



The Wine Market in Germany

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Le marché du vin en Allemagne)*

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Market Research Centre
and the
Canadian Trade Commissioner Service

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THE WINE MARKET IN GERMANY



EXECUTIVE SUMMARY

In 1998, the German wine market was valued at approximately \$12.4 billion.⁽¹⁾ Still wines, including red, white and rose, account for over three quarters of total sales. Sparkling wines hold a 21% market share, while fortified wines and non-grape wines account for less than 1% of annual wine sales.

Although white wines have traditionally dominated both domestic production and sales in Germany, red wines have steadily increased their share of total sales. Reports outlining the health benefits of red wine consumption, combined with the recent increase in affordable imported red wines (due to low production levels in Germany between 1995 and 1997) are the principal factors behind the growth of red wine sales.

Germany currently imports over 12 million hectolitres (hl) of wine with a value of more than \$3 billion. EU member countries dominate the import market accounting for 85% of total imports. However, imports from non-EU countries have showed the strongest growth in recent years, increasing by 70% since 1995.

In 1998, Canadian wine exports to Germany totalled \$64,000. Canadian wine producers will have stiff competition, from within the EU itself, as well as from other countries such as the United States, Macedonia, Bulgaria and Chile. The most promising opportunities for Canadian exporters are in the higher-priced market segments due to the costs associated with exporting wine to Germany.

TABLE OF CONTENTS

[EXECUTIVE SUMMARY](#)

[MARKET OVERVIEW](#)

[Key Factors Shaping Market Growth Opportunities](#)

[Actual and Planned Projects](#)

[COMPETITIVE ENVIRONMENT](#)

[Local Capabilities](#)

[International Competition](#)

[Canadian Position](#)

[Competitive Advantage Through Canadian Government Policies and Initiatives](#)

[MARKET LOGISTICS](#)

[Channels of Distribution](#)

[Distributors and Wholesalers](#)

[Agents and Sales Representatives](#)

[Market-entry Considerations](#)

[Suggested Business Practices](#)

[Import Regulations](#)

[Local Standards, Certificates or Registrations](#)

[Export Credit Risks, Restrictions on Letters of Credit or Currency Controls](#)

[PROMOTIONAL EVENTS](#)

[KEY CONTACTS AND SUPPORT SERVICES](#)

[BIBLIOGRAPHY](#)

[OTHER REFERENCE MATERIAL](#)

[Internet Sites](#)

THE WINE MARKET IN GERMANY



MARKET OVERVIEW

Germany is the world's northernmost wine-growing country. However, the geographical location of the country can result in significant variations in both the quantity and quality of annual wine production. After three years of low production levels, due to poor weather, German wine production increased to 11.7 million hectolitres (hl) in 1998, up from 8.5 million hl the previous year. In 1999, production is anticipated to meet or surpass 11.7 million hl.

In 1998, the German wine market was valued at roughly \$12.4 billion. Although the value of the market has decreased slightly over previous few years, the volume of wine consumed has increased by 0.7% since 1997, to more than 1.9 billion litres. The decrease in value of the market can be attributed to the increased supply in 1998 which, in turn, led to lower prices.

Still wines, including red (35.6%), white (37.2%) and rose (5.5%) varieties, account for over 78% of total wine sales. Sparkling wines have a 21% market share, while fortified wines and non-grape wines account for the remaining market share.

Germany's colder climate produces grapes that have a lower sugar content than those produced in Southern European countries. As a result, German wine producers add sucrose to grapes before fermentation in order to increase the alcohol content, thereby creating competitive products for both domestic and foreign markets.

Germany has four classifications for domestically produced wines based on the quality of the wine:

- Table wines are everyday products that have consistent quality and value.
- Country wines are made completely from one variety of grape, and are strictly regulated. These products are of high quality and are dry or half dry.
- Quality wines are produced from high-quality grapes that are grown in a specific region of the country. These wines are sold under the name of the region with no mention of the grape variety.
- Superior quality wines are subject to the same restrictions as quality wines. However, these are the highest-quality wines, and are further classified into five categories depending on a number of growing and harvesting factors.

