

GERMAN FOOD AND DRINK INDUSTRIES 2022

Federation of German



**FOOD & DRINK
INDUSTRIES**

In the food and drink industry, around 6,150 companies generate an annual turnover of 186 billion euros. With over 638,000 employees, this sector is Germany's fourth-largest industry. The German food and drink industry is the leading one in Europe.

This sector ensures stability, prosperity and employment in all of Germany's regions. Closely connected to its production sites and firmly integrated in the global supply chain the food and drink industry is an important economic factor in rural areas as well as internationally competitive. Maximum quality, safety, reliability and customer orientation at affordable prices are the hallmarks of modern food production. Every day the food industry provides for the well-being of 83 million satisfied consumers in Germany. Additionally, customers all over the world appreciate the quality of German products.

The Federation of German Food and Drink Industries (BVE) is the eco-political umbrella organisation of the German food and drink industry. Its members are a composition of branch associations and major companies. BVE's principal task is the representation of its members' common interests in the national and international context. With this brochure we provide information about the most important core data of our economic sector.

THE FOOD INDUSTRY AS AN ECONOMIC FACTOR

Contribution to the economic power of manufacturing industries in 2021, in percent



13,3
COMPANIES



9,4
TOTAL REVENUE



10,3
EMPLOYEES









5,2
EXPORT

Every seventh industrial company in Germany produces food. In terms of sales, the food and drink industry is the fifth-largest industrial sector of Germany. This sector contributes significantly to the economic power of the manufacturing industry.

ECONOMIC DATA OF THE FOOD AND DRINK INDUSTRY 2021

Change compared with previous year in brackets

	2021	2020
 Nominal sales thereof domestic thereof abroad · EU · non-EU	186.3 bn. € (+0.5 %)	185.3 bn. € (± 0.0 %)
	120.5 bn. € (–2.7 %)	123.9 bn. € (+0.7 %)
	65.8 bn. € (+7.0 %)	61.5 bn. € (–1.3 %)
	48.4 bn. € (+11.5 %)	43.4 bn. € (–1.1 %)
	17.4 bn. € (–3.9 %)	18.1 bn. € (–1.6 %)
 Real sales trend	–1.7 %	–0.8 %
 Foreign share of total sales	35.3 %	33.2 %
Companies	6,152 (–0.2 %)	6,163 (+0.7 %)

	2021	2020
 Employees Trainees	638,831 (+4.0 %)	614,063 (–0.8 %)
	28,357 (–4.4 %)	29,664 (–6.0 %)
 Consumer prices (total) thereof food and non-alkoholic beverages	+3.1 %	+0.5 %
	+3.1 %	+2.3 %
 Producer prices of the food and drink industry · Domestic · Export	+2.0 %	+1.2 %
	+2.9 %	+0.1 %

