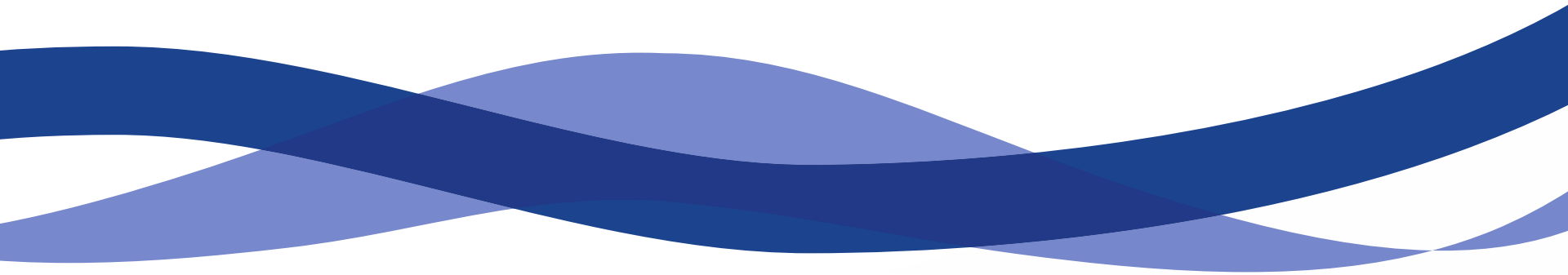


The German food and drink industries:

facts and figures 2015



Economic data of the food and drink industries 2013



“We ensure economical wealth and stability.”

	2014	2013
Total turnover	172.2 bn € (-1.7%)	175.2 bn € (+3.5%)
Domestic turnover	117.8 bn € (-3.3%)	121.9 bn € (+3.2%)
Exports	54.3 bn € (+1.9%)	53.3 bn € (+4.1%)
(EU)	43.2 bn € (+2.2%)	42.3 bn € (+5.8%)
(Extra-EU)	11.1 bn € (+0.8%)	11.0 bn € (-1.8%)
Real sales trend	-1.4%	+1.0%
Shares of exports in total turnover	32%	30%
Companies	5,828 (-0.8%)	5,970 (-0.8%)
Employees	559,776 (+1.0%)	555,300 (+0.1%)
Consumer prices (total)	+0.9%	+1.5%
thereof food and beverages (non-alcoholic)	+1.0%	+3.9%
Producer prices of the food and drink industry		
Domestic	-0.3%	+2.8%
Export	-0.5%	+1.8%

(Changes compared to previous year in bracket)

