



USDA Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Voluntary Report - public distribution

Date: 10/2/2003

GAIN Report Number: GM3036

Germany

Kosher Foods

The German Kosher Market

2003

Approved by:

Richard Petges/ Christine Knierim
U.S. Embassy

Prepared by:

Kerstin Krueger

Report Highlights:

The market for kosher products in Germany is a niche market. There are no statistics available for the German kosher market, mainly because it is an extremely small market in comparison to neighboring countries like France. Although the size of the Jewish community in Germany has more than tripled over the past 12 years, very few consume kosher products on a daily basis (1-2 percent). Nevertheless, there is a growing demand for kosher products, mainly based on efforts made by Jewish organizations to re-cultivate the Jewish life/traditions in Germany.

Includes PSD Changes: No
Includes Trade Matrix: No
Unscheduled Report
Berlin [GM1]
[GM]

Kosher Report - Germany

Report Highlights

There are no statistics available for the German kosher market mainly because it is an extremely small market in comparison to neighboring countries like France, the European center for kosher food sales. Although the size of the Jewish community in Germany has more than tripled over the past 12 years, very few consume kosher products on a daily basis (1-2 percent). Nevertheless, there is a growing demand for kosher products mainly based on efforts made by Jewish organizations to re-cultivate the Jewish life/traditions in Germany. It is mostly during recognized holidays or other special occasions that approximately 60-70 percent will consume kosher products. Domestic production of kosher products is limited in Germany. Roughly 95 percent of all kosher products in Germany are imported from Israel, France, Holland, Belgium and the United States.

Summary

Some in the German Jewish community believe that there is little knowledge about kosher within the community due to the fact that 85 percent of the Jewish population in Germany is composed of immigrants from the former Soviet Union, where very little knowledge and practice of kosher observance existed.

Imported kosher foods and beverages, and a limited number of domestic products can be found in local kosher shops, which are mostly located in cities with large Jewish populations, such as Berlin, Munich and Frankfurt. Some of the larger retail supermarkets may sell kosher products, but only offer a few items, such as matzo, wine and gefilte fish. The consumption of kosher products in Germany is still primarily linked to the Jewish population. The number of Muslims eating kosher is estimated to be relatively small due to religious and political reasons, and because the halal market is better developed than the kosher market.

Market Overview

The market for kosher products in Germany is a niche market. Throughout Germany, the term kosher, or "koscher" in German, is still a foreign term. Although ethnic foods, like Jewish cuisine, have gained much popularity in Germany, kosher requirements are still not well known among the German population.

In Germany, the total Jewish population is estimated at 180,000, or 0.2 percent of the German population according to REMID, an office supplying statistics on religious groups in Germany. This figure includes about 100,000 registered Jews and about 80,000 who are not registered. According to various Jewish organizations and communities, the number of non-registered Jews is much smaller (only about 20,000). Many Jews in Germany emigrated from the former Soviet Union (about 85 percent). Of the total registered Jewish population in Germany only 1-2 percent are strictly kosher (observant) and about 60-70 percent eat kosher during holidays or other special occasions. There are approximately 89 Jewish communities throughout Germany with the largest based in Berlin, Munich, Frankfurt/Main, and Duesseldorf. These communities are supported by organizations such as the Central Council of Jews in Germany (*Zentralrat der Juden in Deutschland e.V.*), the umbrella organization for the Jewish communities in Germany, and the Central Board of Jewish Welfare in Germany (*Zentralwohlfahrtstelle der Juden in Deutschland e.V.*).

Size of the Jewish Community in Germany 1990 – 2002 (registered)		
Year	Population	Jewish population from the former Soviet Union
1990	29,089	1,008
1991	33,692	6,206
1992	36,804	9,983
1993	40,917	15,188
...		
2000	87,756	69,854
2001	93,326	77,006
2002	98,335	83,603

Source: Zentralwohlfahrtstelle der Juden in Deutschland e.V.

