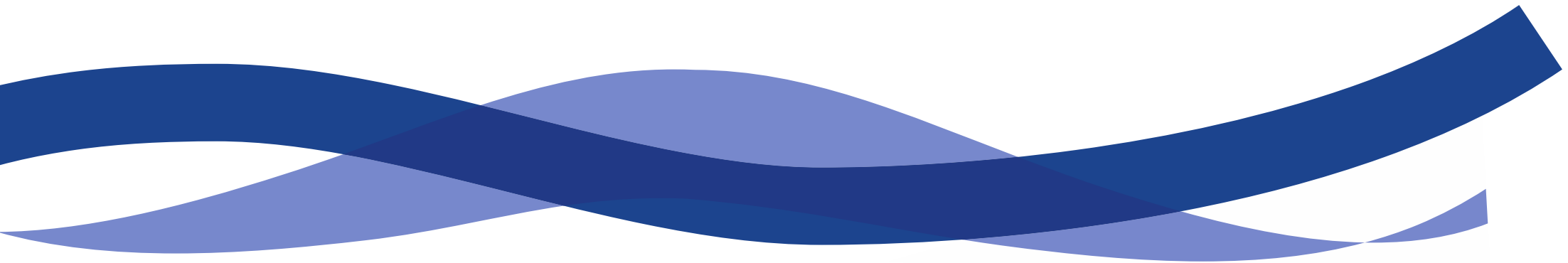


The German food and drink industries:

facts and figures 2018



Economic data of the food and drink industries 2018



“We ensure economical wealth and stability.”

	2018	2017
Total turnover*	179.6 bn.€ (±0.0%)	179.6 bn.€ (+4.8%)
Domestic turnover	120.1 bn.€ (+0.5%)	119.5 bn.€ (+4.1%)
Exports	59.5 bn.€ (-1.0%)	60.1 bn.€ (+6.3%)
(EU)	46.7 bn.€ (-1.3%)	47.2 bn.€ (+6.4%)
(Extra-EU)	12.8 bn.€ (-0,2%)	12.9 bn.€ (+6.1%)
Real sales trend	-0,1%	+1,0%
Shares of exports in total turnover	33%	33.5%
Companies	6,119 (+1.2%)	6.044(1.8%)
Employees	608,553 (+2.2%)	595,506(+2.7%)
Consumer prices (total)	+1.8%	+1.8%
thereof food and beverages (non-alcoholic)	+2.3%	+2.8%
Producer prices of the food and drink industry		
Domestic	+0.8%	+4.1%
Export	-1.2%	+3.1%

Sources: Federal Statistical Office, BVE

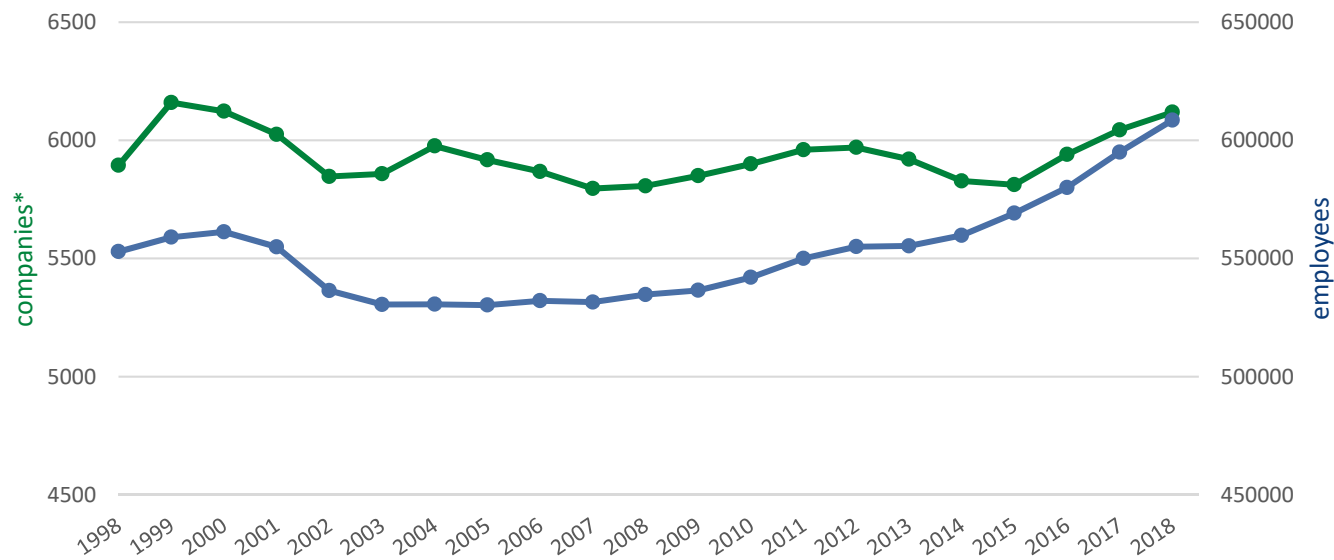
*Changes compared to previous year in brackets

Employment security

„We provide secure employment all over Germany.“



Companies and employees in the food and drink industries



In 2018 the German food and drink industries employed 608.553 people in 6.119 companies.

