Summary

This report analyzes the sporting goods market in Germany, which includes equipment and apparel for the following sports activities: team, winter, water, outdoor, fitness, and individual sports. It does not include hunting equipment and most leisure-related vehicles, such as boats, bicycles, motorcycles, and snowmobiles. The statistics used in this report have been revised and are compatible with the statistical system used by the German Sporting Goods Industry Association (BSI) and the German Sporting Goods Retailer Association (VDS). Goods are divided into two categories: specialist and non-specialist. The former refers to performance related sports products sold only in specialty stores, while the latter incorporates those goods produced for the general population.

The report introduces the industry with an in-depth analysis of the current market and its growth prospects followed by a listing and a description of the industry's key suppliers and any barriers to market entry. Finally, it specifies the industry's main trade events and several useful resources.

Germany is the second largest sporting goods market in Europe. It amounted to approximately EUR 2.9 billion in 2007, and is anticipated to grow moderately over the next few years. This growth is mainly driven by the increasing popularity of sports among the German population, fueled largely by the increasing number of the 50+ age group which is taking up a more active lifestyle.

The ten most popular sports in terms of club membership are soccer, fitness, tennis, track and field, handball, horseback riding, fishing, table tennis, skiing, volleyball, and golf. Outdoor sports such as climbing, Nordic walking and hiking have developed into one of the most important sports market segments in the last 15 years and appeal to a large part of the general public. Golf is another sport which has enjoyed a similar boom in recent years.

With 25 million Germans participating in sports activities, and an approximated average annual growth of 1.0% over the next few years, the German sports market continues to be a profitable area for U.S. companies for export and investment. In 2007, Germany was the 3rd largest importer within the EU. The role of U.S. companies is an important one with the United States being Germany’s 10th largest import partner in 2007. With an actual import gain of about EUR 130 million between 2001 and 2007, there are excellent opportunities for U.S. sports product manufacturers. The major competitors are China (53%), Italy (8.9%), Poland (7.8%), the Netherlands (4.3%), France (4.1%), and the Czech Republic (3.2%).

Considering that over 80% of new products are introduced to the German market through trade fairs, U.S. companies interested in entering this market are advised to take advantage of the business opportunities presented at these events. The most important trade fairs for each individual sports industry are listed under “Trade Events” on page 7 of this report. Please let us know how we may assist your business objectives, regardless of whether they are related to these trade shows or not.

Market Overview

Market Demand. In Europe, Germany is the second largest sporting goods market after France and ahead of the UK. In 2007, Germany’s market volume of EUR 2.9 billion accounted for 19% of the total EU market (2003: 21%). German consumers spend slightly more per-capita (EUR 35.57) on sporting goods than the average European consumer (EUR 31.27). While the European sports market grew by an annual average of 2.3% between 2003 and 2007, Germany was the only market recording a decrease of 0.3 % per annum in the same period of time. A growth of 1.2%
in 2006 was short-lived, and 2007 experienced another decline of 2.7%. Winter sports apparel and footwear sales decreased significantly in 2007 due to a warm winter. An additional impact may also have been the VAT increase from 16% to 19%. However, despite this trend certain sub-sectors such as the outdoor sector have continued to grow at a 7% annual rate since 2000. The outdoor sector comprises outdoor activities such as climbing, camping, canoeing, fishing, hiking, trekking, horseback riding, Nordic walking, and rafting.

Within the German sporting goods market, apparel remains to be the largest sub-sector with a 48% share and EUR 1.4 billion in sales in 2007. Sports equipment ranks 2nd with a 30% share (EUR 878 million) followed by the sports shoes segment with 22% (EUR 649 million). While specialized clothing remains important, “sports-inspired” everyday wear drives most sales. The result is a continuing trend towards fashion in the sports clothing industry alongside traditional calls for functionality.

The ten most popular sports in Germany in terms of club membership are soccer (6.3 million), fitness (5.21 million), tennis (1.7 million), track and field (0.9 million), handball (0.83 million), horseback riding (0.76 million), fishing (0.67 million), table tennis (0.65 million), skiing (0.65 million), volleyball (0.49 million), and golf (0.48 million).