Data is accurate as of 4th June 2022

COMPANIES AND EMPLOYEES OF THE FOOD AND DRINK INDUSTRY

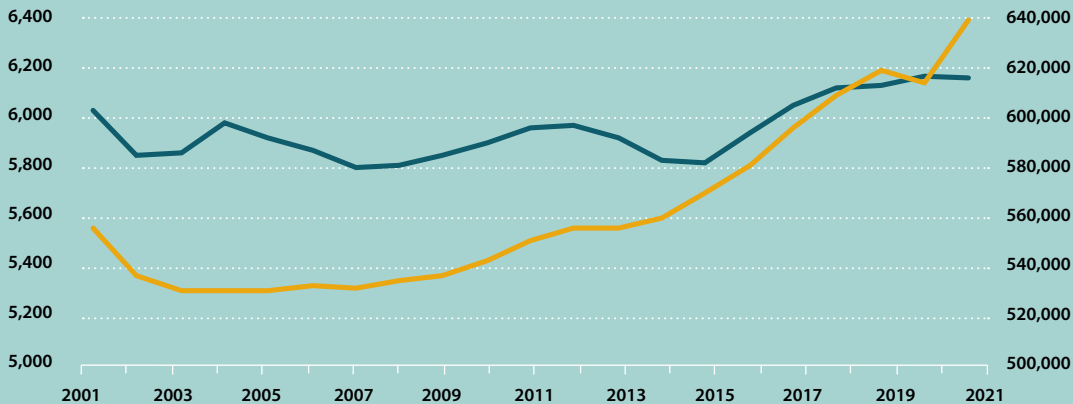
2001 – 2021



6,152
COMPANIES*



638,831
EMPLOYEES

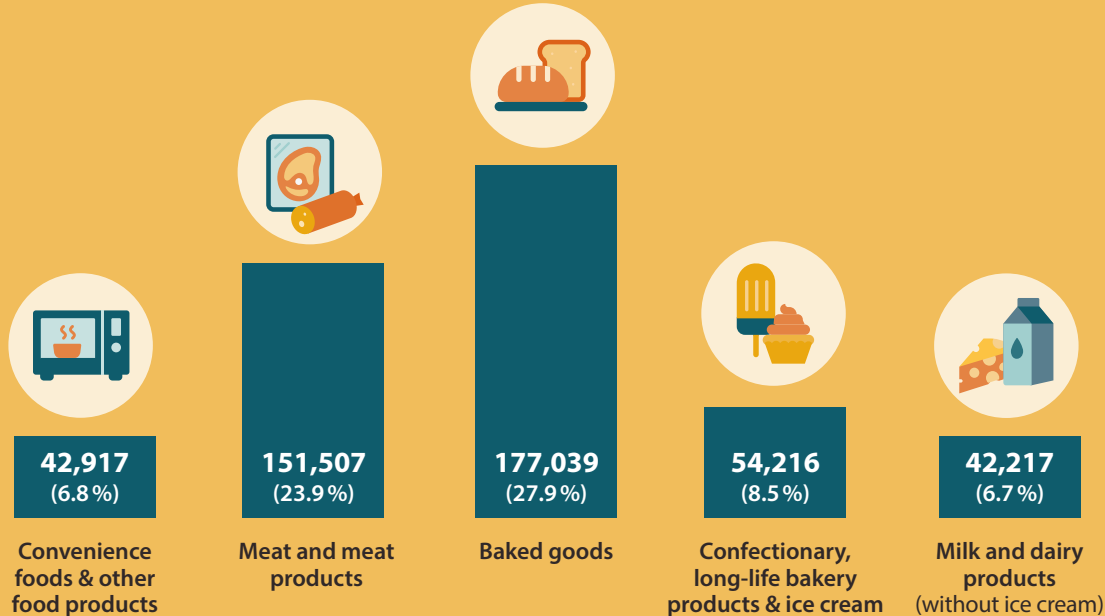


In 2021, the food and drink industry employed 638,831 people in 6,152 companies. The industry, of which 90 percent is characterised by small and medium sized companies, offers a wide range of secure employment opportunities in all regions of Germany.

* Companies with >20 employees

TOP 5 EMPLOYERS* IN THE FOOD AND DRINK INDUSTRY

2021, number of employees, percentages in brackets



The food and drink industry makes a major and stable contribution to economic well-fare, economic growth and employment in Germany.

* Companies with >20 employees

EMPLOYEES IN THE FOOD AND DRINK INDUSTRY: PROPORTION OF WOMEN AND MEN

Employees subject to social security contributions by economic sector (WZ 2008) excluding apprentices and selected characteristics, 2021, in percent



The gender ratio in the food and drink industry is balanced.

