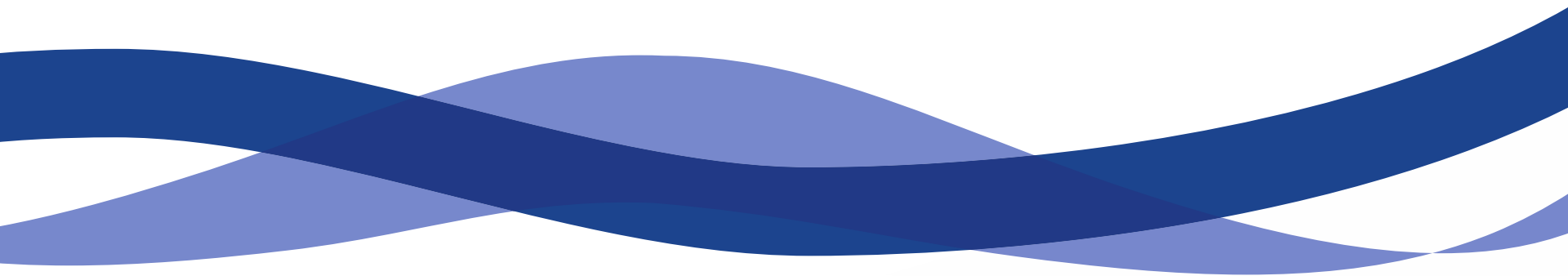


The German food and drink industries:

facts and figures 2017



Economic data of the food and drink industries 2016



“We ensure economical wealth and stability.”

	2016	2015
Total turnover	171.3 bn.€ (+1.6%)	168.6 bn.€ (-2.1%)
Domestic turnover	114.6 bn.€ (+0.7%)	113.9 bn.€ (-3.4%)
Exports*	56.7 bn.€ (+3.6%)	54.7 bn.€ (+0.7%)
(EU)	44.4 bn.€ (+2.8%)	43.2 bn.€ (±0%)
(Extra-EU)	12.3 bn.€ (+6.9%)	11.5 bn.€ (+3.7%)
Real sales trend	+1.7%	-0.1%
Shares of exports in total turnover	33%	32.5%
Companies	5,940 (+2.2%)	5,812(-0.3%)
Employees	580,030 (+1.9%)	569,162(+1.7%)
Consumer prices (total)	+0.5%	+0.3%
thereof food and beverages (non-alcoholic)	+0.8%	+0.7%
Producer prices of the food and drink industry		
Domestic	+0.2%	-2.1%
Export	-0.6%	-2.0%

(Changes compared to previous year in bracket)