Currently, white wine grapes account for over three quarters of total German vineyards. However, due to the increasing demand for red wines, the amount of land dedicated to growing white wine grapes has steadily decreased from 85% in 1990 to the current level of 77%.

German vineyards can be found throughout the country. The northernmost regions, such as Franken and Mosel-Saar-Ruwer, produce white wines almost exclusively, while the majority of red wine production occurs in the southern regions of Baden, Pfalz and Wurttemberg.

In 1998, Germany was the world's largest wine importer (12 million hl), ahead of the United Kingdom (8.8 million hl), and France (5.6 million hl). Germany's wine imports have increased by more than 20% since 1995.

Because wine consumption is generally considered to be a sign of sophistication, it tends to be correlated to the income level of consumers. Therefore, although per-capita wine consumption is estimated to be 23 litres annually, most wine is consumed by those consumers with above average levels of income.

Key Factors Shaping Market Growth

Recent reports on the health benefits of red wine have helped to drive up consumption. In addition, a shortage of domestically produced wines has led to more imported low-priced wines, thus encouraging consumers to experiment with different varieties. As a result, a growing number of German consumers are spending more on wine and less on other alcoholic beverages.

German consumers typically consume wine at home more frequently than they do other alcoholic beverages. Coupled with the fact that drinking and driving has taken on an increasingly negative connotation, sales of wine for consumption in the home have steadily increased in recent years. Another factor is the decrease in levels of disposable income in Germany, which tends to keep people closer to home rather than going out to more costly public establishments.

The fact that more women are joining the work force -- with higher disposable incomes -- has also led to higher levels of wine consumption. While German men tend to consume more beer or spirits, women tend to drink more wine.

Opportunities

Because of the high cost of exporting wine to Germany, Canadian exporters will likely find the greatest success in the higher-priced market segments. Currently, \$3 to \$8 bottles of wine account for over 55% of total wine sales in Germany. However, German consumers have increasingly purchased more expensive wine varieties. This trend, combined with a movement within both Germany and the EU as a whole to produce more high-quality brands while eliminating lower-quality brands, should provide Canadian producers with good opportunities.

Actual and Planned Projects

In early 1999, Germany's Institute of Vine Cultivation planted 130 genetically altered grapevines. The plants, located in the southwest portion of the country near Siebeldingen, are the first such grapevines planted in Germany. The vines were modified with barley genes in an attempt to protect grapes from fungal infections. Although wine from these grapes will not be available for

several decades, there has already been a fair amount of debate as to the safety of the grapes. Currently, many German consumers refuse to purchase genetically altered foods and beverages.

The German government made some amendments to the DM630-law, which regulates tax-free income. The changes, which increase the ancillary and administrative costs of employing seasonal labour, directly affect the wine industry, which is heavily reliant on seasonal labour to harvest grapes.

The German wine trading group Hawesko Holding AG acquired a majority stake in Wein Wolf, Germany's leading wine and champagne wholesaler. Hawesko purchased a 90% share of Wein Wolf, retroactive to April 1, 1999. In the fiscal year ended March 1999, Wolf had a turnover of approximately \$65 million. Hawesko anticipates a turnover of roughly \$315 million for 1999.

The German government increased taxes on beverages, excluding still and sparkling wines with intermediate levels of alcohol (between 10% and 22%), which has had a negative affect on sales. The tax also affects products such as vermouth, sherry, port, and fortified wines.

The European Parliament is considering reforming the current wine legislation. Possible changes, which could be implemented this year, include plans to reduce over-production, increase competitiveness, and improve quality. However, in order to aid European wine producers, subsidies, which do not include production or retail quotas, will be increased to ECU1,234 million in 2000, from ECU834 million only three years earlier.

COMPETITIVE ENVIRONMENT

Local Capabilities

In 1998, the total German vineyard area decreased slightly to just over 101 000 hectares. In recent years, the amount of land dedicated to vineyards has decreased from approximately 105 000 hectares in response to the German wine industry's efforts to improve the quality of wines while eliminating some of the less productive vineyards.

The German wine production area is typically divided into 13 wine growing regions. Each region produces wine with a distinctive taste. Domestically produced white wines, which have a reputation for being of high quality, account for 77% of the total German vineyard area.

