USDA United States Department of Agriculture
Foreign Agricultural Service

GAIN Global Agricultural Information Network

Required Report: Required - Public Distribution **Date:** December 30, 2025

Report Number: GM2025-0022

Report Name: Food Service - Hotel Restaurant Institutional Annual

Country: Germany

Post: Berlin

Report Category: Food Service - Hotel Restaurant Institutional

Prepared By: Hanna Khan

Approved By: Matthew Snyder

Report Highlights:

With almost 84 million of the world's wealthiest consumers, Germany is the largest market for food and agricultural products in the European Union. The German market offers good opportunities for U.S. exporters of consumer-oriented food and agriculture products, particularly nuts, fish and seafood products, dried fruits, bakery products, and pulses. Germany's HRI sector continues to face challenges: In 2024, the sector's real turnover was 2.6 percent lower than in 2023 and still 13.1 percent below what it was in 2019, the last year before the pandemic hit. Hotels, restaurants, and institutions are still suffering from increasing costs for personnel, food, and energy prices as well as a restoration of the Value Added Tax (VAT) rate to 19 percent.

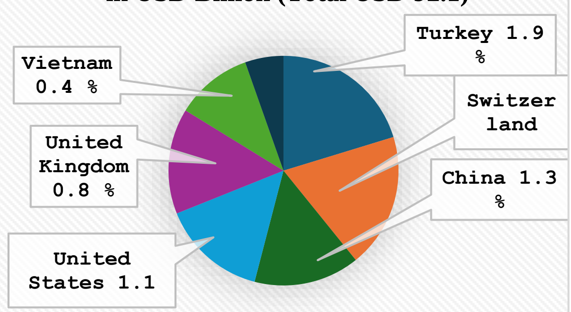
Market Fact Sheet: Germany

Executive Summary

Germany is the largest market for food and beverages in the EU with 83.6 million consumers. In 2024, Germany's nominal GDP reached USD 4.7 trillion, making it the world's third-largest largest economy. Germany is a major producer of food and agricultural products and a leading player in the global marketplace. It is also the third-largest importer of agricultural and related products. In 2024, imports reached USD 146.5 billion. While about 80 percent of these imports originated from other EU member states, the United States was the largest exporter outside the bloc after Brazil. Imports of agricultural & related products from the United States totaled almost USD 2.7 billion in 2024. More information about the German economy can be found in the latest Exporter Guide.

Consumer-Oriented Agricultural Imports

Non-EU Agricultural Imports, 2024 in USD Billion (Total USD 92.1)



Food Retail Industry

Germany's food retail sales reached USD 293.1 billion in 2024. The four largest retailers, the Edeka Group, the REWE Group, the Schwarz Group and the Aldi Group represent more than 75 percent of the market.

Food Processing Industry

In 2024, the German food processing industry employed around 658,150 people in 5,991 companies. The sector is dominated by small and medium size companies; 90 percent of which have less than 250 employees. In 2024, the sector generated a turnover of roughly USD 251.8 billion, accounting for 5.3 percent of German GDP. The largest subsectors by value were meat (21.3%), dairy (17.8%), bakery (8.7%), confectionary (8.6%), and pet food (7.6%).

Food Service Industry

Germany's food service sector is highly fragemented and dominated by full-service restaurants. Institutions are the smallest sector in food service. Germany's food service sales reached USD 93.7 billion in 2024 (compared to USD 91.3 billion in 2023).

Quick Facts CY 2024

Imports of Consumer-Oriented Products
USD 92,163 *(USD million)*

List of Top 10 Growth Products in Host Country

1) Tree Nuts	2) Distilled Spirits
3) Wine	4) Food Preparations
5) Condiments & Sauces	6) Dairy Products
7) Bakery Goods	8) Chocolate Products
9) Candy	10) Seafood Products

Food Industry by Channels (USD billion)

Retail Food Industry	293.1
Food Service	93.7
Food Processing	251.8
Food and Agricultural Exports	90.9

Top 10 Host Country Retailers

1) Edeka/Netto	6) Rossmann
2) Rewe/Penny	7) BartelsLangness
3) Schwarz (Lidl/ Kaufland)	8) Globus
4) Aldi North/South	9) Metro
5) dm	10) Transgourmet

Source: Lebensmittel Praxis

GDP/Population
Population *(millions)*: 83.6
GDP (trillion USD): 4.7
GDP per capita (USD): 54.9

Strengths/Weaknesses/Opportunities/Challenges

Strengths	***Weaknesses***
Germany is the biggest market in Europe with one of the highest income levels in the world.	U.S. exporters face competition from tariff-free products from other EU member states and FTA partners.
Opportunities	***Threats***
A large, well developed food processing industry requiring a wide range of ingredients, from low-value, unprocessed foods to high-value, highly processed ingredients.	Non-tariff barriers such as phytosanitary restrictions and traceability requirements can make exporting to Germany complicated.