* preliminary, estimated

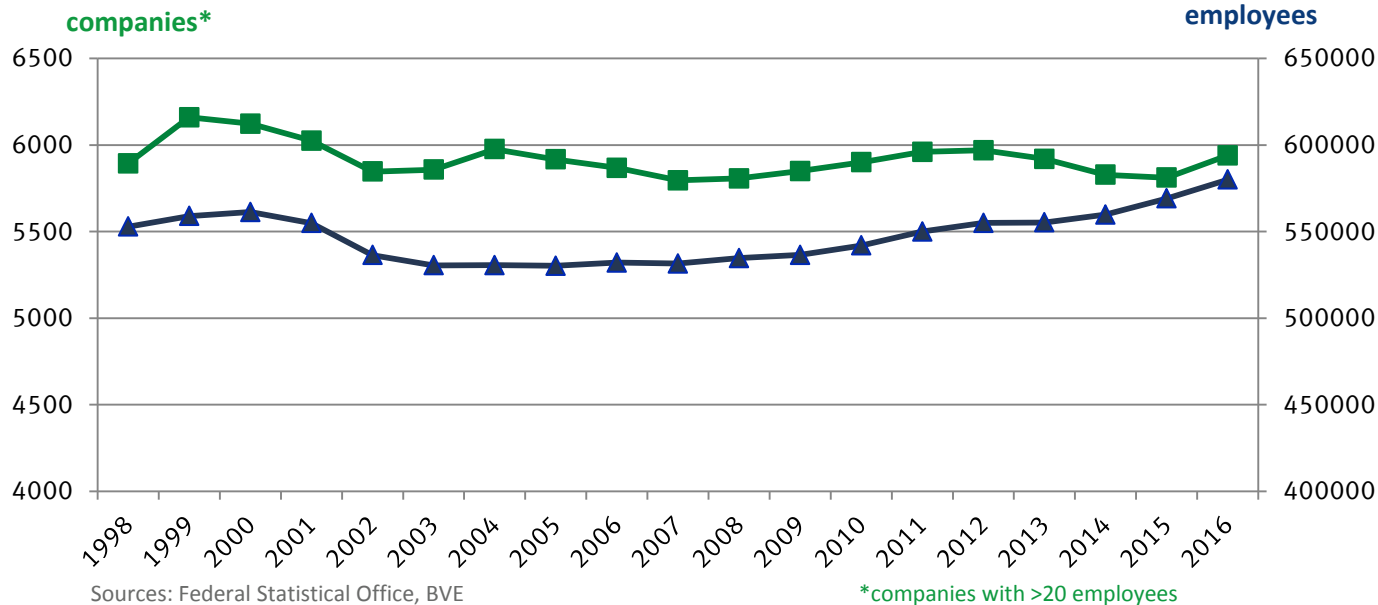
Sources: Statistisches Bundesamt, BVE

Employment security

„We provide secure employment all over Germany.“



companies and employees in the food and drink industries

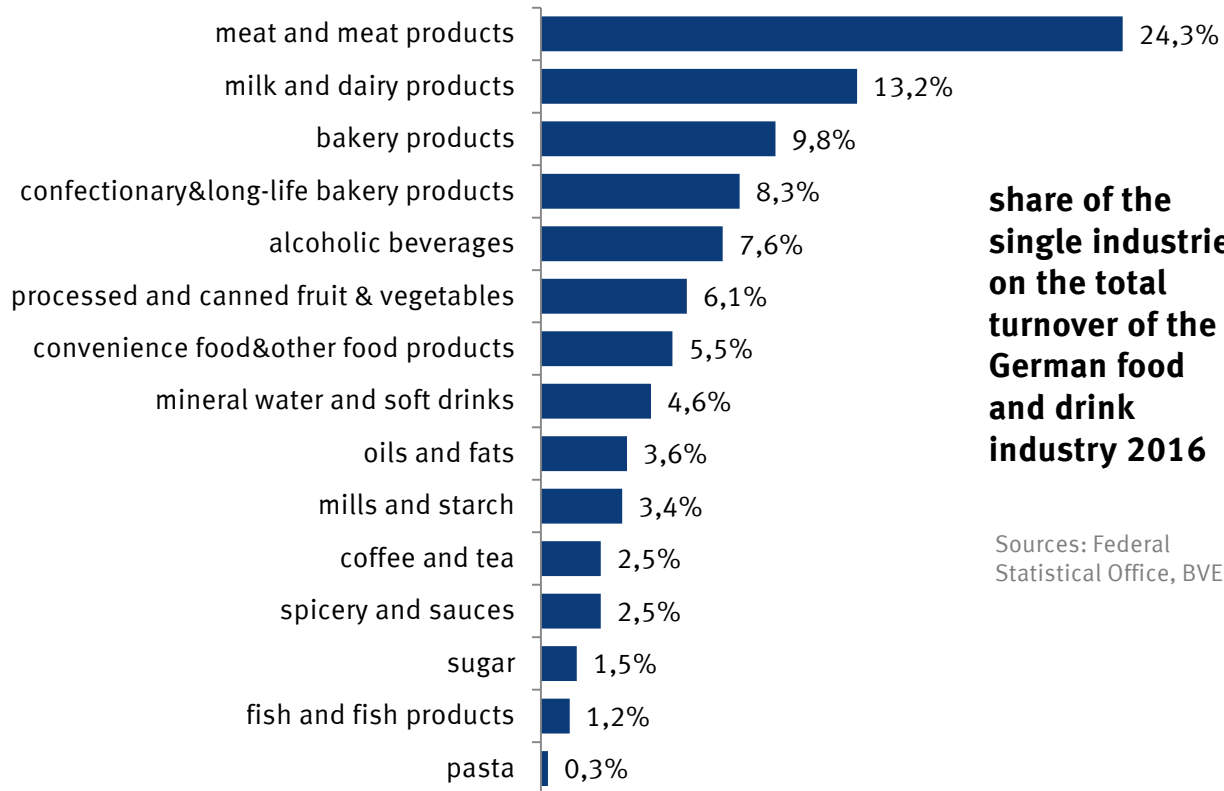


In 2016 the German food and drink industries employed about 580,030 people in 5,940 companies.

The industry - mainly characterized by small and medium sized enterprises – counts to the 3 largest industries in Germany and offers a big variety of employment possibilities.

Big industry variety

“We offer customers a large variety for a healthy nutrition.”



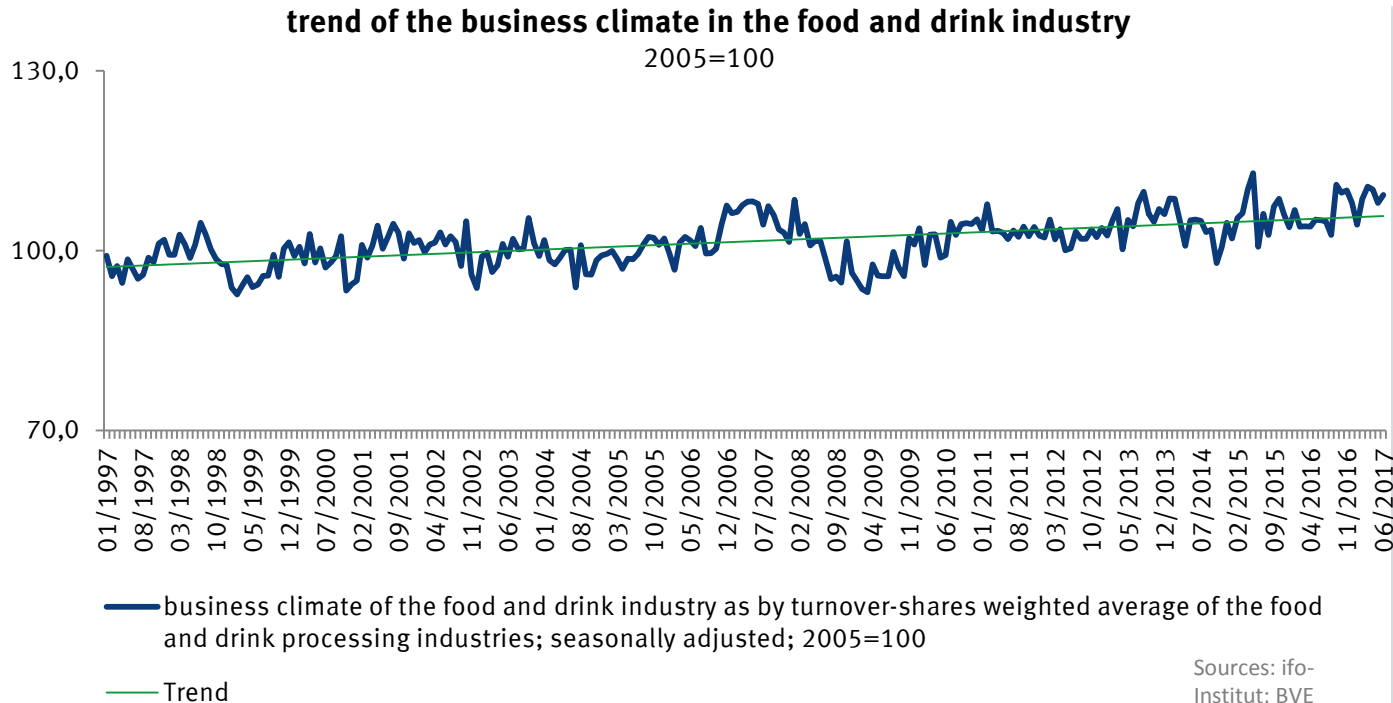
**share of the
single industries
on the total
turnover of the
German food
and drink
industry 2016**