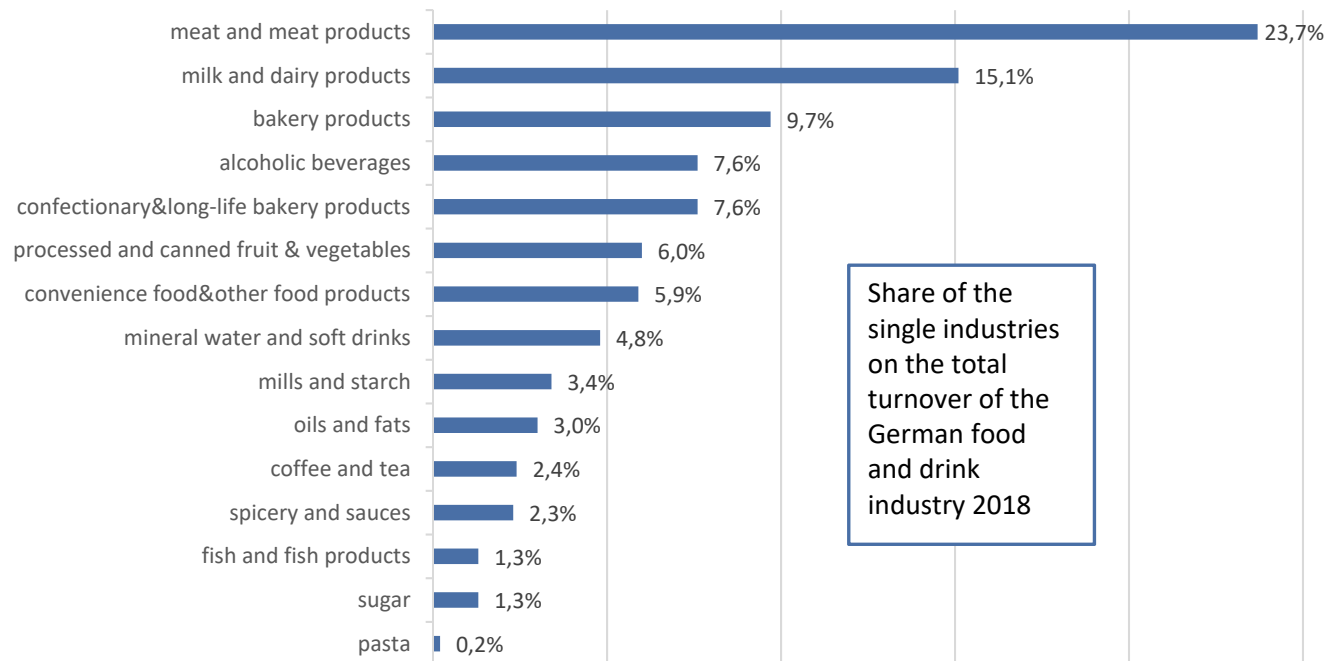
The industry - mainly characterized by small and medium sized enterprises – counts to the 4 largest industries in Germany and offers a big variety of employment possibilities.

Sources: Federal Statistical Office, BVE

*companies with >20 employees

Big industry variety

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



The industry branches with the highest level on turnover are the meat and meat processing industry, the milk industry, the confectionary and bakery industry, as well as the production of alcoholic beverages.

