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The Cheese Market In Germany

July 1998

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Prepared by the
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Department of Foreign Affairs and International Trade / Ministère des Affaires étrangères et du Commerce international

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The Team Canada Market Research Centre produces a wide range of market reports by region and sector for Canadian exporters.

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exporter.

The Cheese Market in Germany

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EXECUTIVE SUMMARY

The German cheese market is large, not only by European standards, but it is also one of the largest international markets for cheese, posting the third highest value of retail sales in the world. In 1997, sales of cheese in Germany reached US$7.1 billion - surpassed only by Italy and the US.

The German Agricultural Marketing Board (CMA) has projected that the German cheese market will grow by 2% annually to the year 2000, and will slow somewhat in the medium term. Analysts cite the popularity of healthy and convenient products, and their growth in the German food service establishments, as the primary forces driving growth of this industry.

The potential for Canadian firms in this market is significant and growing. Canadian cheese exports grew by over 400% from 1996 to 1997, to a value of nearly US$900,000. Although Canadian companies will face stiff competition from European producers, the forecast growth in consumption of 100,000 tonnes of cheese by the year 2000 should provide Canadian producers with even greater access to the German market.

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Team Canada • Équipe Canada

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, behind only the United States and Japan. While Germany's population is widely dispersed, problems concerning market access are eased by its well-developed distribution system.

Although Germany's 1997 production of 1.6 million tonnes of cheese was the highest of any world market, it still imports over US$2 billion worth of cheese annually.

The fact that cheese is consumed by over 90% of the German population on a daily basis presents a dilemma to cheese producers - while the market is lucrative, it is also highly competitive. In fact, various cheese producers have cut prices in an attempt to gain a larger share of the market. However, high degrees of brand recognition and brand loyalty have often stifled these attempts.

Sales of speciality cheeses, which sell at premium prices, have experienced steady growth in recent years. Unlike cheeses produced in the EU, Canadian products face additional tariffs and transportation costs which would, in turn, make most Canadian cheeses speciality products. Heightened demand for speciality cheeses, combined with Canada's reputation for manufacturing quality products, will provide Canadian producers with greater opportunities in the German cheese market.

Sales of hard cheeses increased by 7,000 tonnes, a rise of 12%, between 1991 and 1995. These cheeses benefited from the introduction of healthier products as well as a variety of packaging formats. Smaller packaging made many cheeses available to single-person households. Reduced package sizes also enable consumers to take cheese with them to work or school as part of a meal or even as a snack.

Mozzarella continues to be extremely popular in Germany. Consumption of mozzarella increased by nearly 20% in 1997, with sales of over 12,000 tonnes. Although mozzarella was only introduced to the German market ten years ago, it has experienced double-digit growth every year since its introduction. Galbani and Zott dominate this sector, while cheaper brands continue to have difficulty establishing consumer loyalty.

Cheese is expected to underpin growth in Germany's dairy market for the foreseeable future. Euromonitor forecasts that the cheese sector will grow from US$7.1 billion in 1997 to US$8.5 billion by 2001, nearly a 20% increase.

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Key factors shaping market growth

Despite the unification of East and West Germany, significant differences remain in consumer behaviour. For example, consumers in East Germany were initially captivated by the novelty of speciality products. However, given the region's low incomes and high unemployment, the trend has been toward more frugal tastes.

Indeed, German food consumption has changed significantly in recent years. Perhaps the most significant shift has been that consumers now have less time to shop and prepare meals. In response to these changes, manufacturers have begun pre-wrapping more varieties of cheese in an attempt to increase sales and appeal to a wider variety of consumers.

Manufacturers have also increased the variety of packages available, largely in response to the growing number of single person households, which, on average, have a higher disposable income than households with more than one person. In 1996, there were nearly 13 million single person households in Germany, which is equivalent to 15.9% of the population.

Heightened health awareness has led to a demand for healthier cheeses (ie. low fat or low salt varieties). Although the majority of cheese sold in Germany still contains a high fat content, sales of low fat, low salt, and cheeses with more minerals have all gained a larger share of the German market. While these healthier products tend to retail at premium prices, they comprise a well-established niche market in Germany, and often serve as an alternative to meat products.

Opportunities

The popularity of healthy cheese alternatives is expected to continue. Although Germans still consume many cheese products with high fat content, products which advertise less fat, more minerals, and lighter oils have built a health conscious consumer base.