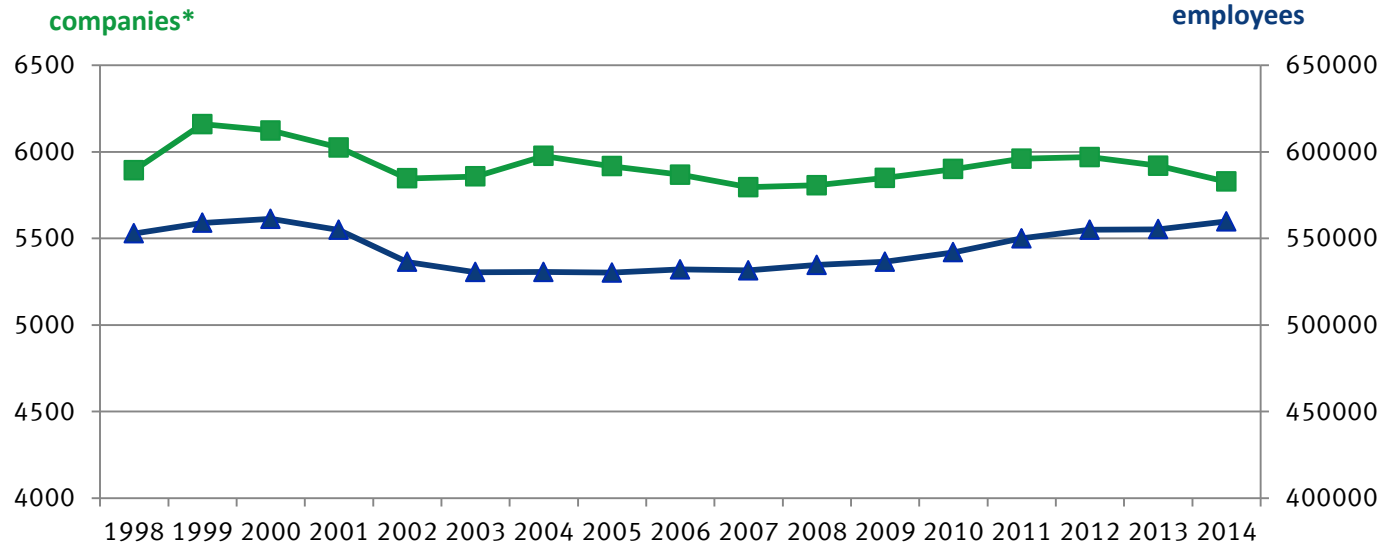
Quelle: Statistisches Bundesamt, BVE

Employment security

„We provide secure employment all over Germany.“



companies and employees in the food and drink industries



source: Federal Statistical Office, BVE

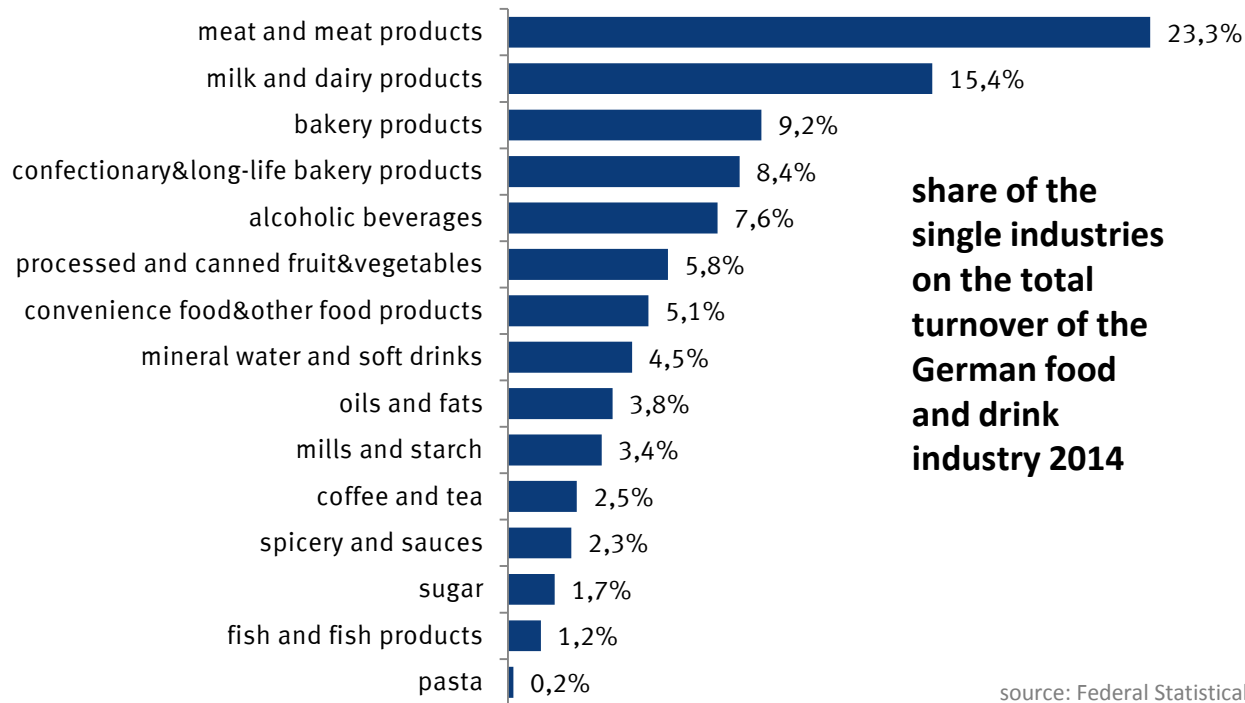
* companies with >20 employees

In 2014 the German food and drink industries employed about 560000 people in 5800 companies.

The industry - mainly characterized by small and medium sized enterprises – counts to the 4 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 2014

