

CBI MARKET SURVEY

**THE NATURAL COLOURS, FLAVOURS AND THICKENERS
MARKET IN GERMANY****Publication date: April 2007****Report summary**

This CBI market survey discusses, amongst others, the following highlights for the natural colours, flavours and thickeners market in Germany:

- In Germany, industrial demand for natural colours, flavours and thickeners is relatively high compared to other EU countries. This is for a great part due to the presence of several processing facilities of multinational food ingredient companies.
- Germany is a relatively small producer of raw material for natural colours, flavours and thickeners. It is however one of the leading producers of pectins in the world.
- Germany is the leading importer of natural colours, flavours and thickeners in the EU.
- Developing country suppliers accounted for 38% of import value in 2005. They are especially important in the supply of natural gums, resins and balsams.

This survey provides exporters of natural colours, flavours and thickeners with sector-specific market information related to gaining access to Germany. By focusing on a specific country, this survey provides additional information, complementary to the more general information and data provided in the CBI market survey 'The natural colours, flavours and thickeners market in the EU', which covers the EU market in general. That survey also contains an overview and explanation of the selected products dealt with, some general remarks on the statistics used as well as information on other available documents for this sector. It can be downloaded from <http://www.cbi.eu/marketinfo>

1. Market description: industrial demand and production**Industrial demand*****Total market size***

Germany can be considered to be one of the leading consumers of natural colours, flavours and thickeners in the EU. This is for a great part due to the fact that many food ingredient manufacturers like Chr. Hansen and Döhler are located in Germany. Another reason is the fact that between 2004 and summer 2005, Germany had the second highest number of new product releases labelled as "all natural" or without preservatives or additives, after the UK (Mintel, 2005). According to industry sources, demand for natural colours, flavours and thickeners is expected to increase in the near future because of increased health awareness of German consumers and EU consumers in general.

Product groups

The presence of several multinational food colour producing companies, like Döhler and Sensient Food Colors, makes Germany a leading consumer of raw material for natural colours. This is also confirmed by Anu Arola, a market analyst at Sensient Food Colors.

Besides natural colours, the presence of the large food industry results in high demand for raw materials for natural flavours and essential oils. Interesting to note is that research has indicated that German consumers prefer the creamy and caramel notes in vanilla (Vanilla Observatory by MANE).

Demand for thickeners such as gum Arabic, guar gum, locust bean gum and xanthan gum is relatively high compared to other EU countries, because of the presence of several large importers.

Production

The production described here is limited to the production of raw materials as the processing into end-products has already been described above.

Total production

Although Germany has a large food processing industry, hardly any production of raw materials for natural colours, flavours and thickeners takes place in Germany. A major reason for this is that climatic conditions in Germany do not allow for the production of the raw materials.

Product groups

With respect to raw materials for essential oils, Germany can be considered to be a small producer in the EU. It is only known to produce small amounts of garden angelica, artemisia, basil, chamomile and thyme. The largest producing countries in the EU are Spain, Italy and France, where citrus fruits are grown which are used for essential oil production.

Although raw materials for pectin (citrus fruit and apples) are for a great part grown outside Germany, it is one of the leading producers of pectins in the world. EU production of pectin is dominated by five large producers. Two of these, Herbstreith & Fox and CP Kelco, have production facilities in Germany which makes Germany the number two producer of pectins after Denmark. According to industry sources, the production of pectins is increasing by around 5% annually and it is expected that this will continue to increase in the future.

Information on German production of raw materials for other natural colours, flavours and thickeners was not encountered. However, the lack of data indicates that production is negligible as, apparently, it is of too little importance to document. Moreover, other documents describing EU production do not refer to Germany, indicating the minor importance of Germany compared to other EU countries.

Major players

- Herbstreith & Fox GmbH (<http://www.herbstreith-fox.de>): manufacturer of pectins
- CP Kelco Germany GmbH (<http://www.cpkelco.com>): manufacturer of pectins
- Givaudan (<http://www.givaudan.com>): manufacturer of flavours and fragrances
- Döhler GmbH (<http://www.doehler.com>): manufacturer of flavours and colours.