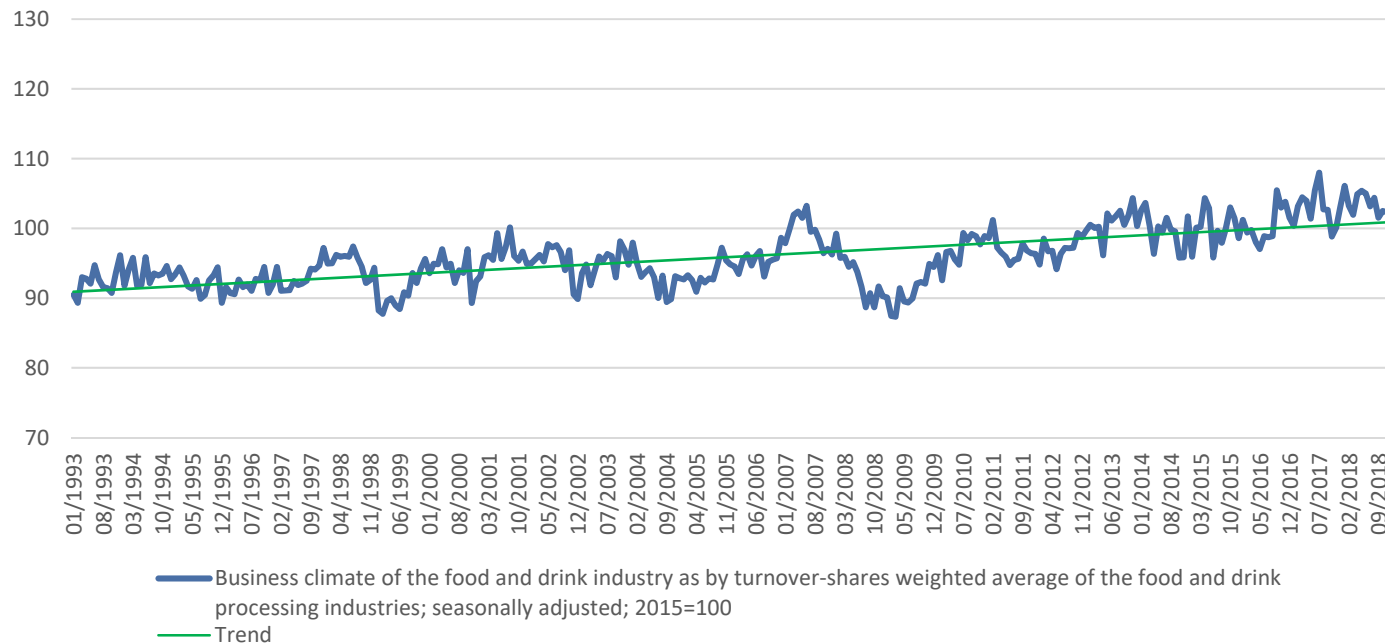
Sources: Federal Statistical Office, BVE

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
2015=100



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.

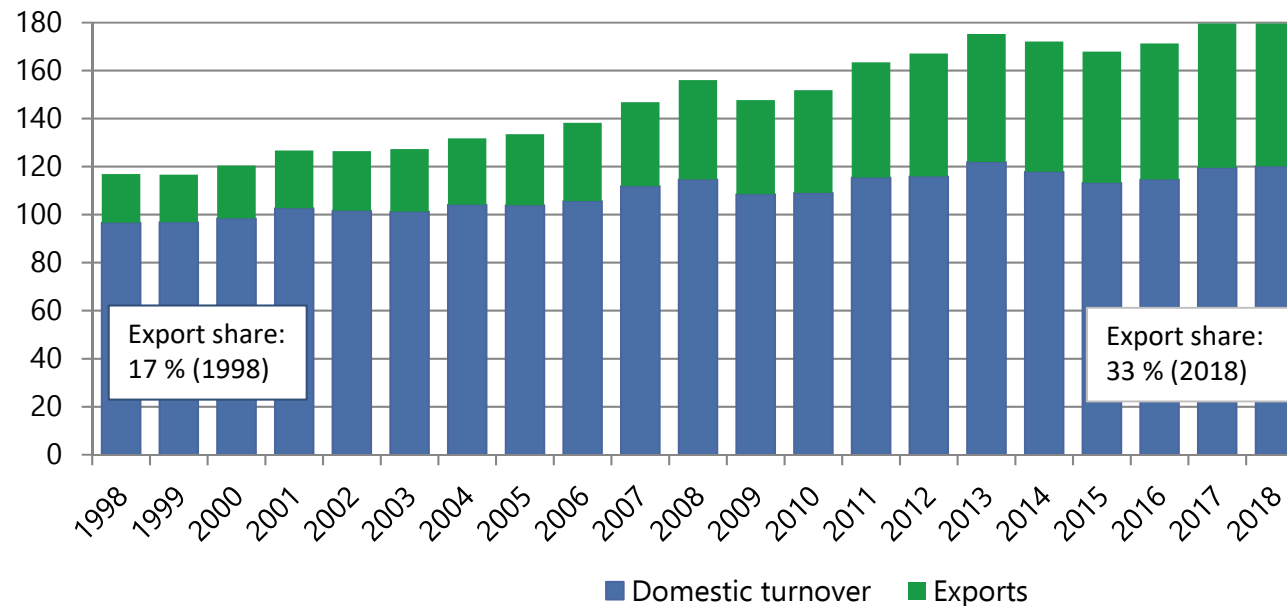
Sources: ifo-Institut, BVE

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.€



Sources: Federal Statistical Office, BVE

2018 the German food and drink industry generated a total turnover of 179.6 bn. Euro – thereof 120.1 bn. Euro on the domestic market and 59.5 bn. Euro on foreign markets.