Sources:
Federal Statistical Office Germany (Destatis), Federation of German Food and Drink Industries (BVE), Trade Date Monitor (TDM), World Bank, Federal Ministry of Agriculture, Food and Regional Identity (BMLEH)
Exchange rate: USD 1.00 = EUR 0.9238
Contact: FAS Berlin, Germany, AgBerlin@usda.gov

SECTION I. MARKET SUMMARY

The German food service sector is large and highly fragmented but can be divided into the commercial and institutional food service markets. The German commercial food service market includes hotels, restaurants, fast food and take-away outlets, bars, cafeterias, coffee shops, and similar channels. The institutional food service market consists of hospitals, universities, nursing homes, and cafeterias.

German food service sales[1] increased by 2.4 percent to USD 93.7 billion in 2024 (compared to USD 91.3 billion in 2023).

Germany's HRI sector continues to face challenges[2]: In 2024, the sector's real turnover was 2.6 percent lower than in 2023 and still 13.1 percent below what it was in 2019, the last year before the pandemic hit. Hotels, restaurants, and institutions are still suffering from increasing costs for personnel, food, and energy prices as well as the restoration of the VAT rate to 19 percent.[3]

In September 2025, the German Federal Cabinet passed a draft bill setting a permanent, lower VAT rate of seven percent for food served in restaurants from January 1, 2026, onwards. The draft bill still needs to be approved by the upper house (Bundesrat) of Parliament on December 19, 2025[4].

Table 1: Advantages and Challenges of the German Food Service Market

Sector Strengths & Market Opportunities	Sector Weaknesses & Competitive Threats
Germany is the biggest market in Europe with one of the highest income levels in the world.	Strong price sensitivity. German consumers demand quality but expect low prices.
Many German consumers are uninformed about U.S. sustainability, and there is still room to define a U.S. sustainability message.	Misconceptions about U.S. agriculture.
Germany is among the largest food-importing nations in the world.	EU import regulations and tariffs; EU gives preferential access to products from EU countries.
U.S. style is popular, especially among younger generations; good reputation for U.S. foods like dried fruits, seafood, and wine.	HRI companies rarely import products into Germany on their own, but rather utilize specialized wholesalers.
Germany is the largest EU market for U.S. beef under the EU import quota for high quality beef, which was expanded in January 2020.	The quota only applies to beef from animals not treated with growth-promoting hormones.

[1] Consumption of food prepared away from home

[2] Source: German Hotel and Restaurant Association (DEHOGA) Quarterly Report

[3] The reduced VAT rate of 7 percent for food consumed in restaurants was originally introduced as a COVID-19 relief measure. On January 1st, 2024, the VAT on food consumed in restaurants was restored to 19 percent.

[4] Source: Federal Government

Large non-German population and Germans' inclination to travel abroad help fuel demand for foreign products. Plus, increased preference for authentic regional cuisines in bigger cities.	The 'regional' trend can work against U.S. products, but also in favor of.

SECTION II. ROADMAP FOR MARKET ENTRY

a) Market Structure

Purchasing by hotels, restaurants, and institutions is fragmented and competitive. Few of these businesses import products directly from other countries, except for items that they purchase in large quantities. Most HRI companies would rather purchase from central buyers/distributors importing food and beverages. In general, these wholesalers specialize in products or product groups. Some are experts in food products from a specific country of origin. Specialized importers have an in-depth knowledge of import requirements, such as product certification, labeling, and packaging. They also typically handle shipping, customs clearance, warehousing, and distribution of products within the country. The two major distribution channels for the German food service trade are "cash and carry" wholesalers and specialized distributors/wholesalers.

"Cash and carry" wholesalers operate large stores with food and non-food products. They sell to retailers, restaurants, and other food service operators. Cash and carry stores offer a variety of products at competitive prices and are not open to the average consumer.