German consumption of sports goods, as shown in the following chart, is distributed among several types of sports activities: Team sports (EUR 780 million), with soccer (EUR 78 million) being the most popular, followed by handball and volleyball, continues to be the largest market in Germany. Outdoor ranks 2nd (EUR 650 million), with camping goods accounting for 42% (EUR 273 million) followed by equestrian sports with 30% (EUR 195 million). Individual sports activities rank 3rd with EUR 600 million sales, followed by fitness (EUR 400 million), winter sports (EUR 372 million), and water sports (EUR 125 million). While demand for fitness, outdoor sports and water sports are expected to increase, sales related to winter sports activities are expected to decline even further.

Outdoor sports goods have developed into one of the most important segments of the sporting goods market within the last 15 years. Once hailed as the exclusive domain of extreme athletes, it now attracts a wide public audience. Thanks to a greater interest in nature and the environment within the German population and a
subsequent growth in the popularity of outdoor sports, it has become extremely fashionable to use outdoor equipment in daily life. The result is growing demand throughout the country and an increasingly diverse product selection. Outdoor activities such as climbing, rafting, canoeing, and trekking have gained increased popularity. Nordic walking shows the most rapid growth with two million Germans already actively practicing (70% female).

Golf is another sport which has experienced a boom in recent years. In 2006, the entire market volume of the golf industry in Germany added up to EUR 156 million. Notably, Germany ranks 2nd in all of Europe with respect to the sales volume of golf equipment. There were over 550,000 registered golfers in 2006, a total increase of 150,000 over the 2002 figures. The number of golf clubs has also steadily increased by 10% to over 670 within the aforementioned time frame. Germany also has the largest proportion of female golfers in Europe.

In the last couple of years fun sports – often ‘imported’ from the United States - such as kickboarding, rollerblading, spinning, airsoft, bungee jumping, and paragliding have become an increasing popularity among younger age groups.

Market Trends. For many years now there has been an increasing interest in maintaining a healthy lifestyle, and its advancement has high priority in Germany. Excessive weight problems and obesity are becoming widespread in Germany with levels of obesity increasing in all age groups. Childhood obesity has recently become a federal concern after a study conducted by the EU in 2007 showed that there were two million children in Germany who were overweight or obese. School sports funding, which is a priority for both Federal and State Governments in Germany, is encouraging more physical activity among young people.

Germany is well known internationally for its excellence in a number of different sports including soccer, golf, tennis, and hockey, which ensures interest by Germans of all ages in these sports. The Soccer World Championship in Germany in 2006, regularly organized “Blade Nights,” and the media coverage of national sports idols such as basketball star Dirk Nowitzki, or soccer star Michael Ballack strengthened the trend toward physical recreational pursuits. Such a high interest level will generate greater expenditures on sporting goods, consequently generating more opportunities for U.S. exporters.

The German sporting goods market will also be driven by an increasing sensitivity towards the environmental impact of sports activities, and the environmental sustainability of the utilized equipment.

Despite economic uncertainties, the German sporting goods market is expected to grow moderately over the next few years, fueled largely by the increasing numbers of elderly consumers taking up a more active lifestyle. Germany already has the largest proportion (25 million) of the 50+ age group – the so-called “Best Agers” - within the EU, which is expected to grow more rapidly than elsewhere. As forecasts expect, the percentage of younger age groups will decrease and lifestyles and spending habits of older consumers will gain greater significance in the future.

Market Data

In 2007, Germany’s total sporting goods market was valued at EUR 2.9 billion. The Association of Sporting Goods Retailers (VDS) estimates that the value of the German sporting goods market will increase annually by at least 0.5% over the next two years.

