



**MARKET ACCESS SECRETARIAT
Global Analysis Report**

Competitive Trade Analysis

Germany

July 2015



REPORT CONTENT SUMMARY

- This report looks to highlight the major sectors in Germany, and attempts to identify the best opportunities for Canadian exports.
- Specifically, the data analysis that follows focuses on the top ten German imports by major aggregate sector, of which Canada is a supplier. It identifies the gap between Germany's imports from the world and the proportion provided by Canada, and then outlines top international competitors.
- Unless otherwise specified, all figures in this document are based on import data as reported by Statistics Germany, and were sourced from Global Trade Atlas (2015).

GERMAN MARKET SUMMARY

- Germany is the world's third-largest importer of agri-food and seafood products with a value of C\$119.0 billion in 2014, behind the United States and China. The country is also the world's third-largest agri-food and seafood exporter, and recorded a trade deficit of just C\$16.3 billion in 2014, with C\$102.7 billion in exports.
- Top agri-food and seafood suppliers include the Netherlands with 19.2% of total import value, France (8.6%), and Italy (7.6%). Canada was Germany's 37th-largest import provider in 2014, representing C\$456.2 million, or just under 0.4% of the market.
- Germany's agri-food and seafood imports from Canada have actually been slowly decreasing while imports from the world are on the rise. This has resulted in a widening supply gap not only overall, but among all ten of Germany's top import commodities.

Note: Please see the Annex at the end of this document for a list of abbreviations that will be used throughout this report.

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TRADE OVERVIEW

Germany is the third-largest importer and exporter of agri-food and seafood products in the world. The country recorded an agri-food and seafood trade deficit of C\$16.3 billion in 2014, with imports valued at C\$119.0 billion and C\$102.7 billion in exports. Sourcing a diverse range of agri-food and seafood products from international suppliers, key import commodities include edible fruit and nuts (9.4% of total imports), dairy, eggs and honey (8.4%), and beverages (7.8%). The top three supplying countries of overall agri-food and seafood imports are the Netherlands, France and Italy. Canada is ranked 37th among supplying countries to Germany, and registered a decrease in market share in 2014, as demonstrated in the chart below.

Germany's Top Ten Suppliers of Agri-Food and Seafood Products, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
World	91,366.71	103,899.59	100,457.93	109,832.61	119,033.69	6.84
1 Netherlands	18,455.78	20,526.43	19,320.95	21,386.52	22,905.37	5.55
2 France	8,090.09	9,538.97	8,813.05	9,423.87	10,285.33	6.19
3 Italy	7,152.67	7,748.59	7,485.52	8,486.61	9,066.10	6.11
4 Poland	3,964.92	4,524.01	5,009.61	6,196.22	6,972.07	15.15
5 Spain	4,862.11	5,165.82	5,417.23	6,393.35	6,689.24	8.30
6 Belgium	4,570.70	5,066.63	4,989.67	5,569.29	6,056.53	7.29
7 Brazil	4,201.68	5,361.11	4,707.03	4,103.88	5,310.67	6.03
8 Denmark	3,870.01	4,235.01	4,420.93	4,818.07	5,043.73	6.85
9 Austria	3,399.45	3,886.03	3,805.60	4,270.83	4,672.93	8.28
10 United States	2,272.80	2,636.88	2,950.28	3,560.07	3,772.39	13.50
37 Canada	494.54	502.07	447.31	546.51	456.15	-2.00

Germany's Top Ten Suppliers of Agri-Food and Seafood Products, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
1 Netherlands	20.20	19.76	19.23	19.47	19.24	-0.96
2 France	8.85	9.18	8.77	8.58	8.64	-0.21
3 Italy	7.83	7.46	7.45	7.73	7.62	-0.21
4 Poland	4.34	4.35	4.99	5.64	5.86	1.52
5 Spain	5.32	4.97	5.39	5.82	5.62	0.30
6 Belgium	5.00	4.88	4.97	5.07	5.09	0.09
7 Brazil	4.60	5.16	4.69	3.74	4.46	-0.14
8 Denmark	4.24	4.08	4.40	4.39	4.24	0.00
9 Austria	3.72	3.74	3.79	3.89	3.93	0.21
10 United States	2.49	2.54	2.94	3.24	3.17	0.68
37 Canada	0.54	0.48	0.45	0.50	0.38	-0.16



Canada has a substantial supply gap with Germany that has been increasing at rate almost identical to Germany's agri-food and seafood import growth. Canada holds just marginal market share in each of Germany's top ten import commodities, presenting opportunities to further supply the country's growing demand. This may prove particularly true in light of the Canada-European Union Comprehensive Economic and Trade Agreement (CETA). However, while Germany has a diverse supplier list, totalling 207 countries in 2014, Germany's primary trading partners are fellow members of the European Union (representing eight of the top ten suppliers, or over 60% of the market), signalling a concentrated supply environment.

Agri-Food and Seafood Products Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Germany's imports from the world	91,366.71	103,899.59	100,457.93	109,832.61	119,033.69	6.84
Germany's imports from Canada	494.54	502.07	447.31	546.51	456.15	-2.00
Supply gap	90,872.16	103,397.52	100,010.62	109,286.10	118,577.54	6.88

Edible fruit and nuts represented Germany's top-grossing import commodity in 2014, with a value of C\$11.2 billion, or 9.4% of overall agri-food and seafood imports. Across the 2010 to 2014 period, edible fruit and nuts was also the third-best performer in terms of value sales growth, with a compound annual growth rate (CAGR) of 7.4%. The smaller categories of oilseeds, and food waste and animal feed were the strongest growing commodities over the period, with CAGRs of 13.5% and 8.7% respectively.