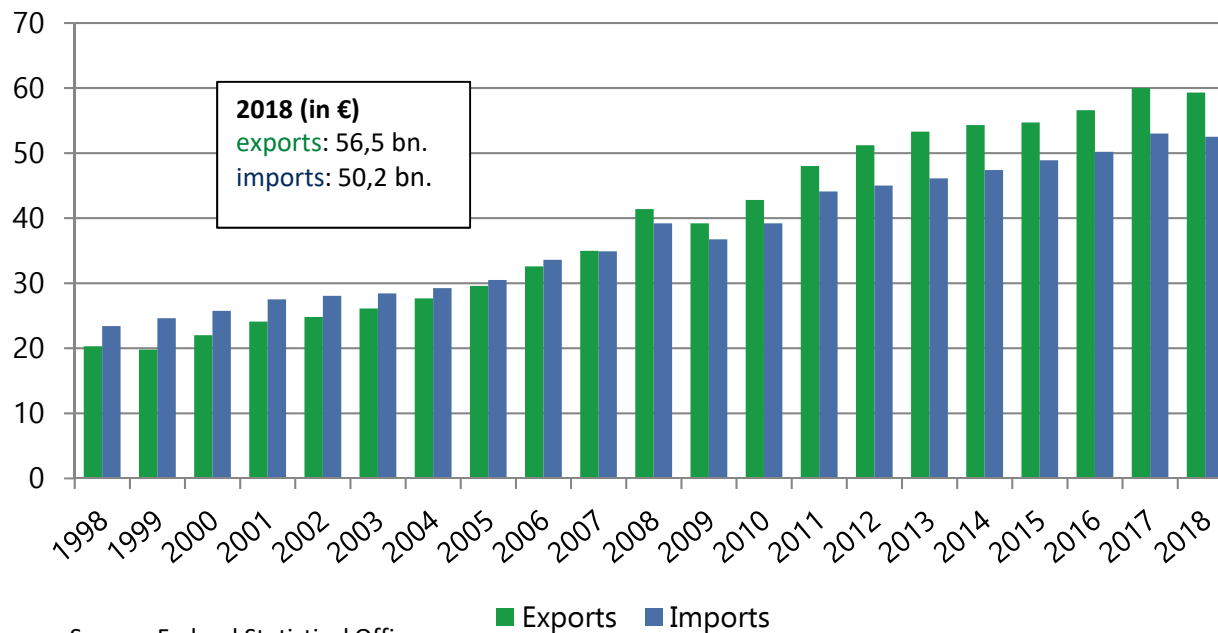
Exports are a main pillar for the industry – every third Euro is earned abroad. German food quality is in great demand on the global market.

Positive foreign trade balance

„The international markets want to deal with us.”



Exports and imports of products of the food and drink industries
in bn.€



Source: Federal Statistical Office,
BVE

■ Exports ■ Imports

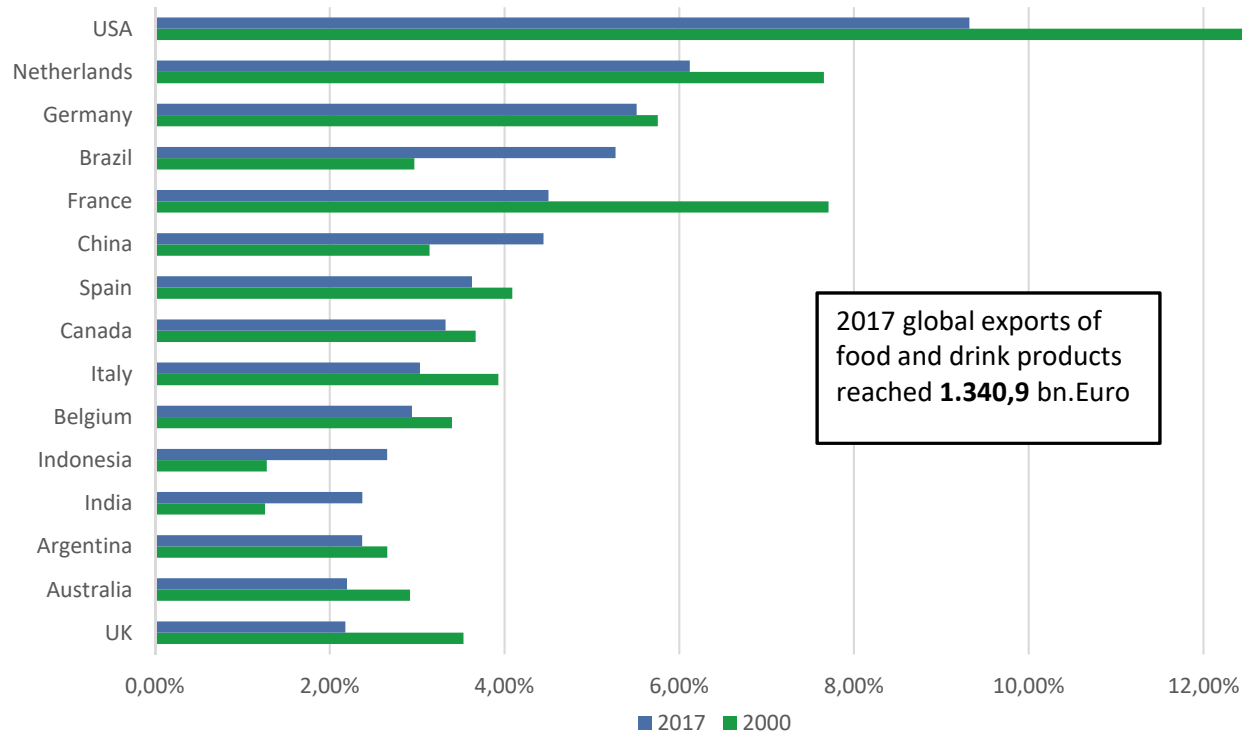
The exports of the German food and drink industry more than doubled since 1998, they increased by 192%.