Total wine production in 1999 was forecast to meet or exceed the 11.7 million hl produced the previous year. Between 1995 and 1997, wine production averaged 8.5 million hl per year, which was down from the average annual production of 10 million hl per year. Weather changes are primarily responsible for variations in annual wine production.

Although Germany experienced high production levels in 1998 and 1999, the market share of German wines has steadily declined from 65% of sales in the early 1990s to 47%. Imported wines have taken advantage of steadily declining tariffs, and in recent years, low production levels, to establish themselves in the German market.

The German wine market is fragmented, with an estimated 78 000 producers. Although the vast majority of wine producers hold less than one hectare of land, around two thirds of all producers were part of a co-operative. The largest domestic producers include *A Racke GmbH & Co.*, *Seagram Deutschland*, *Rotkappchen GmbH*, *Henkell & Sohnlein*, and *Schloss Wachenheim AG*.

The German Wine Institute actively markets German wines both domestically and abroad. Advertising, educational seminars, participation in trade fairs, and sales promotion are just a few of the areas in which the Wine Institute aids German producers. The Wine Institute, which charges wine growers per hectare of vineyard area and producers/traders per hectolitre produced, has an annual budget of between \$17 million and \$18 million, depending on the annual yield. The final collection and check-offs typically take two years to complete, and as a result, the higher yields in 1998 and 1999 will not affect the Institute's budget until 2000 and 2001.

International Competition

In 1998, Germany imported over 12 million hl of wine with a value of more than \$3 billion. While white wines have traditionally accounted for the majority of wine imports, red wine imports have significantly increased in recent years, and now exceed white wine imports. Health benefits associated with red wine consumption are the primary force driving the sale of red wines in Germany.

The largest suppliers of wine to the German market are Italy, France and Spain. EU member countries collectively account for 85% of German wine imports. However, imports from non-EU countries have experienced the strongest growth since 1995, increasing by 70%, to reach 164 million litres in 1998. The largest wine exporters from outside the EU are Macedonia, Bulgaria, Hungary and Romania. In addition, wine imports from Chile increased sixfold between 1995 and 1998, totalling 13.7 million litres annually.

Canadian Position

In 1998, Canadian wine exports totalled \$64,000 up from no exports the previous year and only \$6,000 in 1996. Although Canadian exports increased significantly in 1998, Canada still represents less than 1% of total imports to Germany. The most significant barriers for Canadian products include shipping costs, tariffs and duties, and a lack of exposure, on the part of German consumers, to Canadian wines.

Competitive Advantage Through Canadian Government Policies and Initiatives

Export Development Corporation

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, bank credits or bank guarantees. Approval for financing will be considered on a case-by-case basis.

Canadian Commercial Corporation

The Canadian Commercial Corporation (CCC) gives 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 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.

Program for Export Market Development

The Program for Export Market Development (PEMD) is the federal government's primary international business development program. The objective of the 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 offshore 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 more information, visit <http://www.infoexport.gc.ca/pemd-e.asp> or call 1-888-811-1119.

WIN Exports

Exporters can register their companies with WIN Exports, a database of Canadian exporters and their capabilities. This database is used by trade commissioners around the world and by Team Canada partners in Canada to match Canadian suppliers with foreign business leads and to share information on trade events. For more information, visit: <http://www.infoexport.gc.ca/winexports/menu-e.asp> or call 1-888-811-8119.

New Exporters to Overseas (NEXOS)

Canadian companies that have not yet begun exporting overseas can obtain assistance from the Department of Foreign Affairs and International Trade (DFAIT)'s New Exporters to Overseas (NEXOS) program. The program introduces the essentials of exporting and provides practical information and first-hand exposure to new markets in Europe. For more information about NEXOS, visit <http://www.infoexport.gc.ca/nexos-e.asp> or contact DFAIT's European Trade Fairs and Missions Section (RENF).