Germany's Top Ten Agri-Food and Seafood Commodity Imports from the World, C\$ Millions

Rank	HS Code	Commodity	2010	2011	2012	2013	2014	CAGR % 2010-14
Total Agri-Food and Seafood Imports			91,366.71	103,899.59	100,457.93	109,832.61	119,033.69	6.84
1	08	Edible fruit and nuts	8,437.03	8,830.29	8,681.76	10,430.95	11,213.78	7.37
2	04	Dairy, eggs and honey	7,869.51	8,483.56	7,940.19	9,130.21	9,995.32	6.16
3	22	Beverages	7,571.74	8,537.49	8,386.84	9,019.69	9,323.07	5.34
4	02	Meat and edible offal	6,843.25	8,007.41	7,596.74	8,243.25	8,791.93	6.46
5	07	Vegetables	6,536.90	6,248.06	6,174.89	7,101.20	7,401.56	3.15
6	12	Oilseeds	4,079.94	5,358.69	6,307.07	6,877.64	6,773.95	13.51
7	20	Preserved foods	4,946.71	5,616.81	5,463.51	5,670.97	6,100.94	5.38
8	09	Spices, coffee and tea	4,411.68	6,366.95	5,705.24	4,888.18	5,764.54	6.92
9	18	Cocoa and cocoa preparations	4,163.04	4,506.35	3,852.26	4,232.75	5,388.60	6.66
10	23	Food waste and animal feed	3,826.66	4,158.71	4,533.74	4,988.41	5,347.77	8.73



TOP TEN AGRI-FOOD AND SEAFOOD COMMODITY IMPORTS

1. EDIBLE FRUIT AND NUTS

Germany's Top Ten Suppliers of Edible Fruit and Nuts, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
World	8,437.03	8,830.29	8,681.76	10,430.95	11,213.78	7.37
Spain	1,695.66	1,744.91	1,850.09	2,303.28	2,380.33	8.85
Italy	1,150.10	1,138.86	1,148.90	1,366.21	1,354.03	4.17
United States	521.74	572.99	612.91	806.16	1,019.53	18.23
Turkey	580.54	639.65	611.79	727.40	735.22	6.08
Netherlands	250.38	330.79	324.62	409.13	553.62	21.94
Ecuador	299.26	329.17	351.37	333.05	398.63	7.43
Costa Rica	353.30	352.16	394.19	391.28	395.51	2.86
Colombia	326.01	316.40	267.02	393.75	381.29	3.99
France	260.89	261.10	289.77	297.65	294.84	3.11
Poland	192.25	210.42	233.96	290.21	289.44	10.77
Canada (37)	28.21	45.60	48.33	40.33	34.84	5.41

Germany's Top Ten Suppliers of Edible Fruit and Nuts, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Spain	20.10	19.76	21.31	22.08	21.23	1.13
Italy	13.63	12.90	13.23	13.10	12.07	-1.56
United States	6.18	6.49	7.06	7.73	9.09	2.91
Turkey	6.88	7.24	7.05	6.97	6.56	-0.32
Netherlands	2.97	3.75	3.74	3.92	4.94	1.97
Ecuador	3.55	3.73	4.05	3.19	3.55	0.00
Costa Rica	4.19	3.99	4.54	3.75	3.53	-0.66
Colombia	3.86	3.58	3.08	3.77	3.40	-0.46
France	3.09	2.96	3.34	2.85	2.63	-0.46
Poland	2.28	2.38	2.69	2.78	2.58	0.30
Canada (37)	0.33	0.52	0.56	0.39	0.31	-0.02

Edible Fruit and Nuts Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Germany's imports from the world	8,437.03	8,830.29	8,681.76	10,430.95	11,213.78	7.37
Germany's imports from Canada	28.21	45.60	48.33	40.33	34.84	5.41
Supply gap	8,408.82	8,784.69	8,633.44	10,390.62	11,178.95	7.38



Germany's Top Five Edible Fruit and Nut Product Imports, C\$ Millions

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
080390	Fresh/dried bananas	950.55	1,158.85	1,231.90	13.84
080212	Fresh/dried shelled almonds	437.95	611.19	774.46	32.98
080610	Fresh grapes	627.46	725.73	774.39	11.09
080810	Fresh apples	596.43	730.92	646.71	4.13
080222	Fresh/dried shelled hazelnuts or filberts	376.01	496.98	543.11	20.18

Germany's Top Five Edible Fruit and Nut Product Imports and Top Supplying Countries, 2014

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
080390	Fresh/dried bananas	Ecuador 31.16	Colombia 29.44	Costa Rica 21.61	N/A
080212	Fresh/dried shelled almonds	United States 65.64	Spain 19.84	Italy 4.48	0.04
080610	Fresh grapes	Italy 32.54	South Africa 12.19	Spain 12.12	N/A
080810	Fresh apples	Italy 43.15	Netherlands 12.22	France 11.79	N/A
080222	Fresh/dried shelled hazelnuts or filberts	Turkey 67.22	Italy 19.13	Georgia 6.91	N/A



2. DAIRY, EGGS AND HONEY

Germany's Top Ten Suppliers of Dairy, Eggs and Honey, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
World	7,869.51	8,483.56	7,940.19	9,130.21	9,995.32	6.16
Netherlands	2,542.86	2,581.94	2,415.31	2,799.75	3,023.92	4.43
France	1,148.77	1,247.36	1,088.62	1,202.68	1,431.32	5.65
Austria	534.52	636.65	610.51	678.16	832.69	11.72
Italy	434.32	540.08	495.00	607.08	690.30	12.28
Belgium	441.79	490.49	425.73	501.19	598.29	7.88
Poland	356.59	392.32	428.14	470.44	554.38	11.66
Denmark	474.14	488.82	533.28	603.68	438.71	-1.92
Ireland	283.04	347.43	270.45	403.21	422.52	10.53
Switzerland	237.92	282.23	286.69	320.26	361.45	11.02
Czech Republic	213.67	257.55	233.10	253.91	308.27	9.60
Canada (46)	14.62	9.18	1.13	1.34	2.45	-36.03