Smaller packaging has also become a key marketing strategy. Products which are convenient for both the large number of single-person households and those consumers interested in carrying meals to work or school have been highly successful.

Cheese varieties which are new to the German market or not produced domestically represent a good opportunity for Canadian exporters. Just a few of the numerous cheese varieties introduced to the German market in the last two years are cheeses containing nuts, and varieties soaked in alcohol, or wrapped in bacon.

Organic cheese products are also an emerging trend in Germany. In fact, Germany accounts for almost 40% of all organic sales in Europe - one of the largest global markets for organic products. As such, consumption of organic cheeses has grown steadily in recent years. As demand for these products continues to grow, Canadian cheese producers will be able to benefit from Canada's image as a natural and reputable source for cheese products.

Actual and planned projects

Germany has planned to raise import quotas in the near future. This will allow non-EU countries greater access to the German market, especially with the recent demand for new and unique products.

The German dairy Ostbayrische Milchwerke merged in early 1998 with Goldsteig Kaesereien Bayerwald Cham-Plattling GmbH retroactively to January 1, 1998. A third producer, Rottaler Milchwerk, may join this partnership in the future. The companies hope that the merger will improve their distribution capabilities as well as expanding their range of products.

COMPETITIVE ENVIRONMENT

Local capabilities

German cheese manufacturers produce 70% of the cheese consumed within the country. Although German producers account for such a large share of the total market, there are numerous regional producers and only a handful of national manufacturers. The number of domestic producers has grown in recent years from 34 in 1991, to 43 in 1994, however, part of this growth can be attributed to the developments in east Germany.

German cheese producers benefit from the existence of the German Agricultural Marketing Board (CMA) which promotes German products both domestically and abroad. The CMA has an annual budget of approximately US$110 million, 70% of which is spent promoting the meat and dairy sectors. The CMA helps manufacturers develop marketing strategies, conducts market research and participates in agricultural trade shows.

Kraft-Jacobs Suchard GmbH holds the largest share of the German market with total annual sales (domestic and international) of nearly US$4 billion. Kraft is involved in nearly all sectors of the cheese market with leading brands such as Philadelphia cream cheese.

Other top producers include Union Deutsche Lebensmittelwerke GmbH, Nordmilch eG, and Hochland Gruppe. Private label producers and imports have become more competitive in recent years with the growing interest in new, healthy, and innovative products.

International competition

Despite the dominance of domestic producers, the import market presents significant opportunities. In 1996, Germany imported over US$2.3 billion worth of cheese from the rest of the world, with almost all imports originating from other European countries.

Manufacturers within the EU have considerable advantage over Canadian suppliers in the German market given their geographic proximity and preferential tariff schedules. In 1996, only New Zealand, ranked in the top 10 exporters of cheese to Germany. The Netherlands and France are the leading exporters to the German market with combined cheese exports valued at approximately US$1.6 billion.

France and the Netherlands also benefit from organisations such as SOPEXA (France) and the Dutch Bureau for Dairy Production, which run promotional programs in Germany and help producers export their products to Germany. The result of their efforts is that the Netherlands exported over US$940 million worth of cheese to Germany in 1996, and 28% of France's total cheese exports (US$650 million) were sold in the German market.

Canadian position

Canadian companies have a limited presence in the German cheese market. In 1997, Canadian exports of cheese were valued at US$887,000, an increase of over 400% from 1996. Although Canadian exports grew significantly in 1997, they still represented only 0.02% of total German cheese imports.

In 1992, Canadian exports of cheese were valued at US$174,000, however, between 1993 and 1995, Canada did not export any cheese to Germany. The size and forecast growth of the cheese market will create excellent opportunities for Canadian producers, who have a reputation for manufacturing quality products.

Opportunities for joint ventures may exist with smaller manufacturers. Large producers are unlikely to be open to these sort of agreements.

Competitive advantage through Canadian government policies and initiatives

The Export Development Corporation (EDC) does not have a financing program established to aid Canadian companies exporting cheese products to Germany. The EDC does, however, provide Canadian exporters with receivables insurance. The Global Comprehensive Insurance Policy, provided by the EDC, covers up to 90% of losses resulting from risks such as:

- insolvency or default of your foreign customer;
- payment delay caused by a blockage of funds or transfer difficulties;
- refusal of goods by your foreign customer (provided contract terms are met);
- war or hostilities in your customer's country or between two or more other countries;
- cancellation or non-renewal of export or import permits.

