

The German market potential for fresh fruit and vegetables

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Germany relies on imports to guarantee a year-round supply of fresh produce. Almost 40% of Germany's fresh fruit and vegetable imports come from developing countries. The opportunities for tropical and exotic fruit are growing, such as bananas, grapes, avocados, blueberries and mangos. The same is true of (exotic) vegetables such as tomatoes, capsicum, beans, asparagus and pumpkins. The German organic market is the largest in Europe, which makes it attractive for suppliers from developing countries.

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1. Country description

Germany has the strongest economy and the largest population in Europe. This makes it the largest consumer market for fresh fruit and vegetables. The official language is German, but it is common to do business in English.

Table 1: Key indicators of Germany, 2022

Population	84.3 million
GDP at current prices	€3,869.9 billion
GDP per capita	€46,182

Source: © Statistisches Bundesamt (Destatis), 2023

Germany is located in Central Europe. The port of Hamburg is the country's most important fruit port. However, Germany gets a large share of its fresh produce via the Netherlands, Belgium and Spain, by truck. The port of entry depends on the origin and the routes to it. The most used ports are Rotterdam, Antwerp, Algeciras and Vlissingen. Germany is surrounded by nine different countries. However, its re-exports are minimal and not relevant in this sector.

Figure 1: Location of Germany in Europe



Source: [The World Factbook 2021](#)

Tip:

Visit the portal deutschland.de to read more about Germany, such as culture and business.

2. What makes Germany an interesting market for fresh fruit and vegetables?

As well as being the largest European consumer of fresh fruit and vegetables, Germany is also the largest fresh produce importer. Developing countries are important suppliers. Germany's share of total imports of fresh fruit and vegetables has continuously increased over the last five years.

Germany is the largest fresh produce importer in Europe

Germany is the third largest importer of fresh fruit and vegetables in the world after the USA and China, and the main importer within Europe (Figure 2). In 2022, the total value of imports was €12.6 billion, which represented 18.5% of the imports of the region (EU27, United Kingdom, EFTA). Germany is the largest importer of vegetables in Europe, and the second-largest importer of fruit after the Netherlands.

Source: ITC Trade Map, 2023

Germany's imports of fresh fruit and vegetables have grown over the last five years. However, between 2021 and 2022, import values did not grow and import quantities decreased. This was due to the uncertainty that started with the COVID-19 pandemic in 2020. This increased even more when Russia invaded Ukraine in early 2022. This led to an economic shock that increased prices and affected consumer behaviour across Europe and production all around the world.

Source: ITC Trade Map, 2023

Suppliers from developing countries performed well compared to other regions. Imported values from these countries grew at a rate of 5%, compared to the -2% of imports from Europe. Imported quantities decreased, but at a rate of 6%, slower than the world (10%) and the European average (12%). This is an indication that costs are rising everywhere.

Source: ITC Trade Map, 2023

The share of imports from developing countries keeps increasing

Although 70.8% of the German fresh fruit and vegetable imports come from Europe, developing countries are also essential suppliers. In 2018, imports from developing countries accounted for 23.1% of the total. In 2022, this share increased to 25.4%. Imports from Europe are mainly from Spain and the Netherlands. A big part of this is related to re-exports, as both countries are relevant trade hubs for the sector. Spain is also an important producer and competitor for products from developing countries. The Netherlands produces a lot of greenhouse vegetables, open field onions, potatoes and certain fruit, including apples, pears and strawberries. However, most of the remaining products are imported through the Netherlands.

Germany is a producer of fruit and vegetables, such as apples, strawberries, plums, carrots, onions and asparagus. However, it relies on imports from developing countries during the off-season. The country also needs imports to satisfy the demand for tropical fruits that do not grow in Germany or Europe.

Developing countries are particularly important suppliers of fruits. In 2022, 38% of Germany's total fruit imports came from developing countries (Figure 5). This share has slightly increased over the last five years. The main suppliers were Costa Rica, South Africa, Peru, Colombia, Morocco and Ecuador. The top six imported fruits are bananas, grapes, avocados, berries, mangoes and pineapples.