Germany's Top Ten Suppliers of Dairy, Eggs and Honey, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Netherlands	32.31	30.43	30.42	30.66	30.25	-2.06
France	14.60	14.70	13.71	13.17	14.32	-0.28
Austria	6.79	7.50	7.69	7.43	8.33	1.54
Italy	5.52	6.37	6.23	6.65	6.91	1.39
Belgium	5.61	5.78	5.36	5.49	5.99	0.38
Poland	4.53	4.62	5.39	5.15	5.55	1.02
Denmark	6.03	5.76	6.72	6.61	4.39	-1.64
Ireland	3.60	4.10	3.41	4.42	4.23	0.63
Switzerland	3.02	3.33	3.61	3.51	3.62	0.60
Czech Republic	2.72	3.04	2.94	2.78	3.08	0.36
Canada (46)	0.19	0.11	0.01	0.01	0.02	-0.17

Dairy, Eggs and Honey Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Germany's imports from the world	7,869.51	8,483.56	7,940.19	9,130.21	9,995.32	6.16
Germany's imports from Canada	14.62	9.18	1.13	1.34	2.45	-36.03
Supply gap	7,854.89	8,474.38	7,939.06	9,128.87	9,992.88	6.20



Germany's Top Five Dairy, Eggs and Honey Product Imports, C\$ Millions

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
040690	Cheese, including cheddar and Colby, not elsewhere specified	3,117.30	3,616.66	3,991.47	13.16
040120	Milk and cream with fat content between 1% and 6% by weight	706.21	813.13	944.70	15.66
040721	Fresh chicken eggs	672.66	639.11	660.05	-0.94
049999	Dairy, eggs and honey products, detailed description unknown	196.36	333.57	625.75	78.51
040510	Butter	470.61	625.70	582.35	11.24

Germany's Top Five Dairy, Eggs and Honey Product Imports and Top Supplying Countries, 2014

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
040690	Cheese, including cheddar and Colby, not elsewhere specified	Netherlands 37.91	France 22.52	Italy 7.66	<0.01
040120	Milk and cream with fat content between 1% and 6% by weight	Czech Republic 25.30	Austria 20.69	Belgium 19.32	N/A
040721	Fresh chicken eggs	Netherlands 81.48	Poland 9.97	Belgium 4.21	N/A
049999	Dairy, eggs and honey products, detailed description unknown	Netherlands 26.34	Italy 9.68	France 8.86	0.35
040510	Butter	Ireland 47.46	Netherlands 22.23	Belgium 10.02	N/A



3. BEVERAGES

**does not include juices*

Germany's Top Ten Suppliers of Beverages, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
World	7,571.74	8,537.49	8,386.84	9,019.69	9,323.07	5.34
France	1,597.39	1,792.05	1,613.94	1,756.20	1,993.31	5.69
Italy	1,515.92	1,732.09	1,614.27	1,824.27	1,903.24	5.85
Spain	449.16	598.30	601.51	731.06	731.15	12.95
Austria	663.20	644.92	571.05	564.44	596.18	-2.63
United States	409.33	464.06	513.87	572.88	585.39	9.36
Denmark	381.18	415.32	583.79	545.59	575.69	10.86
Netherlands	747.41	890.70	881.77	711.96	570.66	-6.52
United Kingdom	344.66	429.36	442.18	511.48	472.20	8.19
Belgium	256.08	309.46	315.17	362.61	347.65	7.94
Hungary	50.55	56.11	100.95	150.19	150.03	31.26
Canada (38)	4.58	3.64	3.57	4.26	6.17	7.73

Germany's Top Ten Suppliers of Beverages, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
France	21.10	20.99	19.24	19.47	21.38	0.28
Italy	20.02	20.29	19.25	20.23	20.41	0.39
Spain	5.93	7.01	7.17	8.11	7.84	1.91
Austria	8.76	7.55	6.81	6.26	6.39	-2.37
United States	5.41	5.44	6.13	6.35	6.28	0.87
Denmark	5.03	4.86	6.96	6.05	6.17	1.14
Netherlands	9.87	10.43	10.51	7.89	6.12	-3.75
United Kingdom	4.55	5.03	5.27	5.67	5.06	0.51
Belgium	3.38	3.62	3.76	4.02	3.73	0.35
Hungary	0.67	0.66	1.20	1.67	1.61	0.94
Canada (38)	0.06	0.04	0.04	0.05	0.07	0.01

Beverages Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Germany's imports from the world	7,571.74	8,537.49	8,386.84	9,019.69	9,323.07	5.34
Germany's imports from Canada	4.58	3.64	3.57	4.26	6.17	7.73
Supply gap	7,567.16	8,533.85	8,383.27	9,015.44	9,316.90	5.34



Germany's Top Five Beverage Product Imports, C\$ Millions

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
220421	Wine of fresh grapes, <2 litres	1,935.32	2,170.32	2,368.10	10.62
220429	Wine of fresh grapes, >2 litres	680.32	845.45	766.59	6.15
220300	Beer made from malt	571.12	599.41	686.87	9.67
220710	Ethyl alcohol, >80% strength by volume	727.73	837.74	659.41	-4.81
229999	Beverage products, detailed description unknown	456.99	352.42	636.42	18.01