source: Federal Statistical Office, BVE

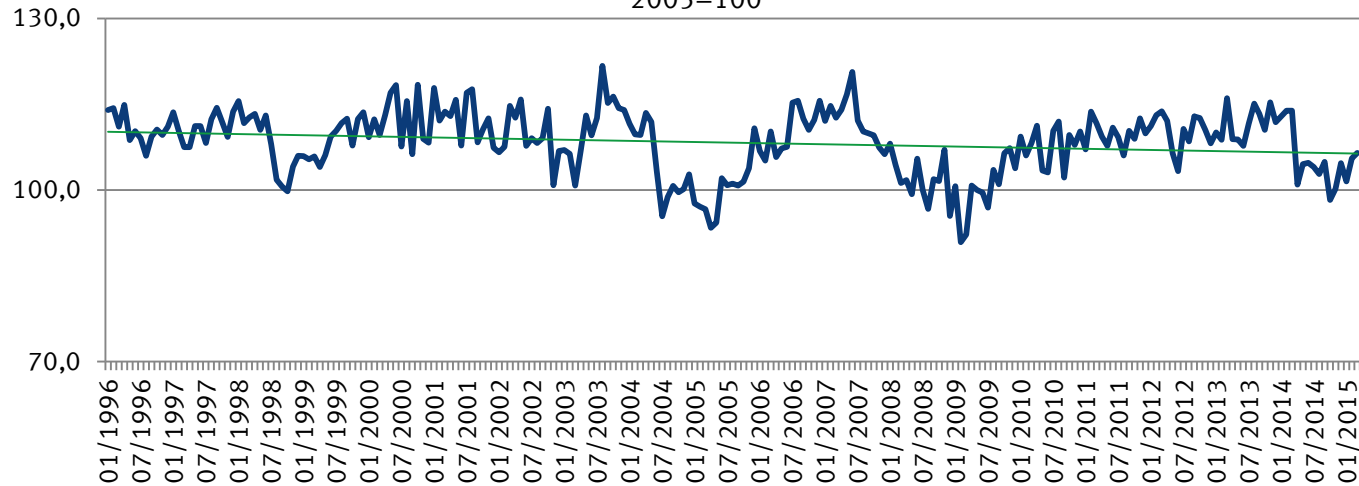
The most important industry branches are the meat and meat processing industry, the milk industry, the confectionary and bakery industry, as well as the production of alcoholic beverages.

The German food and drink industry holds steady

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

trend of the business climate in the food and drink industry

2005=100



— business climate of the food and drink industry as by turnover-shares weighted average of the food and drink processing industries; seasonally adjusted; 2005=100

Source: ifo-Institut; BVE

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

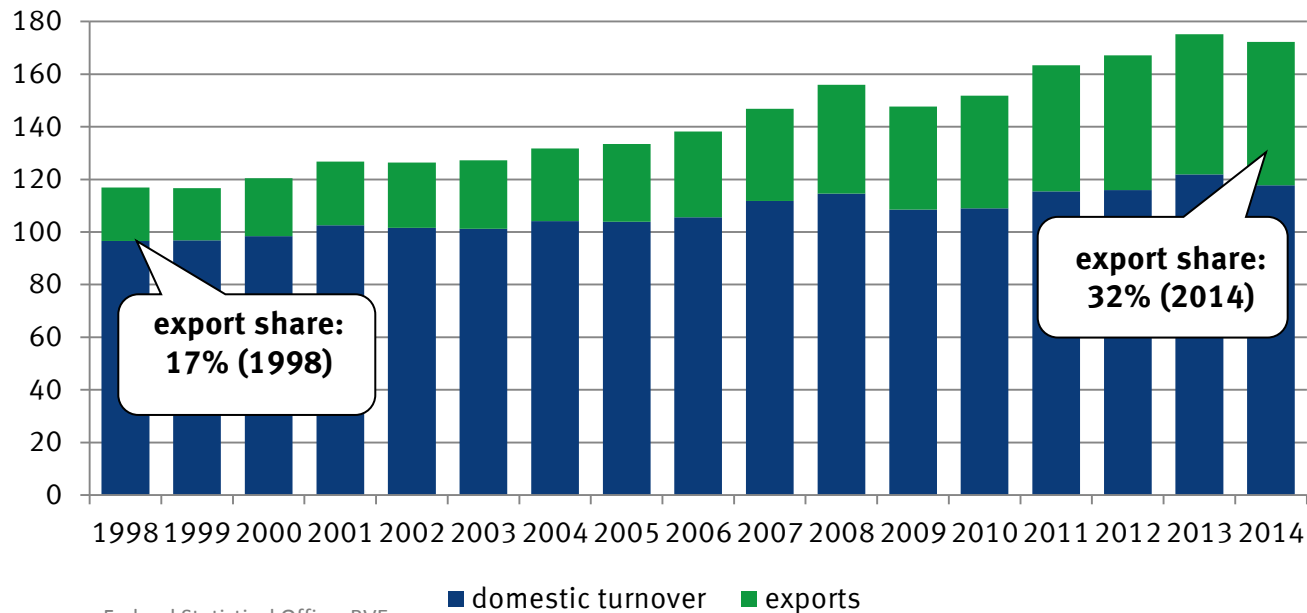
—
in the long-run the industry remains stable.

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.€



export share:
32% (2014)

export share:
17% (1998)

2014 the German food and drink industry generated a total turnover of 172.2 bn. Euro - thereof 117.8 bn. Euro on the domestic market and 54.3 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.