The EDC does have other, more customized, financial instruments to help meet the needs of Canadian exporters and lower their risks.

The Canadian Commercial Corporation (CCC) can also help Canadian exporters penetrate the German market. The CCC aids exporters in identifying market opportunities, assessing proposed transactions and the various parties to see if the CCC can provide support, preparing transaction bids or proposals, developing sales strategies and financing packages. CCC participation provides a guarantee from the Canadian government that the contract will be carried out.

After the CCC assesses the risks of a potential deal, and the capabilities of the parties involved, it acts as the prime contractor. Banks which provide funds for these export sales may boost the line of credit if the CCC is involved. Once the funds have been provided, the CCC ensures that the contract is carried out.

The CCC provides support for small to medium-sized companies (those with sales of C$50 million or less). Financial institutions which are involved in the CCC's Progress Payment Program (PPP) are:

- Bank of Nova Scotia

- Bank of Montreal

- Caisse Centrale Desjardins

- Canadian Imperial Bank of Commerce

- Royal Bank of Canada

- Toronto-Dominion Bank

- National Bank of Canada

- Hong Kong Bank of Canada

- Société générale

- Banque Nationale de Paris

Banks limit credit lines to C$2 million per transaction and no one company is extended more than C$2 million in credit at one time.

PRIVATE SECTOR CUSTOMERS

With a population of 82 million and per capita consumption of over 20kgs per year, Germans rank only behind France as the top consumers of cheese in the world.

Germans have a high average disposable income which means that most of the population is able to buy cheese for daily consumption. Cheese consumption has become so entrenched in the German diet that even lower-income consumers tend to purchase cheese for daily use. It was found that 90% of German households eat cheese with their evening meal and 50% also eat cheese as a part of breakfast.

Consumers have shown preference for German cheeses, although Dutch and French cheese products are the most popular imports. Both East and West Germans have shown a tendency to buy brand-name cheeses rather than less expensive cheeses under another name. However, price is slightly more significant in Eastern Germany where income levels tend to be lower. This illustrates the importance of establishing brand recognition in the German market.

Customers main sources for purchasing cheese are hypermarkets and supermarkets. Canadian exporters will likely have to use the services of agent(s) and/or distributor(s) to access the French market.

PUBLIC SECTOR CUSTOMERS

Currently, the majority of cheese consumption occurs in private households. However, the CMA anticipates that 60% of the forecast growth of the market, 2% annually through the year 2000, will come from industry. This demand for imported cheese, especially cheddar, mozzarella, and gouda, is stimulated by the growing popularity of cheese-oriented foods, such as pizza, pasta, and cheese cakes.

MARKET LOGISTICS

The food distribution system within Germany is highly efficient and with various channels to ensure speedy delivery of products. The fact that Germany's population and industries are evenly scattered throughout the country has made an efficient distribution system a necessity. Germans take pride in their efficiency and therefore, it is not surprising that the costs associated with the distribution of food products are relatively low due to the existing system. Germany's location combined with its existing distribution channels also makes it a good base from which to ship products to other countries.

Channels of distribution

Germany is not limited to one or two major urban centres from which the distribution network stems, but is marked by multiple business centres through which food products are distributed.

Although hypermarkets make up only a small percentage of total retail outlets, they accounted for the largest percentage of cheese sales in 1996. As Table 1 shows, local shops make up the largest portion of retail outlets, although, their share of cheese sales has been steadily decreasing in recent years, and currently account for roughly 15% of total sales. Smaller stores have been unable to offer competitive prices for cheese products in the German market. As more hypermarkets and supermarkets appear in Germany, cheese sales through local shops is expected to continue to decrease.

Most retail outlets offer both self-service (pre-wrapped) and over-the-counter cheeses. Recently, self-service cheeses have experienced growing popularity due to their convenience and greater time constraints on consumers. The growing popularity of pre-wrapped cheeses is also partly attributable to an increased selection of cheeses available to consumers. Some retailers have capitalized on this trend by offering counters with a wide variety of cheeses and package sizes.

Table 1 - German Cheese Sales by Outlet - 1996

Category of Outlet	Number of Outlets	Percentage Share	Share of Cheese Sales (%)
Hypermarkets	6,400	8	46
Discount Stores	11,700	15	22
Supermarkets	5,000	7	15
Local Shops	54,000	70	17

Source: USDA, Annual Marketing Plan, 1997.