Specialized distributors to the food service sector have dry and cold storage facilities with refrigerated/frozen trucks for deliveries. They buy from processing companies, importers, and occasionally, foreign exporters. To cover the entire German food service market, regional distributors have organized in groups, such as Intergast and Service-Bund. Some of those distributors organize in-house food shows once or twice a year, during which their suppliers can showcase their products to potential customers. These shows are excellent opportunities for U.S. suppliers to enter the German food service market.

b) Entry Strategy

The German market offers good opportunities for U.S. exporters of consumer-oriented agricultural products. However, there are several challenges U.S. exporters face before exporting to the German market. Success in introducing food products depends largely on market knowledge and personal contact with key decision-makers. The U.S. supplier should analyze German and EU food law, packaging, and labeling requirements, business practices, trade-related laws and tariffs, potential importers, and the distribution system. The FAS Office of Agricultural Affairs (OAA) in Berlin offers guidelines on business practices and import regulations. Information can be found in the latest Food and Agricultural Import Regulations and Standards report for Germany. The FAS Foreign Buyers List gives important information on German buyers of food and beverage products.

Participating in German food trade shows is a proven and cost-effective way to find the right distributor and facilitate direct contact with German food brokers, importers, and wholesalers. Germany offers a wide variety of trade show venues for food and beverage products. Trade shows like Anuga or Internorga enjoy an exceptional reputation and have a wide reach within the global food industry. U.S. exporters who are looking to sell to Germany should consider participating in or visiting the following trade shows.

Table 2: Upcoming International Trade Shows in the HRI Sector in Germany

Trade Show	Date	Description
Intergastra	**February 7-11, 2026** Stuttgart	International trade fair for the gastronomy and hotel sector.
Nord Gastro & Hotel	**February 2-3, 2026** Husum	Trade fair for hotels and catering.
Internorga	**March 13-17, 2026** Hamburg	International trade show for hotel, restaurant, catering, baking, and confectionery trades.
Chefs Culinar	**March 22-23, 2026** Berlin	Trade fair for wholesale food trade for restaurant, hotel, and community catering.
Bar Convent Berlin	**October 12-14, 2026** Berlin	International trade show for bars and beverages.

c) Distribution and Sub-Sector Profiles[5]

The German food service sector is highly fragmented and dominated by full-service restaurants. Full-service restaurants continue to lead in consumer food service sales, and they make up the largest type within the gastronomy branch of the sector. International chains like McDonald’s, Burger King, and Yum! Restaurants (KFC, Pizza Hut) have a very strong position in the market.

In 2024, real restaurant sales were 16.2 percent below 2019 levels, the year before the pandemic hit, and 4.7 percent lower than in 2023.

Accommodation sales were 4.9 percent below 2019 levels in 2024 and 0.4 percent lower than in 2023.

Institutions are the smallest sector in food service. Most of the institutional food service market is covered by caterers, of which Compass, Aramark, Sodexo, Klüh, and apetito are among the largest in Germany. They usually cater to in-house company restaurants, hospitals, retirement homes, schools, and universities. The catering sector’s real turnover was 12.0 percent below what it was in 2019 and 0.4 lower than in 2023.

[5] Numbers are taken from German Hotel and Restaurant Association (DEHOGA) Quarterly Report

SECTION III. COMPETITION

Trade within the EU27 bloc is significantly easier for Germany than trading outside the bloc. As such, the top exporters of most products to Germany are typically other European countries. The United States ranked fifteenth of all countries from which Germany imported consumer-oriented agricultural products in 2024 (one rank up compared to 2023), but among non-EU countries the United States is a much larger source for imported customer-oriented products. Key U.S. competitors for the German market include Turkey, Switzerland, and China which exported slightly more to Germany last year, and the United Kingdom, Vietnam, Cote d'Ivoire and Argentina who exported less than the United States.

