CBI MARKET SURVEY

The honey and other bee products market in Germany

Publication date: June, 2009

Report summary
This CBI market survey discusses the following highlights for the honey and other bee products market in Germany:
- Germany is by far the leading honey market in the EU. It consumes 96 thousand tonnes of honey annually. The markets for niche products, such as organic and Fair Trade honeys, are also considerable.
- Domestic production of honey is large, amounting to 25 thousand tonnes. Nevertheless, production is insufficient to satisfy demand from German consumers. Therefore Germany is dependent on imports of honey. Moreover, the honey production in Germany is decreasing due to several factors which harm the bee populations.
- Germany is the largest EU importer of honey, with imports amounting to € 140 million / 94 thousand tonnes in 2007. Between 2003 and 2007, these imports fluctuated due to price developments. Developing countries accounted for 64% of the imports, which was high compared to other EU countries. The leading suppliers are Argentina and Mexico.

This survey provides exporters of honey and other bee products with sector-specific market information related to gaining access to Germany. By focusing on a specific country, the survey provides additional information, complementary to the more general information and data provided in the CBI market survey 'The honey and other bee products 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: consumption and production

This survey provides information on honey and other bee products. The product selection is explained in Appendix A of the survey 'The honey and other bee products market in the EU'. The following chapter only provides information on honey and beeswax, as no reliable information on the markets for other bee products was available for the German market.

Consumption and industrial demand

Germany is the leading market for honey in the EU, followed by the UK and France. Germany accounts for more than a quarter of the total EU honey consumption. In 2007, honey consumption in Germany amounted to 96 thousand tonnes (Eurostat, 2008). Both a large population and a high per capita consumption of 1.2 kg contribute to the high consumption level in Germany. Between 2003 and 2007, consumption fluctuated resulting in a small net decrease of 544 tonnes (Eurostat/FAOSTAT, 2008).

German consumers mainly use honey as a sweetener in meals and drinks, an ingredient in bakery products and a bread spread. The variety of honeys available is relatively large. Both liquid and creamed honey are popular. Orange Blossom is a popular monofloral honey.

The maturity of the German market for honey hampers further growth rather than promoting it. Consequently, consumption of honey is expected to remain stable in the next 5 years.

There are no statistical data available on consumption of beeswax and other bee products. However, there are numerous traders and importers offering beeswax and other bee products on their websites, indicating significant interest in these products in Germany compared to other EU countries.

Market segmentation

The division between honey consumption by consumers and by industrial users is not expected to vary much from the EU average, where 85% is consumed by end-consumers and 15% by industrial users.

The Langnese brand has a prominent place in the German supermarket with a 25% market share. Langnese offers both liquid and creamed honey, blended honeys, and monofloral honeys such as clover, acacia, rapeseed, and lime-tree honey. Recently, Langnese introduced a range of flavoured honeys, which are infused with vanilla, cinnamon, and ginger. Other major brands on the German market are Biophar (organic), Allos (organic), and Walter's Imkerhof (organic).

Organic segment

Germany is the largest market for organic food products in the EU, with sales amounting to € 4.6 billion in 2006, representing 2.7% of its total food market (FiBL, 2008). Per capita consumption amounted to € 56 in 2006, which is relatively high. Around 2.6% of the honey market concerns organic honey. The brand leader for organic honey is Allos, with a share of 80%.

Fair Trade segment

The Fair Trade Labelling Organisation (FLO) is widely known in Germany, which is the largest market in the EU for FLO certified Fair Trade honey. Sales volumes of FLO certified Fair Trade honey amounted to 438 tonnes in 2006. Although sales decreased between 2003 and 2004, they increased again steadily between 2004 and 2006. Germany is now closely followed by the UK, which saw a large increase in the sales of Fair Trade honey.

Trends

The health trend also has an effect on the German market. This trend is likely to affect the honey market positively, as honey is regarded as a natural, pure and healthy product. Please refer to the CBI market survey 'The honey and other bee products market in the EU' for more information on the natural health trend.

A trend in the honey market is that the trade of honey containing supplements is increasing in Germany. This indicates an increasing consumption of these products, where supplements could be for example hazel, earth nuts or fruits.