EMPLOYEES IN THE FOOD AND DRINK INDUSTRY: WOKRFORCE STRUCTURE

2021, in percent



EMPLOYEES IN THE FOOD AND INDUSTRY: TRAINING SITUATION

2021, in percent

Technical professions
46



Commercial professions
25



Unfilled apprenticeship positions
8



Typical food-related professions
21



EMPLOYEES IN THE FOOD AND DRINK INDUSTRY: ACCORDING TO COLLECTIVE BARGAINING AGREEMENTS

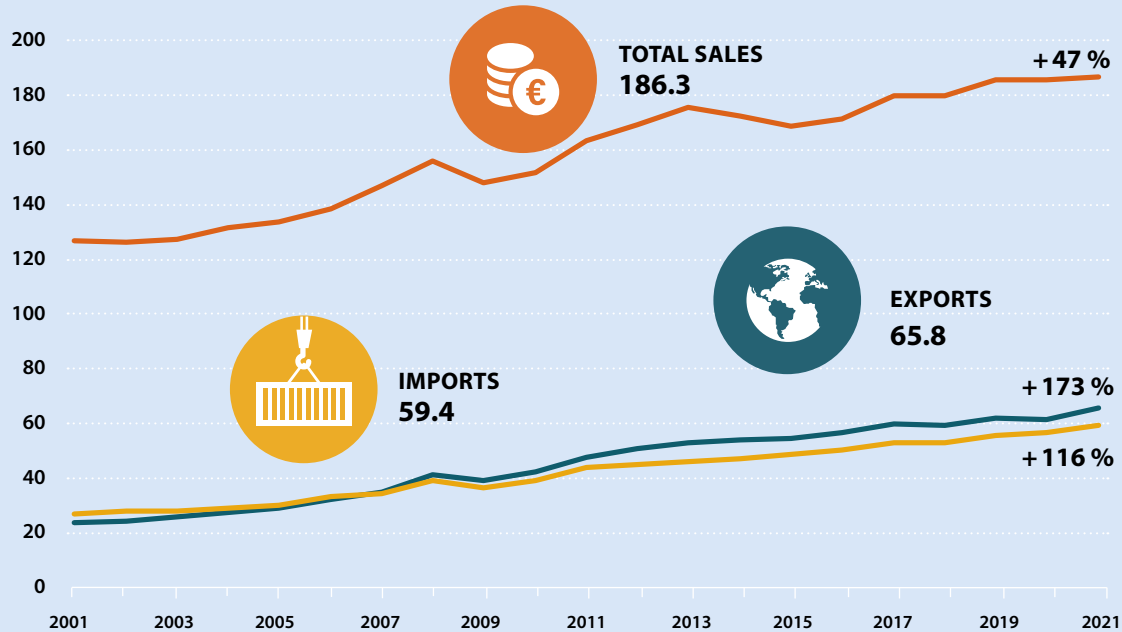
2021, in percent



Collective bargaining coverage in the food and drink as well as luxury food industry remains high compared to the economy as a whole. The figures from the current IAB company panel show that around one in two employees (48 percent) in the sector works in a company that is covered by a collective agreement. Overall, as many as 78 percent of those employed in food, drink and luxury food production work in a company that is covered by a collective agreement or follows the sectoral oriented.