Sources: Federal
Statistical Office, BVE

The most important industry branches are the meat and meat processing industry, the milk industry, the confectionary and bakery industry, as well as the production of alcoholic beverages.

The German food and drink industry holds steady

„The business climate often underlies seasonal fluctuations, in the long-run the industry remains stable.“



Business cycle and seasonal fluctuations, volatile commodity prices, impacts of political regulation or crises in the food-supply-chain cause the short-run up- and downturns of the business climate in the food and drink industry

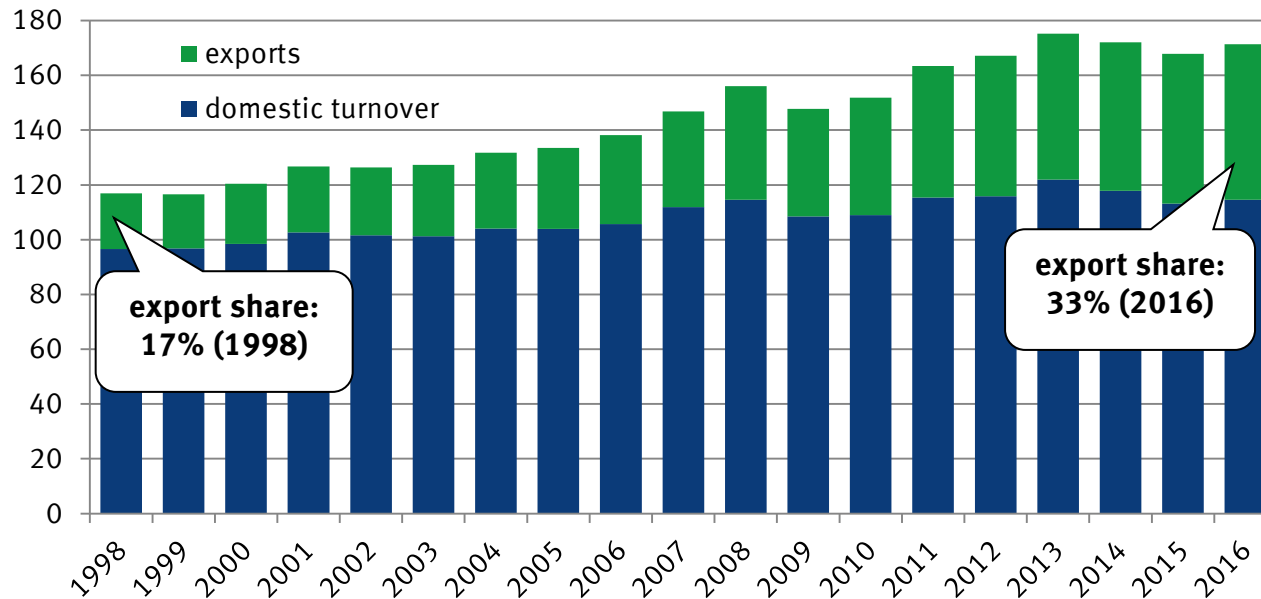
in the long-run the industry remains stable.

