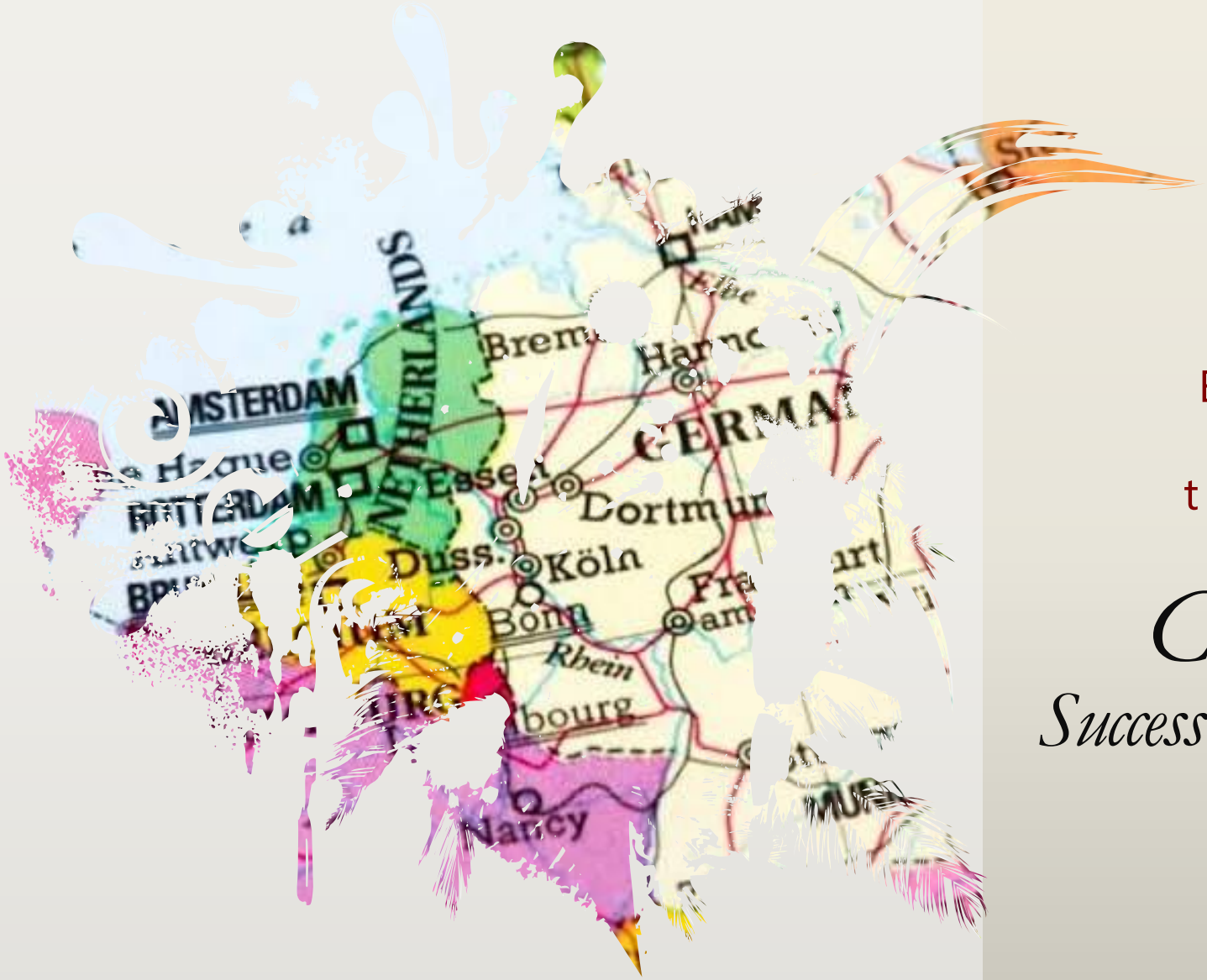


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Eleonora Escalante Strategy
presents
the Summer Saga of the year

Cacao and Coffee 101.

Success strategies for Small Farm Holders

Episode 23.

Chocolate Industry Analysis Germany, Belgium and The Netherlands

27/11/2026

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Cacao and Coffee 101.
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Next Saga: Human Talent: From Feudal Slaves to Digital Beggars. As of January 9th, 2027.

Outline Calendar *One Season: From May 22nd to December 31st, 2026*

22-May	29-May	5-June	12-June	17-22 June	26-June
Episode 1	Episode 2	Episode 3	Episode 4		Episode 5
Introduction	A new philosophy beyond circular economy	Sustainability: Beyond caring for the land Part I	Sustainability: Beyond caring for the land Part II	Teacher´s week Pedagogical Pause El Salvador	New Models of Ownership & Corporate Governance

3-July	10-July	17-July	24-July	31-July	07-August
Episode 6	Episode 6A	Episode 7	Episode 8	Episode 9	Episode 10
Customer Segments	Customer Segments Version 2.0	Value Propositions I	Value Propositions II	Distribution Channels	We will work on vacations Certifications Quality Control

14-August	21-August	28-August	11-Sept	25-Sept	09-October
Episode 11	Episode 12	Episode 13	Episode 14	Episode 15	Episode 16
Key Resources Part I Indonesia	Key Resources Part II Indonesian Cacao	Revenue Streams Cost Structure Ethiopian Coffee	Competitiveness Research & Innovation Brazil Coffee	Financing & Access to Capital Colombian Coffee	Key Partnerships Honduras Coffee

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ADDITIONAL BONUS MATERIAL



Outline Calendar *One Season: From May 22nd to December 31st, 2026*

16-October	23-October	30-October	6-Nov	13-Nov	20-Nov
Episode 17 ✓	Episode 18 ✓	Episode 19 ✓	Episode 20 ✓	Episode 21 ✓	Episode 22 ✓
Cacao Industry Analysis Cameroon	Cacao Industry Analysis I Nigeria	Cacao Industry Analysis II Nigeria	Cacao Industry Analysis I: Perú	Cacao Industry Analysis II: Perú	Cocoa and Chocolate Trade Germany, Belgium and The Netherlands

27-Nov	04-Dec	11-Dec	18-Dec	25-Dec	31-Dec
Episode 23 ✓	Episode 24	Episode 25	Episode 26	Episode 27	Episode 28
Chocolate Industry Analysis: Germany, Belgium and The Netherlands	Global coffee shops-retailers Industry Analysis I	Global coffee shops-retailers Industry Analysis II	Upstream Comparative Country Analysis: Coffee	Upstream Comparative Country Analysis: Cacao	Summary and Conclusions Future Research Agenda

31-Dec-2026 to 22-Jan-2027

End of the Year Vacations
Pause & Maintenance



29-Jan-27

Episode 1

First Episode
Human Talent: From Feudal Slaves to Digital Beggars

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Chocolate Industry Analysis: Germany, Belgium, and the Netherlands

AGENDA

Cacao and Coffee 101. Success Strategies for Small Farm Holders

Exports and Imports Analysis- General Overview

1. Belgium
2. The Netherlands
3. Germany

Last Week

Chocolate Industry Analysis. Main themes.

1. **The Netherlands**
2. **Belgium**
3. **Germany**

This Week

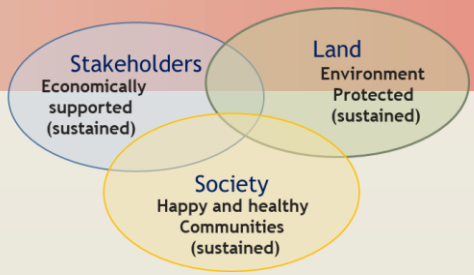


Photo https://klmaeroclub.com/events/drie-landen-vlucht/

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Success Strategies for Small Farm Holders







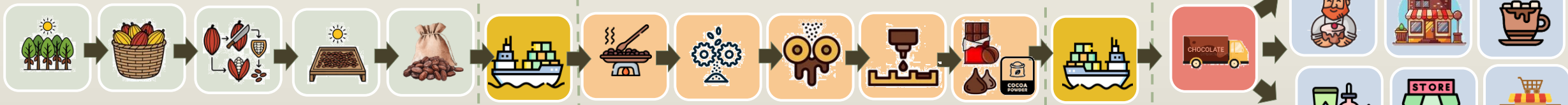
CACAO

Chocolate Industry Analysis: Germany, Belgium, and the Netherlands

Let´s remember the terms of the global cacao value chain

- The global cocoa value chain activities and the main nations involved explained below: the manufacturing conversion from the coca bean to multiple midstream by-products is complex and diverse: liquor, powder, butter, chips, paste, chunks, tablets, kisses, extracts, couvertures, shells and husks. These byproducts are then the input to be re-processed again in the downstream section for end-consumers.