Trends in industrial demand and production

- Increased demand for low-energy, low-fat food. In general, more demand for healthy and natural ingredients
- Growing demand for convenience food with a long shelf-life, which often includes more food additives.
- Increased consumption of organic food. While in 2002 organic food sales accounted for approximately 2.3% of total turnover of the food market, it was expected that by 2005 this would double.
- The share of the most important segment in the German food industry, confectionery, in total turnover in the food industry decreased in 2005 and 2006.
- Increased demand for low-sugar food products stimulates demand for pectins.

Opportunities and threats

- Increased health awareness of German consumers is expected to stimulate demand for natural colours, flavours and thickeners
- German consumers are well-informed and deeply concerned about nutrition and product safety. They are aware of food additives, they read labels and demand a lot of information about the products they consume. Hence, another indicator that consumption of natural colours, flavours and thickeners is expected to increase in the near future.

Useful sources

- BLL (<http://www.bll.de/>): Union for Food Law and Food Science

- BE: Association of Food Industries
- DVAI (www.aromenhaus.de): German Association of the Flavour Industry

2. Trade: imports and exports

Imports

- German Association of the Aroma Industry (DVAI) and the German Association of the Essential Oils Industry (VDDEI): <http://www.aromenhaus.de/>

Total imports

In 2005, Germany was the leading importer of natural colours, flavours and thickeners in the EU, accounting for 19% of total EU imports. The value of imports increased by 4% annually, which is the same as the EU average. In 2005, the value of total imports amounted to € 343 million. In that same year, imports sourced in developing countries accounted for 38% of total import value. The leading developing country supplier of natural colours, flavours and thickeners was India, accounting for 12% of total German import value, followed by China (7%). Although India was the most important supplier, its share in German imports increased by only 3% between 2001 and 2005, whereas China's share increased by 11% annually.

German imports of natural colours, flavours and thickeners is not dominated by a handful of suppliers, so that the market can be characterized as being fragmented.

Imports by product group

Table 2.1 Leading suppliers of natural colours, flavours and thickeners to Germany (share in imported value, 2005)

| Product | 2001 € million | 2003 € million | 2005 € million | | Leading suppliers in 2005 (share in %) | Share in German imports (%) |
|---|-------------------|-------------------|-------------------|-----------------------|---|--------------------------------------|
| Total | 294.8 | 298.3 | 343.0 | Intra-EU: | France (18), Denmark (8), Italy (6), The Netherlands (6), Spain (5) | 50 |
| | | | | Extra-EU excl DC*: | USA (5), Switzerland (4), Norway (1), Australia (1) | 13 |
| | | | | DC*: | India (12), China (7), Sudan (4), Nigeria (2), Brazil (2) | 38 |
| Natural Colours | 35.5 | 34.1 | 40.2 | Intra-EU: | The Netherlands (18), Spain (13), Denmark (9), France (5), Italy (3) | 57 |
| | | | | Extra-EU excl DC*: | USA (8), Norway (3), Australia (2), Switzerland (2) | 16 |
| | | | | DC*: | India (9), Peru (8), Ethiopia (3), China (3), Chile (2) | 27 |
| Flavours | 25.7 | 32.6 | 34.6 | Intra-EU: | France (14), United Kingdom (7), Austria (2), Sweden (1), The Netherlands (1) | 26 |
| | | | | Extra-EU excl DC*: | USA (15), Singapore (1) | 17 |
| | | | | DC*: | India (30), China (27), Brazil (1) | 58 |
| Manioc starch | 0.9 | 1.2 | 2.6 | Intra-EU: | The Netherlands (67), Denmark (3), Austria (2), United Kingdom (1), Italy (1) | 74 |
| | | | | Extra-EU excl DC*: | - | 0 |
| | | | | DC*: | Thailand (24), Brazil (2) | 26 |
| Natural gums, resins and balsams | 16.7 | 13.4 | 36.6 | Intra-EU: | France (18), Belgium (3), United Kingdom (1), The Netherlands (1) | 23 |
| | | | | Extra-EU excl DC*: | - | 1 |
| | | | | DC*: | Sudan (36), Nigeria (20), Iran (6), | 75 |