Germany's Top Five Beverage Product Imports and Top Supplying Countries, 2014

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
220421	Wine of fresh grapes, <2 litres	Italy 41.23	France 26.28	Spain 12.47	0.01
220429	Wine of fresh grapes, >2 litres	Italy 26.68	France 20.59	Spain 19.41	N/A
220300	Beer made from malt	Denmark 49.79	Belgium 12.70	Czech Republic 10.21	0.02
220710	Ethyl alcohol, >80% strength by volume	Netherlands 39.07	Belgium 19.70	France 14.95	<0.01
229999	Beverage products, detailed description unknown	Italy 24.51	France 22.22	Spain 11.98	0.08



4. MEAT AND EDIBLE OFFAL

Germany's Top Ten Suppliers of Meat and Edible Offal, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
World	6,843.25	8,007.41	7,596.74	8,243.25	8,791.93	6.46
Netherlands	1,460.28	1,615.14	1,513.58	1,711.96	1,878.12	6.49
Belgium	946.78	1,041.11	1,046.71	1,152.94	1,110.23	4.06
Denmark	789.00	895.59	885.21	943.67	1,034.19	7.00
Poland	474.26	586.48	564.39	634.89	726.12	11.24
France	471.96	559.67	530.55	545.98	564.47	4.58
Austria	267.90	373.26	394.91	456.91	479.70	15.68
Italy	400.42	396.47	360.52	404.63	477.69	4.51
Spain	305.78	329.08	379.43	419.24	424.99	8.58
Argentina	374.03	410.19	361.87	351.86	343.60	-2.10
Brazil	257.01	289.44	207.90	232.05	303.54	4.25
Canada (30)	7.73	4.87	3.91	3.85	4.90	-10.78

Germany's Top Ten Suppliers of Meat and Edible Offal, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Netherlands	21.34	20.17	19.92	20.77	21.36	0.02
Belgium	13.84	13.00	13.78	13.99	12.63	-1.21
Denmark	11.53	11.18	11.65	11.45	11.76	0.23
Poland	6.93	7.32	7.43	7.70	8.26	1.33
France	6.90	6.99	6.98	6.62	6.42	-0.48
Austria	3.91	4.66	5.20	5.54	5.46	1.55
Italy	5.85	4.95	4.75	4.91	5.43	-0.42
Spain	4.47	4.11	4.99	5.09	4.83	0.36
Argentina	5.47	5.12	4.76	4.27	3.91	-1.56
Brazil	3.76	3.61	2.74	2.82	3.45	-0.31
Canada (30)	0.11	0.06	0.05	0.05	0.06	-0.05

Meat and Edible Offal Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Germany's imports from the world	6,843.25	8,007.41	7,596.74	8,243.25	8,791.93	6.46
Germany's imports from Canada	7.73	4.87	3.91	3.85	4.90	-10.78
Supply gap	6,835.52	8,002.54	7,592.83	8,239.40	8,787.04	6.48



Germany's Top Five Meat and Edible Offal Product Imports, C\$ Millions

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
020130	Fresh/chilled boneless beef	1,195.76	1,275.69	1,415.16	8.79
020311	Fresh/chilled pork carcasses and half-carcasses	909.58	1,013.70	1,011.55	5.46
029999	Meat products, detailed description unknown	299.81	492.40	831.60	66.55
020319	Fresh/chilled pork	843.08	866.03	825.10	-1.07
020713	Fresh/chilled chicken cuts and edible offal	472.74	530.70	551.68	8.03

Germany's Top Five Meat and Edible Offal Product Imports and Top Supplying Countries, 2014

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
020130	Fresh/chilled boneless beef	Netherlands 23.59	Argentina 23.27	Ireland 8.32	0.11
020311	Fresh/chilled pork carcasses and half-carcasses	Belgium 56.54	Denmark 15.89	Poland 5.75	N/A
029999	Meat products, detailed description unknown	Netherlands 22.86	Denmark 14.21	Belgium 11.45	0.3
020319	Fresh/chilled pork	Denmark 48.55	Belgium 18.07	Netherlands 12.91	N/A
020713	Fresh/chilled chicken cuts and edible offal	Netherlands 48.62	Poland 15.66	Austria 11.72	N/A



5. VEGETABLES

**including pulses*

Germany's Top Ten Suppliers of Vegetables, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
World	6,536.90	6,248.06	6,174.89	7,101.20	7,401.56	3.15
Netherlands	2,176.67	2,006.95	2,014.34	2,311.02	2,399.37	2.47
Spain	1,463.67	1,383.72	1,431.26	1,679.02	1,825.99	5.69
Italy	554.64	505.07	512.20	599.51	589.67	1.54
Belgium	520.90	482.59	502.97	544.83	568.43	2.21
France	421.01	394.61	369.21	454.79	424.15	0.19
Poland	219.61	215.34	231.46	262.24	291.10	7.30
China	168.62	194.45	160.50	184.82	211.11	5.78
Morocco	98.47	112.80	113.67	133.88	160.58	13.01
Egypt	64.39	74.93	57.80	83.46	87.53	7.98
Greece	90.16	65.47	66.71	80.70	83.14	-2.01
Canada (19)	18.09	16.53	14.23	14.42	25.56	9.03