TURNOVER, EXPORTS, IMPORTS* OF THE FOOD AND DRINK INDUSTRY

2001 – 2021, in billion euros

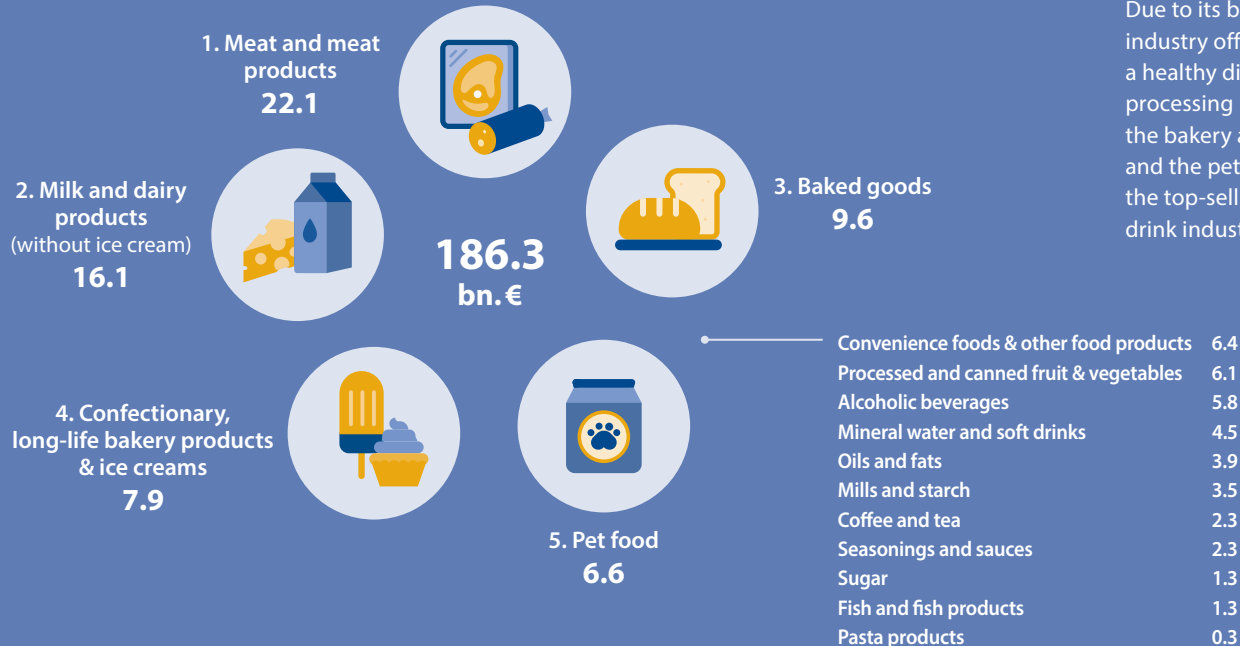


The food and drink industry is considered a robust economic sector. The growth of the sector is based on an ever-expanding export market – every third euro is earned abroad.

* Imports include basic food products for further processing in food production as well as fully processed food.

SECTOR SHARES OF TOTAL TURNOVER OF THE FOOD AND DRINK INDUSTRY

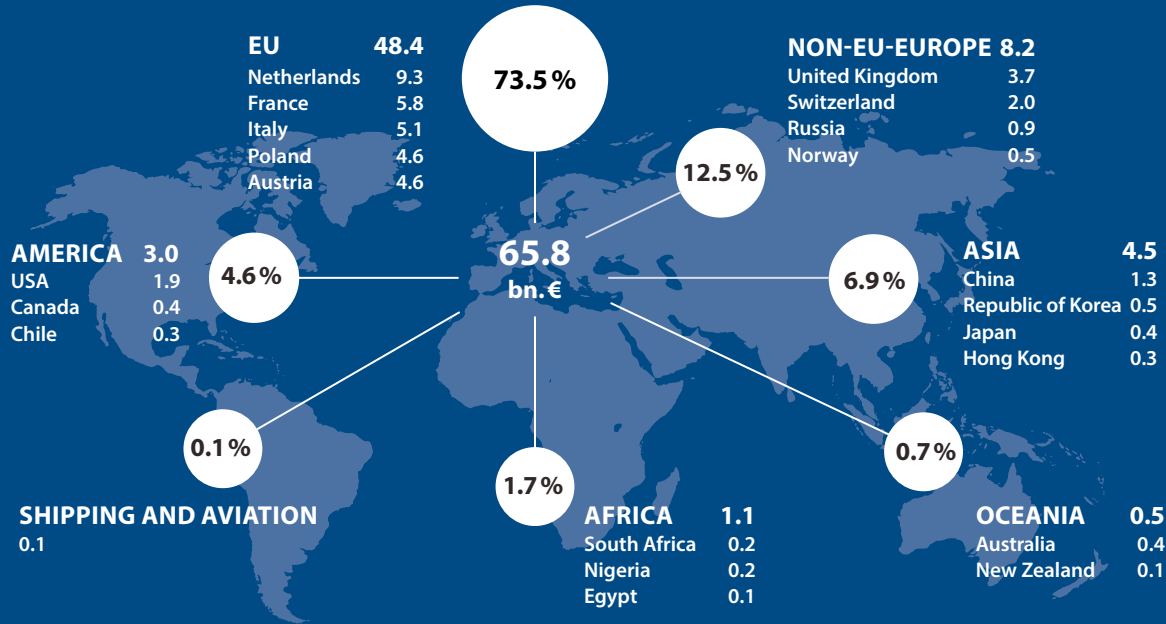
2021, in percent



Due to its broad range of sectors the industry offers consumers variety for a healthy diet. The meat and meat processing industry, the dairy industry, the bakery and confectionery industry and the pet food industry rank among the top-selling sectors of the food and drink industry.