Industry growth is based on exports

„We provide more than 100 Mio. people daily with the ‚means to live‘.“

exports and domestic turnover of the food and drink industry

in bn.€



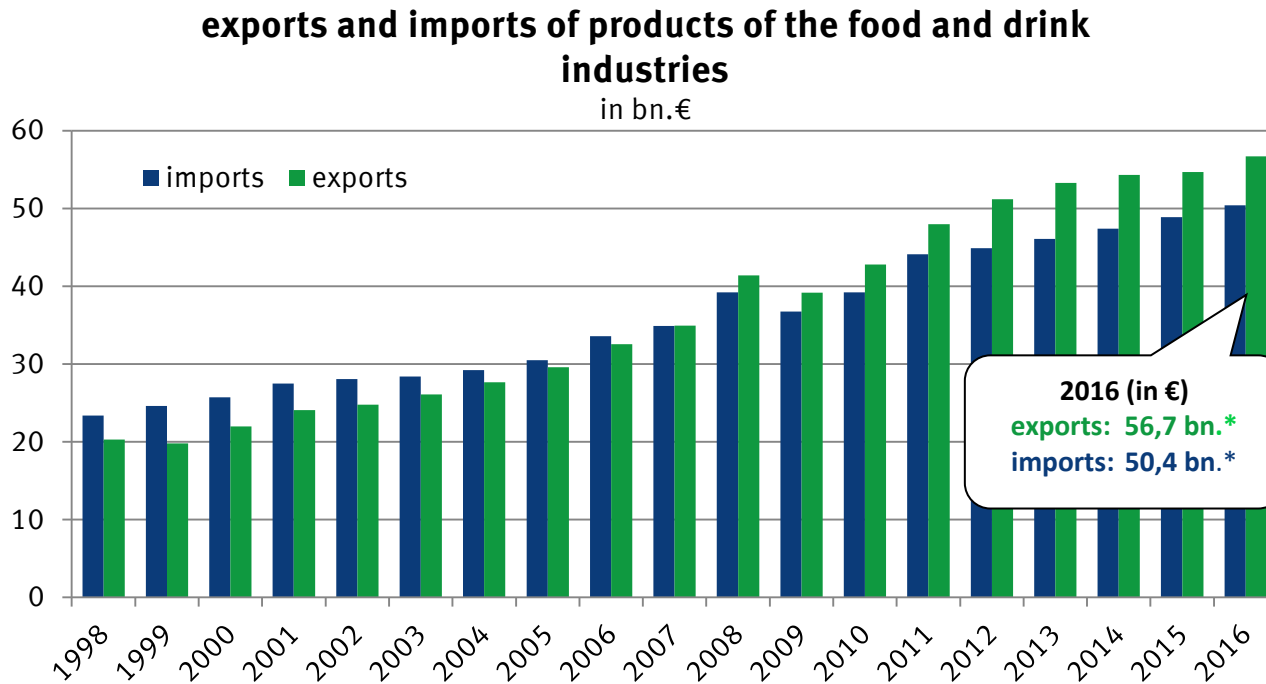
source: Federal Statistical Office, BVE

2016 the German food and drink industry generated a total turnover of 171.3 bn. Euro – thereof 114.6 bn. Euro on the domestic market and 56.7 bn. Euro on foreign markets.

Exports are a main pillar for the industry – every third Euro is earned abroad. German food quality is in great demand on the global market.

Positive foreign trade balance

„The international markets want to deal with us.“



Sources: Statistisches Bundesamt, BVE

*preliminary. estimated

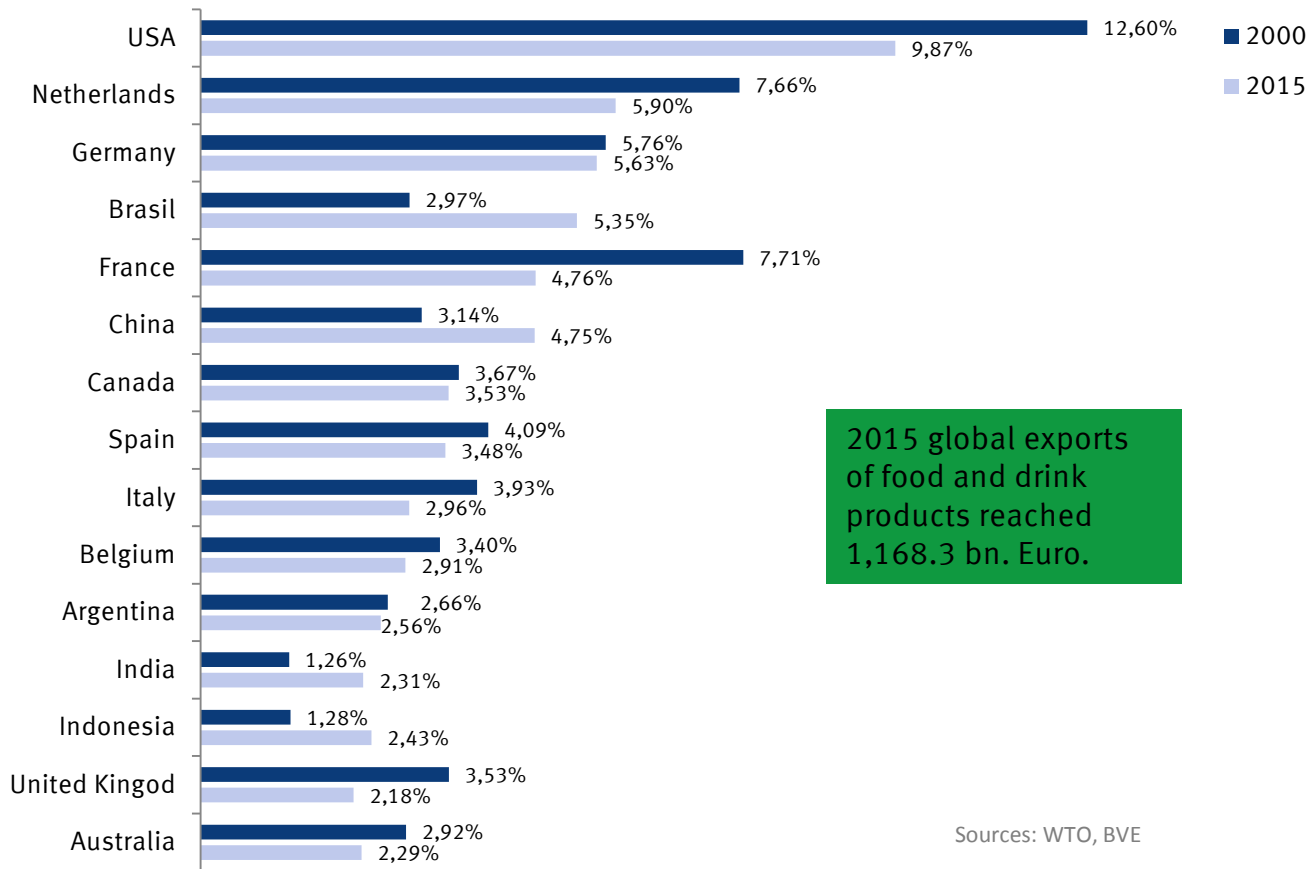
The exports of the German food and drink industry more than doubled since 1998, they increased by 179%.