Table 3: Overall Competitive Situation for Consumer-Oriented Products (2024)

Product Category Total German Import	Main Suppliers in Percentage	Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
Tree Nuts (HS 0801 +0802 +200819) MT 511,798 USD 3.3 billion	1. Turkey: 22.7% 2. **USA: 21.7%** 3. Netherlands: 9.9%	1) Turkey has the lead in hazelnuts. 2) The United States is the leading supplier of pistachios, almonds, and walnuts. 3) The Netherlands is a large re-exporter of cashew nuts.	Domestic production is minimal. Germany is a leading producer of marzipan.
Fish & Seafood (HS 03 + HS 16) MT 1.008 million USD 6.1 billion	1. Poland: 25.5% 2. Netherlands: 16.5% 3. Denmark: 9.8% **11. USA: 2.6%**	1-3) Proximity and availability. 11) United States was Germany's largest supplier of Alaska Pollock fillets in 2024.	Tradition in seafood trading and processing. Fish is popular.
Wine & Beer (HS 2203, 2204, 2205, 2206) Liters: 1.929 billion USD 3.3 billion	1. Italy: 31.9% 2. France: 26.2% 3. Spain: 12.5% **9. USA: 1.6%**	1-3) Proximity, reputation, climatic conditions for wine growing.	Wine only grows in the southern part of country. Insufficient domestic supply.
Food Preparations (HS 210690) MT 508,553 USD 2.8 billion	1. Netherlands: 21.1% 2. Poland: 12.5% 3. Austria: 8.6% **19. USA: 1.2%**	1-3) Proximity and availability.	Strong domestic food industry.
Peanuts (HS 1202) MT 131,723 USD 262.8 million	1. Netherlands: 58.6% 2. Argentina: 10.0% 3. Belgium: 7.7% **4. USA: 6.5%**	1) Volumes consist of re-exported peanuts from Argentina, USA, Brazil	No local availability, high demand from well-established snack food industry.
Dried Prunes (HS 0813 20) MT 7,388 USD 33.1 million	1. Chile: 43.8% 2. Netherlands: 14.9% 3. France: 12.1% **4. USA: 11.3%**	1) Product pricing, zero duty access through EU-Chile FTA 4) Good reputation for quality, California origin	No local availability

		adds value	
Raisins (HS 0806 20) MT 67,243 USD 181.7 million	1. Turkey: 29.1% 2. South Africa: 24.9% 3. Netherlands: 12.5% **10. USA – 2.1%**	1) Pricing	No local availability
Meat (HS 02) MT 2.107 million USD 8.6 billion	1. Netherlands: 26.4% 2. Poland: 15.5% 3. Belgium: 11.5% **19. USA: 0.11%**	1-3) Proximity and availability. 19) U.S. imports consist of hormone-free beef under Hilton beef quota.	Focus on pork rather than beef production.
Sauces and Preparations (HS 2103) MT 425,828 USD 1.14 billion	1. Italy: 28.8% 2. Netherlands: 20.9% 3. Poland: 10.6% **12. USA: 1.8%**	1-3) Proximity and availability. 12) USA is well known as a supplier of BBQ sauces.	Strong domestic food industry.
Snack Foods excl. nuts (HS 1905 + 1704) MT 1.3 million USD 5.1 billion	1. Poland: 18.3% 2. Netherlands: 15.6% 3. Italy: 12.2% **25. USA: 0.24%**	1-3) Proximity and availability. 2) Volumes also consist of re-exports from China, Thailand, & USA.	Tradition in snack food production. Germany is one of the global market leaders in snack foods.

Source: Trade Date Monitor, Products ranked according to value of U.S. products (retrieved October 28, 2025)

SECTION IV. BEST PRODUCT PROSPECTS CATEGORIES

The following tables present products with good sales potential, good current sales, and products not available in the German market.

a) Products present in the market that have good sales potential

Product Category	Total German Imports 2024 [USD]	Total German Imports from the USA 2024 [USD]	% Change from 2023	% Change from 2020	Market Attractiveness for USA
Tree Nuts	$3,329,848,300	$722,407,310	+18.8%	-12.8%	The USA is consistently the leading exporter of pistachios, almonds, and walnuts to Germany. Demand is strong for tree nuts, particularly for snacking and confectionery uses.
Hops	$83,621,069	$28,621,742	-12.0%	-18.4%	German demand for imported hops has doubled between 2015 and 2020 and reached its peak in 2020 with

					the USA being the leading exporter.
Sweet Potatoes	$63,334,498	$1,287,117	-7.7%	-37.0%	German demand for imported sweet potatoes has more than tripled in the past ten years. Sweet potatoes are becoming more popular in processed snacks and in cooking.
Pulses	$173,311,641	$8,398,773	+16.5%	+16.7%	Increased interest in pulses as an alternative protein source.
Fish and Seafood	$6,132,403,383	$160,267,784	+37.2%	-28.7%	Good prospects for high-value products.
Whiskey	$574,677,052	$130,578,353	+59.6%	+69.7%	The USA is the second-largest exporter of whiskies to Germany, after the United Kingdom.