MARKET LOGISTICS

Channels of Distribution

In 1998, retail sales of wine accounted for approximately 80% of total sales, while restaurants, hotels, bars and cafes accounted for the remaining 20%. Supermarkets and discount stores account for the largest share of German wine sales at over 65%, while other retail outlets, such as speciality shops, garner the remaining share of retail sales. The share of sales accounted for by each of these distribution formats has remained consistent since the early 1990s. Retail sales of wine account for a significant share of total sales due to a tendency of German consumers to drink beer in public establishments such as restaurants and hotels, while wine consumption occurs

primarily at home.

Because German retailers rarely import wines directly from foreign manufacturers, Canadian exporters are advised to engage the services of a distributor, wholesaler or importer.

In recent years, many supermarkets and hypermarkets have run promotional campaigns for a wide variety of wines. These presentations help to educate consumers about various aspects of the wine industry, such as the types of wines available, the different wine-producing regions, and grape varieties. Wine retailers and producers hope that these presentations serve to increase consumer interest in both domestic and foreign wines, especially among younger consumers.

Distributors and Wholesalers

German wholesalers and distributors are an excellent channel through which to introduce wine to the German market. In addition, distributors are legally bound to ensure that all imported products adhere to German/EU food regulations. Exporters should 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 or wholesaler, exporters should consider the relationship that these individuals have with local governments, buyers and banks; the condition of their facilities; and their willingness and ability to keep inventory. Canadian producers are advised to review the provisions of German/EU law with a qualified lawyer before entering into an agreement with a prospective partner.

Agents and Sales Representatives

Agents are also excellent channels through whom to introduce new products into the German market. While agents solicit business and enter into agreements on behalf of the exporter they are representing, they do not take ownership over the products they sell.

An exporter must weigh a number of factors when selecting an agent, including:

- region(s) covered by the agent;
- 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 the agent's staff.

These attributes can best be assessed during a visit to Germany. Manufacturers should also ensure that responsibilities are clearly defined before entering into a long-term relationship.

Market-entry Considerations

Suggested Business Practices

Although some aspects of doing business in Germany are similar to those employed in Canada and the United States, 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 should be aware that it may take years of contact with German associates before more personal relationships develop.

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 tend to be wary of those who appear to be interested only in short-term gains. 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 -- which includes providing good after-sales support -- will Canadian producers be able to overcome their geographical disadvantage to other EU competitors.

Import Regulations

Currently, wine imports are subject to tariffs ranging from 10% to 33% depending on the specific product. Wines containing less than 13% alcohol are taxed at a rate of ECU10.3/100 litres. In addition, imported wines are subject to a 16% value-added tax.

Local Standards, Certificates or Registrations

A standard set of shipping documents must accompany all products exported to Germany. 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 Canadian exporters use the services of a German customs broker, agent or distributor to ensure that all essential documentation is correctly prepared and arrives with the shipment. All documents should 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 and must accompany every shipment to Germany. Invoices should be thoroughly checked, since any errors or omissions can result in delays, fines or even confiscation. Invoices must include the following information:

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

Exporters should consult with their customs broker to determine how many copies of the commercial invoice should be sent with each shipment, since the number required varies according to the product being shipped. Any promotional information should also be included with the commercial invoice.

Export Declaration Form (Form B-13)

Exporters whose shipments have a value of \$2,000 or greater must complete an Export Declaration Form. Although exporters are technically responsible, agents, brokers or carriers typically complete the form and submit it on behalf of the exporter.

Packing List

A packing list is necessary when multiple packages are shipped, unless the commercial invoice provides the required information. This list should include:

- the number of packages within one case;
- the net, gross and legal weights of each case, and of the total shipment; and
- the volume of individual packages, as well as of the shipment as a whole.

Between four and seven copies of the packing list should be included in any shipment, depending on the product being shipped.

Bill of Lading

The bill of lading is the contract of carriage between a shipper and a shipping company. Full contract details are commonly printed on the back of a bill of lading. Various types of this form are used depending on the method of shipping. Each shipment may contain a set of bills of lading, one copy of which should be kept on file, while other copies are sent to the importer and customs broker, respectively. The bill of lading should include:

- description of the product(s);
- weights and measurements of the packages and their types;
- ports of origin and destination;
- names and addresses of shipper, importer and customs broker;
- any freight or other charges incurred;
- number of bills of lading in the full set; and
- carrier's acknowledgment of receipt "on board" of the goods for shipment.