German confectionary, meat and milk products are in great demand.

Imports increased in the same period by 115%.

Export nation Germany

„Germany is the third largest exporting nation for food and drink products on the global market.“



2015 global exports
of food and drink
products reached
1,168.3 bn. Euro.

2015 global exports
of food and drink
products reached
1,168.3 bn. Euro.

Germany is – with an
export share of
nearly 6% - the third
largest exporting
nation for food and
drink products on
the global market.

Sources: WTO, BVE

Exports of the German food & drink industries 2015

America: 2.3 bn.€ (4.2%)

USA:	1.6 bn.€
Canada:	0.3 bn.€
Brasil:	0.1 bn.€

EU: 44.0 bn. € (78.3%)

davon: Netherlands:	7.4 bn.€
France:	5.1 bn.€
Italy:	4.7 bn.€
UK:	4.2 bn.€
Austria:	3.9 bn.€
Polen:	3.5 bn.€

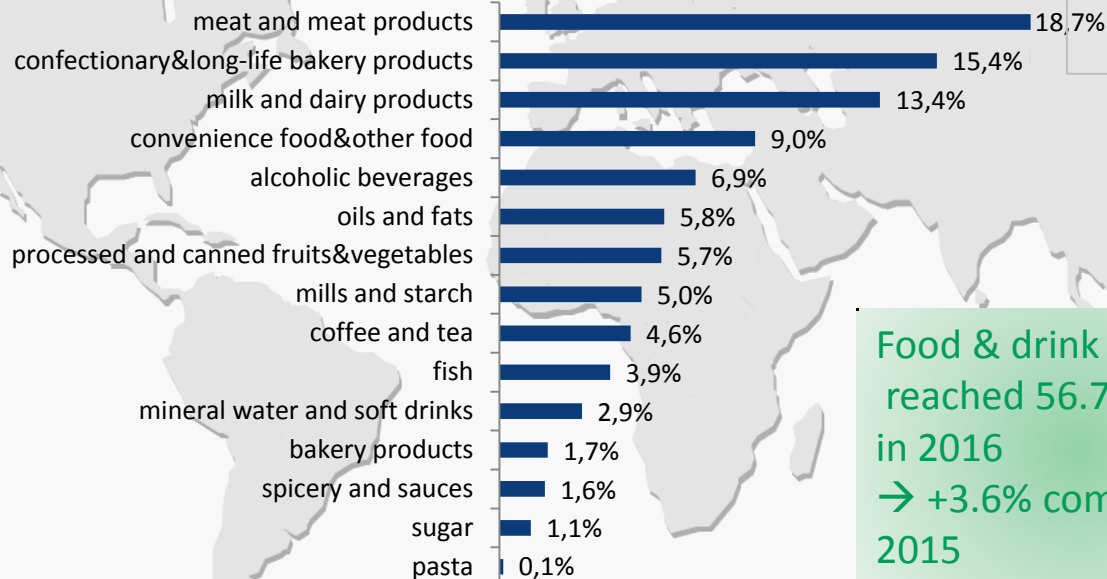
Non-EU-Europa: 3.5 bn.€ (6.2%)

davon: Swiss:	1.5 bn.€
Russia:	0.7 bn.€
Norway:	0.5 bn.€

Asia: 4.9 bn.€ (8.8%)

China:	2.1 bn.€
South Korea:	0.5 bn.€
Japan:	0.4 bn.€

2016 export shares by product group in %



Food & drink exports
reached 56.7 bn.€
in 2016
→ +3.6% compared to
2015

Africa: 0,9 bn.€ (1.6%)