Production

Germany is the second largest producer of honey in the EU, after Spain. The third largest producer is France. German honey production amounted to 25 thousand tonnes in 2007. It is produced by 81 thousand beekeepers of which only 200 are professional beekeepers. The agricultural value of the pollination work done by bees amounts to € 2.5 billion (German beekeepers association (DIB), 2009). Most of the beekeepers are members of the DIB. As in many other EU countries, beekeeping is mainly a hobby. The number of colonies needed to produce sufficient honey to provide a good income is large, so that the business is only attractive to the most dedicated beekeepers. Their strength is the production of honeys which are typically German and of high quality. As an illustration of the strict quality control, the DIB has set the HMF (Hydroxy Methyl Furfuraldehyde) content level for high-quality honeys from German beekeepers at 15 mg/kg, while EU regulation allows 40 mg/kg. Refer to CBI's 'From survey to success. Guidelines for exporting honey and other bee products to the EU' for more details on EU quality requirements.

Some of the main monofloral types of honey produced in Germany are rapeseed, acacia, lime tree, sunflower, pine tree, and heather. Furthermore, Germany's black forest is a well known source for honeydew (Wikipedia, 2008). Honeydew is the sweet secretion of other insects and can be collected by bees. The honey made by bees collecting honeydew, instead of nectar, has a stronger taste and therefore is not appreciated everywhere.

Between 2003 and 2007, honey production fluctuated between 20 thousand tonnes and 25 thousand tonnes. Overall, production increased by 1.6% annually on average in this period. The decreases in German honey production in the between years were the result of bad harvests and decreasing numbers of bee colonies. Recovery of bee colonies and the good harvest in 2007 resulted in the small net increase over the whole period. The main problem for the sector is that many older beekeepers are retiring, while the number of starting beekeepers is declining. Another problem is the deterioration of the bees' habitat, due to other agricultural activities. Furthermore, bee populations suffer from the varroa mite from Asia, and herbicides. The practicing of monoculture also has its effects on honey production.

For more information on German honeys, please visit the websites of the Association of professional beekeepers (http://www.berufsimker.de/) and the websites of local honey traders Honig Göken (http://www.honig-goeken.de/) and Honig Wernet (http://www.honig-wernet.de).

Data on beeswax production in Germany are not available. Although the beekeeping sector is large, production of beeswax for commercial purposes is expected to be small. The German sector is not as competitive as those in Spain and China.

Trends
Beekeepers in Germany mainly consist of older people. As there is a shortage of bee populations and beekeepers, amateur beekeepers increasingly try to involve younger people, especially in cities. The bees increasingly live in the large cities instead of the countryside.

Opportunities and threats

+ Germany is the largest market for honey in the EU, with a high per capita consumption of honey. Based on consumption and production data, Germany was for 26% self-sufficient regarding its honey supplies in 2007. This indicates opportunities for developing country exporters, as the remaining share needs to be imported. When health trends positively influence the consumption of honey in Germany, opportunities increase.
+ Special honeys such as organic, Fair Trade and monofloral honeys, offer good opportunities for suppliers to gain a foothold in the market or expand their market share, as those niche markets are performing well.
+ There is a relatively large interest for honeydew honey from the forest. This indicates that relatively dark honeys, such as forest honeys, are more widely accepted in Germany.
+ The German beekeeping sector is threatened by diseases and falling interest by hobbyists. Therefore, production is expected to decrease in the long term.

Exporters should note that a development or trend can be an opportunity for one exporter, while posing a threat to other exporters. Exporters should therefore analyse if the developments and trends discussed in the previous sections provide opportunities or threats, depending on their specific situation. Please refer to Chapter 7 of the CBI EU market survey for honey and other bee products for an example of such an analysis.

Useful sources

- DIB - http://www.deutscherimkerbund.de - German Association of Beekeepers
- Langnese - http://www.langnese-honig.de
- Transfair - http://www.transfair.org/ - German initiative of Fair Trade

2 Trade channels for market entry

Trade channels
The trade channels for honey and other bee products from developing countries to German consumers do not differ from other EU countries. Honey producers in developing countries are often organised in groups (cooperations or associations) which collect the honey and establish trade relationships with interested buyers in Germany. The buyers can be importers or

packers, but often fulfil both functions. Please refer to Chapter 3 of the CBI market survey covering the EU for more information.