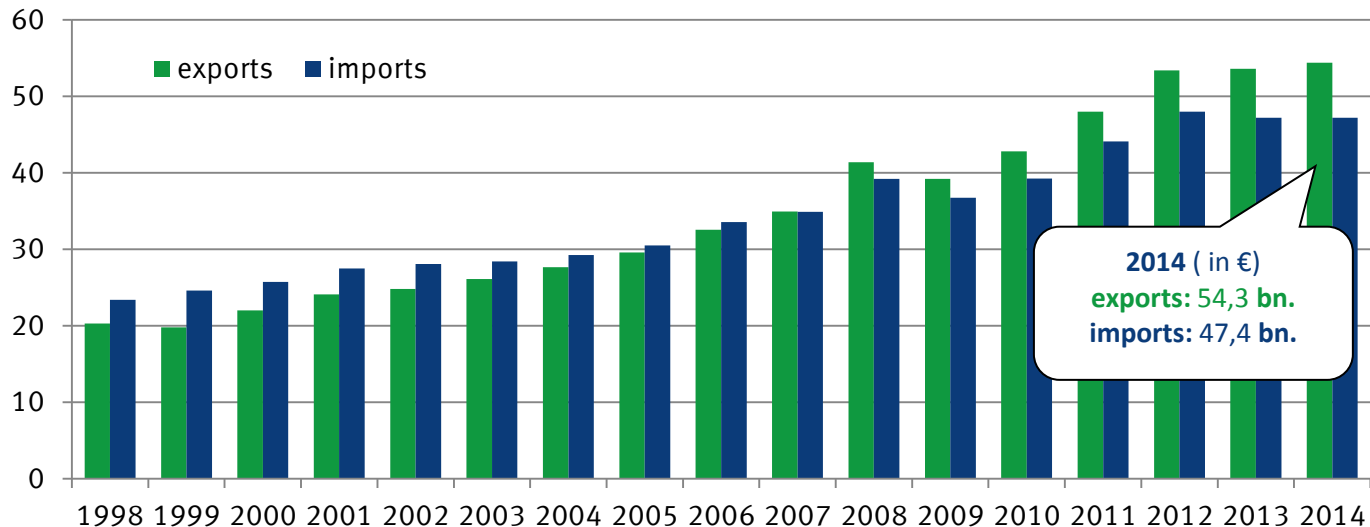
source: Federal Statistical Office, BVE

Positive foreign trade balance

„The international markets want to deal with us.”

exports and imports of products of the food and drink industries

in bn.€



The exports of the German food and drink industry more than doubled since 1998, they increased by 167%.

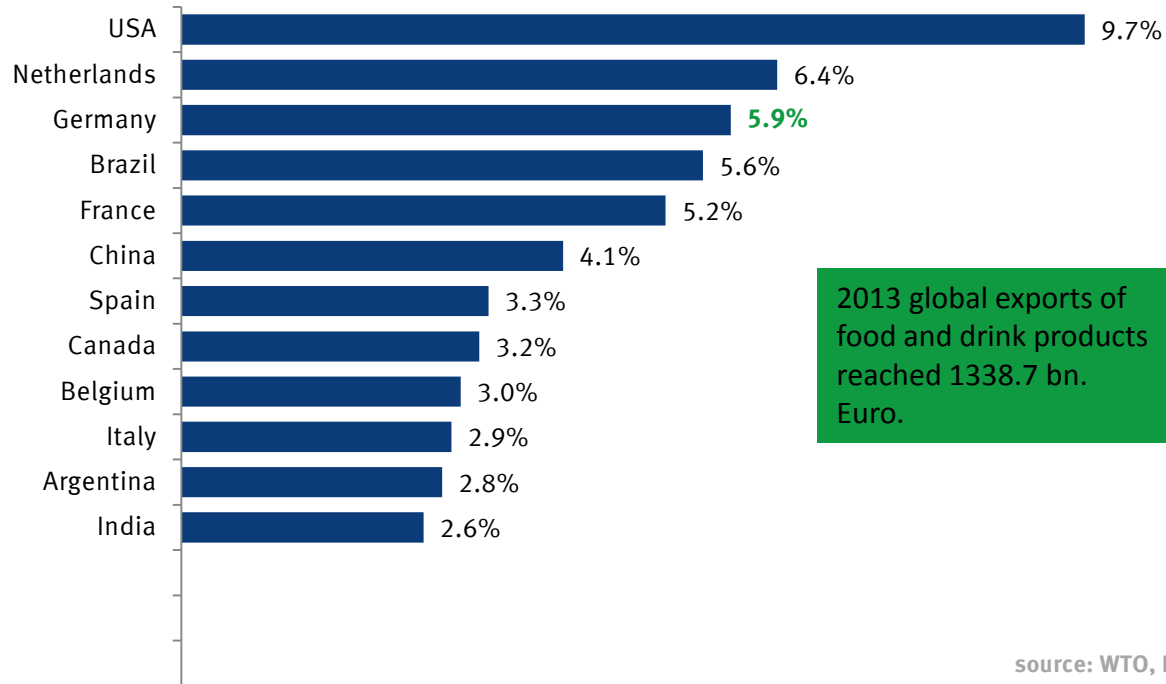
German confectionary, meat and milk products are in great demand.