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

Imports increased in the same period by 124%.

Export nation Germany

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

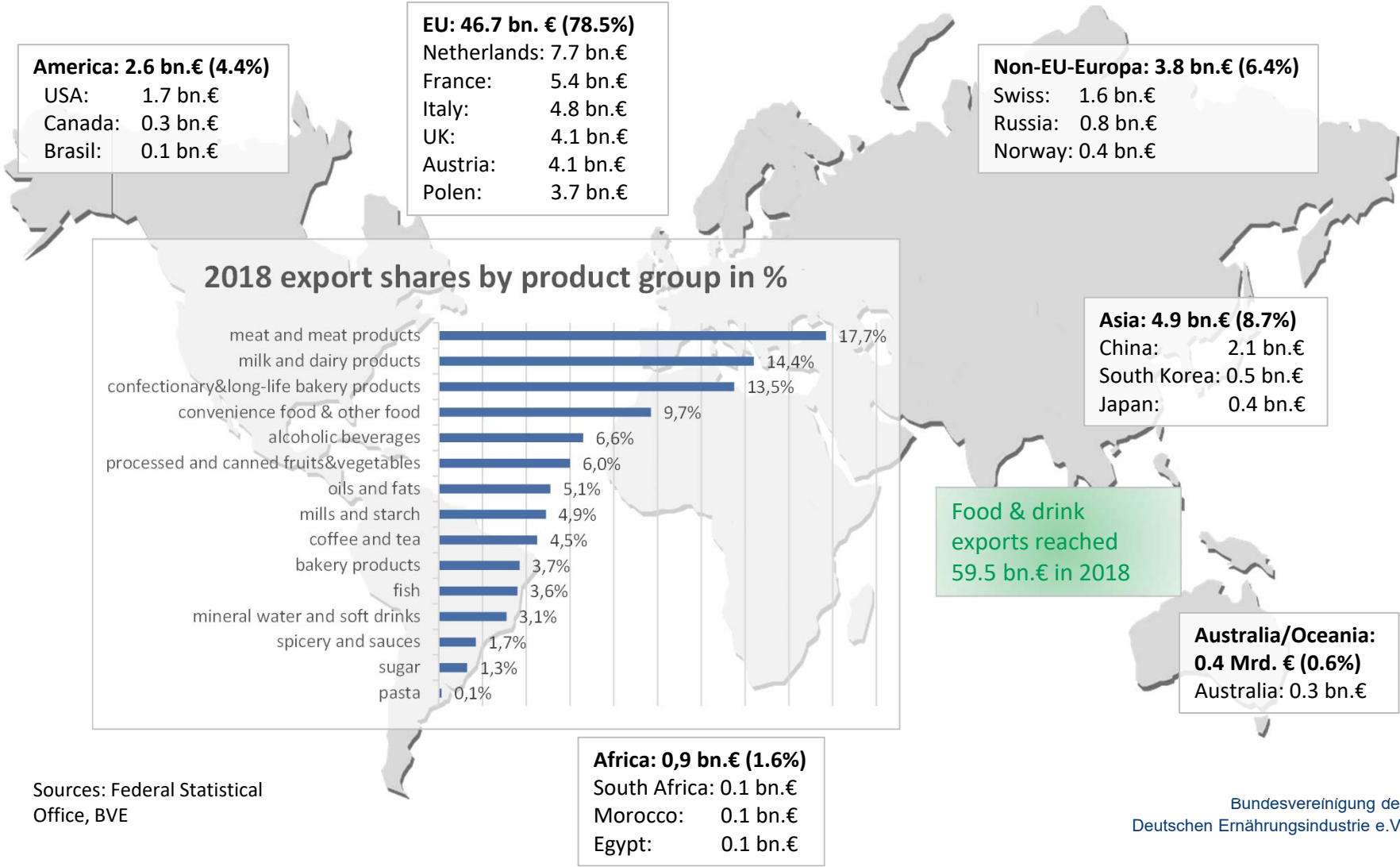


2017 global exports of food and drink products reached 1.340.9 bn. Euro.

