



**MARKET ACCESS SECRETARIAT
Global Analysis Report**

Private Label Trends

Packaged Food in Germany

November 2013



EXECUTIVE SUMMARY

Germany's private label market was valued at US\$33.2 billion in 2012 (Euromonitor, 2013). Private labels had a 34.0% share of the packaged food market and grew at a compound annual growth rate (CAGR) of only 0.8% between 2007 and 2012. Chilled processed food and dairy were the largest sub-sectors.

From 2008 to 2012, German private labels launched over 11,000 products (Mintel GNPd, 2013). Bakery and dairy were the sub-sectors with the most launches. The number of new products exceeded that of new varieties, as companies sought mainly to differentiate themselves through new product innovation.

About 440 German private labels had product launches during the 2008-2012 period, led by Aldi, Lidl, and REWE Markt (Mintel GNPd, 2013). Many of the most prolific companies were supermarket chains. In most sub-sectors, product launches were concentrated among a small number of companies.

Canadian packaged food manufacturers have an opportunity to supply Germany's private labels as they expand into new sub-sectors, develop products with more value added, and undertake further innovation. Furthermore, as in Canada, Germans are highly interested in health and wellness.

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MARKET OVERVIEW

Despite a stable economy and rising consumer confidence, the German packaged food market has been stagnant in recent years. It is a mature market, valued at US\$97.8 billion in 2012, with growth coming from unit price increases rather than volume gains (Euromonitor, 2013). The packaged food market is forecast to decline in value by a total of 5% between 2012 and 2017.

While German consumers are generally value-conscious, there has been a trend toward premium products, driven by an aging population keen on health and wellness as well as quality (Euromonitor, 2013). German consumers are also increasingly eco-conscious, with a growing interest in buying local and concerns about the environmental impact of food production.

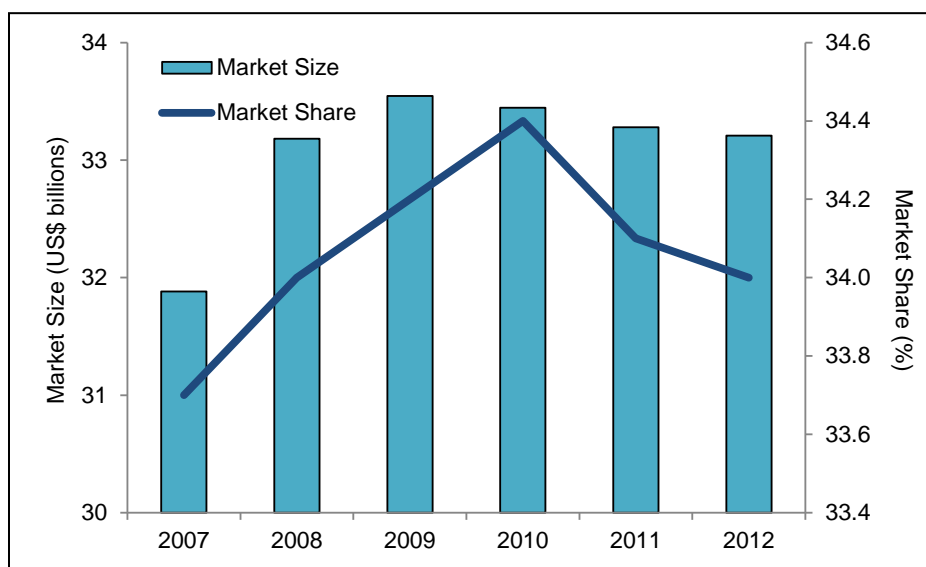
Discounters lead grocery retailing in Germany, followed by hypermarkets and supermarkets. All three channels have had success in developing private labels and dominating grocery sales. However, the market has grown saturated and has slowed their expansion; sales in the grocery retail sector are expected to be flat in the coming years.

MARKET PERFORMANCE*

**Euromonitor was the source for the data in this section. Euromonitor gives relatively conservative estimates of private label market sizes and market shares, as other sources have approximated higher values.*

- ▶ Private labels accounted for US\$33.2 billion of the German packaged food market in 2012. Their market value peaked at US\$33.5 billion in 2009, and has steadily declined since then, partly as a result of the intense price competition among grocery retailers and the renewed interest in higher quality, branded products.
- ▶ Private labels lost market share in recent years, from a peak of 34.4% in 2010 to 34.0% in 2012, as shown in the chart below. This was due to consumers shifting their purchases toward higher quality products, given the rise in consumer confidence and the trend of premiumization. Private labels have increased their premium offerings in response.