Upstream | **Midstream** | **Downstream**



	Upstream	Midstream		Downstream	
Stakeholders	• Mid-size Independent growers • Small Farm holders • Cooperatives • Multinational Corporations • Harvest collectors • Laborers from Farm communities and external imported • Cacao Commodity Traders • Cacao Processing Plants (fermenting-drying) and packing the cocoa beans in sacks • Intermediaries (paid by commission)	• Transporters to the port of exit • Import-Export Intermediaries • Customs Officers • Warehousing entities • Shipping major global lines • Multinational trading companies	• Independent Artisanal and mid-size Roasters & grinding • Wholly integrated manufacturers • Multinational Corporations • Packaging Specialists • Other re-exporters	• Transporters to the port • Customs Officers • Warehousing (if needed) • Shipping Companies • Intermediaries	• Distribution Reps. • Grocery Stores • Municipal Market Shops • Retailers: supermarkets, markets, stores, coffee-shops, hotels, bakeries chocolatiers, pharma, restaurants, cafeterias, • Households (direct consumers)
Main Nations involved	• Cote d'Ivoire, Ghana, Indonesia, Ecuador, Brazil, Nigeria, Perú, Dominican Republic, and Colombia	• Switzerland (MSC) • Denmark (Maersk) • France (CMA-CGM)	• The Netherlands, USA, Malaysia, Germany, Indonesia, France, Belgium, Canada, Turkey, Italy, Spain, Singapore, and UK.	• Switzerland (MSC) • Denmark (Maersk) • France (CMA-CGM)	• All nations on earth.

All the references cited and used for our inferences are shown in slide 11

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Success Strategies for Small Farm Holders



Chocolate Industry Analysis: Germany, Belgium, and the Netherlands

The upstream farmers are part of a huge global chain

All the references cited and used for our inferences are shown in slide 15-16.

Upstream Farmers

Midstream processors & Manufacturers

Downstream end-consumers brands

CACAO

Local Upstream Intermediaries

Multinational Trading Houses

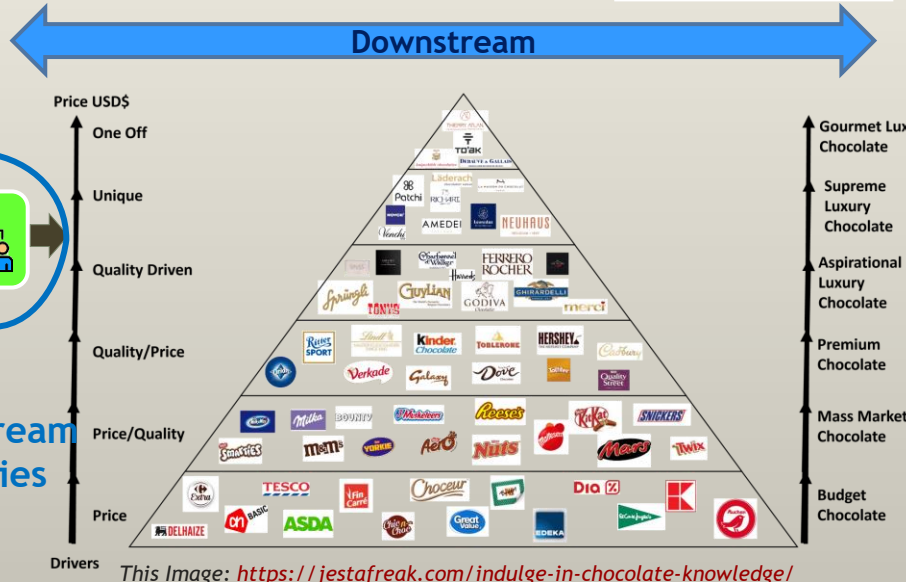
Upstream

Midstream

Some midstream companies are also integrated with downstream activities
And they also have specialty cocoa divisions to supply the best lots of cacao for the luxury segment.

CHOCOLATE

Local Downstream Intermediaries



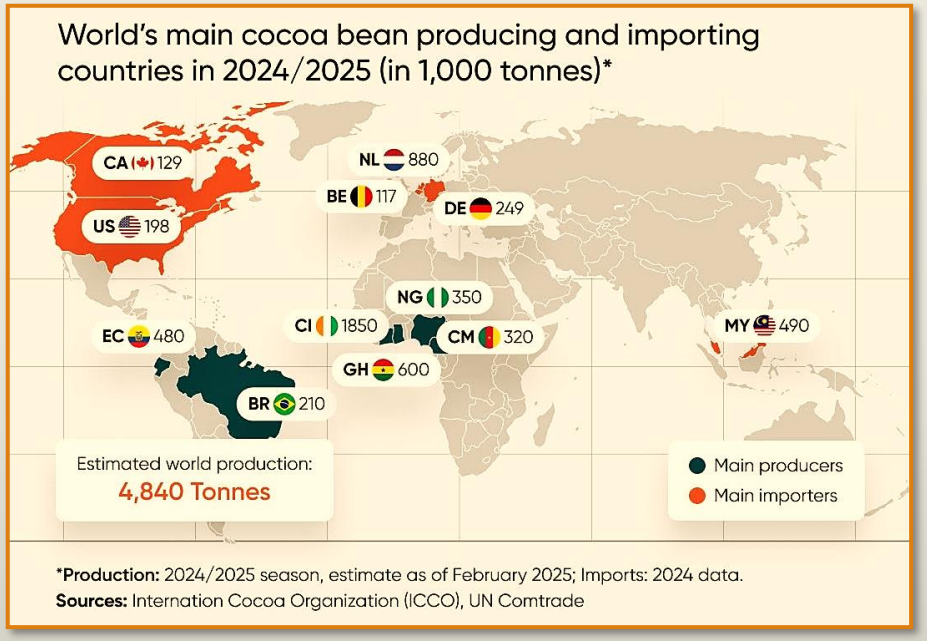
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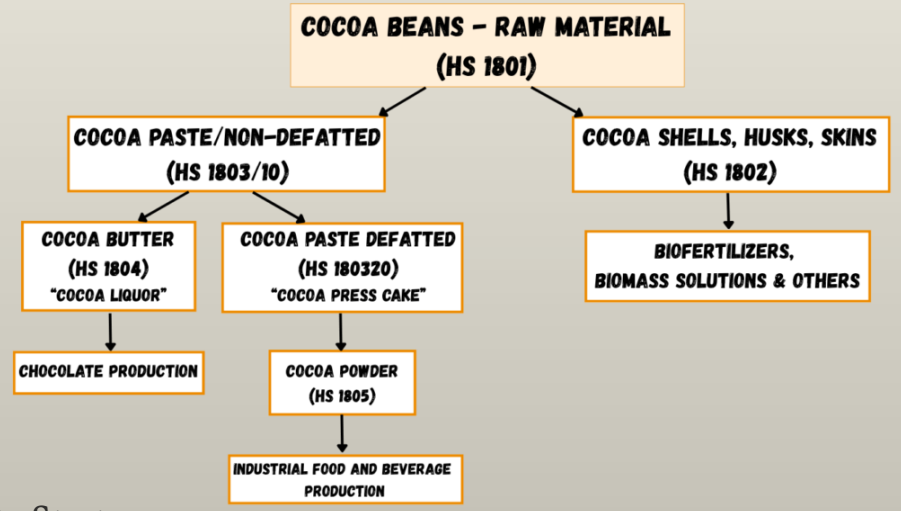
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Success Strategies for Small Farm Holders

Cocoa and chocolate Trade: Germany, Belgium, and the Netherlands

Analyzing the role of trade of cacao-cocoa-chocolate byproducts in these 3 nations



HS Code	Cacao products analyzed in this episode per nation of study. Source: UNComtrade+
180100	Cocoa beans; whole or broken, raw or roasted
180310	Cocoa; paste, not defatted
180320	Cocoa; paste, wholly or partly defatted
180400	Cocoa; butter, fat and oil
180500	Cocoa; powder, not containing added sugar or other sweetening matter
180610	Cocoa; powder, containing added sugar or other sweetening matter
180620	Chocolate & other food preparations containing cocoa; in blocks, slabs or bars weighing > 2kg
180631	Chocolate and other food preparations containing cocoa; in blocks, slabs or bars, filled, weighing 2kg or less
180632	Chocolate and other food preparations containing cocoa; in blocks, slabs or bars, (not filled), weighing 2kg or less
180690	Chocolate and other food preparations containing cocoa; n.e.c. in chapter 18
180200	Cocoa; shells, husks, skins and other cocoa waste



- At the upstream level, the cacao beans leave the farms from the tropical nations and are imported year over year. Every year these are pulled mainly by the following nations: The Netherlands, Germany, Belgium, Malaysia, Canada, USA, and more recently Poland.

https://www.eurococoa.com/cocoa-story/cocoa-story-the-production-process-from-cocoa-beans-to-semi-finished-products/

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Success Strategies for Small Farm Holders

Chocolate Industry Analysis: Germany, Belgium, and the Netherlands

Grinding capacity

Which nations are the main grinders of chocolate?