Imports increased in the same period by 103%.

Export nation Germany

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

share on the global export value of food and drink products
2013



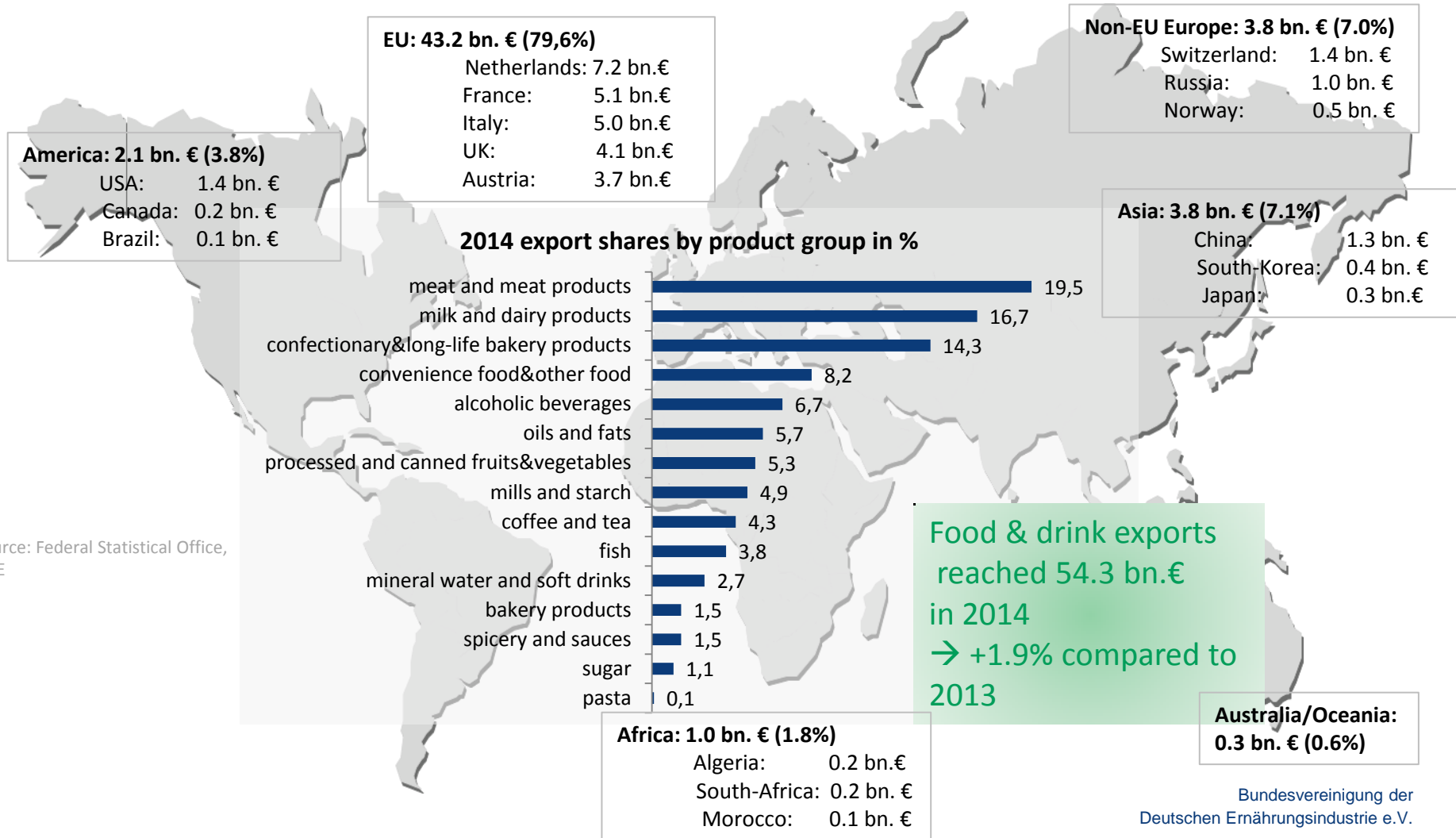
2013 global exports of food and drink products reached 1338.7 bn. Euro.

source: WTO, BVE

2013 global exports of food and drink products reached 1338.7 bn. Euro.