Germany's Top Ten Suppliers of Vegetables, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Netherlands	33.30	32.12	32.62	32.54	32.42	-0.88
Spain	22.39	22.15	23.18	23.64	24.67	2.28
Italy	8.48	8.08	8.29	8.44	7.97	-0.51
Belgium	7.97	7.72	8.15	7.67	7.68	-0.29
France	6.44	6.32	5.98	6.40	5.73	-0.71
Poland	3.36	3.45	3.75	3.69	3.93	0.57
China	2.58	3.11	2.60	2.60	2.85	0.27
Morocco	1.51	1.81	1.84	1.89	2.17	0.66
Egypt	0.99	1.20	0.94	1.18	1.18	0.19
Greece	1.38	1.05	1.08	1.14	1.12	-0.26
Canada (19)	0.28	0.26	0.23	0.20	0.35	0.07

Vegetables Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Germany's imports from the world	6,536.90	6,248.06	6,174.89	7,101.20	7,401.56	3.15
Germany's imports from Canada	18.09	16.53	14.23	14.42	25.56	9.03
Supply gap	6,518.81	6,231.53	6,160.65	7,086.78	7,376.00	3.14



Germany's Top Five Vegetable Product Imports, C\$ Millions

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
070200	Fresh/chilled tomatoes	1,379.62	1,435.75	1,601.31	7.74
070960	Fresh/chilled peppers	800.70	925.31	924.54	7.46
070700	Fresh/chilled cucumbers and gherkins	503.23	578.30	582.51	7.59
079999	Vegetable products, detailed description unknown	327.62	338.38	574.34	32.40
071080	Frozen vegetables (raw, steamed or boiled)	365.40	397.21	417.38	6.88

Germany's Top Five Vegetable Product Imports and Top Supplying Countries, 2014

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
070200	Fresh/chilled tomatoes	Netherlands 55.37	Spain 23.06	Morocco 6.81	<0.01
070960	Fresh/chilled peppers	Spain 49.01	Netherlands 35.92	Turkey 3.07	N/A
070700	Fresh/chilled cucumbers and gherkins	Spain 45.69	Netherlands 42.26	Belgium 3.17	0.01
079999	Vegetable products, detailed description unknown	Netherlands 33.73	Spain 15.07	France 10.34	0.44
071080	Frozen vegetables (raw, steamed or boiled)	Belgium 31.62	Poland 14.92	Netherlands 12.47	N/A



6. OILSEEDS

**including seeds for sowing and fodder*

Germany's Top Ten Suppliers of Oilseeds, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
World	4,079.94	5,358.69	6,307.07	6,877.64	6,773.95	13.51
Brazil	733.98	812.56	719.27	497.54	1,171.47	12.40
France	439.82	949.65	1,048.14	855.79	1,036.96	23.91
United States	288.81	347.09	574.90	968.36	773.48	27.93
Poland	242.45	127.02	238.64	500.53	548.66	22.65
Netherlands	263.90	337.75	464.36	489.25	423.38	12.54
Hungary	208.21	197.82	260.18	266.83	252.18	4.91
Czech Republic	147.36	110.11	184.83	280.31	238.72	12.82
Argentina	145.93	180.50	196.10	179.98	178.17	5.12
China	166.91	164.34	145.31	144.25	177.49	1.55
Paraguay	186.42	249.64	338.60	279.03	165.51	-2.93
Canada (12)	273.97	160.07	209.22	304.53	159.12	-12.70

Germany's Top Ten Suppliers of Grains and Oilseeds, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Brazil	17.99	15.16	11.40	7.23	17.29	-0.70
France	10.78	17.72	16.62	12.44	15.31	4.53
United States	7.08	6.48	9.12	14.08	11.42	4.34
Poland	5.94	2.37	3.78	7.28	8.10	2.16
Netherlands	6.47	6.30	7.36	7.11	6.25	-0.22
Hungary	5.10	3.69	4.13	3.88	3.72	-1.38
Czech Republic	3.61	2.05	2.93	4.08	3.52	-0.09
Argentina	3.58	3.37	3.11	2.62	2.63	-0.95
China	4.09	3.07	2.30	2.10	2.62	-1.47
Paraguay	4.57	4.66	5.37	4.06	2.44	-2.13
Canada (12)	6.72	2.99	3.32	4.43	2.35	-4.37

Oilseeds Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Germany's imports from the world	4,079.94	5,358.69	6,307.07	6,877.64	6,773.95	13.51
Germany's imports from Canada	273.97	160.07	209.22	304.53	159.12	-12.70
Supply gap	3,805.97	5,198.62	6,097.85	6,573.11	6,614.83	14.82



Germany's Top Five Oilseeds Product Imports, C\$ Millions

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
120510	Canola seeds	2,527.20	2,618.83	2,218.32	-6.31
120190	Soybeans	1,982.48	2,172.55	2,197.26	5.28
120600	Sunflower seeds	369.53	385.47	329.42	-5.58
129999	Miscellaneous oilseeds, seeds for sowing and fodder, detailed description unknown	122.16	177.75	327.39	63.71
121190	Fresh/dried plants and plant parts used for perfumery, pharmacy, insecticides, etc.	209.57	233.23	281.50	15.90

Germany's Top Five Grains and Oilseeds Product Imports and Top Supplying Countries, 2014

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
120510	Canola seeds	France 36.25	Poland 12.05	Netherlands 7.37	0.64
120190	Soybeans	Brazil 52.74	United States 30.71	Paraguay 6.87	5.26
120600	Sunflower seeds	France 27.46	Bulgaria 15.46	Hungary 14.64	0.01
129999	Miscellaneous oilseeds, seeds for sowing and fodder, detailed description unknown	Poland 25.47	Netherlands 23.42	France 11.82	0.31
121190	Fresh/dried plants and plant parts used for perfumery, pharmacy, insecticides, etc.	Poland 13.60	Egypt 10.95	India 9.22	0.16