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 2018



Sources: Federal Statistical Office, BVE

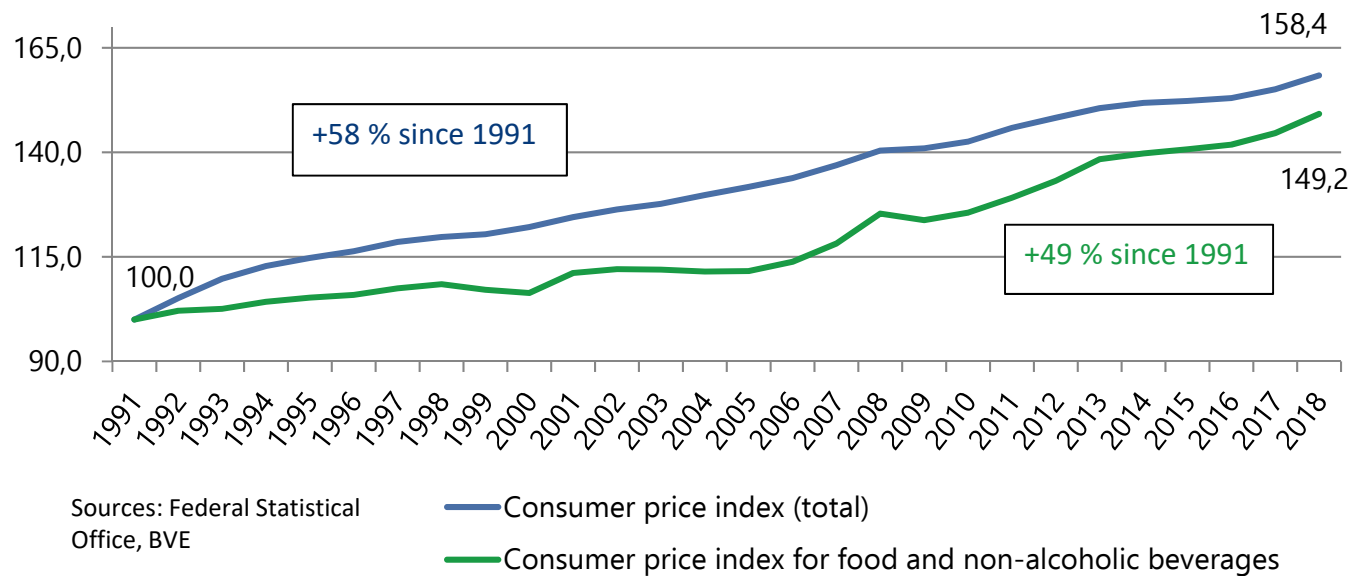
Consumer prices

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



Changes in consumer prices 1991-2018

Consumer price index 1991=100



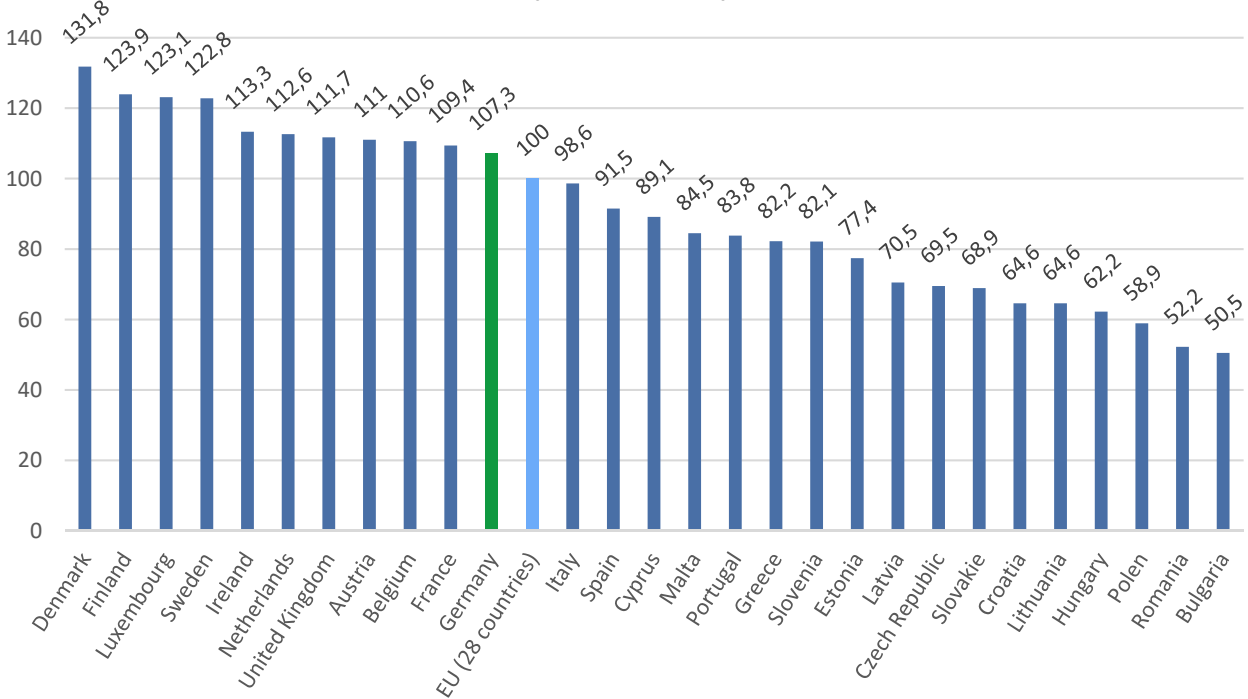
Consumer prices increased more since 2005 but in the long run the price increase for food and drinks remains far below the overall rise in prices.