The importer-packers mostly supply retailers. Large packers, which trade conventional honeys, often supply large retailers such as supermarkets. Smaller packers often supply health shops, organic shops and other specialty food shops. Industrial users are also mainly supplied by large packers. However, some catering businesses look for specialty honeys, such as Fair Trade honey, which are mostly supplied by small packers. Please refer to Chapter 3 of the survey covering the EU market for more information on trade channels.

Interesting players for developing country exporters in the German honey market include:
- Fürsten-reform - http://www.fuersten-reform.de/ - importer and market leader. FLO certified
- Johann Godfried Schutte - http://www.jgs.de
- Alfred L. Wolff - http://www.alwolff.de – importer/packer. FLO certified.
- Allos - http://www.allos.de/ - importer, packer and wholesaler, products sold through trade channels specialised in organic food
- Walter Lang Honigimport - http://www.honigimport.de – FLO certified.
- Tuchel & Sohn - http://www.tuchel-sohn.de/ - FLO certified.
- Apimiel - http://www.apimiel.de
- Honigmayr - http://www.honigmayr.at/ - Packer
- Honig Mehler - http://www.honigmehler.de/ - Importer of honey and other bee products
- Honig Reinmuth - http://www.honig-reinmuth.de – Importer, packer and wholesaler
- Breitsamer - http://www.breitsamer.de – FLO certified.
- Stute (http://www.stute-nahrungsmittelwerke.de/brotaufstrich1.html),
- SANOVA - http://www.sanova-honig.de/ - importer
- Kessler & Co - http://www.kessler-agrar.de – importer of honey from Eastern Europe
- Binder International (http://www.binder-international.com/),
- Albert Claussen Honigversand - http://www.hof-ratzbek.de
- Bahnsen & Prigge - http://www.bahnsen-prigge.de/ - agent for suppliers of bee products
- DE-VAU-GE Gesundkostwerk - http://www.de-vau-ge.de/ - industrial user of honey
- Dreyer Bienenhonig - http://www.dreyer-bienenhonig.de/
- Honig Bracker - http://www.honig-bracker.de
- Honig Wernet - http://www.honig-wernet.de/ - honey packer with own production
- El Puente - http://www.el-puente.de/ - Importer of Fair Trade honey
- Gepa Fair Handelshaus - http://www.gepa.de - Fair Trade company. FLO certified.
- Wilhelm Reuss - http://www.wilhelmreuss.de/ - wholesaler of processed Foods. FLO certified.
- Kahl & Co Vertriebsgesellschaft mbH - http://www.kahlwax.de/ - refiner and the only wax refinery certified to refine organic wax in the EU

In 2007, 6 importers were registered as importers of Fair Trade honey.

Price structure
Honey needs to pass through various intermediaries (e.g. freight company, importer, packer, retailer, etc.) from the moment of export to the moment that the final consumers purchase the product. All of the intermediaries add value to the product and the prices paid for the product are therefore different at every stage. Generally speaking, retail prices are around 2.5-3 times higher than producer prices. Industry sources estimate the following costs and margins:
- Transport and Customs: 10%
- Commission for importer: 5%
- Packer (blending, filtering and packing): 10%
- Wholesaler: 5-10%
- Retailer: 25%-100% (depending on retail channel)
- VAT: 6-21% (depending on country)

The margins for each intermediary are variable and depend on the scale in which the honey is traded, the type of honey (e.g. conventional or organic), the number of intermediaries, etc. Organic honey normally has a premium of 15 to 20% above the global market prices. Please refer to the survey covering the EU market for more detailed information on the price structure of honey.

Finding a suitable trading partner
Finding a trade partner in Germany should not deviate from the general EU method. Buyers and suppliers often find each other through existing contacts in their network. If you can not rely on your network, some research will be required. Contact details can be found at http://www.businessdeutschland.de or through the Chamber of Commerce. Search for importers directly or ask wholesalers or trade associations for contact details of importers or other companies or organisations which can help you in your search.

Another way to get in touch with the appropriate contacts is visiting trade fairs. Please refer to section 6 of this survey for a list of interesting trade fairs in Germany. Participating in or visiting trade fairs is also important for price benchmarking, establishing quality requirements and looking at what 'extras' your competitors offer. Brokers can also help you to find suitable partners.