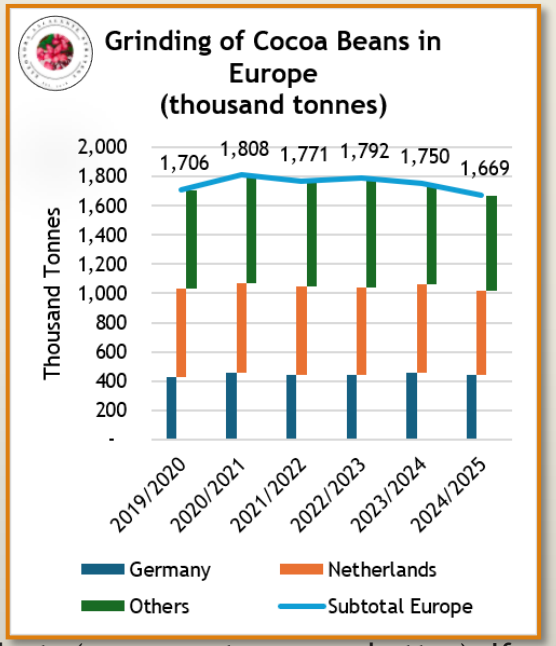


Photo Source:

GRINDING OF COCOA BEANS (thousand tonnes)

	2019/2020	2020/2021	2021/2022	2022/2023	2023/2024	2024/2025	
Germany	430	460	440	440	460	440	
Netherlands	600	610	610	600	600	580	
Others	676	738	721	752	690	649	
Subtotal Europe	**1,706**	**1,808**	**1,771**	**1,792**	**1,750**	**1,669**	**36%**
Cote d ivoire	614	620	710	793	744	730	
Ghana	292	322	295	250	205	210	
Others	92	108	130	148	136	136	
Subtotal Africa	**998**	**1,050**	**1,135**	**1,191**	**1,085**	**1,076**	**23%**
Brazil	221	240	223	260	240	230	
United States	380	390	380	350	340	280	
Others	292	344	333	369	363	336	
Subtotal Americas	**893**	**974**	**936**	**979**	**943**	**846**	**18%**
Indonesia	480	480	460	402	380	390	
Malaysia	318	338	375	364	383	350	
Others	311	332	319	329	344	319	
Subtotal Asia & Oceania	**1,109**	**1,150**	**1,154**	**1,095**	**1,107**	**1,059**	**23%**
World Total Grindings	**4,706**	**4,982**	**4,996**	**5,057**	**4,885**	**4,650**	

Data Source: ICCO Quarterly Bulletin of Cocoa Statistics, 2020 to 2026.



- Grinding activities in Europe are a measure of the production of semifinished products (cacao paste, cocoa butter). If the demand for chocolate augments, there is more grinding too. So, if grinding augments, that tells us that the demand for chocolate is increasing. However, if you observe, the grinding is almost the same YoY.
- If the manufacturing plants do not grind, that means, they are importing the semifinished processed good; or the are stocking cacao beans inventories. All the semifinished products are affected by the factors of conversion (to provide a bean-equivalent figure).
- If the energy prices will rise, the manufacturer can decide to process immediately and stockpile the semi-finished goods for the future. Another decision is to defer the grinding, or request more cocoa butter-cocoa paste from the source of origin.

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The Netherlands

Cocoa Global imports and exports



27/11/2026

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Chocolate Industry Analysis: Germany, Belgium, and the Netherlands

What are the numbers? Let´s study the year 2024.

What is the product?

EXPORTS Consolidation year 2024 All exports products of cacao-cocoa-chocolate The Netherlands (2024)

					qty (kg) **	IN Million USD FOB VALUE
2024	Netherlands	Export	180200	Cocoa; shells, husks, skins and other cocoa waste	11,425,910	$ 3.24
2024	Netherlands	Export	180610	Cocoa; powder, containing added sugar or other sweetening matter	1,192,775	$ 5.82
2024	Netherlands	Export	180320	Cocoa; paste, wholly or partly defatted	18,262,306	$ 60.83
2024	Netherlands	Export	180632	Chocolate and other food preparations containing cocoa; in blocks, slabs or bars, (not filled), < 2kg	42,087,814	$ 226.20
2024	Netherlands	Export	180620	Chocolate & other food preparations containing cocoa; in blocks, slabs or bars > 2kg	74,374,447	$ 301.11
2024	Netherlands	Export	180100	Cocoa beans; whole or broken, raw or roasted	155,213,415	$ 1,000.52
2024	Netherlands	Export	180690	Chocolate and other food preparations containing cocoa; n.e.c. in chapter 18	139,336,322	$ 1,087.22
2024	Netherlands	Export	180631	Chocolate and other food preparations containing cocoa; in blocks, slabs or bars, filled, weigth < 2kg	217,508,438	$ 1,215.11
2024	Netherlands	Export	180500	Cocoa; powder, not containing added sugar or other sweetening matter	281,104,631	$ 1,259.32
2024	Netherlands	Export	180310	Cocoa; paste, not defatted	205,594,958	$ 1,719.56
2024	Netherlands	Export	180400	Cocoa; butter, fat and oil	234,821,039	$ 3,078.68
				TOTAL		**$ 9,957.61**
						94%

IMPORTANT NOTES:

- ***** gty (kg) Note:** The weight of each category is shown unaffected by the respective factors of conversion. We will ONLY analyze today in terms of monetary value (trade in FOB Million USD for exports, or CIF Million USD for imports).*
- *We are analyzing only the main 6 relevant products (shaded in color melon-soft orange), because they represent 94% of the value.*
- *We have chosen year 2024, as a representative of higher monetary values (it is the year when the prices rose to more than 11,000 per metric ton).*
- *Additionally, to analyze the geographic relative importance per country, we are following the pareto principle (80-20), analyzing only those nations that represent in aggregated value the 80% of exports in FOB Value*



RAW INPUT IMPORTS

- In 2024: The Netherlands imported a total amount of 817.5 thousand tons of cacao beans from the tropical belt nations in 2024.
- 87% of those beans (712.5 tons) were imported from:

IMPORTS

Import Nation	*Thousand tons*
Cote d'Ivoire	292.6
Nigeria	143.9
Cameroon	144.5
Ecuador	40.3
Ghana	41.9
Sierra Leone	27.9
Guinea	21.5
87%	712.5

CACAO BEANS

- The average price CIF value per imported metric ton was $5,217/ton.
- The Netherlands, re-exported 155.2 thousand tons of cacao beans to other nations. Of this total re-exports, 82% or 127 thousands tons of cacao beans were sent to Germany and the rest 18% was sent to other European countries (see next slide).
- The rest of beans 662 thousand tons (817.5-155.2) were processed in the Netherlands in any of the rest of 10 categories show above, and ultimately after its grinding and further processing, these were exported or domestically consumed.
- The Dutch factories transformed, processed, and exported in order of significance, the following products: 180400 (cocoa butter), 180310 (cocoa paste), 180500 (cocoa powder), 180631 (chocolate filled < 2kg), 180690 (chocolate miscellaneous).
- The most important is Cacao Butter with 3.08 billion USD, followed by Cacao paste (1.72 billion), and cocoa powder (1.26 billion).
- Look how important is cocoa butter for the Netherlands (it represent 30% of all exports).

All the graphs prepared by Eleonora Escalante Strategy.
Data from UNComtrade + and WITS-World Bank databases.

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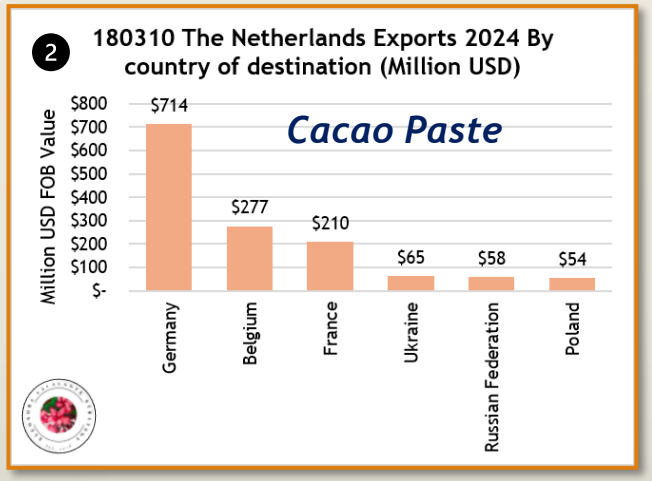
The Netherlands

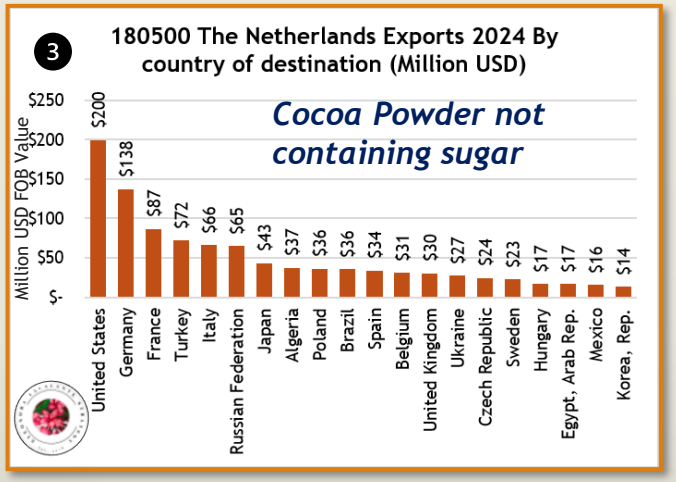
Chocolate Industry Analysis: Germany, Belgium, and the Netherlands