Price level of food and drinks in Germany



„Quality for all income prices.“

Price index for food and alcoholic bevarages 2018,
(EU28=100)



Source: Eurostat

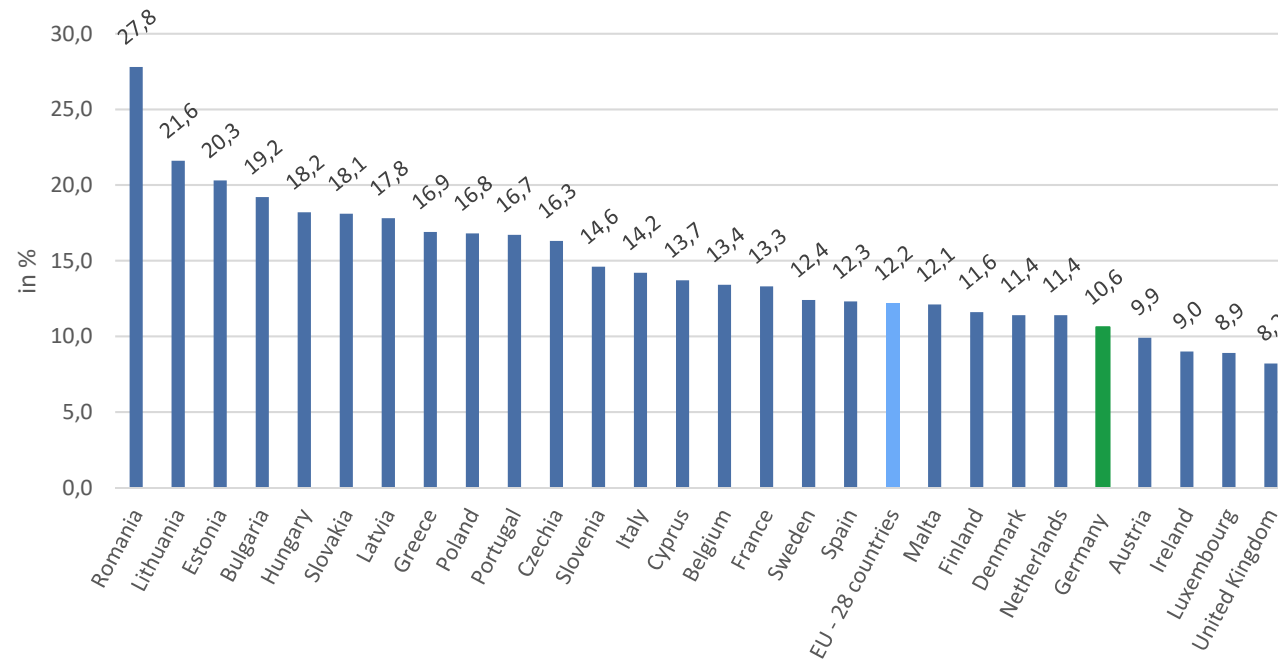
In comparison to the countries of the European Union the price index for food and alcoholic beverages is for Germany in the middle. The price index for Germany is slightly above the reference value of the EU-28 nations.

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 privat consumption 2017*



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

2017 only 10.6% of total private consumption fell upon food and non-alcoholic beverages.