Jewish Communities of Selected Cities in Germany - 2002	
City	Population
Berlin	12.000
Munich	9.000
Frankfurt/Main	8.000
Duesseldorf	7.000

Source: Hagalil

Kosher foods can be purchased at a few special kosher shops and restaurants in cities with larger Jewish communities. The shops offer a full range of products. There are three large kosher supermarkets in Germany, where food and beverage products can also be ordered on-line (Danel Feinkost, Aviv Lebensmittelhandel and Wein-Lehmann). Some of the larger retail supermarkets, including KaDeWe, Wertheim, WalMart and Meyer, offer a very limited selection of kosher products, such as wine, matzo and gefilte fish. The variety of products increases only before major Jewish holidays. The consumption of kosher products in Germany is still primarily linked to the Jewish population and driven by the Jewish religious calendar. Interested consumers outside of the large communities will have a hard time finding kosher products in their local area, since the market is so small.

Domestic Production

Although domestic production of kosher products is very limited in Germany, there are some companies that produce kosher products under permanent supervision of a local rabbinate. Due to the small Jewish population in Germany, qualified kosher supervisors are hard to find. There are few kosher supervisors in Germany and the distance they must travel increases the cost of kosher certification. This significant expense is the influencing factor for many food producers when considering kosher certification.

About 95 percent of kosher products in Germany are imported, for the most part from Israel, France, Holland, Belgium and the United States. Fresh products like bread, Humus and salads are locally produced, although the ingredients are mainly imported. Kosher meat and poultry are mostly imported from France. In Berlin, there is currently a small amount of local kosher slaughter -- approximately three to four cows per week for Jewish institutions.

In Germany, the traditional method of kosher slaughter was prohibited by law at the beginning of this year. However, certified kosher slaughterers can still obtain a special permit for kosher slaughter.

Market Opportunities

Today, there are many Jewish organizations in Germany trying to promote and recultivate Jewish traditions, including the consumption of kosher products. One example is providing kosher food and prepared meals for senior citizen homes and schools. There are also many programs and activities specifically targeted at the younger generation to revive their awareness of their Jewish heritage.

One way to promote kosher food among non-Jewish consumers would be to emphasize the high quality, safety factors, and the certification process. Another target group would be people suffering from lactose intolerance, as their dietary needs could be met by kosher parve products (which contain no dairy or meat ingredient). In general, there is a lack of name recognition in this sector of the food business, which some Jewish organizations would like to see improved in order to gain greater acceptance of kosher products in Germany. Increased kosher food demand and production would result in more competitive prices, and thereby make kosher products available and affordable for a wide range of consumers.

In addition, U.S. companies that market kosher products could promote to non-Jewish consumers in Germany by participating in trade shows. The Office of Agricultural Affairs in Berlin recommends the following trade shows:

ANUGA

Cologne, Germany, October 2005 (Interval: 2 years)

U.S. Pavilion Organizer: B*FOR International, Tel: (540) 373-9935; Fax: (540) 372-1414.

Information on ANUGA can be viewed at <http://www.koelnmesse.de/anuga>

Target Market: Europe/International

One of the leading international trade shows for food and beverages and the premier show of its kind held in Germany. There is traditionally a large U.S. Pavilion at this show; about 150-200 U.S. companies and associations normally exhibit in the U.S. Pavilion. This is a USDA-endorsed show.

ISM (International Sweets and Biscuit Show)

Cologne, Germany, February 1-4, 2004 (Interval: yearly)

U.S. Pavilion Organizer: National Confectioners Association (NCA), Tel: (703) 790-5750; Fax: (703) 790-5752, <http://www.koelnmesse.de/ism>

Target Market: Europe/International

The world's largest show for snacks and confectionery products. NCA organizes a U.S. Pavilion at ISM, which is also a USDA-endorsed show.

Bio Fach

Nuremberg, Germany, February 2004 (Interval: yearly)

U.S. Pavilion Organizer: B*FOR International, Tel: (540) 373-9935; Fax: (540) 372-1414.
<http://www.biofach.de>

Target Market: Germany/Europe

The leading European trade show for organic food and non-food products.

ProWein

Dusseldorf, Germany, March (Interval: yearly)

U.S. Pavilion Organizer: Wine Institute's office in the Netherlands, Tel: (31-172) 47 15 71;
Fax: (31-172) 47 55 45, <http://www.prowein.de>

Target Market: Germany/Europe

The leading German trade show for wine and other alcoholic beverages.