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 these pages only give general remarks. Therefore, when conducting business, use your intuition and an understanding attitude.

Finally, the Internet can also be used for finding a trading partner through a business-to-business database such as:
- Agronetwork.com - http://www.agronetwork.com/global
- Europages - http://www.europages.com
- Alibaba – http://www.alibaba.com

Refer to chapters 3 and 4 of CBI's 'From survey to success. Guidelines for exporting honey and other bee products to the EU' for more information on selecting trade partners.

3 Trade: imports and exports

The information in the following chapter is limited to honey and beeswax. The other bee products do not have their own HS codes and only make up a small part of the product groups of the HS to which they belong. Consequently, the consolidated statistics on the product groups to which they belong are not useful.

Imports

Table 3.1 Imports by and leading suppliers to Germany 2003 - 2007, share in % of value

Product	2003 € mln	2005 € mln	2007 € mln	Leading suppliers in 2007 Share in %	Share (%)
Honey	57	39	47	Intra-EU: Hungary (8.0), Romania (5.1), Spain (4.4), Italy (4.3), Bulgaria (2.6)	34
	3.9	2.7	3.1	Extra-EU ex DC*: New Zealand (0.9), Canada (0.5), Switzerland (0.4), Australia (0.3)	2.2
	153	92	90	DC*: Argentina (26), Mexico (14), Uruguay (8.1), Chile (5.3), India (3.2), Cuba (2.4), China (0.9), Guatemala (0.6), El Salvador (0.5), Brazil (0.5)	64
Beeswax	0.9	0.8	1.2	Intra-EU: The Netherlands (5.3), Spain (3.3), France (3.2), United Kingdom (0.5), Belgium (0.1)	12

Product	2003 € mln	2005 € mln	2007 € mln	Leading suppliers in 2007 Share in %	Share (%)
	0.6	1.2	1.3	Extra-EU ex. DC*: Australia (9.8), New Zealand (2.3), USA (1.5), Russia (0.3)	14
	4.1	5.8	6.9	DC*: China (52), Argentina (7.7), Central Africa (4.3), Ethiopia (2.4), Ivory Coast (2.3), Vietnam (1.7), Thailand (1.0), India (0.8), Tanzania (0.5), Cameroon (0.5)	74

Source: Eurostat (2008)
*Developing Countries

Honey
Germany is the largest EU importer of honey, accounting for 37% of the total EU imports of honey in 2007. Behind Germany are the United Kingdom (16% share in EU imports), and France (12% share). In 2007, Germany imported € 140 million / 94 thousand tonnes of honey. Between 2003 and 2005, imports decreased by 21% annually on average in terms of value. Between 2005 and 2007, imports slightly recovered by 2.0% annually. In terms of volumes, imports remained more or less stable. The difference in development between import values and volumes is the result of large price fluctuations in the global market.

Developing countries accounted for a share of 64% in imports of honey by Germany, which was high compared to the EU average of 41%. However, German imports from developing countries decreased by 12% annually in value, while imports from other EU countries decreased at a lower rate. In terms of volume, imports from developing countries decreased by only 0.3% annually. The leading suppliers are Argentina and Mexico, but imports from these countries decreased by 13% and 1.8% annually respectively during the review period. In contrast, imports from Uruguay increased by 10% annually during the review period. East-European countries are also important suppliers of honey to Germany, although imports from Hungary, Romania, Bulgaria and Czech Republic all decreased.

In 2007, Fair Trade certified honey was imported from Mexico (50%), Guatemala (16%), Nicaragua (16%) and Chile (16%) (Traidcraft, 2007).

Beeswax
Germany is the largest EU importer of beeswax, followed by France and Greece, accounting for 39% of total EU imports of beeswax. Between 2003 and 2007, imports increased by 14% annually in terms of value, which was a strong increase compared to other leading importers, and by 5.4% annually in terms of volume. In 2007, imports amounted to € 9.4 million / 2.9 thousand tonnes. Unfortunately, there are no data available on the German market for beeswax, but as the imports are much higher than the exports, it can be assumed that Germany has a considerable market for beeswax.