| Product | 2001 € million | 2003 € million | 2005 € million | | Leading suppliers in 2005 (share in %) | Share in German imports (%) |
|---|-------------------|-------------------|-------------------|-----------------------|---|--------------------------------------|
| | | | | | Chad (4), Ethiopia (2) | |
| Pectates, agar-agar, mucilages and thickeners | 122.4 | 120.1 | 139.8 | Intra-EU: | France (23), Denmark (17), Italy (10), Spain (6), The Netherlands (2) | 62 |
| | | | | Extra-EU excl DC*: | Switzerland (8), Norway (1) | 10 |
| | | | | DC*: | India (14), China (4), Philippines (4), Morocco (4), Indonesia (1) | 28 |
| Essential oils | 93.5 | 97.0 | 89.4 | Intra-EU: | France (20), The Netherlands (7), Italy (6), United Kingdom (5), Spain (3) | 47 |
| | | | | Extra-EU excl DC*: | USA (10), Switzerland (2), Australia (1), Singapore (1), United Arab Emirates (1) | 18 |
| | | | | DC*: | India (9), China (8), Brazil (6), Indonesia (3), Turkey (2) | 35 |

Source: Eurostat (2006)

*DCs: Developing countries

In 2005, pectates, agar-agar, mucilages and thickeners were responsible for the largest share of total imports, accounting for 41%. Within this product group 'other mucilages and thickeners' are the most important products, accounting for 36% of the import value of the product group. The leading developing country supplier of pectates, agar-agar, mucilages and thickeners was India with a share of 14%. In the period 2001 – 2005, imports of pectates, agar-agar, mucilages and thickeners experienced an annual growth of 3%, which is slightly less than the average for total German imports (4%).

The second most important product group was essential oils, accounting for 26% of total import value in 2005. The value of German imports of essential oils, however, decreased by 1% annually between 2001 and 2005. India was the largest developing country supplier with a share of 9%, followed by China (8%). In the period 2001 – 2005, India's share in imports decreased by 5% annually, whereas China's share increased by 5% annually.

Exports

Germany is the third largest exporter of natural colours, flavours and thickeners (in terms of value). In 2005, exports amounted to 28.2 thousand tonnes with a value of € 167 million, representing 12% of total EU export value. In the period 2001 – 2005 export value decreased by 32%, which is strong compared to the EU average decrease of 4%. German exports of natural colours, flavours and thickeners consisted of pectates, agar-agar, mucilages and thickeners (33%), essential oils (30%), natural colours (23%), natural gums, resins and balsams (11%), flavours (3%) and manioc starch (1%).

Opportunities and threats

- Germany is a strong net importer and a considerable part of these imports is sourced in developing countries.
- The value of the imports from developing countries increased by 6% compared to 4% for total German imports, indicating a strong position of developing countries in German imports. Developing countries performed particularly well in German imports of pectates, agar-agar, mucilages and thickeners. Their share in these imports increased by 5% annually in the period 2001 – 2005.
- Imports of manioc starch mainly come from The Netherlands, which imports manioc starch from developing countries and then re-exports it to Germany, amongst others. Developing countries could take advantage of the growing German imports of manioc starch by supplying through traders in The Netherlands.

Useful sources

- EU Expanding Exports Helpdesk - <http://export-help.cec.eu.int/>
Go to: trade statistics.
- Eurostat – official statistical office of the EU - <http://epp.eurostat.cec.eu.int>
Go to: 'themes' on the left side of the home page - 'external trade' - 'data – full view' - 'external trade - detailed data'.

3. Trade structure

Trade channels

Germany is covered by the EU distribution network for natural colours, flavours and thickeners which consists of a relatively small number of multinational processors, traders and agents. Therefore, the trade structure in Germany cannot be described separately from the trade structure given in the survey covering the EU market.

The market for colours and flavours is dominated by compounders, which supply the largest food manufacturers. These multinational processors are often vertically integrated including import, production/processing, marketing and sales. Moreover, they are often integrated horizontally as well to include many different, but related products (i.e. colours and flavours). Although production facilities are located in just one or a few locations, sales offices of these multinationals are spread out more widely. They are located in many different countries in order to cover specific countries or regions. IFF, for example, has sales offices in 11 EU countries. Although smaller markets are often covered by sales offices located in other countries, larger markets such as Germany are generally covered by one office dedicated solely to that market. The reasons for the multinationals to have offices in many different countries are market coverage and knowledge of customer requirements. By having offices in different countries, they can reach more buyers and gather more information about country, regional and company specific requirements. This enables them to compete better with other suppliers.

Smaller food manufacturers in Germany are in many cases supplied by independent traders and agents. Similar to the compounders, some traders have set up local offices in different countries from where they sell their products. Sometimes, local sales offices have their own purchasing department. They basically operate independently, but under the same flag.