Private Label Packaged Food Market Size and Market Share in Germany, 2007-2012



Source: Euromonitor, 2013.



- ▶ Chilled processed food, dairy, and bakery were the largest sub-sectors among private labels. They combined for sales of US\$20.4 billion, or over 60% of the private label market in 2012. Chilled processed food was valued at US\$8.9 billion, followed by dairy (US\$7.1 billion), and bakery (US\$4.4 billion). The smallest market was noodles (US\$6.0 million).
- ▶ German private labels enjoy a high degree of popularity. In 2012, the median market share among private labels across sub-sectors was 29.1%, up slightly from 28.7% in 2007. Private labels in chilled processed food had the highest market share (68.7%), followed by those in canned/preserved food (49.0%) and frozen processed food (38.4%), as shown in the following table.

Top 10 Private Label Packaged Food Sub-Sectors in Germany by Market Size, 2012**

Sub-Sector	Market Size (US\$ millions)	Market Share (%)	CAGR (%) 2007-2012
Chilled processed food	8,875	68.7	0.7
Dairy	7,097	35.7	1.1
Bakery	4,390	21.5	0.0
Frozen processed food	3,103	38.4	0.7
Canned/preserved food	2,524	49.0	1.5
Confectionery	1,740	15.0	-0.8
Oils and fats	1,623	38.9	0.8
Ready meals	1,575	34.5	1.6
Sweet and savoury snacks	1,021	38.7	7.0
Sauces, dressings and condiments	886	19.7	2.9

Source: Euromonitor, 2013.

**CAGR = compound annual growth rate.

PRODUCT INNOVATION*

*The remainder of this report is sourced from Mintel GNPD, unless otherwise noted. Mintel GNPD labels its sub-sectors differently than Euromonitor.

- ▶ German private labels launched 11,078 products from 2008 to 2012. The number of annual launches increased steadily, reaching 3,536 in 2012. At the same time, national brand launches peaked in 2009. The average private label company introduced nearly three times as many products than its national brand counterpart.
- ▶ The following table shows that bakery, dairy, and sauces and seasonings were the sub-sectors with the most private label launches between 2008 and 2012, accounting for nearly 40% of the total. Bakery had 1,525 launches, followed by dairy (1,343) and sauces and seasonings (1,257). As with many of the leading sub-sectors, their annual launches rose steadily over time.



Top 10 Private Label Packaged Food Sub-Sectors in Germany by Total Launches, 2008-2012

Sub-Sector	Total Launches	New Products	New Varieties	Other Launches
Bakery	1,525	535	798	192
Dairy	1,343	641	420	282
Sauces and seasonings	1,257	595	473	189
Processed fish, meat and egg products	1,236	462	608	166
Snacks	900	438	312	150
Meals and meal centres	854	369	376	109
Desserts and ice cream	798	395	328	75
Chocolate confectionery	762	326	330	106
Side dishes	595	253	244	98
Fruit and vegetables	471	168	236	67

Source: Mintel GNPD, 2013.

- ▶ Unlike their North American counterparts, German private labels introduced more new products than new varieties. Given the high degree of product saturation in the packaged food market, they may have undertaken this approach to differentiate themselves from the competition. Indeed, private labels have increased their research and development efforts to this end in recent years.
- ▶ The vast majority of sub-sectors had spinoff ratios (the ratio of new varieties to new products) for private labels of 1.0 or less, as shown in the table below. This indicates that private labels expanded their offerings primarily through new product introductions. Spinoff ratios among national brands were below 1.0 in nearly all sub-sectors.

Top 10 Private Label Packaged Food Sub-Sectors in Germany by Spinoff Ratio, 2008-2012**

Sub-Sector	Private Labels	National Brands
Bakery	1.5	1.0
Fruit and vegetables	1.4	0.7
Processed fish, meat and egg products	1.3	1.2
Meals and meal centres	1.0	0.7
Chocolate confectionery	1.0	0.9
Baby food	1.0	0.6
Side dishes	1.0	0.8
Desserts and ice cream	0.8	0.9
Sauces and seasonings	0.8	0.6
Snacks	0.7	0.5

Source: Mintel GNPD, 2013.

**Spinoff ratio = the ratio of new varieties to new products. For example, a ratio of 1.5 for private labels in the bakery sub-sector means that there were 1.5 new varieties for each new product launched.

