany

Mailing Address:

Postfach 12 02 40
53044 Bonn, Germany
Tel: (49-228) 968-0
Fax: (49-228) 968-3900
E-mail: bonn.td@bonn01.x400.gc.ca

Canadian Consulate in Düsseldorf

Benrather Strasse 8
D-40213 Düsseldorf, Germany
Tel: (49-211) 17-21-70
Fax: (49-211) 35-91-65

Office of the Canadian Embassy

Internationales Handelszentrum
Friedrichstrasse 95, 23rd Floor
10117 Berlin, Germany
Tel: (49-30) 20-31-20
Fax: (49-30) 20-312-590

Canadian Consulate in Munich

Tal 29
80331 Munich, Germany
Tel: (49-89) 21-99-57-0
Fax: (49-89) 21-99-57-57
E-mail: munic.td@bonn02.x400.gc.ca

Agriculture and Agri-Food Canada

930 Carling Avenue, 10th Floor
Ottawa, Ontario, K1A 0C5
International Markets Bureau
Contact: Nathalie Vanasse
Tel: (613) 759-7726
Fax: (613) 759-7506
E-mail: vanassen@em.agr.ca

Canadian Consulate in Hamburg

ABC-Strasse 45
20354 Hamburg, Germany
Tel: (49-40) 35556-295
Fax: (49-40) 35556-294

Canadian Commercial

Corporation Metropolitan Centre
50 O'Connor Street, 11th Floor
Ottawa, Ontario, K1A 0S6
Tel: 1-800-748-8191 or (613) 996-0034
Fax: (613) 995-2121
E-mail: info@ccc.ca

Business Development Bank of Canada

#400, 5 Place Ville Marie
Montreal, Quebec H3B 5E7
Tel: 1-888-463-6232
Fax: (514) 283-0617
Internet: <http://www.bdc.ca/>

Alliance of Manufacturers and Exporters Canada

75 International Boulevard, 4th Floor
Toronto, Ontario, M9W 6L9
Tel Ottawa: (613) 563-9218
Tel Toronto: (416) 798-0000
Fax: (416) 798-8050
Internet: <http://www.plantir.ca/the-alliance>
E-mail: national@the-alliance.com

Department of Foreign Affairs & International Trade - Market Support Division (TCM)

125 Sussex Drive
Ottawa, Ontario, K1A 0G2
Tel: (613) 995-1773
Fax: (613) 943-1103

Export Development Corporation

151 O'Connor Street
Ottawa, Ontario
K1A 1K3
Tel: (613) 598-2500
Fax: (613) 237-2690
Email: export@edc4.edc.ca
Internet: <http://www.edc.ca>

Department of Foreign Affairs & International Trade - Central European Division (REC)

125 Sussex Drive
Ottawa, ON, K1A 0G2
Tel: (613) 943-0611
Fax: (613) 995-8756

Chambers of Commerce in Germany

Darmstadt - Chamber of Industry and Commerce

Rheinstr. 89
D-64295 Darmstadt, Germany
Contact: Helmut Schoenleber
Tel: (49-6151) 871-266
Fax: (49-6151) 871-281

**DIHT - Deutsche Industrie und Handelstag
(Federation of German Chambers of Industry and Commerce)**

Adenauerallee 148
53113 Bonn, Postfach 1446, 53004 Bonn
Tel: (49-0228) 1040
Fax: (49-0228) 104-158

Kiel Chamber of Commerce and Industry

Lorentzendam 24
24103 Kiel, Germany
Tel: (49-431) 51-940
Fax: (49-431) 5194-234

**Hannover - Industrie - und Handelskammer
Hannover**

Hildesheim Postfach 30 29 30030 Hannover
Contact: Werner Jathe
Tel: (49-0511) 3107-0
Fax: (49-0511) 3107-333

Canadian German Chamber of Industry and Commerce Inc.