7. PRESERVED FOODS

Germany's Top Ten Suppliers of Preserved Foods, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
World	4,946.71	5,616.81	5,463.51	5,670.97	6,100.94	5.38
Netherlands	851.89	894.47	884.92	953.96	1,129.28	7.30
Italy	705.02	718.97	741.68	766.35	851.01	4.82
Turkey	431.49	495.21	498.00	473.85	615.10	9.27
Brazil	374.33	549.83	521.56	431.04	423.75	3.15
Poland	273.91	383.81	410.58	428.42	355.49	6.73
Austria	244.61	321.83	277.03	332.31	352.74	9.58
Spain	233.96	276.68	263.40	266.93	288.68	5.40
France	239.65	250.68	218.32	251.24	268.93	2.92
Belgium	223.09	193.30	190.44	222.15	265.78	4.48
Greece	208.42	217.60	207.98	224.56	242.93	3.91
Canada (36)	7.64	11.64	9.09	12.02	13.93	16.19

Germany's Top Ten Suppliers of Preserved Foods, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Netherlands	17.22	15.92	16.20	16.82	18.51	1.29
Italy	14.25	12.80	13.58	13.51	13.95	-0.30
Turkey	8.72	8.82	9.11	8.36	10.08	1.36
Brazil	7.57	9.79	9.55	7.60	6.95	-0.62
Poland	5.54	6.83	7.51	7.55	5.83	0.29
Austria	4.94	5.73	5.07	5.86	5.78	0.84
Spain	4.73	4.93	4.82	4.71	4.73	0.00
France	4.84	4.46	4.00	4.43	4.41	-0.43
Belgium	4.51	3.44	3.49	3.92	4.36	-0.15
Greece	4.21	3.87	3.81	3.96	3.98	-0.23
Canada (36)	0.15	0.21	0.17	0.21	0.23	0.08

Preserved Foods Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Germany's imports from the world	4,946.71	5,616.81	5,463.51	5,670.97	6,100.94	5.38
Germany's imports from Canada	7.64	11.64	9.09	12.02	13.93	16.19
Supply gap	4,939.07	5,605.17	5,454.42	5,658.94	6,087.01	5.36



Germany's Top Five Preserved Food Product Imports, C\$ Millions

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
200819	Prepared/preserved nuts and seeds (excluding peanuts), including mixtures	450.82	466.00	650.76	20.15
200410	Prepared/preserved frozen potatoes, including French fries	255.98	310.97	346.42	16.33
209999	Preserved food products, detailed description unknown	156.49	189.12	335.04	46.32
200979	Apple juice, not fortified	533.72	435.21	323.99	-22.09
200290	Prepared/preserved tomatoes, other than whole or in pieces (including pastes, purees etc.)	242.05	266.87	307.18	12.65

Germany's Top Five Preserved Food Product Imports and Top Supplying Countries, 2014

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
200819	Prepared/preserved nuts and seeds (excluding peanuts), including mixtures	Turkey 64.00	Luxembourg 6.83	Netherlands 5.58	0.03
200410	Prepared/preserved frozen potatoes, including French fries	Netherlands 75.90	Belgium 10.14	Austria 9.60	N/A
209999	Preserved food products, detailed description unknown	Netherlands 21.25	Italy 17.07	Poland 9.80	0.28
200979	Apple juice, not fortified	Poland 47.78	Austria 17.94	Italy 7.56	N/A
200290	Prepared/preserved tomatoes, other than whole or in pieces (including pastes, purees etc.)	Italy 55.64	Spain 19.85	China 7.37	0.02



8. SPICES, COFFEE AND TEA

Germany's Top Ten Suppliers of Spices, Coffee and Tea, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
World	4,411.68	6,366.95	5,705.24	4,888.18	5,764.54	6.92
Brazil	1,239.46	1,878.31	1,346.61	1,043.00	1,500.39	4.89
Vietnam	414.58	548.81	727.98	598.42	694.42	13.76
Honduras	238.33	401.70	496.22	304.47	367.95	11.47
Switzerland	141.02	203.17	223.80	276.18	298.36	20.61
Peru	342.97	465.31	390.91	303.19	274.51	-5.41
Colombia	87.93	146.72	120.48	158.18	248.98	29.72
China	139.25	174.61	207.96	204.05	231.06	13.50
Italy	120.21	186.28	199.19	202.57	222.29	16.61
Netherlands	118.07	159.96	141.92	129.27	211.02	15.62
Indonesia	176.51	179.14	213.44	245.17	204.39	3.73
Canada (85)	0.54	0.46	0.29	0.35	0.65	4.90

Germany's Top Ten Suppliers of Spices, Coffee and Tea, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Brazil	28.09	29.50	23.60	21.34	26.03	-2.06
Vietnam	9.40	8.62	12.76	12.24	12.05	2.65
Honduras	5.40	6.31	8.70	6.23	6.38	0.98
Switzerland	3.20	3.19	3.92	5.65	5.18	1.98
Peru	7.77	7.31	6.85	6.20	4.76	-3.01
Colombia	1.99	2.30	2.11	3.24	4.32	2.33
China	3.16	2.74	3.65	4.17	4.01	0.85
Italy	2.72	2.93	3.49	4.14	3.86	1.14
Netherlands	2.68	2.51	2.49	2.64	3.66	0.98
Indonesia	4.00	2.81	3.74	5.02	3.55	-0.45
Canada (85)	0.01	0.01	0.01	0.01	0.01	0.01

Spices, Coffee and Tea Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Germany's imports from the world	4,411.68	6,366.95	5,705.24	4,888.18	5,764.54	6.92
Germany's imports from Canada	0.54	0.46	0.29	0.35	0.65	4.90
Supply gap	4,411.14	6,366.49	5,704.94	4,887.84	5,763.88	6.92