Direct sales

While direct sales are possible, a number of factors must first be considered. Although many large retail chains such as Rewe Ag, EDEKA/AWA-Group, and Aldi-Group import products directly (reducing the cost to Canadian suppliers) there are also a number of problems involving the size of shipments and competitive pricing.

These retailers tend to buy items directly from the manufacturer in large quantities, while it would be unlikely that a Canadian producer of speciality cheese entering the German market for the first time, would be able, at least initially, to convince a retailer to import large quantities of their product immediately.

Canadian producers could also face stiff competition from competing foreign suppliers, who may be able to provide more support and similar products for a cheaper price. Acquiring the services of an agent or distributor may be a better option for Canadian cheese producers.

Distributors and wholesalers

Utilizing German distributors is an excellent method by which new products are introduced to the German market. The distributor will ensure that buyers receive the timely service and delivery. Distributors also are legally bound to ensure that all imported products adhere to the German/EU food regulations. Exporters may wish to note that it may be necessary to use more than one distributor or agent in order to ensure national distribution.

When seeking the services of a distributor, the following points should be considered:

- Their relationships with local governments;

- Their relationships with buyers;

- The condition of their facilities;

- Their willingness and ability to keep inventory; and

- Their relationships with banks.

Agents and sales representatives

Utilizing the services of an agent is a good way to introduce a new product to the German market. Agents generally solicit business' and enter into agreements on behalf of the exporter they are representing, but do not take possession of the products they sell.

A few of the factors that an exporter must weigh when choosing an agent include:

- what region(s) of Germany that the agent covers;

- their reputation, product knowledge, and experience in handling the specific product;

- the commission to be paid;

- what (if any) after sales service is provided; and

- the agents track record, and the size and quality of staff.

Market Entry Considerations

The arrival of the "Euro dollar" should help Canadian exporters in the future by helping consumers identify the lowest cost products and alleviate unfair pricing advantages from currency distortions. Between January 1, 1999 and the year 2002, national currencies are forecast to be replaced by the Euro currency which will be used throughout the European Union.

The size and forecasted growth of the German cheese market will identify several opportunities for Canadian exporters. However, Canadian producers must be willing to:

- meet German/EU food laws regarding packaging and labelling;

- invest time and money marketing their product and developing a consumer base for their product.

- provide imports/distributors with ample sales support.

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

Advertising practices in Germany can be quite different than those in Canada. Cheese exporters are recommended to discuss any potential advertising campaigns with an advertising agency in Germany. The address of the German Association of Advertising agencies is:

Gesamtverband Werbeagenturen e.V.

(German Association of Advertising Agencies)
Friedensstr. 11
60311 Frankfurt a.M.
Tel: 011-49-69-235-096

Suggested business practices

Although some aspects of doing business in Germany are similar to those employed in Canada and the US, certain cultural behaviours and nuances, though seemingly trivial, can be very important.

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

A long-term commitment is the key to success in Germany. German business people appreciate foreign exporters who are willing to make a long-term commitment to the German market, and are wary of those who only appear interested in short-term gains. New products that are introduced in Germany generally require twelve to eighteen months before success can be accurately assessed. Only by making a long-term commitment will Canadian producers be able to overcome their geographical disadvantage to other EU competitors. For example, providing inadequate after sales support, regardless of distance from the market, is unacceptable to German importers and distributors.

Import regulations

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 serve to limit the range of foreign products entering the market and protect domestic industries. These factors combined with transportation costs and other import costs mean that Canadian products will tend to be higher-priced, specialty cheeses.

In recent years, the EU has approved specific cheeses for Protected Denomination of Origin (DOP) status, thus enabling producers from certain areas or countries to produce specific types of cheese and sell them under that name. For example, feta cheese can only be sold under the brand name Feta if the producer is of Greek origin. There is a growing list of cheeses with DOP status from countries such as Italy and the Netherlands.

Local standards, certificates or registrations

All products which are exported to Germany must be accompanied by a standard set of shipping documents. Additional documents may expedite the processing of goods at the German border, but due to the complexity of German/EU regulations, Canadian exporters should request any additional information from the importer prior to shipping. It is recommended that all documents be completed in both German and English to avoid unnecessary delays.