Production. In 2006, there were 317 companies that manufactured sporting goods items in Germany. They usually tend to specialize in particular sports, rather than producing for a wide range of sports activities. Overall production of sporting goods has been decreasing in recent years from EUR 500 million in 2003 to EUR 472 million in 2006 at an average annual rate of 1.9%. In 2007, Germany accounted for 13.3% (EUR 472 million) of the EU sporting goods production, thus ranking 4th behind France, Italy and the U.K. According to Eurostat, 31% (EUR 148 million) of Germany’s production is attributable to team sports; 30% (EUR 144 million) to fitness equipment; 17% (83 EUR million) to camping equipment; 13% (EUR 61 million) to equestrian goods; 3% (EUR 15 million) to balls; 2% (EUR 9 million) to both winter sports and table tennis; 1% (EUR 4 million) to fishing equipment, and 0.4% (EUR 1.5 million) for
water sports. According to Eurostat, production figures for winter sports declined significantly between 2003 and 2007, while the production of outdoor and camping goods increased. Minor declines in production were recorded also for balls, fitness, table tennis, and fishing equipment, as well as water sports, while the production of equestrian goods increased (no data available).

**Imports.** In 2007, Germany’s import total amounted to EUR 1.7 billion. This accounted for 13% of all EU imports by value, and represented an average annual decrease in value of 0.3% since 2003. In 2007, Germany was the 3rd largest importer within the EU behind the U.K. and France. According to the Association of the German Sporting Goods Industry (BSI), China accounted for 53% of these imports, 31% (EUR 513 million) originated from other EU member countries with Italy (8.9%), Poland (7.8%), the Netherlands (4.3%), France (4.1%) and the Czech Republic (3.2%) being the leading supplier states. The United States was Germany’s 10th largest import source in 2007, achieving a 3.6% import market share and ranking above important sporting goods supplier countries like India, Taiwan, Switzerland, and the U.K. With an actual import gain of about EUR 130 million between 2001 and 2007, there are excellent opportunities for U.S. sports product manufacturers.

**Exports.** German sports exports totaled EUR 778 million in 2007. This represented an average annual increase of 4.8% since 2003 (EUR 646 million). Within the EU, Germany was the 3rd largest exporter behind Italy and France. 66% of German exports are intra-European with Austria, France, Switzerland, and the Netherlands being the main export destinations. In terms of product groups, fitness equipment accounted for 19% (EUR 144 million) of Germany’s total exports by value, a 21% decrease over 2003 figures. Winter sports accounted for 15% (EUR 120 million) of total exports (-24%), team sports for 14% (EUR 116 million; +12%), and equestrian products for 12% (EUR 95 million; +10%). The remaining product groups produced the following export values: Camping goods (EUR 77 million), balls (EUR 40 million), fishing (EUR 39 million), table tennis (EUR 37 million), and water sports (EUR 37 million).

### Market Entry

The German sporting goods market is dominated by specialty retail stores. In 2007, there were more than 8,000 sports retailers in business. The current German distribution channels are featured in the table below.

#### Sporting Goods Retail Market in Germany 2007

![Sporting Goods Retail Market in Germany 2007](image)