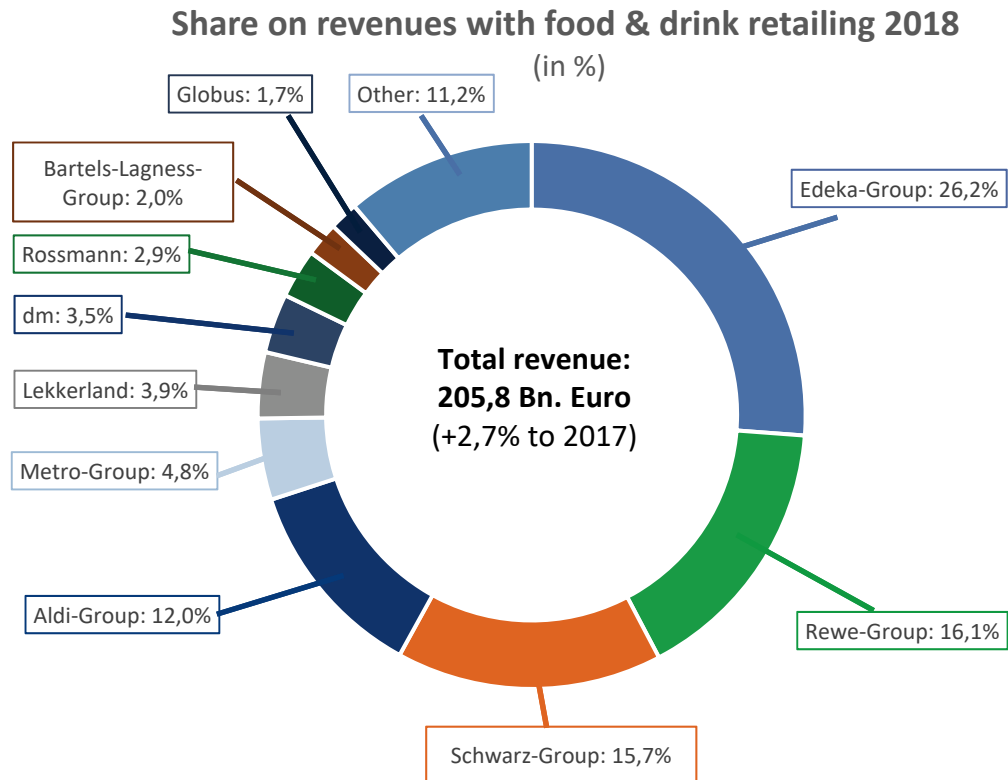
A single-person household spends on average 174 € per month, a 4-persons-household 512 € for food and drinks.

Sources: Eurostat, Federal Statistical Office, BVE

*Note: No data for Croatia

Revenues of the food retailers

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



Source: Nielsen TradeDimensions

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

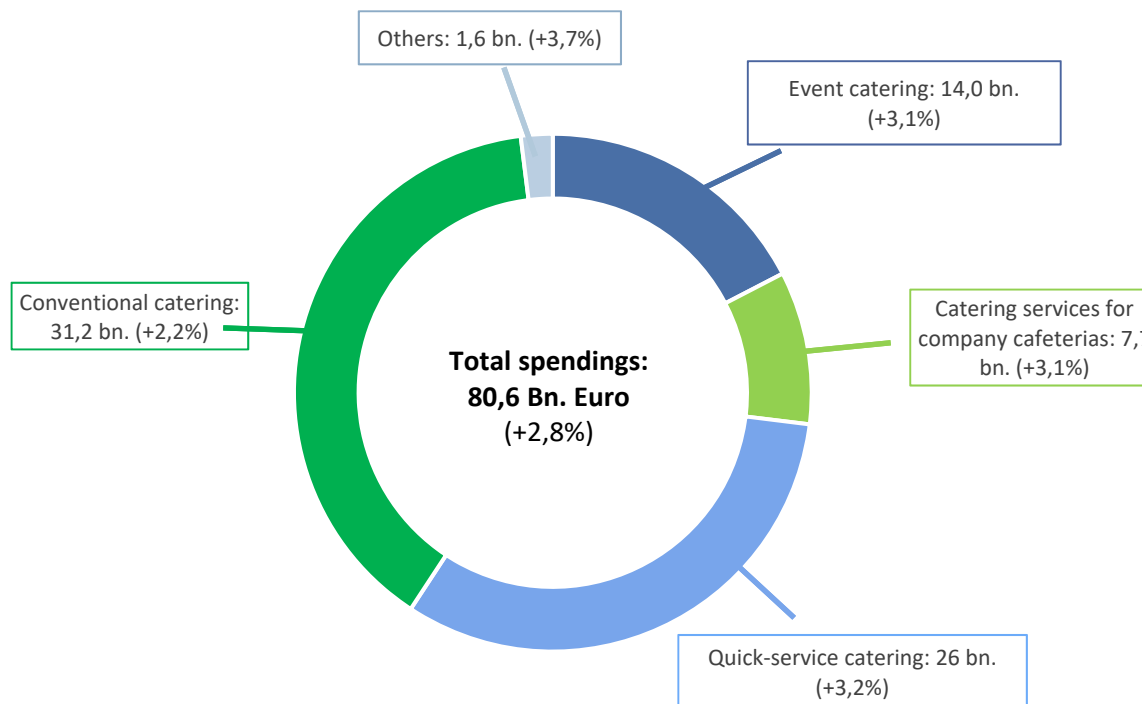
The Top-5 food retailers combine about 75% of total revenues.

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 2018
(in Bn. Euro*)



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

2018 consumers spent about 80.6 bn.€ on the „out-of-home“ consumption of food and drinks – 2,8 % more than in the previous year.

Source: CREST Verbraucherpanel,
npdgroup deutschland GmbH

*Changes compared to 2017 in brackets

Questions? Please feel free to ask us!



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