- ▶ From 2008 to 2012, quality-related claims experienced the most growth among private labels. Premium claims rose 6.3 percentage points to appear on 8.7% of private label launches in 2012. Similarly, economy claims increased 2.1 percentage points to reach 2.2%. Low/no/reduced fat claims, however, fell 6.0 percentage points, from 10.2% to 4.2%.



- ▶ Both private labels and national brands emphasized health and wellness in their product claims, primarily in response to Germany's demographic shift toward an older population. The table below lists organic as the most popular claim, appearing on 12.7% of private label launches, followed by no additives/preservatives (8.5%) and premium (7.6%).

Top 10 Private Label Packaged Food Claims in Germany by Product Launches, 2008-2012

Claim	Launches with Claim	Proportion of Launches (%)
Organic	1,409	12.7
No additives/preservatives	939	8.5
Premium	841	7.6
Microwaveable	684	6.2
Low/no/reduced fat	508	4.6
Low/no/reduced allergen	420	3.8
Seasonal	342	3.1
Ease-of-use	341	3.1
Economy	307	2.8
Gluten-free	303	2.7

Source: Mintel GNPD, 2013.

- ▶ Private label products were, on average, 30% larger by weight and 50% larger by volume than their branded counterparts. By weight, confectionery products (chocolate, snacks, sugar and gum) were 50% larger. By volume, dairy and baby food were twice the size, due mainly to the product bundling and bulk sizing practices of private labels.

Packaged Food Sub-Sectors in Germany by Private Label to National Brand Median Size Ratios, 2008-2012*

Sub-Sector	Weight	Volume
Sweeteners and sugars	1.8	-
Chocolate confectionery	1.5	-
Snacks	1.5	-
Sugar and gum confectionery	1.5	-
Sweet spreads	1.4	-
Sauces and seasonings	1.4	1.0
Breakfast cereals	1.3	-
Dairy	1.3	2.0
Baby food	1.3	2.5
Bakery	1.3	-
Side dishes	1.3	-
Desserts and ice cream	1.2	1.0
Soup	1.1	1.0
Fruit and vegetables	1.1	-
Meals and meal centres	1.0	-
Processed fish, meat and egg products	1.0	-
Savoury spreads	1.0	-

Source: Mintel GNPD, 2013.

*Private label to national brand median size ratio = the ratio of the median private label weight (volume) to the median national brand weight (volume). For example, a ratio of 1.5 for snacks means that the median weight of private label snacks was 1.5 times larger than that of national brand snacks. Dashes indicate the absence of launches measured by volume for either private labels or national brands.



MAJOR PRIVATE LABELS

- ▶ Aldi, Lidl, and REWE Markt were the most prolific private labels in Germany during the 2008-2012 period. They had the most launches, with over 6,000 products combined. Nearly all of the top private labels were grocery supermarket chains with extensive distribution networks.
- ▶ Few of the top companies had a spinoff ratio exceeding 1.0, as listed in the table below. This reinforces the notion that German private labels emphasized new product development over product line extension. Furthermore, while their chilled/frozen rates varied, their median rate of 39.9% did not differ significantly from the overall rate for private labels.

Top 10 Private Label Companies in Germany by Packaged Food Product Launches, 2008-2012*

Company	Launches	Spinoff Ratio	Chilled/Frozen (%)
Aldi	2,786	1.0	28.3
Lidl	1,706	1.0	42.1
REWE Markt	1,531	0.7	37.7
NORMA	903	0.9	36.8
Edeka	795	1.1	55.2
Real	631	0.8	48.8
Netto Marken-Discount	488	0.5	50.0
Bofrost	348	4.7	98.9
Rossmann	196	0.6	1.0
Alnatura	124	1.9	25.0

Source: Mintel GNPD, 2013.

*Spinoff ratio = the ratio of new varieties to new products. For example, a ratio of 1.1 for Edeka means that there were 1.1 new varieties for each new product launched.
Chilled/frozen (%) = the percentage of launches that were chilled or frozen.

ALDI

- ▶ Aldi is Germany's leading discount retailer and its largest grocery chain, with nearly 4,300 outlets throughout the country and US\$32.6 billion in sales in 2012 (Planet Retail, 2013). The company had a 13.6% share of the grocery retailing market in 2011, and about 95% of its sales came from private label products (Euromonitor, 2012).
- ▶ Aldi had nearly 2,800 product launches from 2008 to 2012, the most among all German packaged food companies. Bakery, followed by sauces and seasonings, were the sub-sectors with the most launches, as shown in the table below. The company had a below-average chilled/frozen rate of 28.3% and a spinoff ratio of 1.0. The top product claim was premium, which appeared on 7.5% of Aldi's launches.