The EU-wide scope of the multinational processors, traders and agents requires that developing country exporters assess carefully the channels through which country and company products reach end-users. The location of end-users is often different from where the products are imported. Products sold by the sales office of IFF in Germany, for example, might come from one of the production facilities in France, The Netherlands, Sweden or the UK. This means that products from a developing country exporter aiming to supply large food manufacturers in Germany might have to go to France, The Netherlands, Sweden or the UK first.

Major compounders, traders and agents active in the German market for colours, flavours and thickeners are listed below. Many of the major players are multinational companies which are mentioned in the survey covering the EU market. For each company, an indication is given of the location of the headquarters, production facilities or sales offices. Note that only those offices and facilities are mentioned which are active in the markets for colours, flavours or thickeners:

- Givaudan Deutschland GmbH (<http://www.givaudan.com>): manufacturer of flavours. 1 production facility in Germany, 2 creative offices and 2 sales offices.
- Sensient Food Colors Europe (<http://www.sensient-fce.com>): producer of natural colours. 3 relevant offices in Germany (1 for essential oils, 1 for flavours and 1 for colours).
- Symrise GmbH & Co (<http://www.symrise.com>): supplier of flavours. Has 5 locations in Germany.

- Chr. Hansen (<http://www.chr-hansen.com/>): largest producer of colours in the world, headquarters in Denmark, supplier of colours, flavours, cultures, enzymes and more. Has a production facility in Germany.
- Danisco (<http://www.danisco.com>): Danish supplier of value-added ingredients such as colours, emulsifiers, essential oils, hydrocolloids, etc. Recently purchased Rhodia Food Ingredients. Danisco has production facilities and sales offices in nearly every EU country.
- Alfred L. Wolff GmbH (<http://www.alwolff.com>): supplier of gum arabic, agar-agar, carrageenan, guar gum, locust bean gum and xanthan gum. Headquarters in Germany and 2 production facilities.
- Döhler GmbH (<http://www.doehler.com>): manufacturer of flavours and colours. Headquarters and 2 production facilities in Germany.
- CP Kelco Germany GmbH (<http://www.cpkelco.com>): manufacturer of pectins. Has a manufacturing plant in Germany (pectins) and a sales office.
- Herbstreith & Fox GmbH (<http://www.herbstreith-fox.de>): manufacturer of pectins.
- Willy Benecke GmbH (<http://www.willy-benecke.com>): supplier of gum Arabic, guar gum, locust bean gum, agar-agar and carrageenan.

Other companies active in the German market for natural colours, flavours and thickeners are: Firmenich, Axxence Aromatic GmbH, Destilla GmbH, International Flavours & Fragrances GmbH (creative office and sales office), Ringe & Kuhlmann, Paul Kaders GmbH, S. Black, WILD.

Trends

The consolidation in the EU market for colours, flavours and thickeners is also applicable to the German market. The acquisition of the German company Degussa Food Ingredients by Cargill (US company) in 2006 is a clear example of the consolidation in the German market.

Another trend is the increasing production scale. Particularly the large companies invest in their production facilities

Useful sources

- German Association of Wholesaling and Foreign Trade Companies in the Drugs and Chemical Business: <http://www.v-d-c.org/>

For more suppliers of colours, flavours and thickeners: <http://www.thomasglobal.com>.

4. Prices and margins

Prices and margins

Please refer to the CBI market survey covering the EU market for prices of natural colours, flavours and thickeners. The price indications given there are the best reference point for prices in Germany. If any price differences exist, they are the result of differences in transport costs and individual buyer preferences for product origin, quality, packaging, etc. These differences are considerable, both between countries and within countries. Nonetheless, world market prices as mentioned in the survey covering the EU market are the basis for price calculations in every country. Actual prices are dependent on negotiation with partner companies.

The margins charged by different intermediaries in the trade of natural colours, flavours and thickeners are influenced by many different factors. These include the product type, the current and expected future harvest situation, the availability or number of sources for the particular product, the level of demand and the trend in prices.

Useful sources

- The Public Ledger (<http://www.public-ledger.com>): Prices for selected colours, flavours and thickeners
- MCX India (<http://www.mcxindia.com/>): Prices for menthol and guar
- Chemical Marketing Reporter

- Quarterly Review of Food Hydrocolloids: Prices for hydrocolloids
- Organic Trade Services (<http://www.organicts.com/>): Prices for organic products

5. Market access requirements

As a manufacturer in a developing country preparing to access Germany, you should be aware of the market access requirements of your trading partners and the German government. Requirements are demanded through legislation and through labels, codes and management systems. These requirements are based on environmental, consumer health and safety and social concerns.