**Source:** G+J Märkte + Tendenzen

Nevertheless, specialty retail stores have encountered a lot of competition-induced turbulence in recent years, resulting in a dramatic fall in the number of these kinds of institutions. Once littered with small and medium-sized enterprises, Germany’s inner cities are now the domain of one or two large retail stores. This trend has resulted in a standardization of products, as most large chains carry similar goods. Distribution patterns have also undergone significant changes with the growth and prosperity of online shops. Like any other industry, the sporting goods market has to cope with this new form of competition which does not only allow the consumer to order goods online but also to have a direct comparison of prices. Another change in distribution patterns is the growing importance of sales of sporting goods (mainly clothing) in department stores and outlets. However, these distribution channels fail to provide the necessary service and backup support which buyers of professional equipment typically require. Therefore, the preferred distribution channels for sports equipment remain to be the specialty retail stores.
Buying groups are stronger in Germany than in any other EU country with two particular groups dominating the sports retail market (Intersport - http://www.intersport.de: 1,200 members; Sport 2000 - http://www.sport2000.de: 1,000 members). The leading independent sports retailers are Sport Scheck (16 outlets, http://www.sport-scheck.de), Globetrotter (8 outdoor stores, http://www.globetrotter.de), and Sport Mueller (4 outlets, http://www.sport-mueller.de). Major market players, among them U.S. suppliers like Cascade, Columbia, The North Face, Nike, Paramount Fitness, Quicksilver, Timberland, etc. often market their individual brands through company-owned stores. Consumers' demand for quality, service, and reasonable prices have helped such establishments maintain their market share of about 60% despite increased competition from non-traditional retailers. Among the non-specialized retailers, Karstadt operates 130 department stores which sell sporting goods, as well as a number of sports outlets (http://www.karstadt.de). Another leading department store chain is Galeria Kaufhof (126 department stores; http://www.galeria-kaufhof.de). The leading hypermarket is Metro with 123 cash & carry stores (http://www.metrogroup.de), which tend to sell at a low-price level. The leading mail order houses that also sell sporting goods are Otto (http://www.otto.de), Neckermann (http://www.neckermann.de), and Quelle (http://www.quelle.de).

**Distribution Channels.** The most convenient method of selling in the German market is by appointing a local representative, either on a commission basis or under an exclusive distribution agreement. The Association of Commercial Agents (http://www.cdh.de) is a valuable source when looking for sales agents. A very useful business portal in this context is also Sports Contacts (http://www.sports-contacts.de), which specializes in locating business partners across a wide range of product groups.

With Germany being a highly competitive market, it is important to find a distributor with a well-developed marketing network, as well as the ability to provide after-sales services. Reliability, marketing assistance, punctual delivery, and after-sales service capabilities are key factors in maintaining an edge over competitors and sustaining successful business relations in Germany. The minimum duration of a distribution contract is typically one year. A contract will be renewed automatically for the same period unless terminated by one of the parties in time. Wholesale distributors such as Fritz Berger (http://www.fritz-berger.de; distributor of outdoor products) and Lettmann GmbH (http://www.lettmann.de; distributor of water sports products) usually take on the costs of advertising the trademark.

**Price Structure.** Mark-up from importer to retailer can be in the 30-50% range. Because of their stronger leverage with suppliers, major retailers, such as department stores, generally apply a lower mark-up than smaller specialty shops. In order to ensure increased volume sales, U.S. manufacturers are encouraged to establish minimum/maximum selling prices with their importers, distributors, or agents in their contracts.

**Financing.** Financing and payment practices in this industry sector follow “normal” standards. The method of payment depends on the creditworthiness of the company and its relationships. Trade sources reported that for companies that have had no past experience with each other, the standard method of payment is by letter of credit since this offers the highest degree of protection for the sellers. However, financing agreements are generally negotiated privately on a case-by-case basis between the manufacturer/exporter and the importer. The minimum distributor discount is 25%, which covers storage and marketing costs. In representation agreements, the German company is usually granted a 5% discount from the export list price. Price quotations also usually provide payment within 30 days. A 2-3% cash discount is commonly granted for payment received within ten days. Scientific institutions, universities and other public agencies often obtain the customary German 10% “Public Agency Discount” (Behördenrabatt).

**Best Prospects**

- Fitness equipment for physical exercise, gymnastics, or track and field
- Footwear (all sports)
- Golf clubs
- Golf balls
- Inflatable balls for soccer, basketball, field hockey, handball
- Outdoor goods for Hiking/Climbing/Trekking/Nordic Walking Activities
- Roller blades
- Water sports equipment

**Key Suppliers**

The share of U.S. brands in Germany and Europe is significant. U.S. brands are generally very popular in Germany, and U.S. sporting goods manufacturers such as Columbia, Nike, Patagonia, Timberland, and The North Face are major players in the German market.