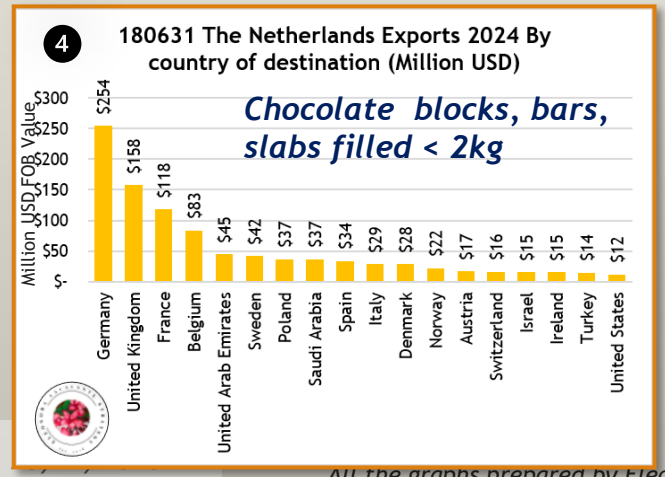
Who are the country clients of The Netherlands. Let´s analyze the year 2024

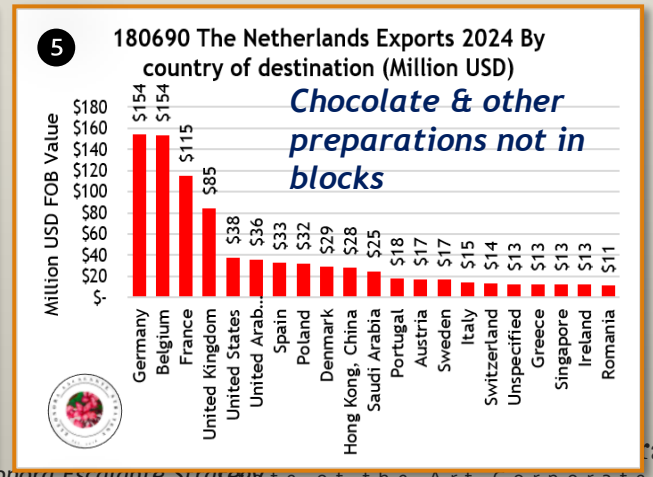
Who are the clients?

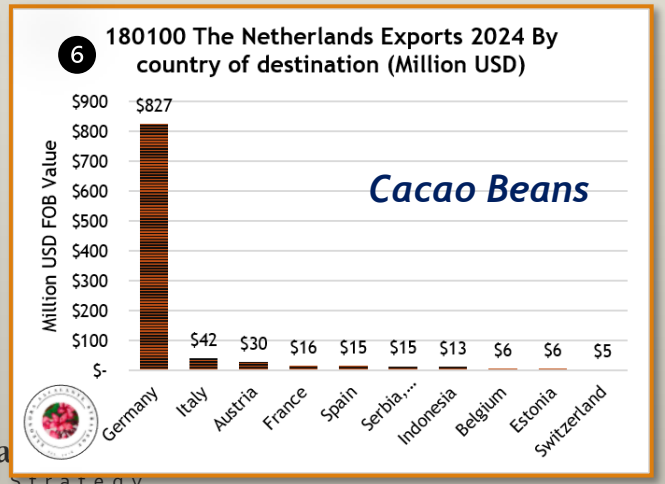












- The main partners of exports trade per country with aggregated FOB Value of the 6 main products exported by The Netherlands represent 94% of the export cocoa-chocolate matrix.
- The main nations that receive these 6 products at your left, have been sorted from largest to smallest. See table below:

Country	Million USD FOB
Germany	$3,079
Belgium	$1,090
France	$776
United Kingdom	$616
USA	$296
Italy	$285
Poland	$262
Switzerland	$226
Turkey	$190
Spain	$187
Total	**$7,006**

- Look at the weight of Germany.
- These 10 countries represent 70% of the total exports
- The most important in economic value are Cacao butter and cacao paste (semifinished goods).

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Data from UNComtrade + and WITS World Bank databases.

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Chocolate Industry Analysis: Germany, Belgium, and the Netherlands

The mapping of cocoa processing and chocolate industry of the Low Countries.

The Netherlands

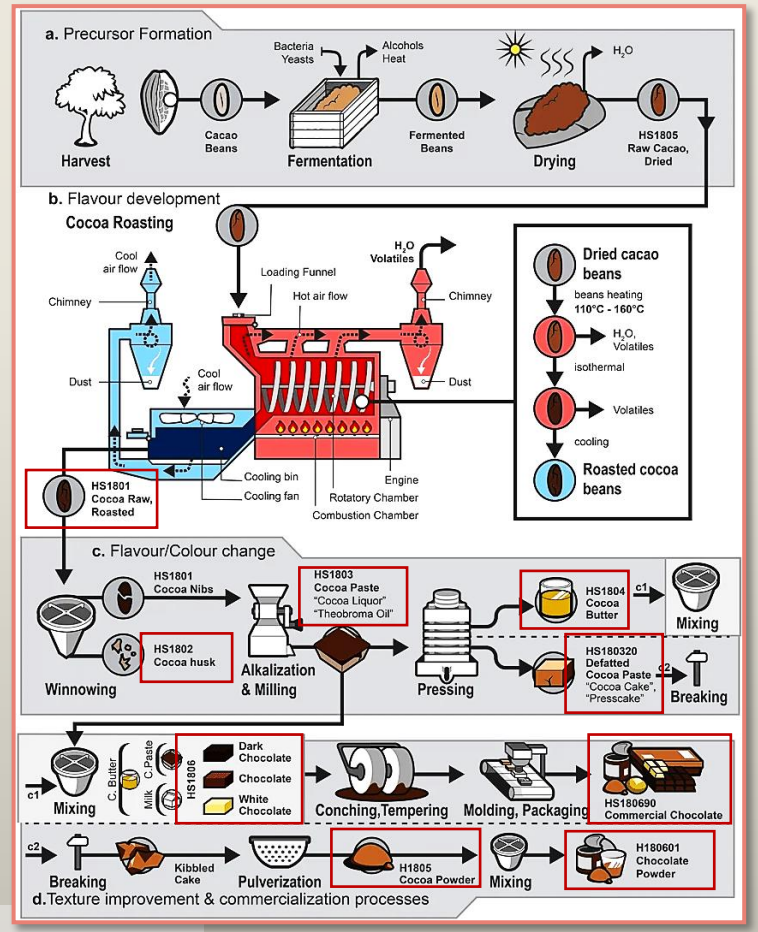


Image Source: https://www.researchgate.net/figure/Industrial-processing-steps-from-raw-cacao-to-chocolate-a-Precursor-formation-b_fig2_357803382

Main players?

Examples Vertically integrated traders with cacao processing plants Or cocoa-chocolate manufacturers only.

Cargill
ofi deZaan
DUTCH COCOA Sustainable Success in Cocoa
ECOM Cocoa B.V
JS COCOA SINCE 1923
TRADIN ORGANIC
cocoa supply EUROPE
Crown of Holland
LBD
LOOS CACAO B.V.
Only processing

Examples: Downstream Chocolate Producers

STEENLAND CHOCOLATE
Délicia TOGETHER WE MAKE LIFE DELICIOUS
Chocomel
FrieslandCampina
MARS
Mars Nederland B.V.
Droste
BRINKERS
HQ: Wawel (Poland)
TONY'S CHOCOLONELY
Tony´s Open Chain:
Barry Callebaut-Cemoi-Baronie
Verkade
DeRuijter
KraftHeinz

Examples of Traders and transportation (sourcing, warehousing, order management, QC, logistics)

Arasco International Food Trading
DAARNHOUWER
ADANADA Your Satisfaction is our Pride
GOODFLOW
C. Steinweg Group
ECOM
KATOEN NATIE
COTTERELL
CWT
VOLLERS
Spliethoff
Only logistics
NUTRADA

Examples: Artisan Dutch Chocolatiers

Luca
Chocolaterie Pierre
Ptelli
Rousseau CHOCOLADE
Van Dam Sinds 1904
MADAQ CHOCOLATIER
De Bonte Koe
Ganache AMSTERDAM
Martinez Chocolatier