Commercial Invoice

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

- the place and date of issue;
- the names and addresses of the importer and exporter;
- a detailed description of the merchandise, including identifying marks, quantities (in units customary of international trade), quality, and kinds;

- the method of shipment;
- all freight and insurance charges;
- the signature of the responsible officer, along with the name and title; and
- the shipper's invoice number and customer's order number.

Any promotional information should also be sent along with several copies of the commercial invoice.

Bill of Landing or Air Waybill

This document is the agreement between the owner of the goods and the carrier. Shipments may be made freight collect and no other consular formalities are necessary.

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. Certificates of origin are not required for all products but exporters are recommended to complete these forms to avoid any possible problems or delays.

Packaging and Labelling

Packaging and labelling regulations are still undergoing many changes due to the application of both German and EU regulations. It is recommended that Canadian exporters examine both German and European Union regulations regarding packaging and labelling standards. All imported cheese labels must include:

- all information must be in German;
- the name of the product;
- it must state what the product is;
- the expiry date and any other storage requirements;
- the product's country of origin;
- the manufacturers lot or batch number;
- all nutritional information;
- a list of ingredients and weights in metric units;
- a list of additives, preservatives, or colouring used.

In January 1993, Germany introduced new packaging legislation, requiring packaging to display the "Green Dot" recycling symbol. The "Duales System Deutschland" (DSD) issues licenses to German producers to use the Green Dot symbol. The "Green Dot" symbol is not required by law, however, it is nearly impossible to sell food-products of any kind without this symbol. Technical restrictions concerning weight, volume, and labelling are also applied and therefore, Canadian exporters should deal closely with German importers who are responsible for obtaining a license and paying the associated costs. Licensing fees vary depending on the type and quantity of packaging materials used.

For further information regarding export promotion, labelling, packaging, agents and distributors, please contact:

Mr. Stephan Rung
Commercial Officer
Consulate of Canada
Prinz-Georg-Str. 126
40479 Düsseldorf, Germany
Tel: 011-49-211-172-1718
Fax: 011-49-211-359-165

For further information on regulatory matters, please contact:

J. Peter Otto

Commercial Officer
Embassy of Canada
Friedrich-Wilhelm-Str. 18
53113 Bonn, Germany
Tel: 011-49-228-968-3323
Fax: 011-49-228-968-3900

Authentication of documents

Documents that need to be authenticated, 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. At no cost to the exporter, the notarized documents can be authenticated by sending them to:

Department of Foreign Affairs and International Trade
Authentication and Service of Documents (JLAC)
125 Sussex Drive, Ottawa K1A 0G2
Telephone: (613) 992-6602
Facsimile: (613) 992-2467

Export credit risks, restrictions on letters of credit or currency controls

Although East Germany has experienced tremendous growth since reunification, Canadian exporters should thoroughly analyse the financial position of any potential business associates. The growth of new businesses has led to other competitors declaring bankruptcy, although this situation is anticipated to stabilize in the coming years.

PROMOTIONAL EVENTS

Event / Description	**Organizer**
Intermopro Dusseldorf, Germany September, 1999	**Dusseldorfer Messegesellschaft GmbH Nowea** Mrs. Rössel, Dept. NI-RG, Postach 101006, Stockumer Kirchstrasse 61, 40001 Düsseldorf, Germany Tel: (49) 211 45 60 01 Fax: (49) 211 45 60 668 www.tradefair.de
IMEGA Munich, Germany October, 1999	**Messe Munchen GmbH**, Messegelande, N80325 Munich, Germany Tel: (49) 89 5107 0 Fax: (49) 89 5107 506
ANUGA Cologne, Germany October 9-14, 1999	**Köln Messe - Cologne Trade Fair** **Promotions Department** Messeplatz 1 50679 Cologne, Germany Tel: (49) 221 821-0

Fax: (49) 221 821 2574

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KEY CONTACTS AND SUPPORT SERVICES

Canadian government contacts

Agriculture and Agri-Food Canada
Sir John Carling Building
930 Carling Avenue
Ottawa, ON, K1A 0G2
Tel: (613) 995-7662
Fax: 944-1604

Market Support Division (TCM)
Foreign Affairs & International Trade Canada
125 Sussex Drive
Ottawa, ON, K1A 0G2
Tel: (613) 995-1773
Fax: (613) 943-1103

Department of Foreign Affairs and International Trade
International Market Intelligence Infocentre
Tel: 1-800-267-8376