**Major Players in the German Sports Market (by Product Group)**

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Country Key – (AT) Austria; (AUS) Australia; (CH) Switzerland; (FR) France; (GER) Germany; (IT) Italy; (J) Japan; (SWE) Sweden; (UK) United Kingdom; (US) United States of America
Prospective Buyers

The German population is relatively wealthy with an average annual income of over EUR 32,000. Over 25 million Germans participate in sports activities, spending approximately EUR 36 per person annually.

The typical German sporting goods buyer fits into a broad age range, reflecting the variety of sports and the use of sports items in daily life. Extreme sports such as free climbing, hang gliding, and bungee jumping typically attract people in their 20s and early 30s, while participants in lighter sports, such as Nordic walking are either from the baby boom generation or older. Sports such as skiing and hiking bridge the generation gap, attracting people of all ages.

Germans also expect high quality from their goods, in that apparel and equipment also counts as a status symbol. This applies not only to clothing, but also equipment and accessories. In many cases, consumers have purchased low-quality products only to be disappointed by the result. The consequence, particularly among returning customers, is the demand for the best and most professional equipment even among non-professionals.

Market Issues & Obstacles

The import climate for sporting goods is satisfactory in Germany. Import restrictions, such as quotas, do not exist, however import duties do. German importers have to pay a 19% import-turnover tax on the CIF (Cost, Insurance, and Freight) value of imported sports equipment and accessories. This tax is passed on in later distribution stages to the consumer as a value added tax (VAT). Customs duties have to be paid when clearing goods through customs. For sports equipment, the European external tariff rate is presently six percent. Detailed information on customs issues can be found on the following web pages:


Standards and Requirements. In order to be utilized or marketed in Germany and Europe, outdoor equipment needs to meet a variety of safety and technical DIN (Deutsche Industrie Norm). A list of standards and testing procedures can be ordered from the publisher of the German Industry Standards Committee – Beuth Verlag GmbH (Beuth Publishing) at: http://www2.din.de/index.php?lang=en. Underwriters Laboratories, Inc. (UL) (www.ul.com) also assists U.S. manufacturers and exporters with international standards, certification requirements, and compliance procedures. UL has agreements with a number of foreign agencies and conducts product testing and factory evaluations. The National Institute of Standards and Technology (www.nist.gov) is a U.S. government contact for foreign standards information. Detailed information is also available in the Country Commercial Guide (www.export.gov/mrktresearch). Detailed information on standards and inspecting agencies, including the TUV is included in the Country Commercial Guide, available at www.export.gov, or through the various U.S. Department of Commerce - Export Assistance Centers in the United States.

Trade Events

Participating in German trade fairs is one of the most cost-effective ways of testing the market's receptiveness to a product, investigating competitors, and finding customers or potential agents and distributors. Due to their international significance and large attendance, German trade fairs provide an excellent vehicle for introducing new products and for presenting a gateway to both EU markets and Eastern European markets.

Resources and Key Contacts

Association of German Sporting Goods Retailers, www.vds-sportfachhandel.de
European Outdoor Group, www.europeanoutdoorgroup.com
Association of the German Fitness Industry, http://www.vdf-fitnessverband.de
German Golf Association, www.golf.de

Advertising in trade journals is an effective means of entering the German market. The following are links to a selection of leading magazines in Germany reporting either on the overall sports market, such as www.sport-und-mode-magazin.de, www.saz.de, or on particular sports activities, such as: www.outdoor-magazin.com, www.outdoorwelt.de, www.golf.de/journal (golf), www.boote.de (boating), www.ski-magazin.de (skiing), www.wassersport-magazin.com (water sports), www.kanumagazin.de (canoeing), www.wandermagazin.de (hiking), www.reitsport-markt.de (equitation), www.divemaster.de (diving).
U.S. firms can use these trade journals to obtain market information, follow industry trends, and advertise their products. All magazines are published in German.

For More Information
The U.S. Commercial Service in Munich, Germany can be contacted via e-mail at: dagmar.winkler-helmdach@mail.doc.gov; Phone: +49-89-2888-769; Fax: +49-89-285261; or by visiting our website: www.buyusa.gov/germany/en

The U.S. Commercial Service — Your Global Business Partner
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