Source: ITC Trade Map, 2023

In terms of vegetables, imports from developing countries only made up 9.3% of the total in 2022 (Figure 6). However, this share has been growing at a steady pace for the past five years. In 2018, this share was 6.5%, showing an increase of 43% in the 2018–2022 period. Products like tomatoes, chili, capsicum, potatoes, beans and asparagus are the top six imported vegetables. Morocco, Turkey and Egypt are the top three suppliers, followed by China, Peru and Mexico. In fact, Morocco and Turkey are responsible for the growth in the share of imports from developing countries.

Source: ITC Trade Map, 2023

Tip:

For more information about opportunities for fresh produce in the German market, check the [Import Promotion Desk \(IPD\) website for exporters](#). The IPD is a German government funded programme that is also a CBI partner. It supports the entry of imports from developing countries into the European market.

Germany has the largest consumer market for fresh produce

Germany is the largest consumer of fruit and vegetables in Europe (Figure 7). This is mainly because of its large population. In 2021, the purchased volume of fresh fruit and vegetables was 7.7 million tonnes. The second largest was Spain with 6.9 million. When measured in kilograms per household, Germany is not the largest consumer. However, it is still the fourth largest in Europe. An increasingly health consciousness and foreign-born population are factors that can lead to [an increase in per capita consumption over the next years](#).

Source: [European Statistics Handbook, Fruit Logistica 2023](#)

A consumer survey performed in 2019, conducted every four years across European countries, found that [55.9% of Germans consume between one and four portions](#) of fruit and vegetables daily. This is higher than the EU-27 average of 54.7%. Germany has the '5 am Tag' ('5 a day') campaign to motivate the consumption of at least five portions of fruit and vegetables a day. This initiative is also expected to increase fresh produce purchases in the coming years.

The top five fruit and vegetables consumed in German households are apples, bananas, tomatoes, cucumbers and carrots. However, Germans also like to consume exotic tropical fruits, such as mangos, passion fruit, avocados and lychees. Their consumption is often related to special occasions and celebrations.

Tips:

To stay up to date with the German market, check specialised news portals like [Fruchthandel](#), [Fruchtportal](#) and the German version of [Freshplaza](#).

Use the translation option in your browser to read German websites in your own language.

3. Which fresh fruit and vegetables offer the most opportunities for the German market?

Figure 8 shows the fresh fruit and vegetables with the highest import value from developing countries. Most of the opportunities for developing countries are in the fruit category. Besides the top five imported fruits, the demand for other fruits, such as citrus fruit, is also growing. Vegetables like peppers, onions, sweet potatoes, beans, asparagus, ginger and turmeric also have good opportunities in the German market.

Source: ITC Trade Map, 2023

Bananas: eyes on human rights due diligence

In 2022, [bananas were the most consumed fruit in Germany](#), surpassing apples for the first time. They were also the most imported fruit from developing countries to Germany. 98.5% of the bananas imported into Germany come from developing countries. Latin America is the main source, with Costa Rica, Ecuador, Colombia and the Dominican Republic accounting for 85% of the total imported value. New countries to the market, like Guatemala, Panama, Cameroon, Peru, Nicaragua, Cote d'Ivoire and Brazil, make up the final 13.5%. Peru is mainly active in the organic bananas market and is the main exporter worldwide.

Besides the opportunities offered by the organic and Fairtrade banana market, there is a niche for biodynamic Demeter-certified bananas (also see the [trends](#) below). [There are very few Demeter-certified banana producers](#), and they are all in Latin America. Some examples include [Latbio](#) from Ecuador and [Dominique Farms](#) from Colombia. [Biofrusan](#) is a German importer trading with Demeter bananas.