INTERNATIONAL EXPORT MARKETS OF THE FOOD AND DRINK INDUSTRY

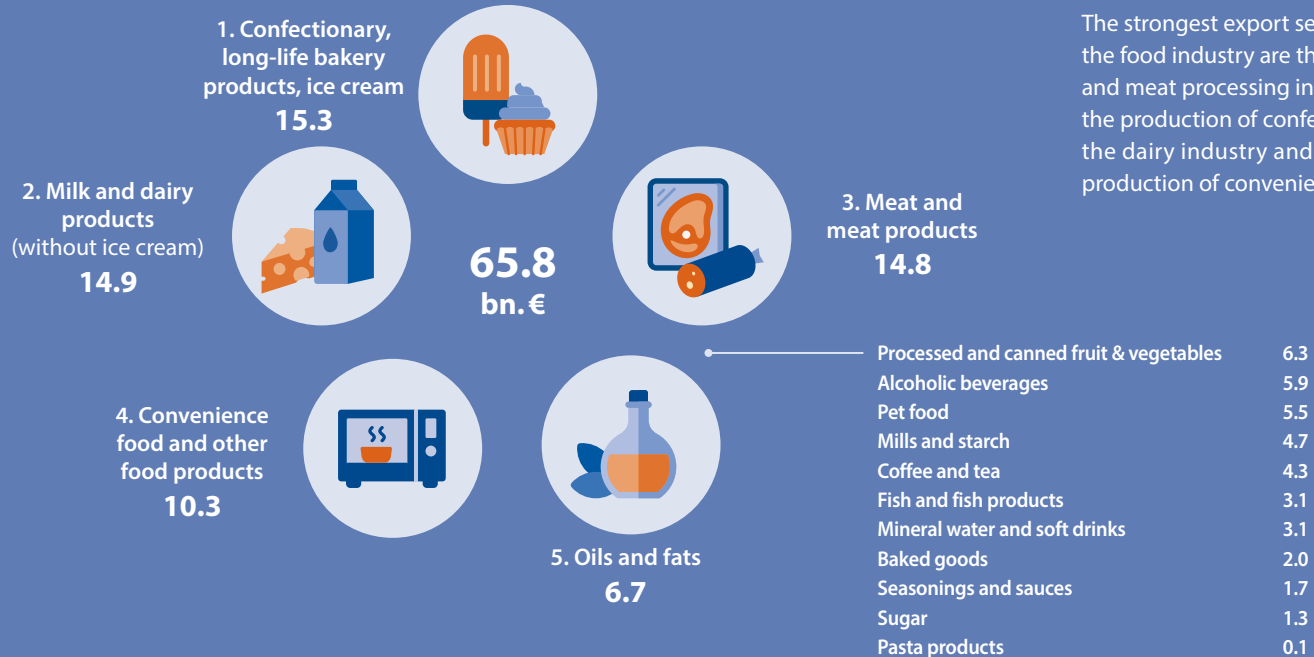
2021, in billion euros, share of total exports in the circle, preliminary figures



The food industry continues to grow in the face of global competition. Food products “Made in Germany” are popular all over the world due to their variety and quality.