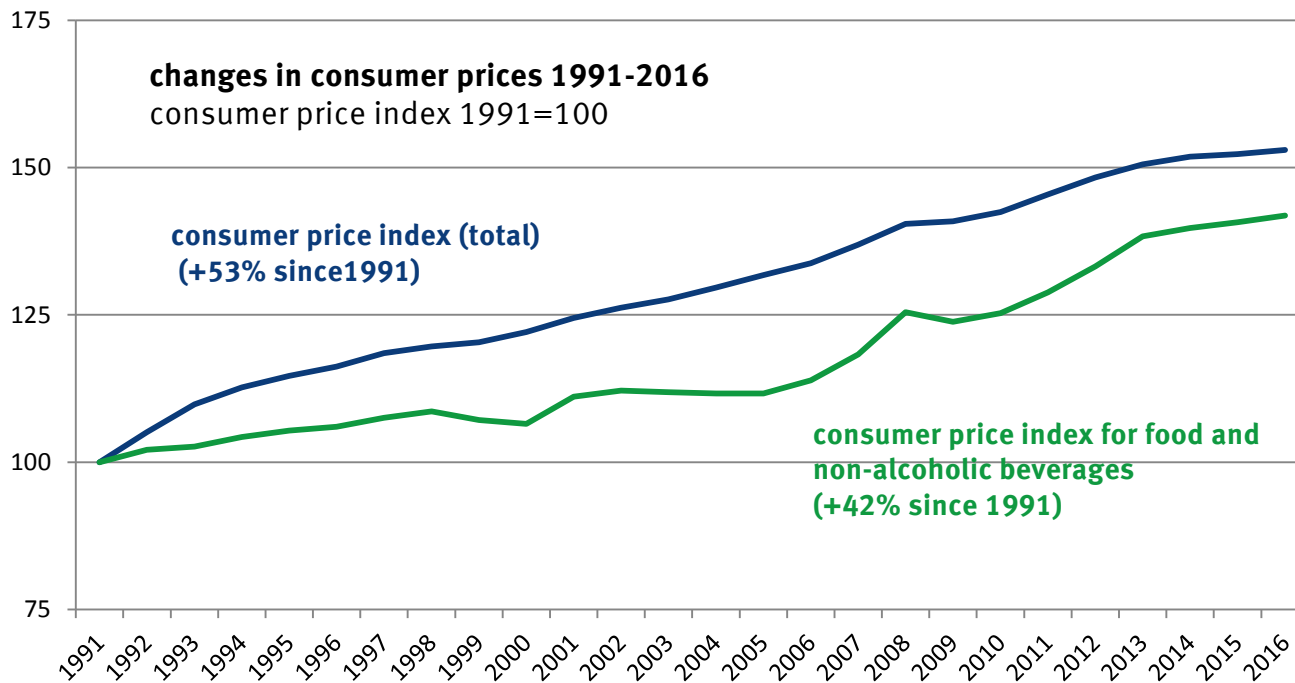
South Africa:	0.2 bn.€
Egypt:	0.2 bn.€
Morocco:	0.1 bn.€

Australia/Oceania:

0.3 Mrd. € (0.6%)
Australia: 0.3 bn.€

Consumer prices

„Price increase for food and drinks remains below the overall rise in prices.“

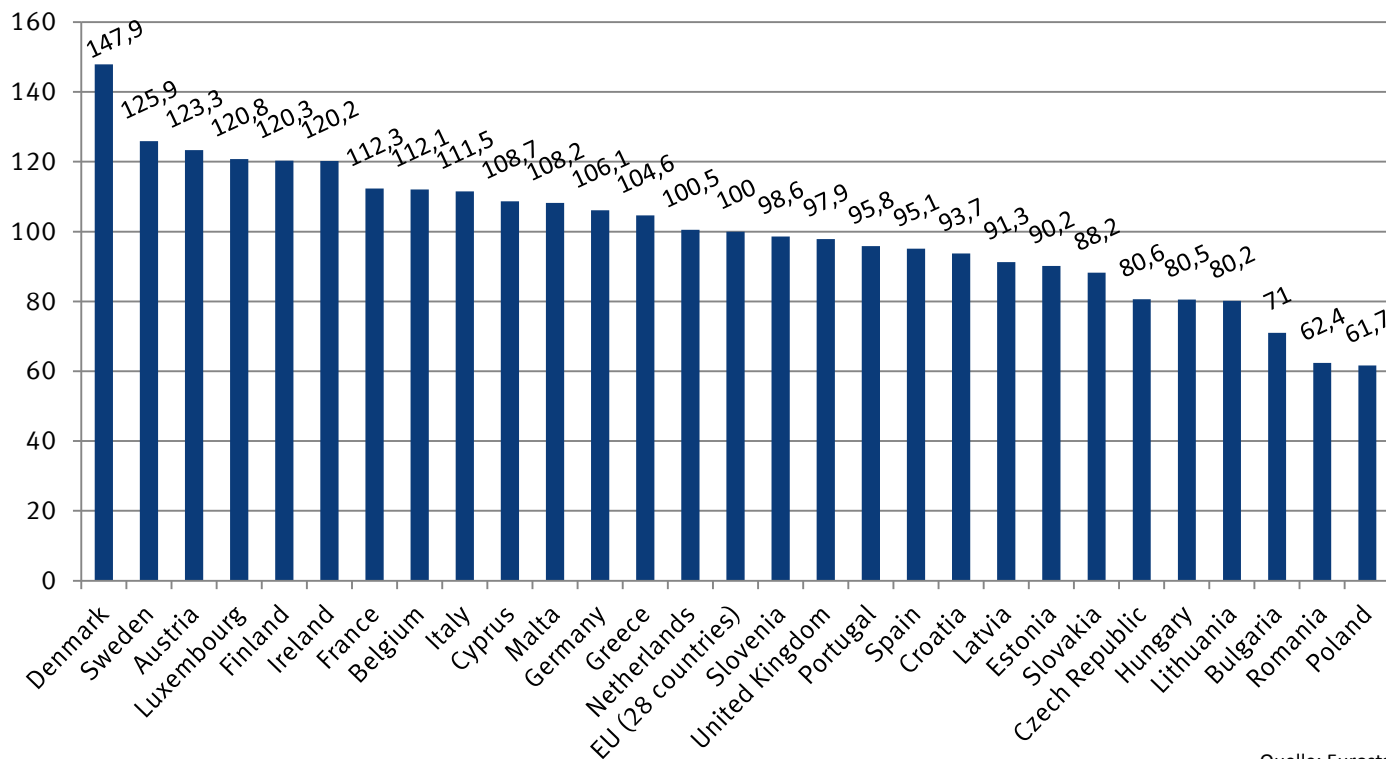


Consumer prices increased more since 2005 but in the long run the price increase for food and drinks remains far below the overall rise in prices.