Business Development Bank of Canada
#400, 5 Place Ville Marie
Montreal, PQ
Tel: 1-888-463-6232
Fax: (514) 283-0617
Internet: **http://www.bdc.ca**

Canadian Export Development Corporation
151 O'Connor Street
Ottawa, ON, K1P 5T9
Tel: (613) 598-2500
Fax: (613) 598-2503
Internet: http://**www.edc.ca**

E-mail: **export@edc4.edc.ca**

Alliance of Manufacturers and Exporters Canada
Canada's Leading Business Network
1 Nicholas St., Suite 1500
Ottawa, ON, K1N 7B7
Tel: (613) 238-8888
(416) 798-8000

Canadian Commercial Corporation
50 O'Connor Street, 11th Floor
Ottawa, ON, K1A 0S6
Tel: (613) 996-0034
Fax: (613) 995-2121

Internet: **http://www.ccc.ca**
E-mail: **info@ccc.ca**

Department of Foreign Affairs and International Trade - Western European Division (REO)
125 Sussex Dr.
Ottawa, ON, K1A 0G2
Tel: (613) 995-8269
Fax: (613) 995-5772

Chambers of Commerce of Germany

Darmstadt - Chamber of Industry and Commerce
Rheinstr. 89
D-64295 Darmstadt, Germany
Contact: Helmut Schoenleber
Tel: 011-49-6151-871-266
Fax: 011-49-6151-871-281

DIHT - Deutsche Industrie und Handelstag
Adenauerallee 148
53113 Bonn, Postfach 1446, 53004 Bonn
Tel: 011-49-0228-1040
Fax: 011-49-0228-104-158

Kiel Chamber of Commerce and Industry
Lorentzendamm 24
24103 Kiel, Germany
Tel: 011-49-431-51-940
Fax: 011-49-431-5194-234

Hannover - Industrie - und Handelskammer
Hannover
Hildesheim Postfach 30 29 30030 Hannover
Contact: Werner Jathe
Tel: 011-49-0511-3107-0
Fax: 011-49-0511-3107-333

German Offices in Canada

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Fax: (514) 931-7239

E-mail: **106167.425@compuserve.com**

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Fax: (416) 925-2818

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Fax: (604) 684-8334

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Prinz-Georg Strasse 126
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Postfach 12 02 40
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Friedrichstrasse 95, 23rd Floor
10117 Berlin, Germany
Tel: 011-49-30-261-1161
Fax: 011-49-30-262-9206

Canadian Consulate
Consul General Mr. Timothy A. Williams
Tal 29
80331 Munich, Germany
Tel: 011-49-89-2199-570
Fax: 011-49-89-2199-5757

E-mail: **munic.td@bonn02.x400.gc.ca**

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The Grocer, *Germany's Cheese Power*, 04/04/98.

USDA, *Annual Marketing Plan*, August, 1997.

US Department of Commerce, *Marketing US Products and Services*, February, 1998.

OTHER REFERENCE MATERIAL

Useful Internet sites

-Agri-Food Trade Service: **http://atn-riae.agr.ca**

- Canadian International Development Agency (CIDA): **http://www.acdi-cida.gc.ca/index.htm**

- Chambers of Commerce of Germany: **http://www.uitc.com/chambers/europe/germany.htm**

- DFAIT Websit: **http://www.dfait-maeci.gc.ca**

- Export Development Corporation: **http://www.edc.ca**

- Exportsource: **http://exportsource.gc.ca**

- 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**

- InfoExport: **http://www.infoexport.gc.ca**

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

- Strategis: **http://strategis.ic.gc.ca/engdoc/main.html**

- Tradeport: **http://www.tradeport.org**

- Trade Show Central: **http://www.tscentral.com**

- USDA: **http://ffasusda.gov**

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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) 943-8820. Thank you for your valuable input.

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

☐ InfoCentre FaxLink system ☐ Government worldwide web site
☐ InfoCentre help line ☐ InfoCentre bulletin board system
☐ Local government office ☐ Other: ___________________________

2. How would you describe this market report?

	Strongly agree	Agree	No opinion	Disagree	Strongly disagree
Useful	☐	☐	☐	☐	☐
Complete	☐	☐	☐	☐	☐
Well organized	☐	☐	☐	☐	☐
Well written	☐	☐	☐	☐	☐
Ideal length	☐	☐	☐	☐	☐

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.

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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: ________________________

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OPTIONAL — The name of your organization is: ______________________________

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