IBA (International Bakers Show)

Duesseldorf, Germany, October 2006 (Interval: 3 years)

Show Organizer: Tel: (49-2224) 770 40; Fax: (49-2224) 77 04 40

Target Market: Germany/Europe

International show for bakery and confectionery trade.

Note: For more information about these and other German exhibitions and trade shows, please contact the FAS office in Berlin. Further details can also be found under the following Internet address: www.auma-messen.de

Certification Process

There are several kosher certifying organizations that are widely accepted by the Jewish community. These include the major certification organizations in the United States -- Kof-K, Orthodox Union (OU), Organized Kashruth Laboratories (OK) and Star-K -- which are seen as highly reliable, according to German trade representatives.

Please see the following websites for further information about these organizations:

Kof-K

www.kof-k.org

OU

www.ou.org

OK

www.ok.org

Star-K

www.star-k.org

Domestic kosher production is supervised and certified by the local rabbinate.

Packaging and Labeling

All kosher products have to be clearly labeled as kosher, i.e. marked kosher and have the kosher seal/stamp including the name of the rabbi who certified the product. Labels must be in the German language, but multi-language labels that include German are allowed.

German requirements for all food/beverage packaging and labeling, as well as import regulations, also apply to kosher products. Labels must include the following information:

- Name of product as commonly used in trade
- List of ingredients and food additives
- Quantitative ingredient declaration (QUID)
- Alcohol content
- Un-coded minimum shelf-life date
- Storage conditions
- Metric units for all measurements
- Name and address of manufacturer, packer or importer in Germany/EU
- Coded lot identification
- Bar codes

Import taxes/duties

Import requirements, restrictions and customs duties for kosher products are identical to the requirements for mainstream food products.

Food products that enter Germany are also subject to customs duties that vary by product. The EU has established a harmonized tariff schedule, which applies to all EU member states.

Most processed products are subject to additional import charges (excise and turnover tax which is country-specific). Detailed information on customs duties can be obtained on the website of the European Commission under www.europa.eu.int/comm/taxation_customs/dds/en/tarspec.htm (Taxation and Customs Union).

Wine with an alcohol content of less than 13 percent (HS-Code 2204 21 11 through 2204 21 80), for example, has a customs tariff of 13,1 EUR per hectoliter and is subject to a 16-percent turnover tax.

A good source of information on customs duties, excise and turnover taxes, as well as import restrictions and other relevant details is the German Customs Information Center website (available in the English language) at www.zoll-d.de.

In general, importers and distributors in Germany are familiar with the relevant import requirements, and are therefore a good source of information.

Retail Prices

In general, the price of a kosher food product is significantly higher than the price of a comparable mainstream item. In addition, the variety of kosher products is quite limited.

Sample Products and Retail Prices

(16 percent value added tax included)

Product	Origin	Size	Price (Euro)
Bakery products			
Bagels	Local production	piece	1.00
Bagels	USA	piece	1.00
Matzo	Israel	450 g	3.20
Pita bread (fresh)	Local production	10 pieces	3.30
Pita bread (frozen)	Israel	6 pieces	1.50
Beverages			
Coca Cola	Israel	1 ltr.	4.40
Coffee and Tea			
Coffee, instant	Israel	200 g	8.90
Coffee white	Israel	300 g	6.90
Turkish coffee	Israel	200 g	5.90
Groceries – miscellaneous			
Olive oil, native	Israel	60 ml	4.50
Olive oil, native	Israel	250 ml	11.50
Kusbara Koriander Pesto	Israel	280 g	7.90
Kibbuz Beit Yizhak Dressing	Israel	250 ml	4.90
BBQ Sauce Haddar	USA	510 ml	5.00
Mustard Squeeze	USA	252 g	4.00
Yellow Mustard	France	226 g	3.00
Heinz Ketchup	USA	390 ml	3.00
Mayonaise Helman's	USA	240 g	3.00