Developing countries accounted for 74% of the German imports of beeswax, which was high compared to the EU average share of 56%. Moreover, German imports from developing countries increased by 14% annually during the review period, also indicating an increased share in imports. The leading supplier is by far China, accounting for 52% of the imports. Imports from China increased by 13% annually during the review period. Emerging developing country suppliers of beeswax are Argentina and Ethiopia, with annual growth rates of 106% and 59% respectively. Imports from Ivory Coast and Tanzania decreased. A possible explanation for the erratic imports is the low demand for beeswax compared to global production. Importers can easily switch between suppliers to get the lowest prices

Exports
Germany is the leading EU exporter of honey, accounting for 26% of total EU exports in 2007, followed by Hungary (19%) and Spain (12%). In 2007, Germany exported € 62 million / 24 thousand tonnes of honey. Between 2003 and 2007, these exports decreased by 3.0% annually on average in terms of value, but increased by 2.9% annually in terms of volume, in line with the EU trend. A large part of the honey imported by Germany is redistributed again to

other European countries. The main countries of destination are The Netherlands (15%), France (14%) and the United Kingdom (12%).

Germany is the largest EU exporter of beeswax, accounting for 36% of total EU exports in 2007. Other leading exporters are France (29%) and The Netherlands (16%). Between 2003 and 2007, German exports increased by 9.2% annually in value terms, and by 2.2% annually in terms of volume, to an amount of € 4.7 million / 1.0 thousand tonnes in the latter year. The main countries of destination were West-European countries, as well as Switzerland and the USA.

Opportunities and threats

+ Germany is the principal EU importer of honey and plays a leading role in the European honey trade. Moreover, developing countries account for a considerable share in these imports, which provides opportunities for developing country exporters.
- However, the share of developing countries in honey imports decreased during the review period. Although this is largely explained by disappointing harvests in Argentina, it shows how vulnerable these supplies are to substitutes from other countries.
+ In contrast to other leading EU importers, Germany does not import a large share of honey from China, indicating more opportunities for other developing country exporters. Moreover, imports from East-European countries, which could be strong competitors to developing country exporters, decreased during the review period.
+ Germany is a leading EU trader in beeswax, and developing countries account for a large share in German imports of this product group. Moreover, the share of developing countries increased during the review period.
- However, in contrast to honey, the largest part of the beeswax is supplied by China, which is a strong competitor to other developing country suppliers.

Exporters should note that a development or trend can be an opportunity for one exporter, while posing a threat to other exporters. Exporters should therefore analyse if the developments and trends discussed in the previous sections provide opportunities or threats, depending on their specific situation. Please refer to Chapter 7 of the CBI EU market survey for honey and other bee products for an example of such an analysis.

Useful sources

- EU Expanding Exports Helpdesk - http://exporthelp.europa.eu/
- ➔ go to: trade statistics
- Eurostat – http://epp.eurostat.ec.europa.eu - official statistical office of the EU

➔ go to 'themes' on the left side of the home page
➔ go to 'external trade'
➔ go to 'data – full view'
➔ go to 'external trade - detailed data'

4 Price developments

In the long term, honey prices in Germany are mainly influenced by global market prices. Increased imports of low-priced honey from the world's leading producers have pushed down honey prices in Germany. German beekeepers have been unable to compete with cheap imports. The result is a wide difference between the low-priced imported honey and honey from German beekeepers. The latter needed to upgrade their quality and image to justify their high prices.

Short-term price developments mainly result from weather conditions and major events, such as the ban on Chinese honey (imposed in 2002, due to contamination by chloramphenicol).

Currently, worldwide prices of honey are increasing dramatically because of a worldwide supply shortage of honey. The weather conditions and bee losses have a negative influence on the production of honey, which makes the product more scarce, resulting in increasing prices.

Furthermore, information on the producer prices in Germany is available at FAOSTAT. In 2003, the producer price of honey amounted to € 7,300 per tonne, but decreased to an amount of € 6,750 per tonne in 2006.

For more information on price developments, please refer to Chapter 5 of the CBI market survey 'The honey and other bee products market in the EU'.