Figure 9: Regeneratively grown and biodynamic certified bananas from Latbio, Ecuador



Source: Dana Chahin, courtesy of Latbio

There are also importers doing new things with banana sales. [Gebana](#) is a Swiss importer and trader, also active in the German market. They deliver bananas to consumers in large boxes directly from the producers, without getting ripe in Europe. This means there is less damage to the planet, and there are fewer steps and people involved between the field and the consumer. If you want to target these innovators, make sure you keep an open mind, as you will need to deliver the fruit in different ripening conditions and packaging.

Worker welfare is a hot topic for the fresh produce industry, especially in the banana value chain, which has [historically witnessed serious human rights violations](#). This is why seven leading [German retailers have committed to paying workers a living wage](#) for at least 50% of the bananas they sell by 2025. To achieve this, they are introducing more responsible and transparent purchasing systems. As part of this, importers are asking for more information about wages from their suppliers to understand the gaps and to come up with initiatives to

close them.

Contracts for bananas are usually closed between October and November for the following year. There are some opportunities on the spot market, but if you are targeting supermarkets, the programmes are decided in advance. Prices in the banana market are set by ALDI. This has been the industry benchmark in Europe for over two decades. In 2022, [ALDI announced an increase of €0.09 per kilogram to reach a more sustainable price](#). This was the response to intense lobbying from Latin American producers for fairer prices to cover rising production costs.

Tips:

Attend [Fruit Attraction](#) in Madrid in October. This is an important trade fair for banana producers, as contracts are closed at this time of the year. Even though this trade fair is held in Spain, many German importers attend.

Visit [The World Banana Forum](#) website to learn about the topics and challenges affecting the banana business.

Target niche markets to benefit from better prices than the ones set by the market.

Table grapes: a growing demand from developing countries

Germany is the largest European market for fresh grapes. Consumption is expected to reach 1.36 million metric tonnes by 2026. [There has been an annual increase of 2% since 2017](#). Both European and developing countries are important suppliers, depending on the time of the year. However, European production is becoming less profitable due to increasing production costs and climate change. Thus, exporters from developing countries are expected to become more important in the coming years.

More than half of Germany's grape imports come from Europe (54.1%), with Italy, Spain and the Netherlands as the main supplier countries. The Netherlands does not produce grapes but acts as a re-exporter, so the grapes may come from developing countries. Italy and Spain can supply the European market from July until January, depending on the varieties. Thus, grape imports from non-European countries are especially strong between December and June.

South Africa is the largest supplier of all developing countries. India, Peru, Egypt and Brazil complete the top five. Imports from Namibia, Lebanon and Morocco have grown a lot in recent years, but their share as suppliers is still very low. German buyers welcome new origins as long as they comply with mandatory and market requirements.

Seedless varieties are most commonly imported from developing countries. There are opportunities for white, red, black and mixed grapes. These are usually requested in open punnets or clamshells, but keep in mind that specifications may vary from buyer to buyer. Examples of German importers of grapes include [Fruchthansa](#) and [Anton Dürbeck](#).

If you want to stand out and become a supplier of grapes to the German market, you should focus on sustainable production and high quality. [Fresh Express](#) is an Indian exporter of table grapes successfully supplying the German and the European market. Fresh Express is a family-owned company that works with more than 500 small farmers. They have focused on 'natural farming' production methods to make agriculture commercially viable and sustainable. Their company is certified under GLOBALG.A.P. and Fairtrade.

Tip:

Read the [CBI studies on grapes](#). They will give you further information about the opportunities for this product in the European market.

Avocados: new origins are entering the market

Germany is the second largest consumer market of avocados after France. In per capita terms, [Germany is the sixth most important consumer, with 1.3 kg per year](#). Germany does not produce avocados, and it relies on avocado imports to meet its domestic demand. Although the demand for avocados is expected to keep growing in the coming years, the market is expected to enter a slower growth phase. Suppliers from developing countries are key to sustaining the growth by focusing on sustainable production methods.

German imports of avocados have shown substantial growth over the last five years. Peru is the most important supplier, followed by Chile and Colombia. [Spain and Israel have had exceptional harvests](#) in the last two years. They are the fourth and fifth largest suppliers to Germany. However, not all the avocados imported from Spain are produced there, as Spain is a relevant trade hub for avocados as well. The Netherlands is also an important source of avocados for Germany in its role as re-exporter.