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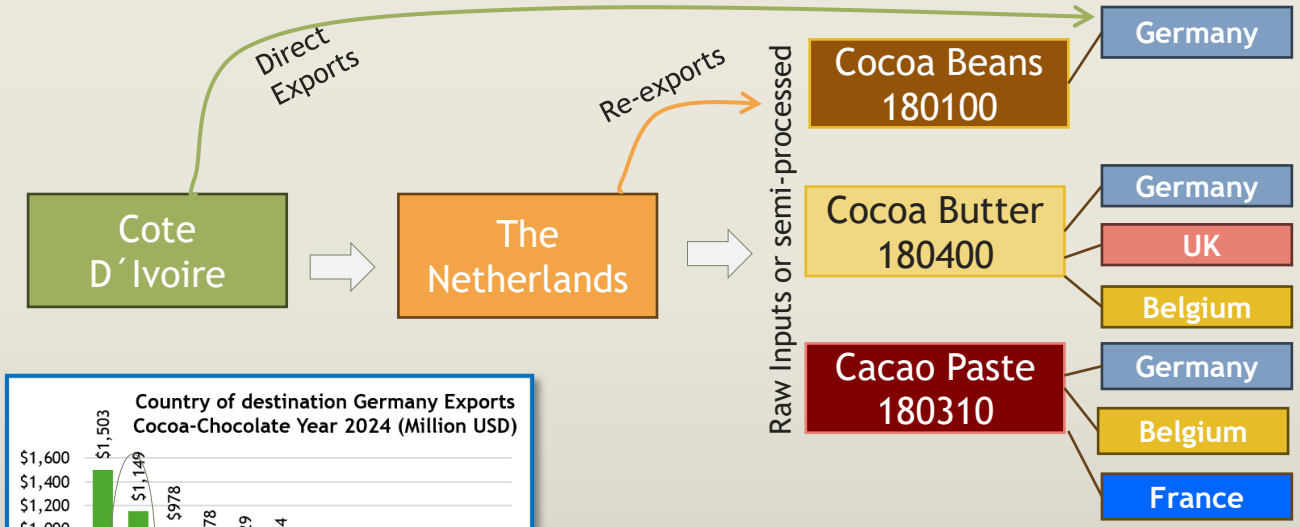
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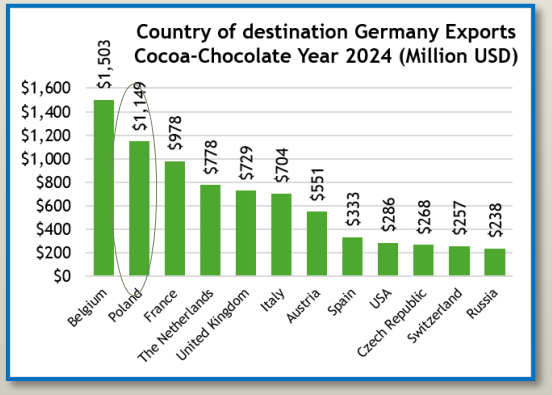
• Grinding capacity of the Netherlands



Chocolate Industry Analysis: Germany, Belgium, and the Netherlands

Let´s follow the flow…





Belgium and Poland, followed by France are the main clients of Germany super grinding capacity (in terms of exports of 2024), yet the raw inputs are mainly coming from the Netherlands. Can you see the complexity and bizarre nature of cocoa-chocolate trade with this example?

How is the industry?



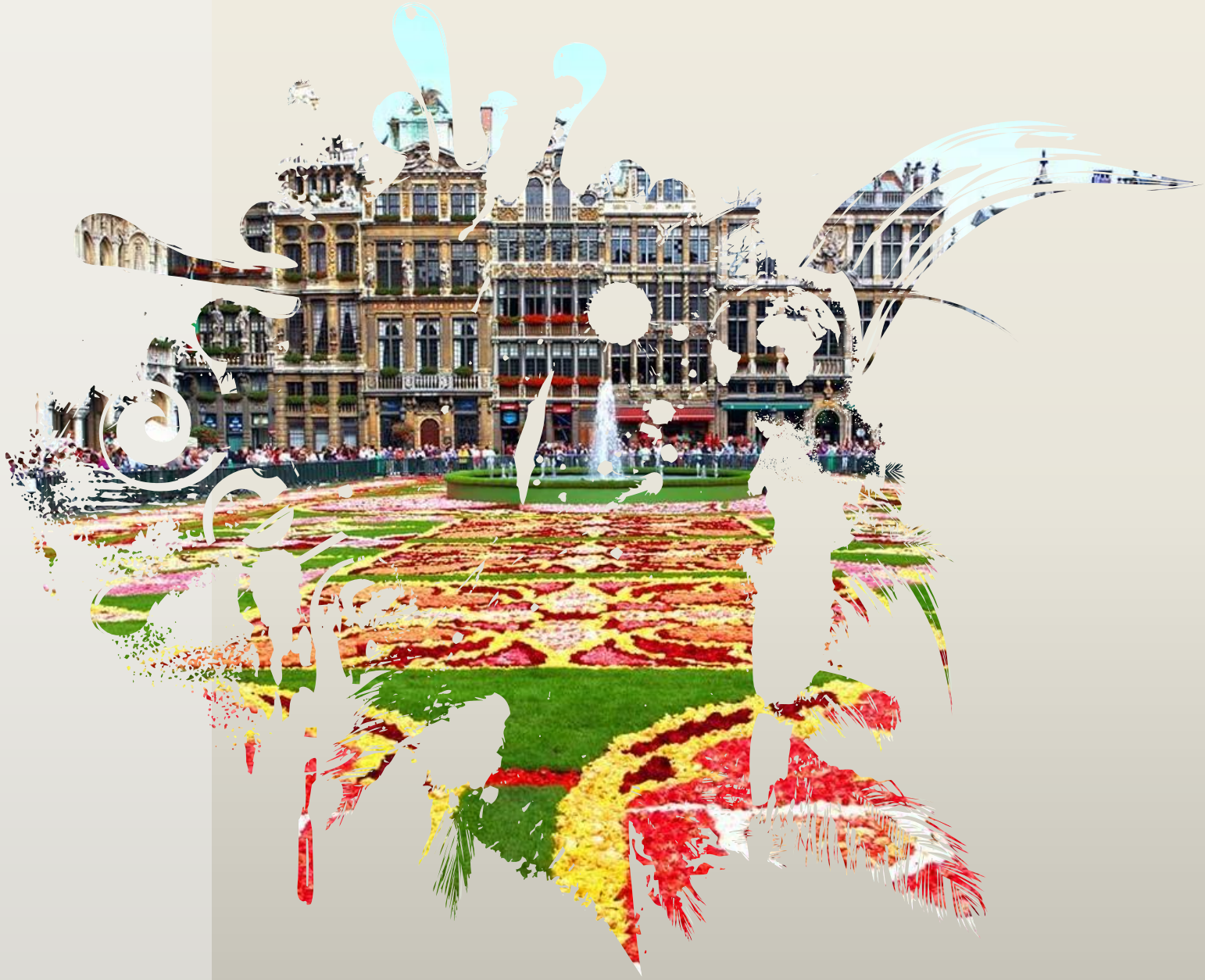
- Let´s explore the flow of the trade.
- The Netherlands imported 293 thousand tons of cacao beans from Cote D´Ivoire, then its re-exported half of it to Germany, but also Germany imported directly another 88 thousand tons from Cote D´Ivoire.
- Additionally, Germany imported a relevant amount of cocoa butter and cacao paste from the Low Countries.
- Let´s continue observing only the flow of what Germany did with those inputs from the Netherlands (this is an approximation flow, choosing only the top 3 to 5 nations).
- Germany is processing its raw inputs received from the Netherlands, mainly for Poland, France, Belgium, and products made in Germany return back to the same Netherlands (it goes back to the source of origin transformed or it is re-exported as the case of cocoa butter).

All the graphs prepared by Eleonora Escalante Strategy.
Data from UNComtrade + databases.

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BELGIUM

Cocoa Global Imports and Exports



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Success Strategies for Small Farm Holders

Chocolate Industry Analysis: Germany, Belgium, and the Netherlands

What are the numbers? Let´s study the year 2024.

What is the product?

EXPORTS				Consolidation All exports of cacao-cocoa-chocolate Belgium. Year 2024	kg **	FOB value in million USD
2024	Belgium	Export	180320	Cocoa; paste, wholly or partly defatted	51,929	$0.51
2024	Belgium	Export	180200	Cocoa; shells, husks, skins and other cocoa waste	6,771,267	$3.08
2024	Belgium	Export	180610	Cocoa; powder, containing added sugar or other sweetening matter	1,986,982	$8.12
2024	Belgium	Export	180500	Cocoa; powder, not containing added sugar or other sweetening matter	6,453,827	$43.97
2024	Belgium	Export	180400	Cocoa; butter, fat and oil	4,785,459	$72.60
2024	Belgium	Export	180100	Cocoa beans; whole or broken, raw or roasted	11,918,696	$74.22
2024	Belgium	Export	180631	Chocolate and other food preparations containing cocoa; in blocks, slabs or bars, filled, < 2kg	22,146,730	$186.04
2024	Belgium	Export	180310	Cocoa; paste, not defatted	19,108,072	$196.27
2024	Belgium	Export	180632	Chocolate and other food preparations containing cocoa; in blocks, slabs or bars, (not filled), < 2kg	37,162,958	$327.65
2024	Belgium	Export	180690	Chocolate and other food preparations containing cocoa; n.e.c. in chapter 18	152,962,972	$1,336.99
2024	Belgium	Export	180620	Chocolate & other food preparations containing cocoa; in blocks, slabs or bars > 2kg	401,576,471	$2,589.33
				Total		**$4,838.78**

IMPORTANT NOTES:

- ***Kg ** Note**: The weight of each category is shown unaffected by the respective factors of conversion. We will ONLY analyze today in terms of monetary value (trade in FOB Million USD for exports, or CIF Million USD for imports).*
- *We are analyzing only the main 5 relevant products (shaded in color light yellow), because they represent 96% of the total exports value.*
- *We have chosen year 2024, as a representative of higher monetary values (it is the year when the prices rose to more than 11,000 per metric ton).*
- *Additionally, to analyze the geographic relative importance per country, we are following the pareto principle (80-20), analyzing only those nations that in total represent in aggregated value the 80% of exports in FOB Value*

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- In 2024: Belgium imported 121.09 thousand tons of cocoa beans (180100), 141 thousand tons of cocoa butter(180400), and 109 thousand tons of cocoa paste (180310). The last two affected by its respective conversion factor.
- The import price CIF Value (average) is in each of the graphs at your right. Cocoa butter CIF price is more than double than cacao bean.
- Also, Belgium is importing Cocoa butter and cocoa paste from the Netherlands, not from the tropical nations.
- The Belgian factories transformed, processed, and exported in order of relevance, the following products: 180620 (chocolate in blocks, slabs or bars > 2 kg), 180690 (chocolate miscellaneous), 180632 (chocolate not filled < 2kg), 180310 (cocoa paste), and 180631 (Chocolate filled < 2 kg). **Eleonora Escalante Strategy**

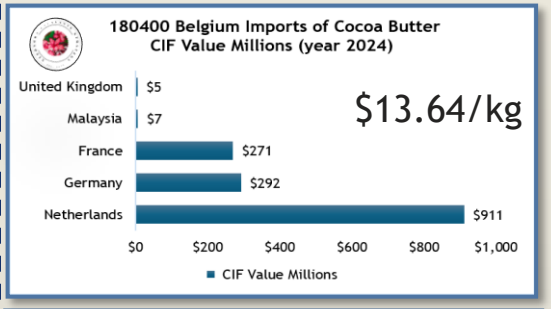
All the graphs prepared by Eleonora Escalante Strategy.
Data from UNComtrade + and WITS-World Bank databases.

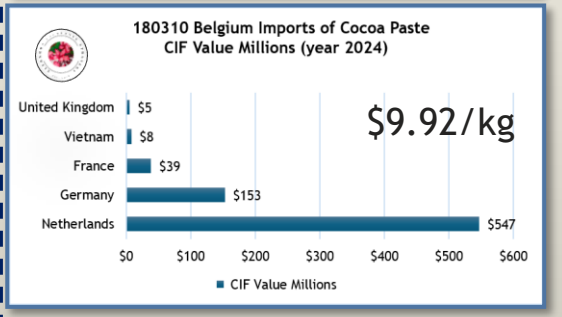
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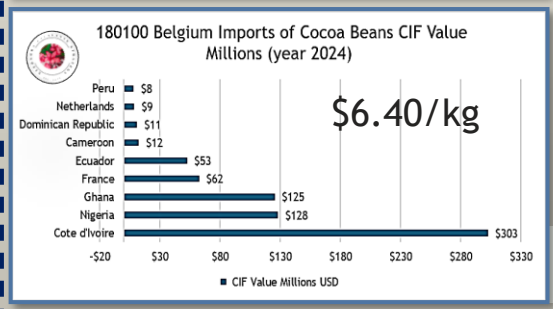


RAW INPUT IMPORTS

- How did Belgium transform the three main raw inputs that imported in 2024? Let´s see these three imports:







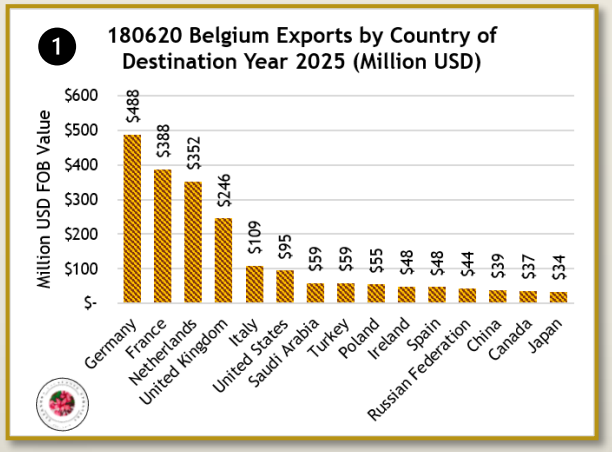
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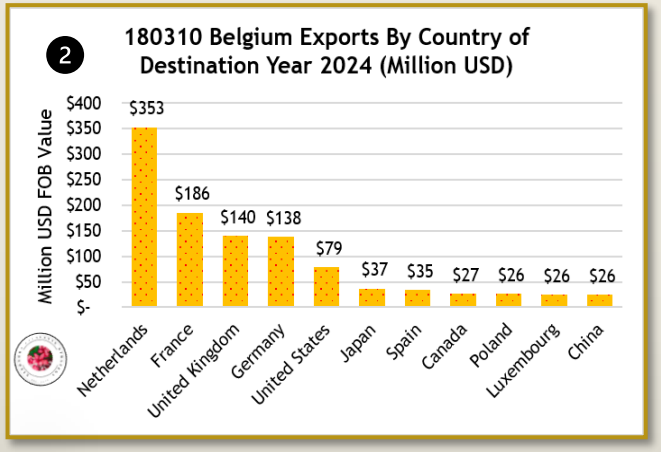


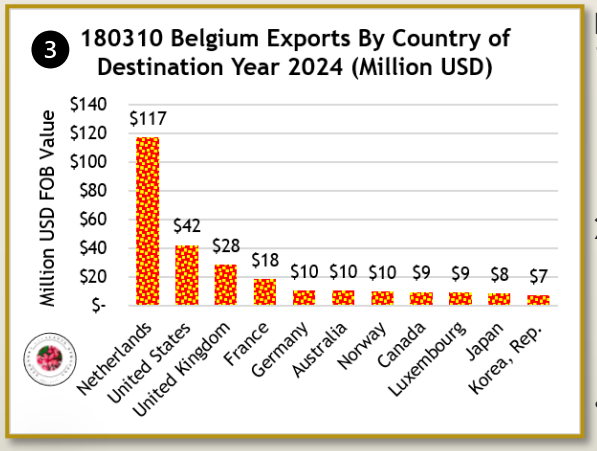
Chocolate Industry Analysis: Germany, Belgium, and the Netherlands

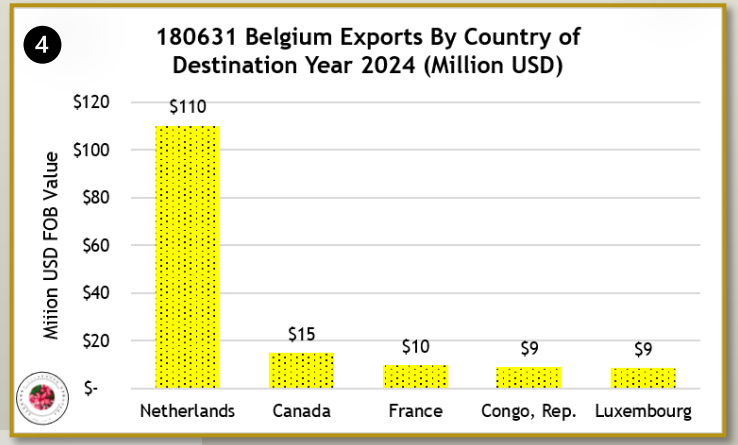
Who are the country clients of Belgium? Let´s analyze the year 2024

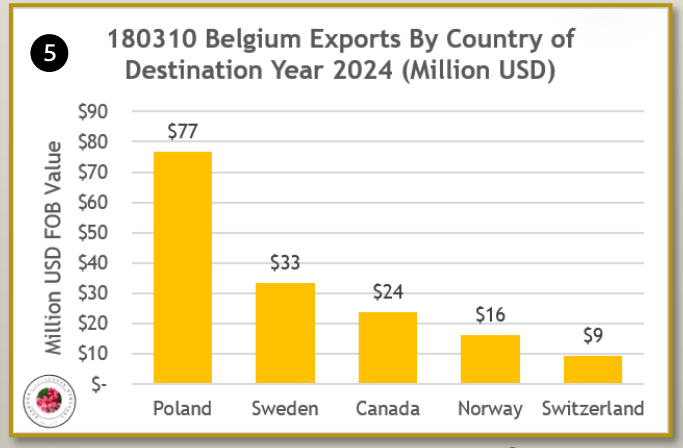
Who are the clients?











Country	FOB value Million USD
The Netherlands	$936.31
Germany	$642.07
United States	$625.28
France	$604.09
UK	$424.37
Poland	$161.48
Italy	$128.71
Canada	$111.21
Spain	$87.89
Japan	$82.12
China	$71.63
Turkey	$68.20
Total	***$ 3,943***

Belgium is exporting mainly two products which are the:

1) 180620 Chocolate & other food preparations containing cocoa; in blocks, slabs or bars > 2kg. This is an input for downstream companies.
2) 180690 Chocolate and other food preparations containing cocoa; n.e.c. in chapter 18. These products belong to the downstream companies (mainly confiseries).