Legislative requirements

National legislation in EU countries is compulsory for all products traded within the country concerned. Therefore, as an exporter in a developing country you have to comply with the legislative requirements which are applicable to your products. For information on legislation go to 'Search CBI database' at <http://www.cbi.eu/marketinfo>, select your market sector, and the EU country of your interest in the category search, click on the search button and click on legislative requirements for an overview of all documents on legislation in your country of interest.

Non-legislative requirements

Social, environmental and quality-related market requirements are of growing importance in international trade and are often requested by European buyers through labels, codes of conduct and management systems. For information on non-legislative requirements, go to 'Search CBI database' at <http://www.cbi.eu/marketinfo>, select your market sector and the EU country of your interest in the category search, click on the search button and click on your subject of interest under non-legislative requirements for an overview of all documents on the subject concerned in your country of interest.

Packaging, marking and labelling

For general information on packaging, refer to the survey covering the EU. You can download information on requirements on packaging, marking and labelling in specific EU markets from <http://www.cbi.eu/marketinfo>.

Tariffs and quota

Tariffs and quota are set by the European Commission and are the same for all EU countries. Refer to the EU survey for more information.

Useful sources

- CBI Database <http://www.cbi.eu/marketinfo>
- Taric Homepage http://europa.eu.int/comm/taxation_customs/dds/en/tarhome.htm
- Directorate General XXI http://europa.eu.int/comm/taxation_customs/common/publications/info_docs/taxation/index_en.htm

6. Business practices

Selecting a suitable trading partner

New suppliers of natural colours, flavours and thickeners are likely to meet with resistance from buyers as this is a very conservative market depending to a great extent on trust regarding supply and quality. Producers and buyers also closely guard information and "secrets". Once stable trading relationships have been established, however, reliable markets can be gained.

Due to the restraints of buyers of natural colours, flavours and essential oils regarding new suppliers, a common procedure in this market is for buyers to send an agent to the producing country, to visit potential suppliers. However, it is also common for exporters to contact buyers. In many cases, first contact is preferably made by e-mail. This e-mail should include a

quotation with a material safety data sheet and a technical data sheet, quantities, prices, delivery times, etc.

As in many other industries, price/quality ratio is the main criterion which importers use to select their supplier. Other important criteria are related to reliability. Food manufacturers like Cargill need constant supplies of basic raw materials. They check the financial stability of potential suppliers and what kind of measures the companies take to deal with disappointing harvests and shortages. Large companies like Cargill also spread risks by sourcing from multiple suppliers.

A major trader in natural ingredients for food products, Danisco, performs a commercial, technical and qualitative audit of a potential supplier of raw materials before selecting a new supplier. They will look into documents such as the annual report, the banker's credit report and product range information.

Note that processing of the raw material is not always preferred by importers. Some of them have their own processing facilities which add value to the product and increase their margins.

Reaching an agreement with your trade partner

Buyers will often request a sample for approval before actual shipment takes place. The sample should be accompanied by some of the following documents, depending on the requirements of the buyer:

- Material safety data sheet
- Technical data sheet
- Pesticide residue analysis
- GMO-free declaration
- Declaration of non-animal product derivatives
- Kosher and Halal certificates
- Organic certificate
- Fairtrade certificate

(ITC's marketing manual for organic spices, herbs and essential oils, 2004).

The buyer will carefully analyse the sample and test its physico-chemical quality. Samples should be representative of the complete shipment to prevent procedural problems. Reliability of delivery in terms of product specifications is mentioned by importers as a critical condition for a good trade relationship.

Natural ingredients are agricultural products which depend on weather conditions for their production. The quality of these products is difficult to control. Large buyers, such as Nielsen Massey (vanilla) often send inspectors to audit their suppliers with the objective of controlling quality as much as possible.