Germany's Top Five Spices, Coffee and Tea Product Imports, C\$ Millions

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
090111	Coffee, not roasted or decaffeinated	4,169.07	3,274.99	3,908.06	-3.18
090121	Roasted coffee, not decaffeinated	703.07	719.40	853.54	10.18
090411	Black and white pepper, neither crushed nor ground	191.40	218.30	226.76	8.85
090240	Black tea and other partly fermented tea	120.48	131.47	135.34	5.99
099999	Spices, coffee and tea, detailed description unknown	91.07	49.46	83.84	-4.05

Germany's Top Five Spices, Coffee and Tea Product Imports and Top Supplying Countries, 2014

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
090111	Coffee, not roasted or decaffeinated	Brazil 35.80	Vietnam 15.92	Honduras 9.41	N/A
090121	Roasted coffee, not decaffeinated	Switzerland 32.50	Italy 22.35	Netherlands 13.66	N/A
090411	Black and white pepper, neither crushed nor ground	Brazil 38.19	Vietnam 24.66	Indonesia 20.51	N/A
090240	Black tea and other partly fermented tea	India 32.88	Sri Lanka 23.35	China 13.52	<0.01
099999	Spices, coffee and tea, detailed description unknown	Netherlands 25.79	Italy 23.59	Poland 9.79	0.34



9. COCOA AND COCOA PREPARATIONS

Germany's Top Ten Suppliers of Cocoa and Cocoa Preparations, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
World	4,163.04	4,506.35	3,852.26	4,232.75	5,388.60	6.66
Netherlands	1,115.49	1,040.76	859.27	982.18	1,266.53	3.23
Côte d'Ivoire	606.49	828.82	626.87	585.03	765.20	5.98
Belgium	410.25	548.68	546.26	523.97	617.43	10.76
Switzerland	278.02	300.82	284.20	345.10	442.11	12.30
France	328.82	269.18	250.49	290.71	434.19	7.20
Poland	96.01	112.43	124.85	219.01	261.70	28.49
Ghana	137.56	128.46	240.25	189.23	226.12	13.23
Austria	179.41	161.29	146.37	169.20	188.99	1.31
Italy	131.48	145.37	133.50	134.61	151.22	3.56
Nigeria	226.89	160.18	84.61	90.12	110.77	-16.41
Canada (54)	3.65	2.63	0.27	0.81	1.13	-25.37

Germany's Top Ten Suppliers of Cocoa and Cocoa Preparations, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Netherlands	26.80	23.10	22.31	23.20	23.50	-3.30
Côte d'Ivoire	14.57	18.39	16.27	13.82	14.20	-0.37
Belgium	9.85	12.18	14.18	12.38	11.46	1.61
Switzerland	6.68	6.68	7.38	8.15	8.20	1.52
France	7.90	5.97	6.50	6.87	8.06	0.16
Poland	2.31	2.49	3.24	5.17	4.86	2.55
Ghana	3.30	2.85	6.24	4.47	4.20	0.90
Austria	4.31	3.58	3.80	4.00	3.51	-0.80
Italy	3.16	3.23	3.47	3.18	2.81	-0.35
Nigeria	5.45	3.55	2.20	2.13	2.06	-3.39
Canada (54)	0.09	0.06	0.01	0.02	0.02	-0.07

Cocoa and Cocoa Preparations Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Germany's imports from the world	4,163.04	4,506.35	3,852.26	4,232.75	5,388.60	6.66
Germany's imports from Canada	3.65	2.63	0.27	0.81	1.13	-25.37
Supply gap	4,159.39	4,503.72	3,851.99	4,231.94	5,387.47	6.68



Germany's Top Five Cocoa and Cocoa Preparations Product Imports, C\$ Millions

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
180690	Cocoa preparations, not in bulk form, not elsewhere specified	905.68	1,031.34	1,223.43	16.23
180100	Raw or roasted cocoa beans, whole or broken	1,042.03	910.48	1,161.59	5.58
180400	Cocoa butter, fat and oil	330.92	519.46	956.33	70.00
180620	Chocolate and other food preparations containing cocoa in various bulk forms, >2 Kg	386.68	491.52	563.71	20.74
180632	Chocolate and other cocoa preparations in blocks, slabs or bars weighing <2 Kg, not filled	373.99	338.34	414.12	5.23

Germany's Top Five Cocoa and Cocoa Preparations Product Imports and Top Supplying Countries, 2014

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
180690	Cocoa preparations, not in bulk form, not elsewhere specified	Poland 17.32	Belgium 16.60	France 11.70	0.03
180100	Raw or roasted cocoa beans, whole or broken	Côte d'Ivoire 57.55	Ghana 16.26	Ecuador 5.95	N/A
180400	Cocoa butter, fat and oil	Netherlands 61.38	France 8.48	China 8.09	N/A
180620	Chocolate and other food preparations containing cocoa in various bulk forms, >2 Kg	Belgium 59.21	Netherlands 17.40	France 9.96	N/A
180632	Chocolate and other cocoa preparations in blocks, slabs or bars weighing <2 Kg, not filled	Switzerland 52.90	Austria 19.32	France 5.72	<0.01