- These two latter categories represent 81% of the total exports of 2024.
- Look who are the main clients of Belgium in the table at your left: Top 5: The Netherlands, Germany, USA, France, and UK.
- 12 countries represent 81% of the total exports.
- An interesting thing is that Poland is a relevant client of cocoa paste (a semifinished) used for manufacturing of downstream products.

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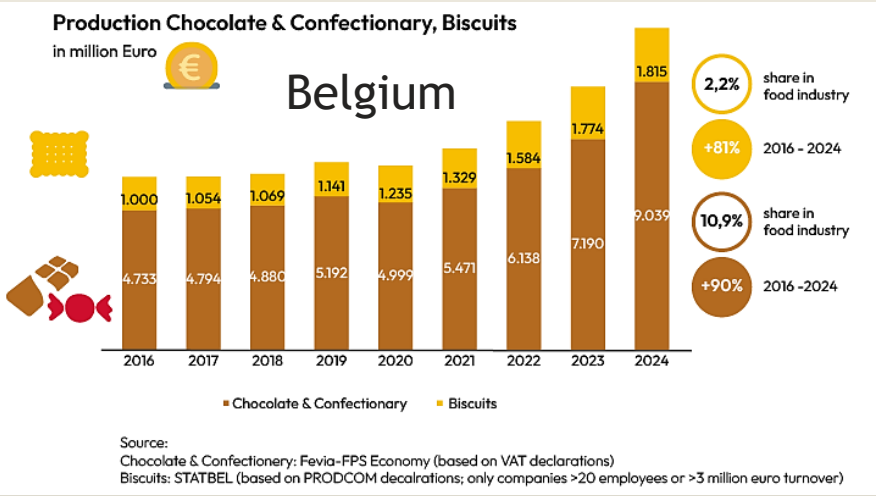
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Chocolate Industry Analysis: Germany, Belgium, and the Netherlands

General Mapping cocoa processing and chocolate industry of Belgium?



Source: https://www.choprabisco.be/en/index.html#members



Main Players

Examples: Vertically integrated traders with cacao processing Or cocoa-chocolate manufacturers.

Fuji Oil Europe-Belgium

BARRY CALLEBAUT Belgium

Cargill Belgium

Puratos Reliable partners in innovation

BARONIE Belgium

Barry Callebaut, Cargill and Puratos. They supply 90% of cocoa raw inputs semifinished from Belgium

Examples: Downstream Chocolate Producers

Natra, Guylian, KIM'S Chocolates, Belgian, GODIVA, Chocolat Essentiel, Jacques, NEUHAUS BELGIUM • 1857

Owned by Yildiz and MBK

Examples of Traders and transportation (sourcing, warehousing, order management, QC, logistics)

msc, MOLENBERGNATIE operated by Ilomar, ZIEGLER, Pacorini, MAERSK, Commodity Centre, KATOEN NATIE, COTTERELL, wemmers TANKTRANSPORT, CMA, VOLLERS, C. Steinweg Group

Examples: Artisan Belgian Chocolatiers

Pierre Marcolini Haute Chocolaterie, WITTAMER, DARCIS CHOCOLATIER, Mary BRUSSELS, Leonidas MAÎTRE CHOCOLATIER 1913, Galler CHOCOLATIER

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Germany

Cocoa Global imports and exports



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Chocolate Industry Analysis: Germany, Belgium, and the Netherlands

Germany

What are the numbers? Let´s study the year 2024. Germany

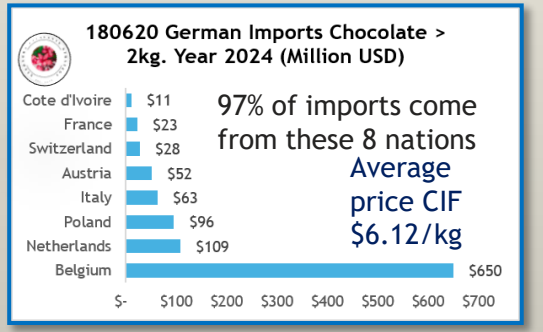
What is the product?

EXPORTS				Consolidation of all exports Cacao-Cocoa-Chocolate Germany year 2024	qty KG **	Fob Value USD Million
2024	Germany	Export	180200	Cocoa; shells, husks, skins and other cocoa waste	31,080,764.79	$5.68
2024	Germany	Export	180610	Cocoa; powder, containing added sugar or other sweetening matter	5,906,685.40	$23.18
2024	Germany	Export	180320	Cocoa; paste, wholly or partly defatted	5,795,534.00	$30.65
2024	Germany	Export	180100	Cocoa beans; whole or broken, raw or roasted	12,028,944.56	$91.15
2024	Germany	Export	180500	Cocoa; powder, not containing added sugar or other sweetening matter	118,869,874.14	$498.51
2024	Germany	Export	180620	Chocolate & other food preparations containing cocoa; > 2kg or in liquid, paste, powder, granular	158,938,714.98	$816.34
2024	Germany	Export	180310	Cocoa; paste, not defatted	89,381,411.91	$907.04
2024	Germany	Export	180631	Chocolate and other food preparations containing cocoa; in blocks, slabs or bars, filled, < 2kg	206,120,047.77	$1,518.32
2024	Germany	Export	180400	Cocoa; butter, fat and oil	118,511,409.45	$1,754.95
2024	Germany	Export	180632	Chocolate and other food preparations containing cocoa; in blocks, slabs or bars, (not filled) < 2kg	239,994,093.75	$1,921.01
2024	Germany	Export	180690	Chocolate and other food preparations containing cocoa; n.e.c. in chapter 18	379,954,591.48	$2,878.99
				TOTAL		$10,445.84

IMPORTANT NOTES FOR EXPORTS TABLE

- ***Kg ** Note:*** *The weight of each category is shown unaffected by the respective factors of conversion. We will ONLY analyze today in terms of monetary value (trade in FOB Million USD for exports, or CIF Million USD for imports).*
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- *Additionally, to analyze the geographic relative importance per country, we are following the pareto principle (80-20), analyzing only those nations that in total represent in aggregated value the 80% of exports in FOB Value.*

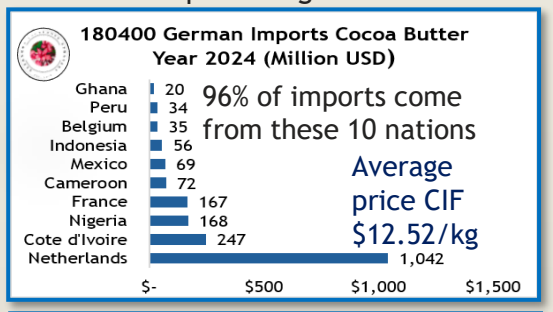
- The importance of understanding the raw inputs origin, and connect to the exports… We can affirm a pattern that is happening here: Germany is definitively processing in the downstream segment. The 4 main products are 180690, 180632, 180400 and 180631. The sum of these 4 is 8 billion USD, or 77% of the total exports (FOB value).

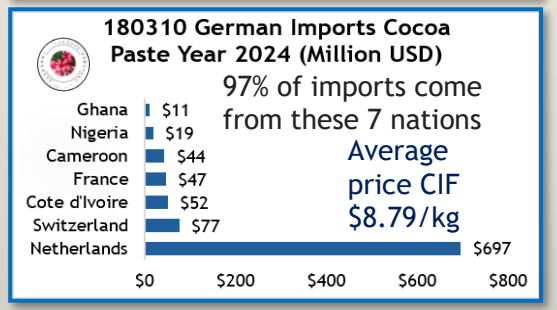


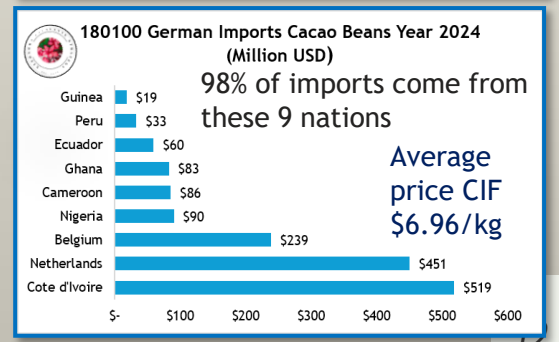
- Germany imported raw inputs mainly from The Netherlands, then Cote D'Ivoire, and Belgium.