Top 10 Aldi Packaged Food Sub-Sectors in Germany by Product Launches, 2008-2012*

Sub-Sector	Launches	Spinoff Ratio	Chilled/ Frozen (%)
Bakery	427	1.5	4.4
Sauces and seasonings	417	1.0	1.9
Processed fish, meat and egg products	330	1.3	53.6
Dairy	259	0.7	83.0
Chocolate confectionery	249	1.4	0.4
Snacks	213	0.6	11.7
Desserts and ice cream	192	0.9	70.8
Meals and meal centres	181	0.9	59.7
Side dishes	141	1.6	33.3
Sugar and gum confectionery	93	0.3	0.0

Source: Mintel GNPD, 2013.

*Spinoff ratio = the ratio of new varieties to new products. For example, a ratio of 1.2 for bakery means that there were 1.2 new varieties for each new product launched. Chilled/frozen (%) = the percentage of launches that were chilled or frozen.

LIDL

- ▶ Lidl is a German discount retailer with sales of \$22.4 billion in 2012 and 3,310 outlets (Planet Retail, 2013). The company has an extensive private label line of economy products and maintains a low-price strategy to compete with its main rival, Aldi. Its leading brands include Deluxe, McEneddy American Way, and Linessa Vital & Active.
- ▶ The company launched 1,706 products from 2008 to 2012. Both its chilled/frozen rate (42.1%) and spinoff ratio (1.0) were slightly above-average among private labels. Dairy, bakery, and sauces and seasonings were the sub-sectors with the most launches, as listed in the table below. Premium was the leading product claim, appearing on 13.0% of Lidl's launches.

Top 10 Lidl Packaged Food Sub-Sectors in Germany by Product Launches, 2008-2012*

Sub-Sector	Launches	Spinoff Ratio	Chilled/ Frozen (%)
Dairy	246	0.7	95.1
Bakery	224	1.2	13.4
Sauces and seasonings	186	1.0	4.8
Processed fish, meat and egg products	183	2.1	83.1
Snacks	157	1.2	17.8
Meals and meal centres	135	1.0	66.7
Desserts and ice cream	129	0.9	80.6
Chocolate confectionery	107	1.6	0.0
Side dishes	97	1.1	26.8
Sweet spreads	56	0.3	0.0

Source: Mintel GNPD, 2013.

*Spinoff ratio = the ratio of new varieties to new products. For example, a ratio of 1.2 for bakery means that there were 1.2 new varieties for each new product launched. Chilled/frozen (%) = the percentage of launches that were chilled or frozen.



REWE MARKT

- ▶ REWE Markt is a supermarket chain with grocery sales of US\$33.1 billion in 2012 and over 6,000 outlets (Planet Retail, 2013). The company has standard, economy, and premium tiers for its private labels, which account for approximately 20% of its sales (Euromonitor, 2012). REWE Markt's leading brands include its generic brand, REWE, REWE Bio (organic food), and REWE Feine Welt (premium).
- ▶ The company launched over 1,500 products between 2008 and 2012. It had a chilled/frozen rate of 37.7% and a spinoff ratio of 0.7. Bakery, sauces and seasonings, and dairy were the sub-sectors with the most launches. REWE Markt's product claims emphasized health and wellness, with organic appearing on 15.5% of its launches.

Top 10 Rewe Markt Packaged Food Sub-Sectors in Germany by Product Launches, 2008-2012*

Sub-Sector	Launches	Spinoff Ratio	Chilled/ Frozen (%)
Bakery	211	1.5	9.5
Sauces and seasonings	186	0.6	10.8
Dairy	169	0.4	87.0
Processed fish, meat and egg products	157	1.0	77.1
Chocolate confectionery	132	0.8	0.0
Desserts and ice cream	123	0.6	77.2
Meals and meal centres	104	0.8	67.3
Side dishes	97	0.6	40.2
Snacks	86	0.4	11.6
Fruit and vegetables	70	1.2	41.4

Source: Mintel GNPD, 2013.

*Spinoff ratio = the ratio of new varieties to new products. For example, a ratio of 1.5 for bakery means that there were 1.5 new varieties for each new product launched. Chilled/frozen (%) = the percentage of launches that were chilled or frozen.