10. FOOD WASTE AND ANIMAL FEED

Germany's Top Ten Suppliers of Food Waste and Animal Feed, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
World	3,826.66	4,158.71	4,533.74	4,988.41	5,347.77	8.73
Netherlands	1,189.72	1,378.08	1,374.91	1,450.76	1,378.31	3.75
Brazil	681.18	750.35	943.28	937.22	967.71	9.17
France	249.51	268.43	234.62	284.56	327.28	7.02
Argentina	344.65	294.73	301.73	339.10	311.53	-2.49
Peru	226.10	164.15	201.40	128.19	228.89	0.31
Poland	49.83	55.69	87.20	148.72	178.50	37.57
Hungary	51.01	77.11	105.37	161.28	177.12	36.50
Liechtenstein	102.71	110.56	110.09	131.80	171.82	13.73
Austria	100.72	114.10	125.22	158.72	166.91	13.46
United Kingdom	86.95	91.72	106.76	130.75	162.65	16.95
Canada (40)	1.05	1.16	4.84	2.64	5.19	49.14

Germany's Top Ten Suppliers of Food Waste and Animal Feed, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Netherlands	31.09	33.14	30.33	29.08	25.77	-5.32
Brazil	17.80	18.04	20.81	18.79	18.10	0.30
France	6.52	6.45	5.17	5.70	6.12	-0.40
Argentina	9.01	7.09	6.66	6.80	5.83	-3.18
Peru	5.91	3.95	4.44	2.57	4.28	-1.63
Poland	1.30	1.34	1.92	2.98	3.34	2.04
Hungary	1.33	1.85	2.32	3.23	3.31	1.98
Liechtenstein	2.68	2.66	2.43	2.64	3.21	0.53
Austria	2.63	2.74	2.76	3.18	3.12	0.49
United Kingdom	2.27	2.21	2.35	2.62	3.04	0.77
Canada (40)	0.03	0.03	0.11	0.05	0.10	0.07

Food Waste and Animal Feed Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Germany's imports from the world	3,826.66	4,158.71	4,533.74	4,988.41	5,347.77	8.73
Germany's imports from Canada	86.95	91.72	106.76	130.75	162.65	16.95
Supply gap	3,825.61	4,157.55	4,528.90	4,985.77	5,342.58	8.71



Germany's Top Five Food Waste and Animal Feed Product Imports, C\$ Millions

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
230400	Soybean oilcake and other solid residues, whether or not ground or pelletized	1,691.40	1,712.88	1,617.28	-2.22
230910	Dog and cat food put up for retail sale	874.52	1,040.61	1,238.21	18.99
230990	Animal feed preparations, other than dog and cat food put up for retail sale	934.09	982.54	951.55	0.93
239999	Food waste and animal feed products, detailed description unknown	109.66	234.24	423.64	96.55
230120	Flours/meals/pellets of fish, crustaceans, molluscs, etc. unfit for human consumption	300.67	260.14	363.52	9.96

Germany's Top Five Food Waste and Animal Feed Product Imports and Top Supplying Countries, 2014

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
230400	Soybean oilcake and other solid residues, whether or not ground or pelletized	Brazil 58.92	Argentina 17.96	Netherlands 15.78	0.02
230910	Dog and cat food put up for retail sale	Netherlands 20.68	France 13.86	Liechtenstein 13.69	0.12
230990	Animal feed preparations, other than dog and cat food put up for retail sale	Netherlands 55.54	Belgium 10.92	France 6.68	0.07
239999	Food waste and animal feed products, detailed description unknown	Netherlands 46.18	France 6.94	United Kingdom 6.65	0.61
230120	Flours/meals/pellets of fish, crustaceans, molluscs, etc. unfit for human consumption	Peru 62.01	Morocco 10.50	Mauritania 7.30	N/A



CONCLUSION

Germany is a mature market, and the world's third-largest importer of agri-food and seafood products. Canada ranked as its 37th-largest supplier in 2014, having registered a slight decline in import value since 2010. As a result, Germany's already marginal imports from Canada have been falling, while its imports from the world have been steadily on the rise. This has created a significant supply gap between Germany and Canada that has been widening at a rate similar to Germany's overall import growth in recent years. As well, while Germany sources agri-food and seafood products from a large number of countries, among many commodities the vast majority of imports come from the top two or three suppliers, and primary trading partners are other European Union members. This leaves just marginal market share for others.

Among Germany's top ten import commodities, Canada's highest supplier ranking was in oilseeds, where it landed as 12th with almost 2.4% of the market. However, Canada's supply value of this commodity fell over the 2010 to 2014 period, by almost the same rate at which German oilseed imports have grown. As well, Canada holds less than 0.5% market share in Germany's remaining nine import commodities, and falls outside the top ten suppliers among all ten. Despite this, over the last five years, German imports from Canada have increased in value across six of the top commodities (edible fruit and nuts; beverages; vegetables; preserved foods; spices, coffee and tea; and food waste and animal feed). This may indicate further opportunities to lessen the gap, particularly within the categories where growth in imports from Canada outpaced growth in imports from the world, including edible fruit and nuts; beverages; vegetables; preserved foods; and food waste and animal feed. Additionally, Canada's performance relative to non-European Union suppliers is expected to improve as a result of CETA.

FOR MORE INFORMATION

International Trade Commissioners can provide Canadian industry with on-the-ground expertise regarding market potential, current conditions and local business contacts, and are an excellent point of contact for export advice.

- **Overview of Trade Commissioner Services in Germany**
<http://www.tradecommissioner.gc.ca/eng/offices-germany.jsp>
- **Find a Trade Commissioner**
www.tradecommissioner.gc.ca/eng/find-trade-contacts.jsp

For additional intelligence on this and other markets, the complete library of Global Analysis reports can be found under *Statistics and Market Information* at the following link, arranged by sector and region of interest:

- ats-sea.agr.gc.ca

RESOURCES

Global Trade Atlas (March 2015).

ANNEX: ABBREVIATIONS

- CAGR** - compound annual growth rate
N/A - not applicable
N/C - not calculable
PP - percentage point (difference between two percentage values)



Competitive Trade Analysis: Germany

Global Analysis Report

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