Figure 10: Ready to eat (genussreif) Hass avocado from Peru in the German supermarket EDEKA



Source: Dana Chahin

Although South American countries are well positioned in the market, buyers are constantly looking for new origins. Imported quantities from new countries like Kenya, South Africa, Morocco and Tanzania have increased exponentially in recent years. One advantage these origins have over South American countries is the shorter transit time. These origins are also increasingly focusing on organic production and highlighting their sustainability credentials.

[Goshen Farms](#) is an example of an exporter from Kenya targeting the German market. They offer conventional and organic avocados. They promote the fact that their production zones are 100% rain fed, limiting the use of irrigation. This is an important differentiator, as water use is one of the most critical issues in the avocado value chain. In fact, German retailers, including ALDI and LIDL, require Rainforest Alliance certification to show compliance with responsible water use. The [SPRING add-on of GLOBALG.A.P.](#) is also a must for high risk regions.

Avocados are primarily sold in supermarkets in Germany, with most consumers located in cities such as Berlin, Hamburg and Munich. There are also smaller retail outlets, wholesale markets and street vendors across the country that sell the fruit in smaller quantities. The most popular variety of avocado is Hass.

German supermarkets have very high-quality standards. LIDL, for example, has stricter residue levels than the European Union (EU). This can be a challenge for exporters that want to supply the German market. Recently, there have also been recurrent problems with the ripening of avocados. Avocados have started to arrive in Europe with mixed quality and low percentages of dry matter. As a result, the ripe avocados are not all the same, resulting in different colours. This is not acceptable for retailers, as the objective is to deliver a uniform product.

Tip:

Read the [CBI studies about avocados](#). Here you can find further information about the opportunities for this product in the European market.

Tomatoes: the most consumed vegetable

Tomatoes are the most consumed vegetable in Germany. Demand has been consistently high over the last five years. However, inflation cut the consumption of fresh produce in Germany in 2022: [even tomato sales fell](#). German households purchased over 800,000 tonnes in the first nine months of 2022. But this was way less than the millions of tonnes sold in 2019. It is not yet clear how the market will develop. However, the fact that [Germany is a net importer of the product](#) makes it attractive to exporters.

The consumption of premium tomatoes increased during the pandemic, but with inflationary pressures the situation has changed. Germans prefer small tomatoes: cherry and cocktail tomatoes are the most popular varieties among consumers.

Germany's tomato imports are dominated by the Netherlands and Spain, followed by Morocco and Belgium. The Netherlands is the leading supplier, accounting for almost half of Germany's tomato imports. Spain is a significant supplier of organic tomatoes. In recent years, direct sourcing of tomatoes from developing countries, particularly from Africa, has significantly increased. In addition to Morocco, other players like Turkey, Tunisia, Senegal and Egypt are supplying the market with smaller quantities.

German importers look for tomatoes from non-European countries to cover all the seasons. They prefer closer origins, which is why there are more opportunities for exporters from developing countries that are closer to Europe. If you want to enter the German market, you need to manage your logistics very carefully. Tomatoes are very sensitive. If they are transported longer than they have to be, this might lead to them arriving in unacceptable conditions for your buyer.

Tip:

Read the [CBI studies about tomatoes](#). This will give you more information about the opportunities in the European market.

Blueberries: an expanding market with local seasonal competition

Germany is a very attractive market for blueberries, as consumption is high and growing fast. It is the largest import market in Europe after the Netherlands. In addition to importing, Germany is also the fifth largest producer in Europe. Most of the imported and produced blueberries are for domestic consumption. Exporters with social sustainability standards and considerable production volumes will find good opportunities in the German market.

Germany went from importing 42,555 tonnes in 2018 to 70,595 in 2022. Production has increased, but not as fast as its imports. Germany produced 12,760 tonnes of blueberries in 2018, and 15,370 tonnes in 2022. Of the 85,965 tonnes imported and produced, less than 10% (8,130 tonnes) was exported. Spain, Peru, Morocco, Poland, Chile and the Netherlands are Germany's main blueberry suppliers. Spain and Poland are the largest producers in the EU. Peru is the main overseas supplier and the world's leading blueberry exporter.