Price level of food and drinks in Germany

„Quality for all income prices.“

Price index for food and alcoholic beverages 2016, (EU28=100)



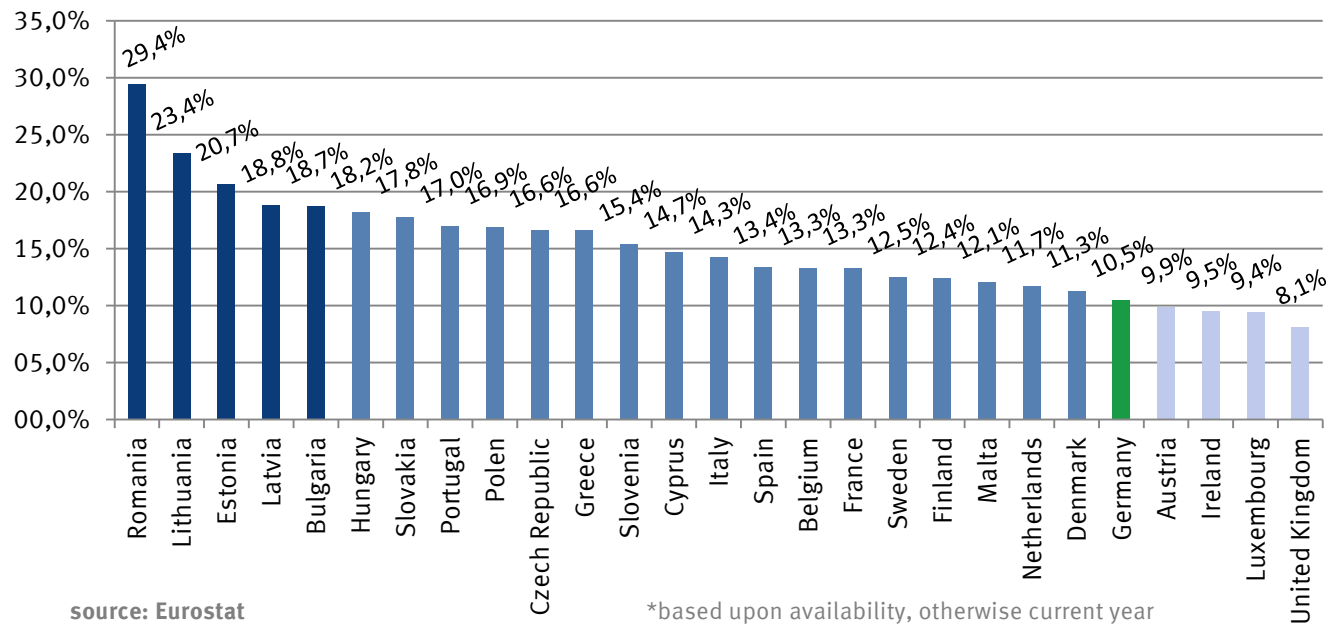
Quelle: Eurostat

In comparison to the countries of the European Union the price index for food and alcoholic beverages is for Germany in the middle. The price index for Germany is slightly above the reference value of the EU-28 nations.

Expenses on consumption on a low level

„Spending on food and drinks afflict German private households less.“

share of the expenses for food and non-alcoholic beverages on total private consumption 2016*



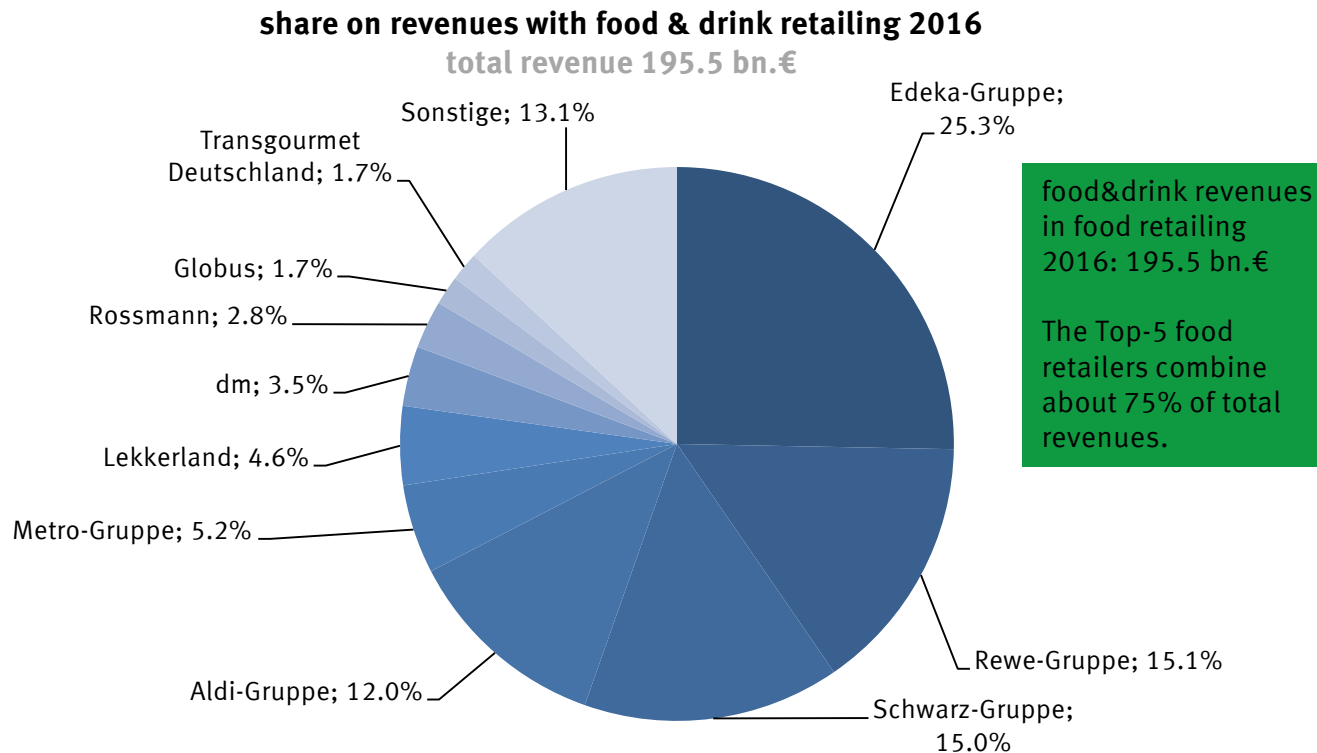
Compared to the other EU-members Germans spend little for food and drinks.