Source: Trade Date Monitor (retrieved October 28, 2025)

b) Germany top 5 consumer-oriented products imported from the world

Product	Total German Imports 2024	Total German Imports from the USA (USD)	U.S. Import Growth (2023-2024)
Dairy	$11,849,088,769	$14,387,388	+163.4%
Fresh Fruit	$9,447,036,661	$771,629	+1.773,3%
Fresh Vegetables	$7,115,396,331	$300,274	-27.04%
Chocolate & Cocoa Products	$7,001,653,187	$2,623,135	+20.2%
Bakery Goods, Cereals, & Pasta	$6,553,283,766	$12,073,099	+117,4%

Source: Trade Date Monitor (retrieved October 28, 2025)

c) Germany top 5 consumer-oriented products imported from the United States

Product	Total German Imports 2024	Total German Imports from the USA (USD)	U.S. Import Growth (2023-2024)
Tree Nuts	$3,329,848,300	$722,407,310	+18.8%
Distilled Spirits	$1,884,162,573	$135,777,799	+61.3
Wine & Related Products	$2,864,944,362	$55,320,796	-6.6%
Soup & Other Food Preparations	$3,101,449,797	$34,210,494	+29.3%
Condiments & Sauces	$1,238,856,172	$23,559,809	-7.4%

Source: Trade Date Monitor (retrieved October 28, 2025)

d) Products not present in significant quantities but which have good sales potential

- High-quality beef
- Cranberries and cranberry products
- Innovative sauces, condiments, and confectionery products
- Products featuring “sustainable” or other social issue-based marketing labels

e) Products not present because they face significant barriers

- Food additives not approved by the European Commission
- Red meat and meat products with hormones
- Most poultry and eggs (non-tariff barrier)
- GMO-derived products that are not approved in the EU

SECTION V: KEY CONTACTS AND FURTHER INFORMATION

Major Regulatory Agencies

Name	Contact	Info
Bundesministerium für Landwirtschaft, Ernährung und Heimat (BMLEH) (Federal Ministry of Agriculture, Food and Regional Identity)	Tel: +49-228 – 99 -529-0 Fax: +49-228 - 99-529-4262 Website: https://www.bmleh.de/EN/H	

Rochusstr. 1 53123 Bonn, Germany	ome/home_node.html	
Bundesamt **für Verbraucherschutz und Lebensmittelsicherheit (BVL)** (Federal Office of Consumer Protection and Food Safety) Bundesallee 51 38116 Braunschweig	Tel: +49 30 18444-99999 Fax: +49 30 18444-99998 Email: poststelle@bvl.bund.de Website: https://www.bvl.bund.de/EN/Home	The biotech division and the novel foods/feeds division of BVL are responsible for registration and approval of biotech products and novel foods.
Bundesanstalt für Landwirtschaft und Ernaehrung (BLE) (Federal Office for Agriculture & Food) Referat 521 Deichmanns Aue 29 53179 Bonn, Germany	Tel: +49 228 6845 – 0 Fax: +49 228 6845-3444 Website: www.ble.de/EN/Home/home_node.html	BLE is the responsible German authority for organic import rules.

Other Import Specialist Technical Contacts can be found in the latest Food and Agricultural Import Regulations and Standards report for Germany.

Homepages of potential interest to U.S. food and beverage exporters are listed below:

- USDA/FAS Washington: https://www.fas.usda.gov/
- USDA/FAS U.S. Mission to the European Union: http://www.usda-eu.org

For U.S. exporters it might be helpful to access the German business portal, which is provided by Germany Trade & Invest. Provided in English, it serves as a central contact platform that can steer inquiries into the right channel.

Please view our GAIN Country Reports for more information on exporting U.S. food and beverage products to Germany, including market and product “briefs” available on specific topics of interest to U.S. exporters. Importer listings are available from the Foreign Agricultural Service for use by U.S. exporters of U.S. food and beverage products.

If you have questions or comments regarding this report, or need assistance exporting to Germany, please contact the U.S. Foreign Agricultural Service Office in Berlin at the following address:

Agricultural Affairs Office Clayallee 170 14195 Berlin http://www.fas.usda.gov	Phone: (49) (30) 8305 – 1150 Email: AgBerlin@usda.gov

Attachments:

No Attachments