Figure 11: Blueberries shipment to Germany (without label on the clamshells) and blueberries from Chile in German supermarket REWE



Source: [Berry Andes](#) – Colombia (upper picture) and Dana Chahin (lower picture)

German supermarkets prefer to source blueberries from nearby countries to guarantee a sustainable production. New countries like Romania, Serbia and Ukraine have shown significant growth. However, to supply demand all year round, countries further away, such as Colombia, Ecuador and South Africa, have increased their exports to the European market as well. Production in these countries is expected to increase exponentially over the next years. For these and other further origins, a focus on sustainability is key to secure a place in the market and set yourself apart.

Most blueberries in the German market are imported by sea. Several retailers have stopped accepting fresh produce by air. This is one of the reasons that prevent small suppliers from entering the market. Air freight blueberries might still have a chance if supply is short. Air freight is still used for channels other than supermarkets that require a fresher and premium quality fruit, such as fine dining restaurants and specialised shops.

The German market is demanding in terms of quality and price sensitivity. However, it also offers the possibility to engage in supermarket programmes all year round with stable and good volumes. [Herbert Widmann](#) is an important importer of blueberries for the German market, supplying supermarkets with both organic and conventional blueberries. Other relevant importers for this fruit are [Port International](#) and [Bivano](#) for organic produce.

Tips:

Check the marketing efforts of overseas blueberry exporters like [South Africa](#) and [Ecuador](#). Their campaigns highlight aspects like year-round production, variety, quality and sustainability.

Expand your production or look for alliances with other producers to reach capacity to fill a container and ship by sea.

Read the [CBI studies about blueberries](#). The studies will give you further information about the opportunities for this product in the European market.

Mangoes: a well-known exotic among Germans

Germany is the largest consumer of mangoes in the European market. Imports have been constant since 2020, but in 2022 supply shortages from Brazil and Peru caused a contraction of 28.5% in quantities. This decline affected the entire European market. The German market offers interesting opportunities for suppliers from developing countries. Securing a stable supply and upholding the right social and environmental standards is a must.

Mangoes are not part of the daily purchase in Germany. They are considered an exotic for special occasions. However, most Germans are familiar with mangoes and base their buying decision on price and appearance. A consistent good taste is key for consumers to buy the product again. The German market demands Keitt and Kent varieties because they do not have fibres. Tommy varieties are getting less popular. Smaller varieties like sweet sugar mango are rather unattractive to retailers because of price and because they are mostly sent by air.

Figure 12: Mangoes from Peru in German supermarket, variety Kent



Source: Dana Chahin

The main mango suppliers of the German market are Brazil and Peru. Import duty is paid on mangoes from Brazil, while imports from Peru are duty-free. Other relevant origins for the German market are Cote d'Ivoire and the Dominican Republic. To stay in business, it is important to constantly innovate in post-harvest to avoid nutrition problems with the fruit. Making transport conditions from Europe to the destination as good as they can be is important to ensure that the fruit arrives in excellent condition. Air-conditioned containers that reduce the oxygen level are essential.

If you want to target supermarkets, non-airfreight is becoming more important. Retailers, such as LIDL, do not accept airfreight mangoes anymore. Many retailers follow LIDL's decisions. In 2023, LIDL also made the Rainforest Alliance certification mandatory for all mango suppliers. ALDI followed suit and other retailers are expected to do the same.

Tip:

[Read the IPD study about mangoes](#) to gain additional practical insights about the German mango market.

4. Which trends offer opportunities or pose threats on the German fresh fruit and vegetables market?

Despite high inflation levels, sustainability remains a key trend on the German market. The preference for local products is a threat for suppliers from developing countries, while the organic market offers growing opportunities for all fresh fruit and vegetables.