480 University Avenue, Suite 1410
Toronto, Ontario M5G 1V2
Tel: (416) 598-3343
Fax: (416) 598-1840

Canadian Financial Institutions**Royal Bank of Canada**

Lyoner Str. 15
60528 Frankfurt, Germany
Tel: (49-69) 669050
Fax: (49-69) 66905256

Commercial Banks**Chase Manhattan Bank**

Alexanderstrasse 59
60489 Frankfurt/Main, Germany
Tel: (49-69) 24789-0
Fax: (49-69) 24789-9285

Citicorp

Neue Mainzer Strasse 75
60311 Frankfurt/Main, Germany
Tel: (49-69) 1366-0
Fax: (49-69) 1366-1113

Commerzbank

Neue Mainzer Strasse 32-36
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German Government Contacts

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Euromonitor. *Market Briefing - Germany: Cookies/Biscuits and Crackers Market*, June 1998.

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USDA. *Annual Marketing Plan*, July 31, 1998.

OTHER REFERENCE MATERIAL

Useful Internet Sites

Agri-Food Trade Service: <http://ats.agr.ca>

Business in Germany: <http://www.business-in-germany.de>

Chambers of Commerce of Germany: <http://www.uitc.com/chambers/europe/germany.htm>

DFAIT Website: <http://www.dfait.maeci.gc.ca>

ExpoGuide: <http://www.expoguide.com>

Exportsource: <http://exportsource.gc.ca/>

Federal Office of Foreign Trade Information: <http://www.bfai.com>

German Agricultural Society: http://www.dlg-frankfurt.de/index_e.htm

German Banks: <http://www.german-banks.com/Inhalt.htm>

German Embassy and German Information Centre: <http://www.germany-info.org>

German Embassy in Ottawa: <http://www.germanembassyottawa.org/noframes.html>

German Government: <http://www.bundesregierung.de/english/01/newsf.html>

German Ministry of Foreign Affairs: http://www.auswaertiges-amt.de/1_fremsp/english/index.htm

German Website Search Engine: <http://web.de>

InfoExport: <http://www.infoexport.gc.ca>

International Association of Food Industry Suppliers (IAFIS): <http://www.iafis.org/>

M & M EURODATA Homepage: <http://www.mm-eurodata.de/english>

Ministry of Agriculture in Germany: <http://www.dainet.de/zadi/zadi-e.htm>

Press and Information Office of the Federal Government: <http://www.bundesregierung.de>

Strategis: <http://strategis.ic.gc.ca>

Tradeport: <http://www.tradeport.org>

Trade Show Central: <http://www.tscentral.com>

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

World Bank: <http://www.worldbank.org/>

Reader Evaluation

Please help the Team Canada Market Research Centre to produce market reports which meet your information needs by completing this evaluation form and returning it by facsimile at (613) 943-1103. Thank you for your valuable input.

1. How did you obtain a copy of this market report?

- InfoCentre FaxLink system
- Government worldwide web site
- InfoCentre help line
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- Local government office
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2. How would you describe this market report?

	Strongly agree	Agree	No opinion	Disagree	Strongly disagree
Useful	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Complete	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Well organized	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Well written	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ideal length	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3. In what form do you prefer to obtain these reports?

- Print
- Electronic

4. Based on the information in this report, what specific action(s) does your organization plan to take in this market? Check all that apply.

- Seek an agent/distributor
- Contact Canadian trade office abroad
- Visit the market
- Participate in a trade show abroad
- Do more research
- Nothing
- Other: _____

5. What other market reports would be of benefit to your organization? Please identify specific products and countries.

6. Which of the following categories best describes your organization? Check one only.

- Processor/manufacturer
- Government
- Trading house
- Student/academia
- Export service provider
- Consultant
- Industry/trade association
- Other: _____

7. What were your organization's total sales last year, in Canadian dollars?

- Less than 10 million 10 million to 50 million
- More than 50 million Not applicable

Additional comments/suggestions for improvement:

OPTIONAL

The name of your organization is: _____

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