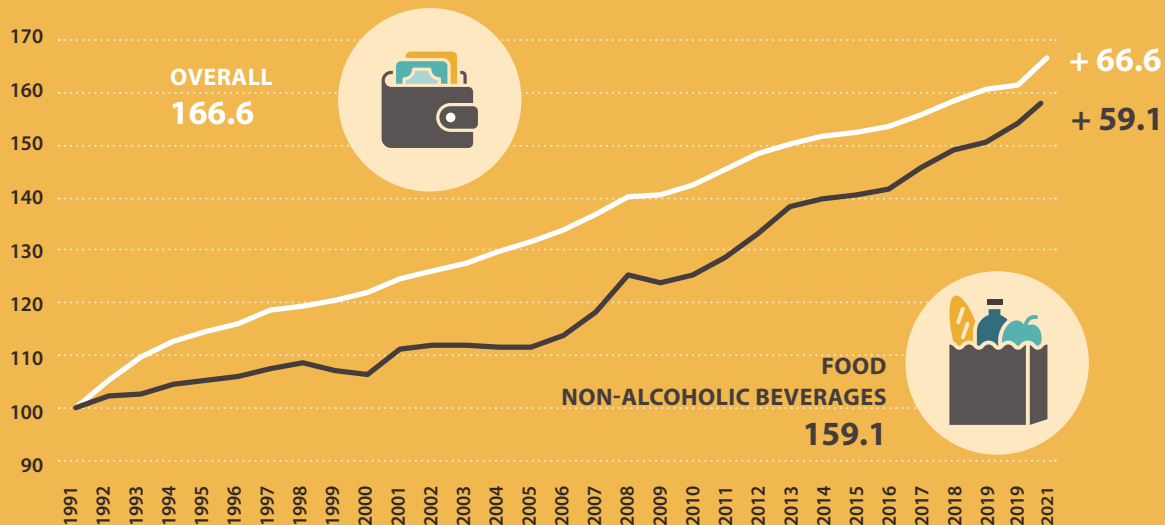
SHARES IN THE TOTAL EXPORT VALUE OF THE FOOD INDUSTRY

2021, in percent, preliminary figures



CONSUMER PRICE DEVELOPMENT 1991 – 2021

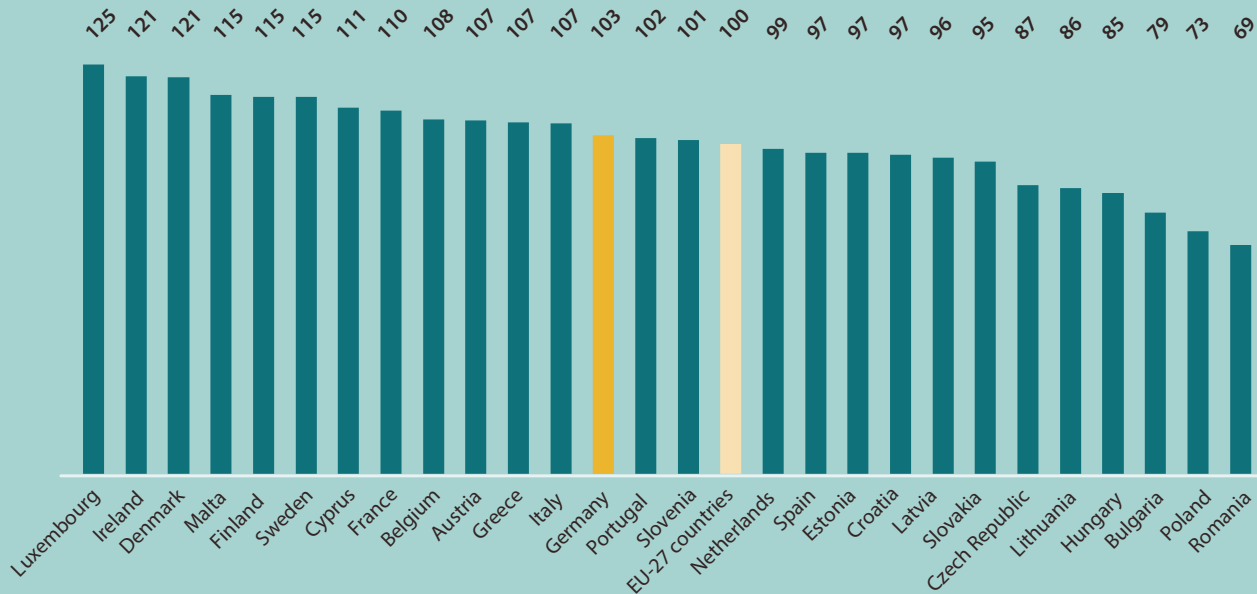
Index value 1991=100



The price increase for food and beverages is below the general inflation rate in the long term. Germans spend only a small proportion of their income on food. Despite a higher level of income the German food price level is only slightly above the EU average.