OPPORTUNITIES

- ▶ Germany's private labels are innovation-focused, seeking to develop new products to differentiate themselves in a price-competitive market. At the same time, they are adding greater value to their products and expanding into new sub-sectors. As such, they will demand an increasing supply of products and ideas, and this represents an opportunity for Canadian packaged food manufacturers.
- ▶ The experience and expertise of Canadian packaged food manufacturers in developing health and wellness products can be carried over to Germany's market. Germany has an aging population with high disposable income that values healthy eating. Environmental sustainability is also a major consumer trend. Canadian producers can thus leverage their strengths in these areas to fulfill German demand for private label products of this nature.



CONCLUSION

- ▶ Private labels maintain high market shares in Germany's packaged food market and will face limited value growth over the next few years, due largely to heavy price competition among major retailers. They will continue to compete on price but also seek to add value to their products and enhance their brand reputations. As such, private labels will likely make further gains on their branded counterparts.
- ▶ Germany's private labels emphasize innovation in the form of new products rather than spinoffs, as this is a means of differentiation from their competitors. Indeed, the packaged food market is highly saturated and caught up in price competition. Both private labels and national brands hope to gain an advantage through product development.
- ▶ There is considerable interest in health and wellness in Germany, due mostly to the aging population and a growing awareness of healthy lifestyles. Both private labels and national brands have targeted this market with an increasing number of health-related product claims, such as organic, no additives/preservatives, and low/no/reduced sugar.

SOURCES

Euromonitor International. (2013, March). Data.

Euromonitor International. (2012, May). Grocery Retailers in Germany.

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Planet Retail. (2013, March). Data.



APPENDIX

Private Label Packaged Food Sub-Sectors in Germany by Market Size, 2007 and 2012*

Sub-Sector	Market Size (US\$ millions)		Market Share (%)		CAGR (%) 2007-2012
	2007	2012	2007	2012	
Chilled processed food	8,573	8,875	67.5	68.7	0.7
Dairy	6,729	7,097	35.9	35.7	1.1
Bakery	4,393	4,390	22.0	21.5	0.0
Frozen processed food	2,995	3,103	37.7	38.4	0.7
Canned/preserved food	2,338	2,524	47.1	49.0	1.5
Confectionery	1,815	1,740	15.5	15.0	-0.8
Oils and fats	1,560	1,623	39.4	38.9	0.8
Ready meals	1,452	1,575	33.3	34.5	1.6
Sweet and savoury snacks	727	1,021	33.6	38.7	7.0
Sauces, dressings and condiments	769	886	19.5	19.7	2.9
Dried processed food	747	671	28.7	29.1	-2.1
Ice cream	676	651	22.2	21.5	-0.7
Pasta	532	561	37.8	38.6	1.0
Spreads	501	555	30.6	31.5	2.1
Soup	134	117	19.8	19.4	-2.6
Snack bars	24	31	14.4	18.0	5.4
Baby food	26	30	2.5	2.9	3.2
Meal replacement	11	12	7.2	7.7	2.5
Noodles	6	6	27.0	21.7	-1.4
All packaged food	31,882	33,207	33.7	34.0	0.8

Source: Euromonitor, 2013.

*CAGR (%) = compound annual growth rate.

Private Label and National Brand Packaged Food Launch Types in Germany by Product Launches, 2008-2012

Launch Type	Private Labels				
	2008	2009	2010	2011	2012
New variety	355	701	847	1,101	1,510
New product	637	830	1,258	1,089	1,122
New packaging	44	58	114	368	783
Relaunch	6	0	4	43	81
New formulation	10	13	31	33	40
All launch types	1,052	1,602	2,254	2,634	3,536

Launch Type	National Brands				
	2008	2009	2010	2011	2012
New product	2,287	2,958	2,580	2,525	2,528
New variety	1,929	2,166	2,263	2,024	2,045
New packaging	401	561	674	705	911
New formulation	175	273	225	187	138
Relaunch	34	63	20	77	136
All launch types	4,826	6,021	5,762	5,518	5,758

Source: Mintel GNPD, 2013.