Useful sources
- The Public Ledger - http://www.agra-net.com ➔ go to the left side of the web page and look for The Public Ledger
- Skamberg market updates - http://skamberg.com/honey.htm - Market analysis by a major importer in the US.
- Honig Göken - http://www.honig-goeken.de/ - price information on German honeys
- FAOSTAT - http://faostat.fao.org

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. You need to comply with EU legislation and have to be aware of the additional non-legislative requirements that your trading partners in the EU might request.

For information on legislative and non-legislative requirements, go to 'Search CBI database' at http://www.cbi.eu/marketinfo, select 'food ingredients' and Germany in the category search, click on the search button and click on market access requirements.

Pre-packed honey is hardly imported by EU countries, due to freight costs and limitations to heat crystallised honey when converting it back to liquid honey.

Honey from outside the European Union is usually imported in bulk, in standard lacquered, epoxy-lined steel drums which can contain 200 litres / 300 kg of honey. Beeswax can also be used for the lining. Paraffin wax should not be used. Phenol, which was previously used for the lining of the drums is now prohibited, as it is dangerous to human health. Exporters must always use clean drums which are completely free from residual taste or smell; they must never use drums previously used for chemicals. The drums must have a rubber seal around the closure. A full container carries approximately 62 drums of 300 kg.

Industrial users in the EU require different packaging methods to those for honey destined for consumers. These methods vary from full truckloads of 25,000 kg (for food industry and honey packers), "cubitainers" of 10,000 kg, and drums of 300 kg, to plastic buckets of 25 kg or 12.5 kg.

Beeswax is exported in small blocks of less than 25 kg and wrapped in special paper or plastic foil. Importers in the EU prefer to receive blocks of beeswax bare, without any cover of jute or polyethylene bags. They stick to the beeswax when it melts during transport. Instead, the blocks are put in stainless steel containers. Other metals negatively affect the quality of the beeswax.

Additional information on packaging can be found in the CBI market survey 'The honey and other bee products market in the EU' and at the website of ITC on export packaging: http://www.intracen.org/ep/packaging/packit.htm

Information on tariffs and quota can be found at http://exporthelp.europa.eu

6 Doing business

General information on doing business like approaching potential business partners, building up a relationship, drawing up an offer, handling the contract (methods of payment, and terms of delivery) can be found in CBI's export manuals 'Export Planner' and 'Your image builder'. Furthermore, cultural awareness is a critical skill in securing success as an exporter. Information on cultural differences in the EU can be found in chapter 3 of CBI's export manual 'Exporting to the EU'. These manuals can be downloaded from http://www.cbi.eu/marketinfo - go to search publications.

Sales promotion
Common practices of trade promotion in Germany should not differ considerably from other European countries. In general, good care should be taken of existing contacts through prompt, constant and reliable communication. Letters of inquiry should always be replied to. Essential tools are a detailed and up-to-date customer database and website(s) proposing well-defined products, competitive advantages (e.g. Unique Selling Point, quality, cost reduction and delivery reliability) and client references, to facilitate building trust.

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.

Trade fairs offer companies in developing countries the opportunity to establish contacts and a trustworthy image through several participations, to promote their products, and to conduct EU market orientation.

Useful sources

Trade associations
- National association of Foodindustries / Bundesvereinigung der Deutschen Ernährungsindustrie - http://www.bve-online.de
- BDSI - http://www.bdsi.de - German Confectionery Industry
- DIB - http://www.deutscherimkerbund.de - German Association of Beekeepers (available in German only)
- Oekolandbau - http://www.oekolandbau.de/ - Information portal on organic farming in Germany

Trade fairs
- Biofach - http://www.biofach.de - the world's leading trade fair for the organic food industry. The fair is held every year in February.
- ANUGA - http://www.anuga.com - Leading trade fair for the global food industry. The next one will be held in October 2009.
- Organic trade forum - http://www.biohandelsforum.de - A fair for organic products in the food retail trade. The last one was held in September 2008.

Check Eventseye (http://www.eventseye.com/) for more trade fairs in Germany.

Trade press
- Lebensmittelwelt - http://www.lebensmittelwelt.de – Magazine for the food industry (available in German only)
- Lebensmittel Zeitung - http://www.lz-net.de - Magazine for the food industry

This survey was compiled for CBI by ProFound – Advisers In Development