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

Exports of the German food & drink industries 2014

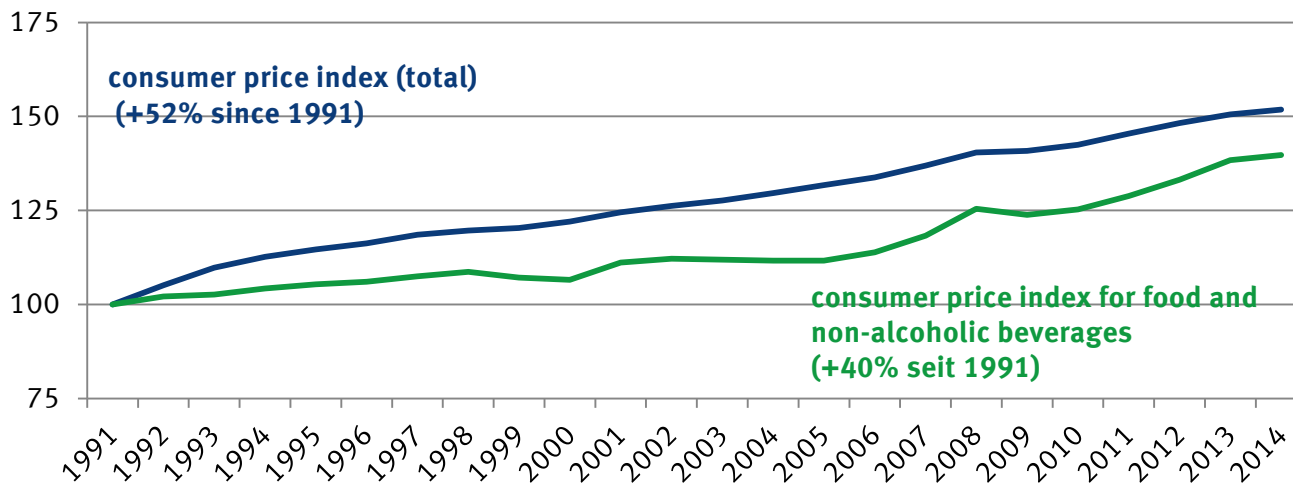


Consumer prices

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

changes in consumer prices 1991 - 2014

consumer price index 1991=100



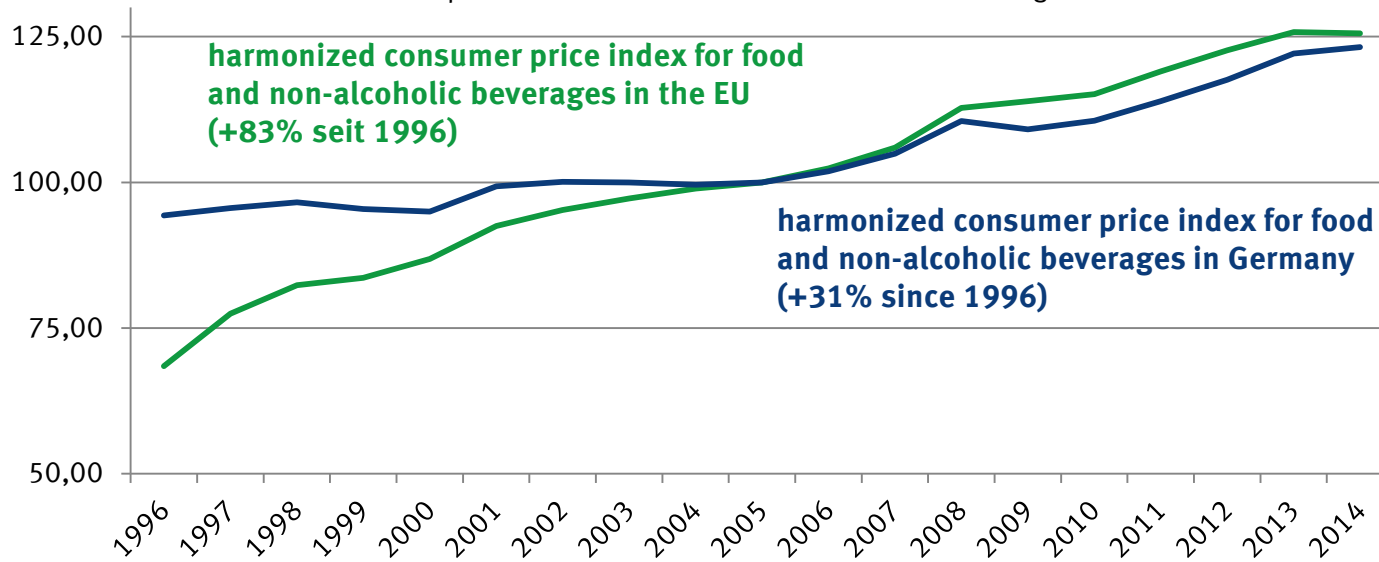
Consumer prices increased more since 2005 but in the long run the price increase for food and drinks remains far below the overall rise in prices.