Private Label Packaged Food Sub-Sectors in Germany by Product Launches, 2008-2012*

Sub-Sector	Private Labels			National Brands		
	Launches	Spinoff Ratio	Chilled/ Frozen (%)	Launches	Spinoff Ratio	Chilled/ Frozen (%)
Bakery	1,525	1.5	12.4	3,471	1.0	8.8
Dairy	1,343	0.7	86.7	3,788	1.1	91.9
Sauces and seasonings	1,257	0.8	7.8	3,190	0.6	7.6
Processed fish, meat and egg products	1,236	1.3	73.2	2,716	1.2	82.5
Snacks	900	0.7	15.7	1,930	0.5	14.1
Meals and meal centres	854	1.0	73.3	1,848	0.7	68.2
Desserts and ice cream	798	0.8	81.8	1,506	0.9	79.7
Chocolate confectionery	762	1.0	0.1	2,831	0.9	0.2
Side dishes	595	1.0	33.4	1,206	0.8	37.5
Fruit and vegetables	471	1.4	50.1	579	0.7	33.5
Sweet spreads	324	0.5	0.0	874	0.7	1.4
Sugar and gum confectionery	284	0.3	0.0	1,308	0.6	0.0
Savoury spreads	227	0.6	50.7	833	0.5	49.2
Breakfast cereals	209	0.6	0.5	554	0.7	0.2
Soup	173	0.7	11.6	586	0.8	12.6
Baby food	70	1.0	0.0	538	0.6	0.9
Sweeteners and sugars	50	0.3	0.0	127	0.5	0.0
All sub-sectors	11,078	0.9	39.2	27,885	0.8	36.4

Source: Mintel GNPD, 2013.

*Spinoff ratio = the ratio of new varieties to new products. For example, a ratio of 1.5 for bakery means that there were 1.5 new varieties for each new product launched. Chilled/frozen (%) = the percentage of launches that were chilled or frozen.



Private Label Packaged Food Sub-Sectors in Germany by Number of Companies, 2008-2012

Sub-Sector	Number of Companies		Launch Share of Top Three Companies (%)	
	Private Labels	National Brands	Private Labels	National Brands
Processed fish, meat and egg products	88	550	46.4	7.4
Dairy	87	486	38.4	12.1
Bakery	86	634	48.2	8.2
Sauces and seasonings	69	599	54.4	12.9
Snacks	59	450	48.2	10.9
Meals and meal centres	55	316	40.8	11.5
Chocolate confectionery	51	314	57.5	16.3
Desserts and ice cream	42	249	44.9	18.1
Side dishes	41	292	45.0	8.1
Savoury spreads	35	232	51.1	13.8
Fruit and vegetables	34	193	39.7	18.0
Sugar and gum confectionery	32	222	53.2	17.2
Sweet spreads	32	172	42.3	28.9
Breakfast cereals	26	90	39.2	22.0
Soup	25	100	52.6	34.6
Sweeteners and sugars	15	50	36.0	29.1
Baby food	5	25	91.4	65.2
All sub-sectors	437	3,254	44.3	4.9

Source: Mintel GNPD, 2013.

Private Label Packaged Food Sub-Sectors in Germany by Median Product Sizes, 2008-2012*

Sub-Sector	Private Labels		National Brands		Size Ratios	
	Weight (g)	Volume (ml)	Weight (g)	Volume (ml)	Weight	Volume
Baby food	250	500	190	200	1.3	2.5
Bakery	250	-	200	-	1.3	-
Breakfast cereals	500	-	375	-	1.3	-
Chocolate confectionery	150	-	100	-	1.5	-
Dairy	200	1,000	150	500	1.3	2.0
Desserts and ice cream	175	500	150	500	1.2	1.0
Fruit and vegetables	425	-	400	-	1.1	-
Meals and meal centres	355	-	350	-	1.0	-
Processed fish, meat, egg products	200	-	200	-	1.0	-
Sauces and seasonings	190	250	140	250	1.4	1.0
Savoury spreads	150	-	150	200	1.0	-
Side dishes	500	-	400	-	1.3	-
Snacks	150	-	100	-	1.5	-
Soup	70	400	65	400	1.1	1.0
Sugar and gum confectionery	150	-	100	-	1.5	-
Sweet spreads	350	-	250	-	1.4	-
Sweeteners and sugars	350	-	200	-	1.8	-

Source: Mintel GNPD, 2013.

*Private label to national brand median size ratio = the ratio of the median private label weight (volume) to the median national brand weight (volume). For example, a ratio of 1.3 for bakery means that the median weight of private label bakery was 1.3 times larger than that of national brand bakery. Dashes indicate the absence of launches measured by volume for either private labels or national brands.



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ISSN 1920-6615

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