Inflation adds to existing price sensitivity

As the fruit and vegetables sector was still recovering from the COVID-19 pandemic, the inflation pressures began. The Russia-Ukraine war caused high energy and fertiliser prices that affected worldwide production. Overall inflation affected consumers' choices, who started to focus on essential purchases and sales. It is still unclear how inflation will influence fresh produce consumption in the long term, but exotic and high-value products might be more affected.

Although fresh fruit and vegetable prices have increased, fruit and vegetables are still among the most affordable items on the supermarket shelves. To prevent a further consumption decline, fresh produce marketing messages are increasingly focusing on the health and environmental benefits of fruit and vegetables, as well as on their [affordability in comparison to other food products](#).

Germany was a very price-sensitive market even before the high inflation rates. [Discounters dominate the fresh fruit and vegetables market in Germany](#). The country is home to world famous discount supermarkets like LIDL and ALDI. German consumers want to buy at low prices but are very demanding about the quality. With inflation adding to these existing issues, we can expect stronger pressures on supply chain margins to keep fresh fruit and vegetables affordable.

Supplying the German market is becoming more difficult. Your chances are good if you can guarantee efficiency and competitive prices without sacrificing quality and sustainability.

Tip:

Monitor overall and industry specific inflation levels in Germany on the website of [Destatis, the Federal Statistical Office](#).

Despite inflation, sustainability still matters

Around 88% of German consumers have behaved more sustainably in their consumption in recent years. Despite inflation, sustainability is still a top priority for consumers (Figure 13). There is digital innovation in the sector to tackle sustainability challenges. Governments are releasing new regulations to ensure that sustainability is not only a trend but becomes the norm. All the players of the fresh produce value chain are doing their part to find the right balance between the three pillars of sustainability: economic, environmental and social sustainability.

Figure 13: Importance of sustainability for German consumers



Source: [GfK Sustainability Index 2022](#)

Environmental concerns are vital for the fresh produce sector. Climate change threatens fruit and vegetable harvests. Companies are innovating to develop climate-resistant varieties. VentureFruit, for example, [launched a new climate-resistant apple variety at Fruit Logistica 2023](#). Further developments for other products are expected in the sector.

Carbon footprint is another hot topic in the sector related to climate change. German importers and supermarkets measure the carbon footprint for the products they work with. An example of this is the German importer Port International (Figure 14). They developed the [BE CLIMATE](#) brand to offer CO2-neutral fruit and vegetables. Their brand now focuses on bananas, blueberries, green asparagus, leaf clementines and strawberries.

Figure 14: BE CLIMATE brand of the German importer Port International

Source: YouTube Channel of Port International, 2023

Around 45% of fruit and vegetables are wasted between the producer and the retailer, making food waste another important concern of the industry. Suppliers can play a role here by automating sorting and organising quality-check processes.

Germany is ahead of the [European corporate sustainability due diligence directive](#), which is currently under development. In 2023, the [German Human Rights Due Diligence legislation](#) entered into force. It means that big German companies need to ensure there are no human rights violations at any point in their supply chain. This is why fully compliant social certifications are a must for suppliers that want to sell to German retailers.

As a supplier from a developing country, you must think about how you can deliver a sustainable product in social and environmental terms.

Tips:

Read the sustainability reports of leading German supermarkets like [ALDI North](#), [ALDI South](#) and [LIDL](#) so you understand their sustainability commitments and the work they do with different actors in the value chain.

Read the [CBI tips so you can become a more socially responsible exporter](#) and the [CBI tips for going green](#) in the fresh fruit and vegetables sector.

Local and regional consumption is preferred

Sustainability is one of the biggest concerns of the German population. Local consumption is associated with this. There is no need for transport over long distances when products are grown locally. Consumers also personally know the area where the products grow and even the producers sometimes. This is one of the

reasons Germans like to choose regional products when grocery shopping but also a reason for reducing freighted goods – especially by air. This may pose a threat for suppliers from countries further afield. To guarantee demand for food from long-distance origins, you need to show that your company is sustainable.