EU-comparison of food and drink prices

„Food and drink prices increased even more in the EU as in Germany.“

national consumer price indexes for food and drinks compared in the EU

consumer price index for food and non-alcoholic beverages 1996=100



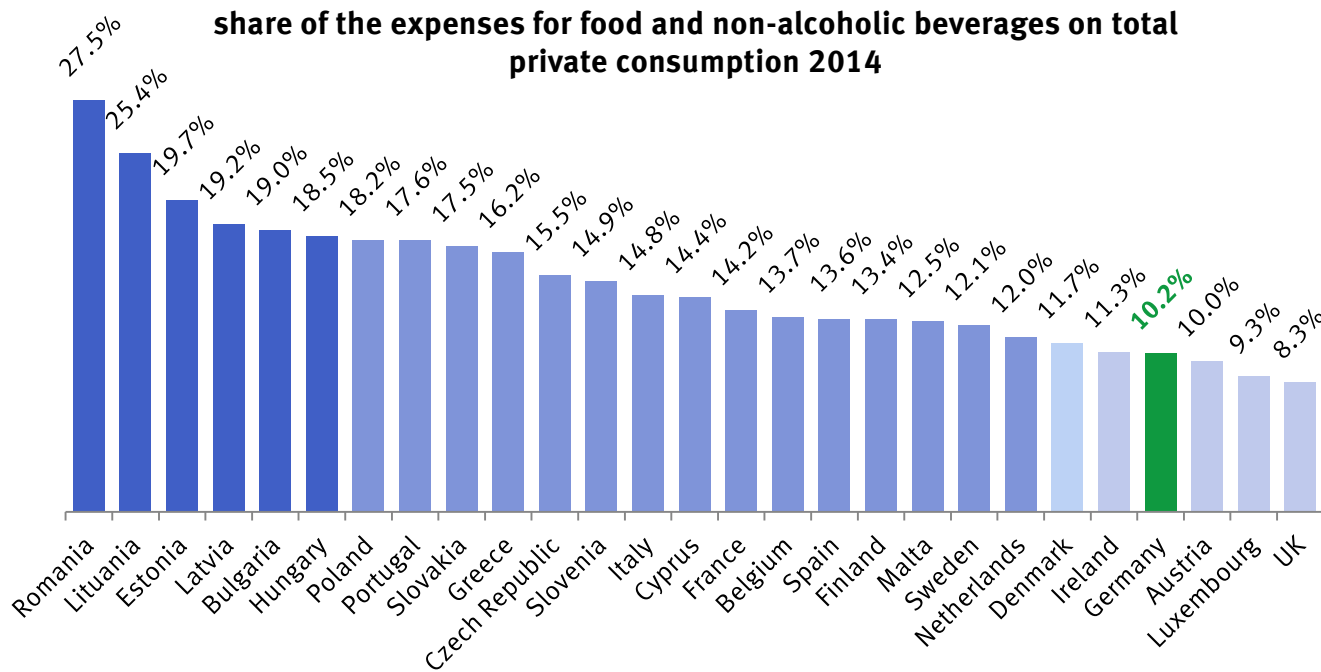
Quelle: Eurostat

The rise in prices between 1996 and 2013 was lower in Germany (+31%) than in the EU (+83%).

A look at the harmonized consumer price index in the EU shows that German consumers shop food and drinks at favorable prices compared to the EU-average.

Expenses on consumption on a low level

„Compared to other European countries food and drinks spendings of German private households are very low.“



source: Eurostat

Compared to the other EU-members Germans spend little for food and drinks. 2014 only 10,5% of total private consumption fell upon food and non-alcoholic beverages.