Depending on the product, it may be necessary for exporters to include storage temperature and requirements on the bill(s) of lading.

Certificate of Origin

A certificate of origin verifies that the goods originate in Canada and are therefore subject to all duties or taxes that apply to Canadian products.

Packaging and Labelling

It is recommended that Canadian exporters examine both German and EU regulations regarding packaging and labelling standards. Imported wines require a specific font size for volume, alcohol content, EU-labelling sign and for possible EU blends. All imported wine labels must include:

- name and address of the bottler;
- net volume in litres;
- country of origin;
- alcohol content; quality category;
- quality control number; and the declaration "wein".

Other voluntary information which may appear on wine labels includes:

- vintage;
- the name of the company responsible for marketing the wine;
- grape variety;
- beside alcohol content, the alcohol consistency (type of alcohols);
- historical information about the wine or bottler;
- information about the type of product;
- natural and technical conditions on which the wine is based;
- a declaration of an official or officially recognized institution;
- a provable award from an official institution; and
- usage recommendations for the consumer.

It is recommended that Canadian companies consult with a German importer to ensure that labels meet with all German and EU regulations. Exporters should note that Germany prohibits the sale of wines with protected European geographical names (i.e. Champagne).

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. Exporters can have the notarized documents authenticated, at no cost, by sending 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

Germany currently implements no restrictions on letters of credit or currency controls.

Generally, the method of payment is a matter for negotiation between the individual supplier and importer. Usual practice is for payment to be made by terms of a letter of credit for 30 to 60 days. In cases where distribution arrangements are concluded, exporters are advised to prepare a contract detailing all major points of agreement, rights, and responsibilities.

PROMOTIONAL EVENTS

Event/Description**Prowein**

March 19-21, 2000 (Annual)
Düsseldorf Fairgrounds
Düsseldorf, Germany
Wines and spirits.

Intervitis Interfructa

May 16-20, 2001 (Every three years)
Stuttgart, Germany
International exhibition for viticulture and enology,
cultivation and processing of fruit, bottling and
packaging techniques.

Anuga

October 13-18, 2001 (Biennial)
Cologne, Germany
Food and beverages.

Organizer

Messe Düsseldorf GmbH
Stockumer Kirchstrasse 6140474 Düsseldorf,
Germany
Tel.: (49-211) 4560-01
Fax: (49-211) 4560-668
E-mail: info@messe-duesseldorf.de
Internet: <http://www.messe-duesseldorf.de>

Messe Stuttgart International
Am Kochenhof 16
Postfach 103252
D-70028 Stuttgart, Germany
Tel.: (49-711) 2589-0
Fax: (49-711) 2589-626
Internet: <http://www.messe-stuttgart.de>

KölnMesse
Messeplatz 1
D-50679 Cologne, Germany
Tel.: (49-221) 8210
Fax: (49-221) 8212-574
Internet: <http://www.koelnmesse.de/anuga/>

KEY CONTACTS AND SUPPORT SERVICES**Canadian Contacts****Agriculture and Agri-Food Canada**

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

Canadian Commercial Corporation (CCC)

Metropolitan Centre
50 O'Connor St., 11th Floor
Ottawa, ON K1A 0S6
Tel.: 1-800-748-8191 / (613) 996-0034
Fax: (613) 995-2121
E-mail: info@ccc.ca
Internet: <http://www.ccc.ca>

Canadian Embassy in Berlin

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10117 Berlin, Germany
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Fax: (49-30) 2031-2590
E-mail: brln@dfait-maeci.gc.ca
Internet: <http://www.kanada-info.de>

Canadian Food Inspection Agency (CFIA)

59 Camelot Dr.
Nepean, ON K1A 0Y9
Tel.: (613) 225-2342
Fax: (613) 228-6653
E-mail: cfiamaster@em.agr.ca
Internet: <http://www.cfia-acia.agr.ca>

Canadian Consulate in Düsseldorf

Prinz-Georg Strasse 126
 D-40479 Düsseldorf, Germany
 Tel.: (49-211) 17-21-70
 Fax: (49-211) 35-91-65
 E-mail: ddorf.td@dfait-maeci.gc.ca