2016 only 10.5% of total private consumption fell upon food and non-alcoholic beverages.

A single-person household spends on average 159 € per month, a 4-persons-household 500 € for food and drinks.

Revenues of the food retailers

„Food retailers are an important distribution partner of the food and drink industry.“



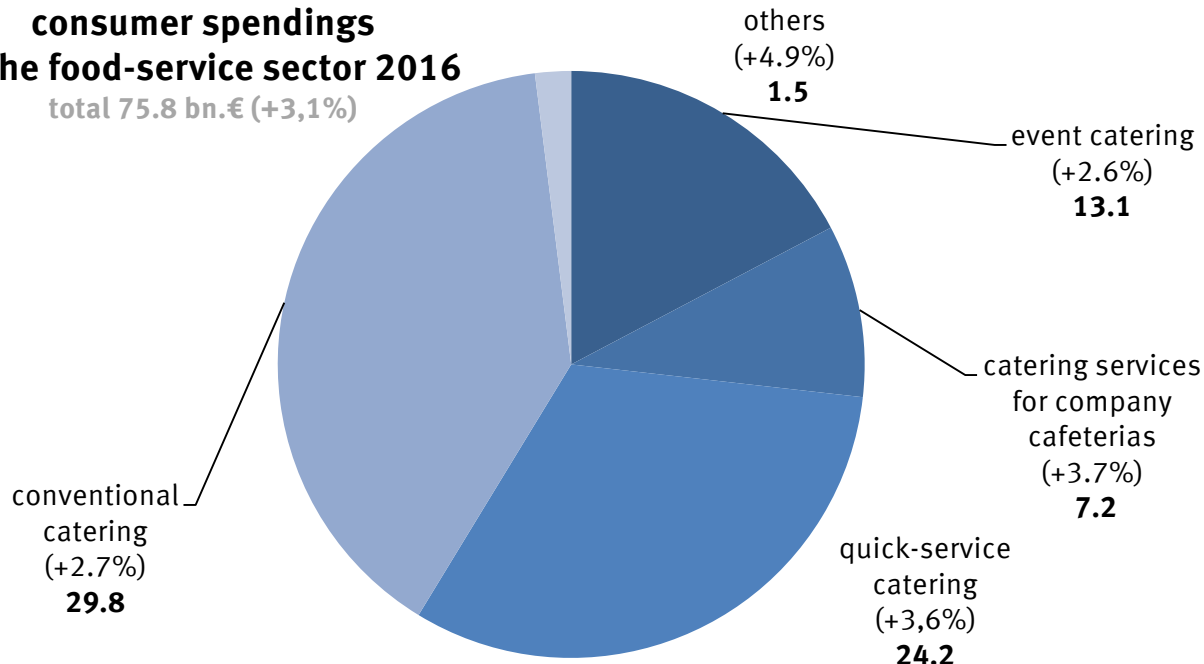
Food-retailing - followed by the food service sector and exports - is the most important distribution channel for the food and drink industry.

A few major enterprises dominate the market for food retailing.

Trend to eat „out of home“

„The „out-of-home“ consumption of food offers promising distribution possibilities to the food and drink industry.“

**consumer spendings
in the food-service sector 2016**
total 75.8 bn.€ (+3,1%)



Eating „out-of-home“ has become an important trend due to the increase of individuality and mobility in the modern society.

2016 consumers spent about 75.8 bn.€ on the „out-of-home“ consumption of food and drinks – 2.2 bn.€ more than in the previous year.

Fragen? Fragen Sie uns!



Stefanie Sabet
Managing Director, Head of Brussels Office
Phone: +49 30 200786-143
ssabet@bve-online.de

Benjamin Baykal
Manager Economic Policy
Phone: +49 30 200786-154
bbaykal@bve-online.de

Bundesvereinigung der
Deutschen Ernährungsindustrie e. V.
Claire-Waldoff-Straße 7
D-10117 Berlin

www.bve-online.de