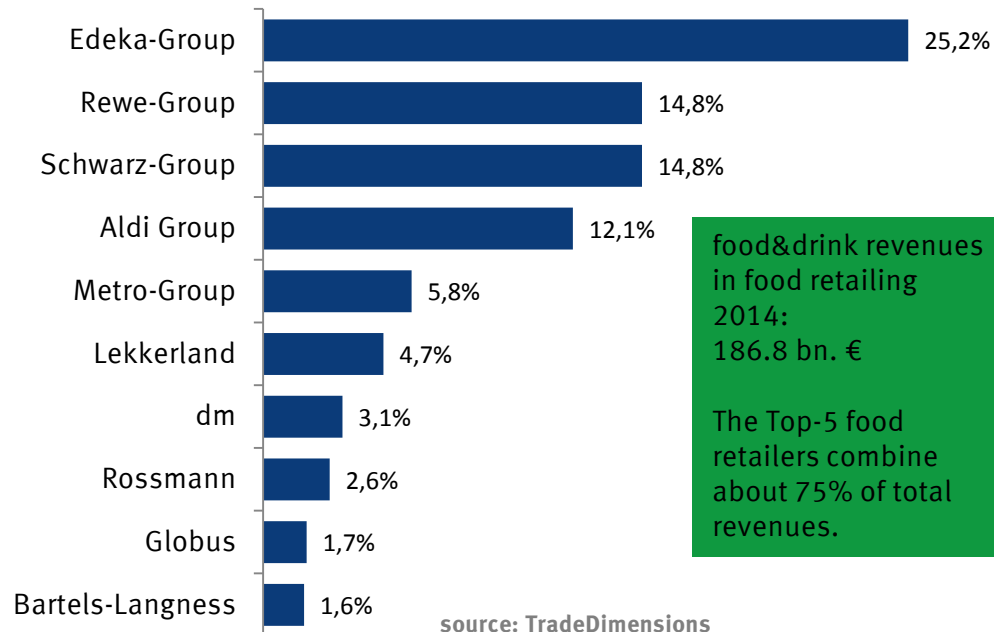
A single-person household spends on average 150€ per month, a 4-persons-household 444 € for food and drinks.

Revenues of the food retailers

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

share on revenues with food & drink retailing 2014

in %



food&drink revenues
in food retailing
2014:

186.8 bn. €

The Top-5 food
retailers combine
about 75% of total
revenues.

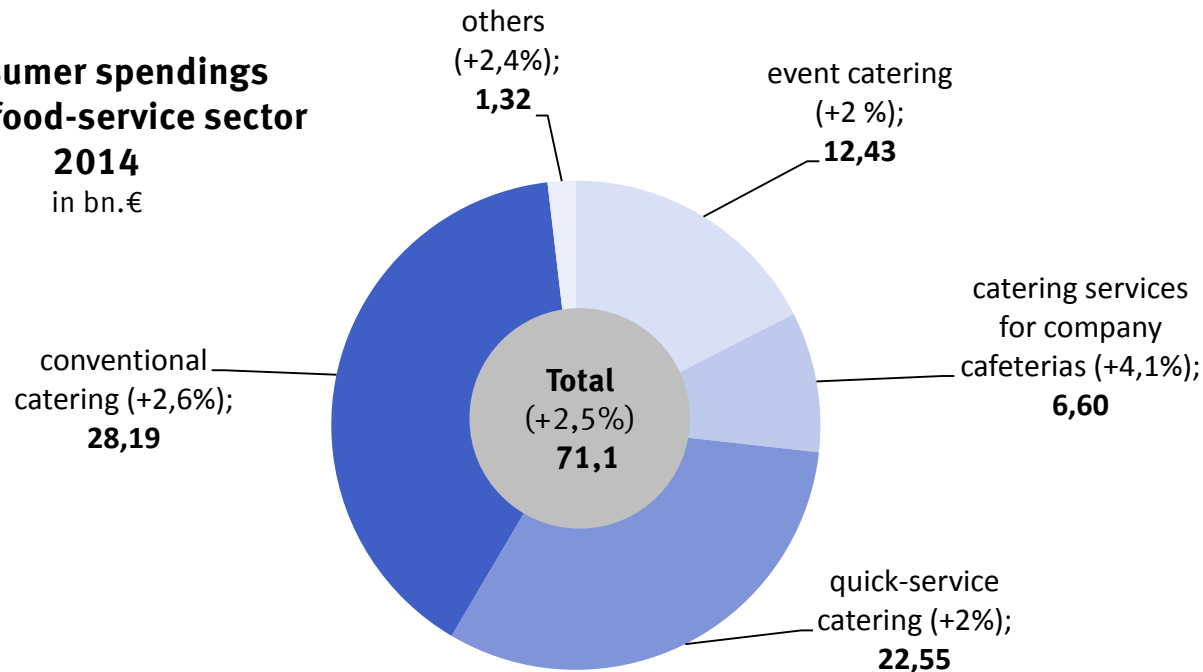
Food-retailing is the most important distribution channel for the food and drink industry – followed by the food service sector and exports.

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 2014 in bn.€



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

2014 consumers spent about 71.1 bn.€ on the „out-of-home“ consumption of food and drinks – 1.7 bn.€ more than in the previous year.