Canadian Consulate in Hamburg

ABC-Strasse 45
 20354 Hamburg, Germany
 Tel.: (49-40) 35556-295
 Fax: (49-40) 35556-294
 E-mail: hmburg@micro.x400.gc.ca

Canadian Consulate in Munich

Tal 29
 80331 Munich, Germany
 Tel.: (49-89) 2199-570
 Fax: (49-89) 2199-5757
 E-mail: munic.td@dfait-maeci.gc.ca

Export Development Corporation (EDC)

151 O'Connor St.
 Ottawa, ON K1A 1K3
 Tel.: (613) 598-2500 or 1-800-850-9626
 Fax: (613) 237-2690
 E-mail: export@edc-see.ca
 Internet: <http://www.edc.ca>

German Offices in Canada**Consulate General of Germany (Montreal)**

Marathon Building - 43rd Floor
 1250 René Levesque West
 Montreal, QC H3B 4W8
 Tel.: (514) 931-2277
 Fax: (514) 931-7239
 E-mail: 106167.425@compuserve.com

Consulate General of Germany (Toronto)

77 Admiral Rd
 Toronto, ON M5R 2L4
 Tel.: (416) 925-2813
 Fax: (416) 925-2818

Department of Foreign Affairs and International Trade (DFAIT)

125 Sussex Dr.
 Ottawa, ON K1A 0G2

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Tel.: (613) 996-2858
 Fax: (613) 995-8756

Market Support Division (TCM)

Tel.: (613) 995-1773
 Fax: (613) 943-1103

Tariffs and Market Access Division (EAT)

Tel.: (613) 992-2177
 Fax: (613) 992-6002 / 944-4840

Vintners Quality Alliance

110 Hannover Dr., Suite B205
 St. Catharines, ON L2W 1A4
 Tel.: (905) 684-8070
 Fax: (905) 684-2993

Consulate General of Germany (Vancouver)

World Trade Centre
 999 Canada Place, Suite 704
 Vancouver, BC V6C 3E1
 Tel.: (604) 684-8377
 Fax: (604) 684-8334
 E-mail: 106167.431@compuserve.com

German Embassy

1 Waverly St.
 Ottawa, ON K2P 0T8
 Tel.: (613) 232-1101
 Fax: (613) 594-9330

E-mail: 106167.430@compuserve.com

E-mail: 100566.2620@compuserve.com

Internet: <http://www.germanembassyottawa.org/>

International Trade Centres

For export counselling or publications for Canadian exporters, please contact your local International Trade Centre by calling 1-888-811-1119.

Chambers of Commerce in Germany

Arbeitsgemeinschaft der Bayerischen Industrie und Handelskammern

Max-Joseph-Str 2
D-80333 Munich, Germany
Tel.: (49-89) 5116-0
Fax: (49-89) 5116-306

British Chamber of Commerce in Germany

Severinstrasse 60
D-50678 Cologne, Germany
Tel.: (49-221) 314-458/489
Fax: (49-221) 315-335

Berlin - Industrie und Handelskammern

Hardenbergstrasse 16-18
D-1000 Berlin 12, Germany
Tel.: (49-30) 3180-1
Fax: (49-30) 3180-278

Darmstadt - Chamber of Industry and Commerce

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

DIHT - Deutsche Industrie und Handelstag

Berlin Office
An der Kolonnade 10
D-10117 Berlin, Germany
Tel.: (49-30) 2385-647/48
Fax: (49-30) 2385-646

Hannover - Industrie und Handelskammer

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

DIHT - Kammervereinigungen Arbeitsgemeinschaft der Industrie und Handelskammern

Jagerstr 30
D-70174 Stuttgart, Germany
Tel.: (49-) 2005-0
Fax: (49-) 2005-354

Kiel Chamber of Commerce and Industry

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

Federation of German Chambers of Commerce

DIHT - Deutsche Industrie und Handelstag

Adenauerallee 148
D-53113 Bonn, Germany
Tel.: (49-228) 1040
Fax: (49-228) 104-158