PRICE LEVEL INDEX FOR FOOD AND NON-ALCOHOLIC BEVERAGES

2020, EU-27=100

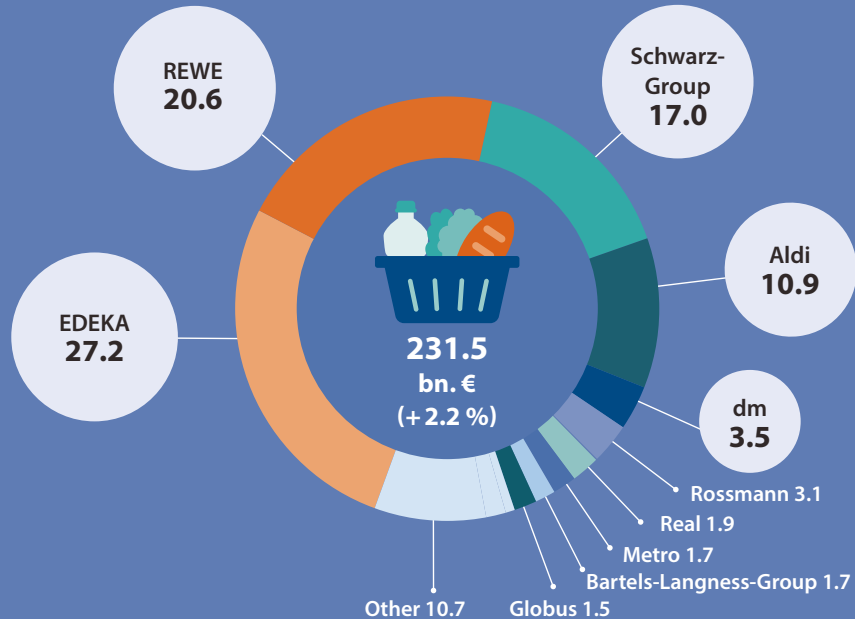


In comparison to the other European Union member states the German price level for food and non-alcoholic beverages is slightly above the EU average.



REVENUES OF THE FOOD RETAILERS

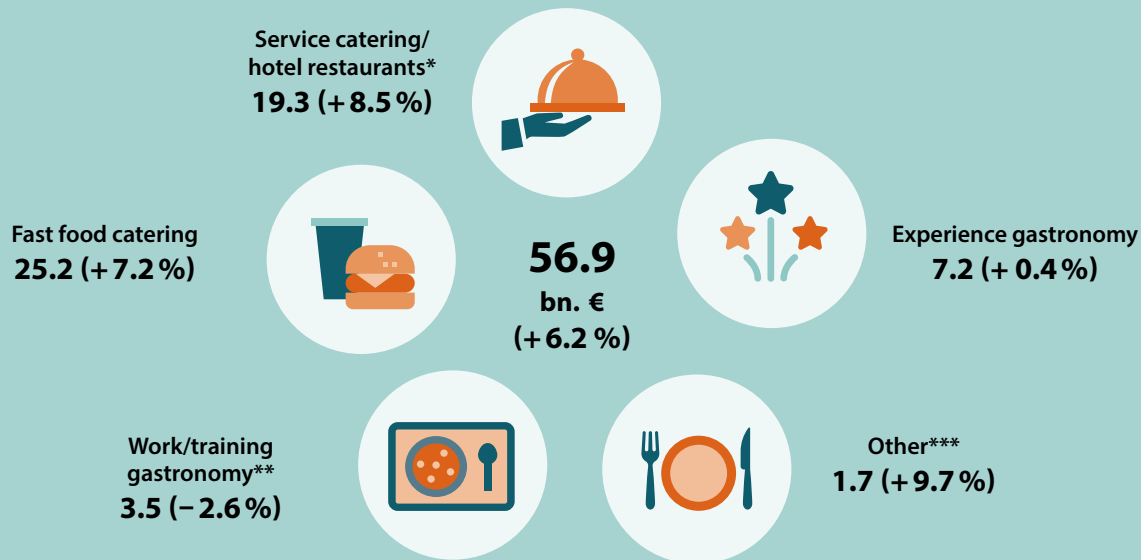
2021, in percent



The food retail trade is the most important market partner for the food industry and is characterised by a high concentration ratio. The increasing consumption of food “out-of-home” offers the industry interesting sales opportunities.

CONSUMER SPENDING OUT-OF-HOME MARKET

2021, in billions of euros, changes compared to 2020 in brackets



* Hotels including breakfast for overnight stays

** incl. vending at work/training place

*** Vending at train stations as well as airline and train catering

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