Buyer and supplier should agree on terms of payment in advance. The most commonly used terms of payment are the *Letter of Credit* (L/C) and *Cash Against Documents* (CAD). When using an L/C, risks are divided between buyer and supplier. The supplier only receives payment after the goods are consigned to a carrier and the buyer only receives the goods after payment. CAD carries the greatest risk for the exporter, as the exporter will only receive payment when the buyer picks up the goods. Other payment terms which carry even more risk for the exporter are bank transfers after 30 days and consignment. In case of co-operation agreements with overseas companies, payment terms could also include periodical payments. Once trading relationships are established, clean payments are often used. The selected payment method often depends on the degree of trust between buyer and supplier.

Export terms of sale determine which costs are covered in the price of the cargo, at which point ownership transfers to the buyer and at which point responsibility for the cargo is transferred. The most commonly used terms of sale are FOB (Free on Board), CFR (Cost and Freight) and CIF (Cost, Insurance, Freight). It is recommended that quotations to European buyers of natural colours, flavours and thickeners should be made on a CIF basis. However,

supplier and importer are free to negotiate and agree whether quotations and subsequent trade are based on CIF or FOB prices. Special attention should also be given to contract fulfilment in reference to contingencies which might occur while the sale order is being processed, shipped etc.

Cultural differences

A profound knowledge of the German business culture is one of the main keys to a durable relationship. In spite of all modern communication tools, the personal relationship with a trading partner often decides a durable co-operation. The general business culture of Germany is described below.

- Germans are formal and never use first names.
- They like to be addressed by Herr (Mr.), Frau (Mrs) or Fraulein (Ms) and their last names; it is important to check beforehand whether your counterpart has a title: in this case titles should be used also: Herr Doktor Schmidt or Frau Ingenieurin Albrecht.
- German purchasers like to come quickly to the point and are well prepared for the meeting; they want to eliminate uncertainties as much as possible, so they will ask a lot of details.
- Offer your German counterpart 'certainties': assurances, guarantees, references to check you and your company out; company background, expertise and track record are very important elements for Germans in their search for certainties.
- Dress correctly and formally; avoid flashy and contrasting colours and expensive watches, rings, bracelets, etc.
- Come strictly on time; German purchasers usually have very tight schedules and many meetings in one day; they usually inform you how long the meeting will last and the points they want to cover.
- They require detailed planning and concrete arrangements and expect you to adhere to them; prepare yourself in detail for this meeting; mistakes or inability to reply to questions will not be tolerated and mean the end of a possible business relationship.
- Try to make friends with the secretaries; they have a lot of influence in scheduling the appointments for their bosses; here again, never address them by their first names.

Internet provides many sources on business practices and culture, such as

<http://www.communicaid.com/germany-business-culture.asp> and

<http://www.kwintessential.co.uk/resources/global-etiquette/germany-country-profile.html>.

Please keep in mind that the above concerns general remarks. Therefore, when conducting business use your intuition and an understanding attitude.

Sales promotion

Common practices of trade promotion in Germany should not differ considerably from other European countries. German people speak good English, especially when they are in the trade business. In general, good care should be taken of existing contacts, by using prompt, constant and reliable communication. Letters of inquiry should always be replied to. An essential tool used in sales is a detailed and up-to-date customer database.

Please refer to CBI's *Export planner* and *Your image builder* for more information on this subject.

Assistance with market entry can also be sought through local business support organisations, import promotion organisations such as CBI and branch organisations focusing on the food additives or food ingredients sector. Interesting *trade associations* in Germany are:

- German Association of Wholesaling and Foreign Trade Companies in the Drugs and Chemical Business: <http://www.v-d-c.org/>

Trade fairs offer companies in developing countries the opportunity to establish contacts, promote their products and conduct EU market orientation. Major fairs of EU-wide significance are mentioned in the Survey covering the EU. *Trade fairs* of interest for entrance to the German market in particular are:

- Biofach: <http://www.biofach.de>

- ANUGA: <http://www.anuga.com/>
- Vitafoods in Switzerland (<http://www.vitafoods.eu.com/>): exhibition in the nutraceuticals, cosmeceuticals, functional foods and functional drinks industries.

Trade press can function as a means for gaining insight into market developments and competition, but can also have a promotional function. This concerns finding potentially interesting companies, as well as promotion of your own activities and products. Major trade press of EU-wide significance is mentioned in the Survey covering the EU. *Trade press* of interest in Germany is:

- Lebensmittelwelt.de: <http://www.lebensmittelwelt.de/>
- Lebensmittel Zeitung: <http://www.lz-net.de/>

This survey was compiled for CBI by ProFound.

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