German Government Contacts and Trade Associations

Federal Office for Trade and Industry

Bundesamt für Wirtschaft
Frankfurter Strasse 29-31
65760 Eschborn, Germany
Tel.: (49-6196) 4041
Fax: (49-6196) 4042-12 or 9422-60
E-mail: bawi@rhein-main.net
Internet: <http://www.bawi.de>

Federal Statistics Office

Statisches Bundesamt (StBa)
Postfach 5528
Gustav-Stresemann-Ring 11
D-65189 Wiesbaden, Germany
Tel.: (49-611) 751
Fax: (49-611) 7240-00

Federation of German Wholesale and Foreign Trade

Bundesverband des Deutschen Gross- und Aussenhandels
Kaiser-Friedrich-Strasse 13
D-5300 Bonn 1, Germany
Tel.: (49-228) 2600-4 or 2600-0

German Wine Association

Deutscher Weinbauverband e.V.
Heussalle 26
D-53113 Bonn, Germany
Tel.: (49-228) 2214-01
Fax: (49-228) 2616-83
E-mail: dww-bonn@t-online.de

German Wine Institute

Deutsches Weininstitut GmbH
Gutenbergplatz 3-5
D-55006 Mainz, Germany
Tel.: (49-6131) 2829-0
Fax: (49-6131) 2829-20

Foreign Trade Association of the German Retail Trade

Aussenhandelsvereinigung des Deutschen Einzelhandels (AVE)
Weyerstrasse 2
D-5000 Cologne 1, Germany
Tel.: (49-221) 2176-17

German Association of Wine and Spirit Importers

Bundesvereinigung Wein- und Spirituosen e.V.
Sonnenberger Str. 46
D-65193 Weisbaden, Germany
Tel.: (49-611) 5210-33
Fax: (49-611) 5997-75

German Foreign Trade Information Office

Bundesstelle für Aussenhandelsinformation (BfA)
Blaubach 13
D-5000 Cologne, Germany
Tel.: (49-221) 2057-1

Ministry of Food, Agriculture and Forestry

Bundesministerium für Ernährung, Landwirtschaft und Foresten
Rochusstrasse 1
PO Box 140270
D-53123 Bonn, Germany
Tel.: (49-228) 5291
Fax: (49-228) 5294-262

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OTHER REFERENCE MATERIAL

Internet Sites

Agriculture and Agri-Food Canada, Agri-Food Trade Service:
<http://ats.agr.ca>

Association of the German Trade Fair Industry:
<http://www.auma.de>

Business In Germany:
<http://www.business-in-germany.de/Engl/index1.htm>

Canadian Food Inspection Agency:
<http://www.cfia-acia.agr.ca>

The Canadian Wine Home Page:
<http://www.canwine.com>

Chambers of Commerce of Germany:

<http://www.uitc.com/chambers/europe/germany.htm>

Department of Foreign Affairs and International Trade:

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

ExpoGuide:

<http://www.expoguide.com>

ExportSource:

<http://exportsource.gc.ca>

Federal Ministry of Food, Agriculture and Forestry:

<http://www.bml.de>

Federal Statistical Office of Germany:

<http://www.statistik-bund.de>

German Embassy and German Information Centre:

<http://www.germany-info.org>

German Embassy in Ottawa:

<http://www.germanembassyottawa.org>

German Government:

<http://www.bundesregierung.de/english/01/newsf.htm>

GermanWine.de:

<http://www.germanwine.de/english/index.htm>

The German Wine Institute:

http://www.deutscheweine.de/englisch/home_e.htm

The German Wine Page:

<http://www.winepage.de>

Germany Online:

http://www.germany-info.org/f_gic/index.html

Governments on the WWW: Germany:

<http://www.gksoft.com/govt/en/de.html>

InfoExport:

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

Strategis:

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

Tradeport:

<http://www.tradeport.org>

Trade Show Central:

<http://www.tscentral.com>

Wine Industry News:

<http://www.wineindustrynews.com>

Wine Route:

<http://www.wineroute.com>

World Wine:

<http://www.worldwine.com>

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 fax (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 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	<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: _____