IMPORTS

- How did Germany transform the 4 raw inputs that imported in 2024? Let´s see these four imports origin:







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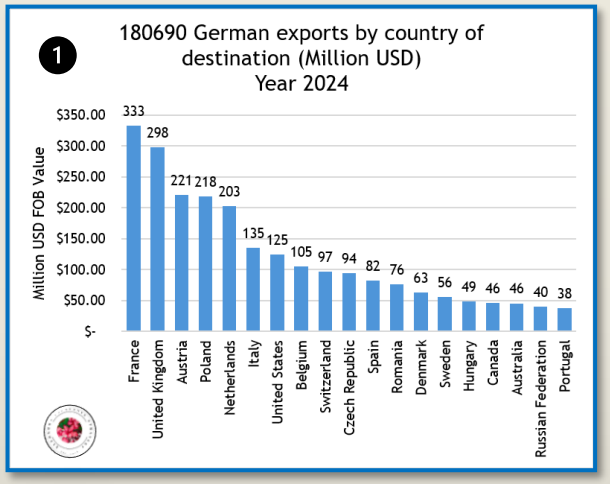
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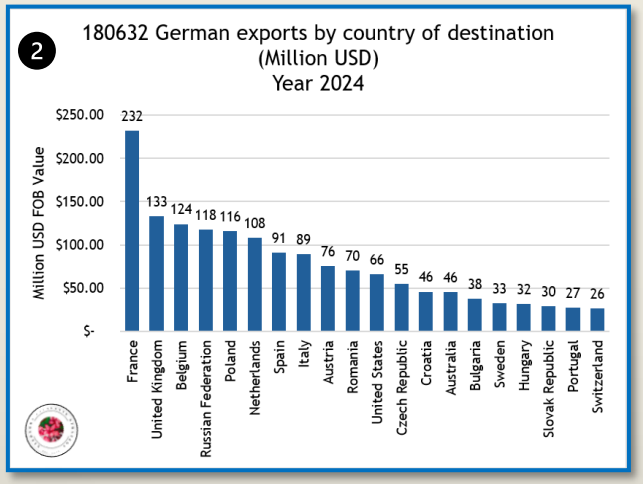
Chocolate Industry Analysis: Germany, Belgium, and the Netherlands

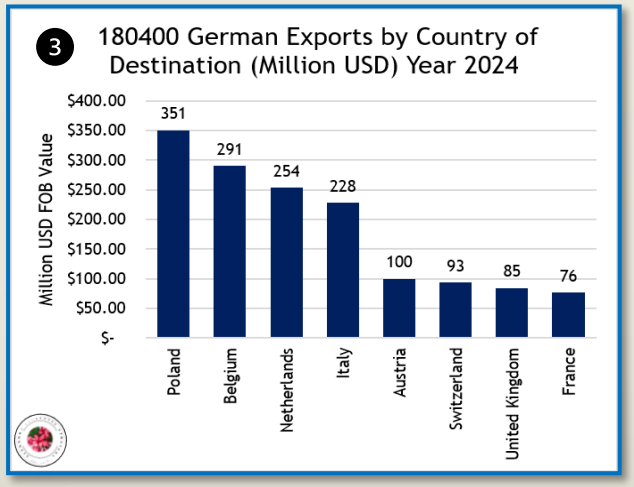


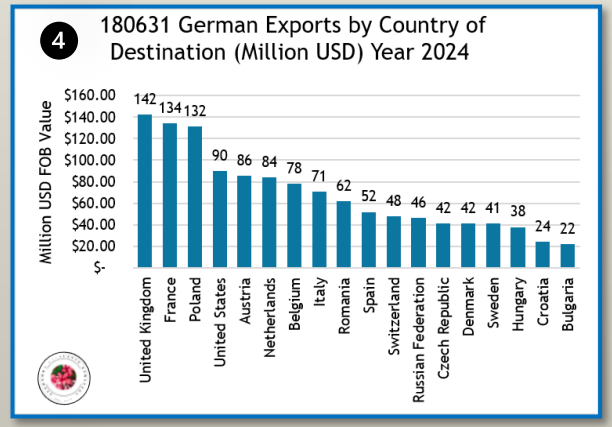
Who are the country clients of Germany? Let´s analyze year 2024

Who are the clients??

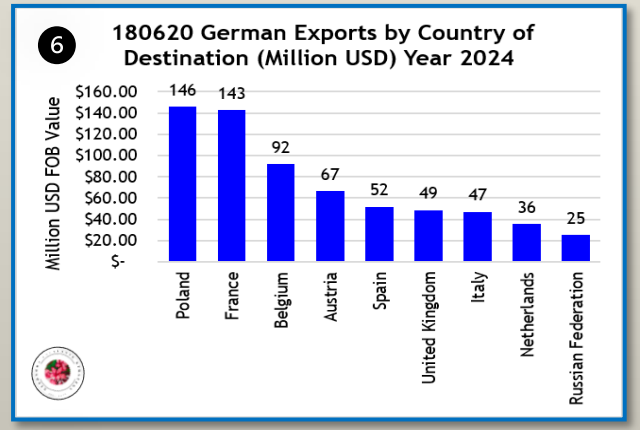




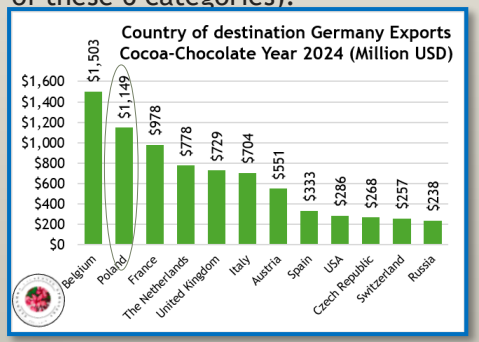








- Germany is a processor of cocoa beans, cocoa paste, and cocoa butter.
- German companies import the raw input products and grind them, or process them further, into the main 6 categories shown in this slide per country of destiny.
- In order of rank, the most relevant is the category 180690, followed by the categories 180632,180400, 180631, 180310, and 180620.
- These 6 categories represent $9.8 billion USD (94% of the total exports).
- The main countries of the latter German destination exports are (in order of significance at the aggregated US$FOB million dollars value of the sum of these 6 categories):



- These 12 nations received 56% of the total cocoa-chocolate exports of Germany.

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Chocolate Industry Analysis: Germany, Belgium, and the Netherlands

Germany

General mapping processing and chocolate industry of Germany

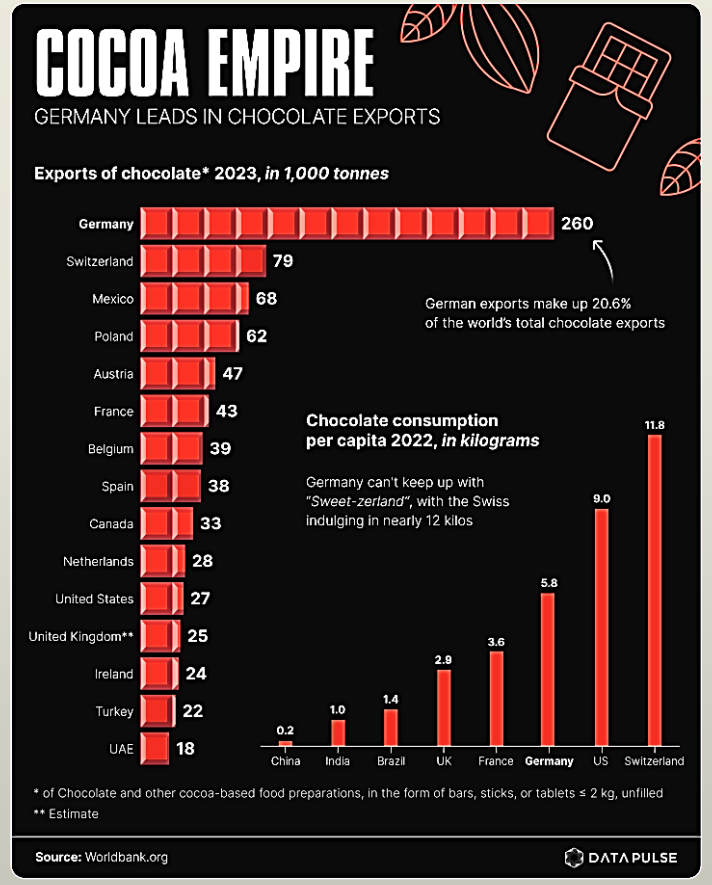


Image Source: https://www.datapulse.de/en/chocolate-exports/

Main Players

Examples: Vertically integrated traders with cacao processing Or cocoa-chocolate manufacturers.

- Barry Callebaut Manufacturing Norderstedt GmbH & Co KG
- Cargill GmbH Cocoa and Chocolate
- Weinrich's finest chocolate since 1895
- FUCHS & HOFFMANN Kruger Group
- SCHOKINAG
- Tulip Cocoa
- KAKAO MANUFAKTUR W4 GMBH
- A&D TRADING GMBH

Examples: Downstream Chocolate Producers

- STORCK Part of Your World
- Rausch Berlin 1918
- coppeneur
- Toms
- KESSKO 1905
- Ritter Sport
- Nestlé
- Ludwig Schokolade Kruger Group
- Meybona

Examples of Traders and transportation (sourcing, warehousing, order management, QC, logistics) to Germany

- msc
- ECOM
- CWT
- VOLLERS
- MAERSK
- CoolCargo

Examples: Artisan German Chocolatiers

- KUMPEL
- Zetti Zeit für Schokolade
- PRALINEN MANUFACTUR GROßE-BÖLTING
- pfersich
- Confiserie Rabbel

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