Herbs and Spices			
Herbs of the Galilee	Israel	20 g	3.90
Saatar	Israel	35 g	3.90
Mediterranean seasoning	Israel	20 g	3.90
Zhug	Israel	20 g	3.90
Segal's Red Pepper Sauce	Israel	500 ml	10.90
Ingredients, Mixes			
Falafel mix	Israel	90 g	2.50
Latkes	Israel	170 g	2.90
Potato flour Hadar	USA	55 LB	44.00
Meat			
Chicken	Local production	kg	8.00
Chicken breast	Israel	kg	13.00
Chicken	France	kg	7.00
Chicken wings	France	kg	4.00
Chicken cutlet	France	kg	15.00
Snacks and Sweets			
Osem Sesame Crackers	Israel	250 g	2.90
Osem Deli Crackers	Israel	200 g	2.00
Humus	Israel	320 g	2.90
Tehina	Israel	310g	3.50
Halwa Sumsum	Israel	100 g	1.90
Jelly Beans	USA	24 x 4 oz	2.50
Soups and Meals			
Mushroom soup	Israel	120 g	2.90
Gefilte fish	Israel	285 g	8.90
Gefilte fish	USA	1.81 kg	20.00
Gefilte fish	USA	6 dumplings	7.50
Gefilte fish	Israel	7 dumplings	8.00
Hot meals (instant)	Israel	84 g	2.90
Chicken soup, instant	Israel	400 g	5.00
Spreads and Jams			
Schum Schamir	Israel	280 g	6.90
Chocolate spread	Israel	250 g	3.90
Dulce de Leche, Caramel Creme	Israel	340 g	5.90
Orange honey	Israel	350 g	6.90
Fruit jam	France	340 g	3.00
Wine			
Carmel 2000 Dan Grenach Rose	Israel	0.75 l	6.90
Carmel 1999 Cabernet Sauvignon	Israel	0.75 l	7.90
Carmel 1999 Sauvignon Blanc	Israel	0.75 l	6.90
Carmel 1999 Samson Cabernet Sauvignon	Israel	0.75 l	7.90
Carmel Chateau Richon	Israel	0.75 l	8.90
Dalton 2000 Cabernet Sauvignon-Merlot	Israel	0.75 l	12.90
Dalton 2000 Sauvignon blanc fume	Israel	0.75 l	11.90

Manischewitz Concord Kidush	USA	0.75 l	8.00
Baron Herzog Cabernet Sauvignon	USA/California	0.75 l	12.00

Source: different German retailers

Note: U.S. Dollar/Euro exchange rate:

2003 \$1 = EUR 0.88 or 1 EUR = \$ 1.14 (as of Sept. 26, 2003)

Key Contacts and further Information

List of importers

The following is a list of some kosher product importers:

AVIV GmbH

Hanauer Landstr. 50
60314 Frankfurt/Main
Ph: (+49-69) 446 017
Fax: (+49-69) 448 064
Avivgmbh.kosherfood@rhein-main.net
www.aviv.de

Importer/distributor of kosher foods, all types.

Danel Feinkost

Pilgersheimerstr. 44
81543 Muenchen
Ph: (+49-89) 669 888
Fax: (+49-89) 669 820
DanEl@hagalil.com
www.danel.de

Retail store for kosher foods and meat products. Interested in kosher products from the U.S.
Interested in products from German or British importers

Lehmann & Co. Weinkontor

Robert-Bosch-Strasse 10
64569 Nauheim
Ph: (+49-6152) 71 09 99
Fax: (+49-6152) 64 293
mail@wein-lehmann-co.de
www.wein-lehmann-co.de

Specialized in the import/distribution of rare wines from unusual growing areas.

If you have questions or comments regarding this report, or need assistance exporting to Germany, please contact the U.S. Agricultural Affairs Office in Berlin at the following address:

Agricultural Affairs Office
American Embassy
Clayallee 170
14195 Berlin
Ph: (+49-30) 8305 1150
Fax: (+49-30) 8431 1935
Email: AgBerlin@usda.gov
Home Page: <http://www.usembassy.de>

Please view our Home Page for more information on exporting U.S. food and beverage products to Germany, including market and products “briefs” available on specific topics of interest to U.S. exporters. The following two reports are available at www.fas.usda.gov, Attache Reports:

GM3004 “Germany Exporter Guide – Road Map to the German Market”
GM3022 “Food and Agricultural Import Regulations and Standards – Country Report”