[Most Germans consider growing food locally important](#), and this is specifically relevant for fresh products. For 84% of Germans, it is important to buy regional fresh fruit and vegetables (Figure 15). 88% of the consumers consider the seasonality of fruit and vegetables when shopping. This trend has been around for several years, but the COVID-19 pandemic and the European [Farm to Fork strategy](#) have made it stronger.

Figure 15: German preference for local production



Source: [Nutrition Report Germany, 2022](#)

The trend for local and regional consumption depends on Europe's ability to produce. This can be a [challenge as a result of climate change](#). There are [strategic plans in place](#) to support the development of the agricultural sector in Europe. For example, Germany recently approved nearly €2.4 billion to support organic farming. Other options, such as indoor farming, might become an option for European production [but it will reach its full potential once its profitability and benefits are clearer](#).

If you offer a product that is produced in Germany or in Europe, look for the windows to cover the season where there is no local production. This is the time of the year when Germans would consider buying your product. Think about everything you are doing to offset the bad impact that bringing your produce from overseas might have. For example, you can focus on the good you are doing for your community or on your environmentally friendly production.

Although this trend is a threat for overseas suppliers, neighbouring countries can turn it into an opportunity. North African countries, such as Morocco and Tunisia, are gaining more attention now. Take a look at the website of [Moroccan Wide Trade](#), a Moroccan GLOBALG.A.P and SMETA certified company that targets the German market with support from [IPD](#).

Tips:

Take a look at supermarkets' marketing campaigns for local products, such as [REWE regional](#). Some of the fruit and vegetables in this campaign are blueberries, strawberries and asparagus.

Check out this [seasonal calendar prepared by IPD](#) to identify the windows for your product.

Source: [AMI-informiert, 2023](#)

Despite the decrease, [there are no clear signs of a fundamental shift away from organic food in the immediate future](#). Growth is expected to continue, especially in large retail chains where prices for organic produce are more affordable than in organic specialised retail chains. As observed in Figure 16, the only channel that grew between 2021 and 2022 was the food retail channel. This includes discounters and one-stop-shop supermarkets.

With 7%, [Germany has the sixth-largest market share of organic food products in Europe](#). For fresh fruit, the

organic market share is 7.2%. For fresh vegetables, it is slightly higher at 9.9%. Germans want to buy organic foods, but they want to spend as little money as possible. This is why discounters were the main channel.

Discounters work all the time to expand their market share. [LIDL has formed a global food partnership](#) with one of the largest organic food associations in Germany (Bioland) to expand the supply of high-quality organic products. Other retailers are also capitalising on the organic trend. REWE, for instance, wants to replace all their conventional limes for organic ones.

Several companies from developing countries benefit from the organic trend entering the German market. Some examples are Grace Organic Farms from Ghana, and Moorgate Trade from Egypt. [Grace Organic Farms](#) produces organic and Fairtrade-certified pineapples. [Moorgate Trade](#) produces organic onion and garlic and is GLOBALG.A.P. and GRASP certified.

Demeter products have potential in the German market

In addition to the EU Organic certification, [Germany has additional private standards for organic agriculture](#) developed by the leading organic food associations. These include [Demeter](#), [Naturland](#) and [Bioland](#). Of these three, the Demeter market offers growing opportunities for suppliers from developing countries. Products such as ginger, turmeric, bananas and citrus fruit have huge potential.

There are importers specialised in organic products, like [Lehmann Natur](#), that sell Demeter fresh produce to the German market (Figure 17). They partnered [with the Colombian limes producer and exporter Orange Exports](#) to increase the number of organic, Fairtrade and Demeter-certified farms.

Figure 17: Demeter fruits in the Lehmann Natur stand at Fruit Logistica 2023



Source: Dana Chahin

Tip:

When searching online supermarkets or visiting Germany, look for the 'Bio' seal. 'Bio' is another word for organic in Germany and Europe.

[Dana Chahin](#) in partnership with [ICI Business](#) and [Globally Cool](#) carried out this study on behalf of CBI.

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