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Citrus

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Most of Germany's imports of citrus originate from Mediterranean countries. Spain is the largest supplier of fresh citrus fruits in the German market. In MY 1997/98 Spain increased exports of fresh citrus to German due to high yields. Estimates indicate a lower citrus production in the Mediterranean countries and thus a decrease of exports for MY 1998/99. The United States leads Germany's grapefruit imports with a market share of around 27 percent (MY 1997/98) but faces increased competition from Israel.

Includes Trade Matrix:

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Executive Summary

Germany does not produce fresh citrus fruit so consumption is met solely by imports. Supply and consumption of citrus fruit in Germany are closely correlated with availability of exports in Mediterranean countries, where most of Germany's imports of fresh citrus fruits originate. The only exception is the market for fresh grapefruit, where the United States leads with an average annual market share of 27 percent. Spain is the largest supplier of fresh citrus fruit to Germany with a 59 percent market share in fresh oranges, 80 percent in fresh crossbreeds (e.g. tangerines and mandarins), and 64 percent in fresh lemons in marketing year (MY) 1996/1997 (October/September). Brazil is the largest supplier of orange juice to Germany with a market share of 73 percent in MY 1996/97.

In general U.S. exports of fresh citrus to German are negligible. However, the United States is the most important supplier of grapefruits in the German market.

Germany reexports limited quantities of fresh citrus fruits. Considerable quantities of orange concentrate are imported into Germany, processed into juice, then exported to other EU countries, mainly France, the Netherlands and Belgium.

General

The data shown in the trade matrices for fresh citrus fruit are based on the local marketing year October through September. Demand and consumption of all fresh citrus fruit in Germany depend on the size of citrus crop and export availability in Mediterranean countries.

German imports of fresh oranges in MY 1996/97 totaled 448,721 MT, down 24 percent from the previous marketing year due to extreme low yields in MY 1996/1997. Imports through August 1998 totaled 527,877 MT, indicating a sharp increase from the last marketing year import level due to record Spanish yields of MY (1997/98). The bulk of German imports stems from Spain (1997/98: 59 percent). This explains the sharp German import increase in MY 1997/98 because Spanish orange production grew by 24 percent. Morocco, Italy, South Africa and Greece also supplied considerable quantities and now exceed traditional exporters like Cyprus and Argentina. Estimates for the MY 1998/99 indicate fewer fresh orange exports from Spain (-9 percent), Italy (-8 percent) and Morocco (-18 percent) while other countries will probably increase exports (Israel, Greece, Turkey). U.S. shipments of oranges are negligible.

Imports of fresh crossbreeds in MY 1996/97 totaled 408,796 MT, slightly down from the previous year. They are expected to rise sharply in MY 1997/98 as indicated by exports from October 1997 to August 1998 (675,853 MT). The increase of German crossbreed imports in MY 1997/98 is a function of increased Spanish exports. Spain, the main supplier of fresh crossbreeds in Germany, increased its exports to Germany by 78 percent between October 1997 and August 1998, based on the record crop in MY 1997/98. Thus, Spain has an import market share of 81 percent in MY 1996/97, followed by Morocco, Italy, Greece and Turkey. New estimates for Spanish crossbreeds production forecast a lower yield in the following MY 1998/99 due to unfavourable cold weather conditions during the blossom and growth period. Therefore less Spanish crossbreed exports from Spain to Germany can be expected in the next market year. However, crossbreeds still are quite popular in Germany so further growth of consumption can be foreseen in the next years.

Imports of fresh lemons amounted to 126,376 MT in MY 1996/97, slightly less than the previous marketing year and are expected to reach the same level in MY 1997/98. In MY 1996/97, Spain, Argentina, Italy, and Turkey supplied around 93 percent of this market. Between October 1997 and August 1998, German lemon imports were 120,801 MT indicating a stable import level. In that period Spain increased its exports to Germany by 18 percent.

As grapefruits are not as popular as “snack fruits” (e.g. crossbreeds) which can be easily peeled. German consumption stagnated during the last years. During MY 1996/97 German imports of grapefruit totaled 82,912 MT and will nearly remain stable in MY 1997/98. Between October 1997 and August 1998, German imports of grapefruit totaled 77,083 MT, with a U.S. market share of 27 percent. The United States still is the most important exporter of grapefruit to Germany with the highest import market share. Other important suppliers are South Africa, Turkey and Israel. In 1998, Israel was the strongest import competitor in Germany for U.S. grapefruit as this country increased exports by 78 percent from 9,266 (MY 1996/97) to 16,524 (MY 1997/98). Estimates for MY 1998/99 depict that grapefruit exports of the Mediterranean countries will grow by seven percent overall. As 60 percent of all grapefruit exports of this area come from Israel, it will increase its efforts to export grapefruit to Germany in the following years.

Imports of orange juice (65 Brix) totaled 249,181 MT in MY 1996/97, with Brazil supplying about 73 percent (181,862 MT) of the market followed by the Netherlands and Switzerland. Through August 1998, imports in MY 1997/98 totaled 249,608 MT. Thus, the upward trend of recent years will probably continue. Brazil still is by far the most important supplier of orange juice with 178,963 MT between October 1997 and August 1998. Transshipments through the Netherlands are around 31,979 MT, indicating a slight increase compared to the previous year (1997/98: 31,387 MT). The United States is a residual supplier of orange juice and accounted for around one percent import volume market share in Germany. The main reason for this unfortunate fact is largely the unavailability of sufficient orange juice for export.

The trade data matrix for orange juice covers total imports of all categories of orange juice. In order to improve the usefulness of these data, imports of different juices consisting of varying concentrations were converted to a single-strength equivalent (i.e. 11.2 Brix or 45 oexle), which differs slightly from the 11.8 Brix considered in the U.S. as single strength). Various conversion factors for the individual categories of juices were used. This is necessary as German and EU import statistics only distinguish citrus juices by specific density of less than or greater than 1.33 kg/l.

Furthermore, because of considerable differences in the concentration of products imported versus products exported, but shown under the same product category, different conversion factors were applied for imported and exported products. The calculated single-strength equivalent citrus juice trade data were converted into 65 Brix equivalent using a factor of 5.8.

Table 1: German Exports of Fresh Oranges (in MT)

MY 1996/97		MY 1997/98	
U.S.A.	-	U.S.A.	-
SWEDEN	4,259	SWEDEN	6,666
NETHERLANDS	4,243	POLAND	4,042
AUSTRIA	2,645	DENMARK	3,582
DENMARK	2,289	FINLAND	2,979
FINLAND	2,081	AUSTRIA	2,938
POLAND	1,978	BEL/LUX	2,035
RUSSIA	1,247	NETHERLANDS	1,635
ITALY	895	GREAT BRITAIN	961
BEL/LUX	635	FRANCE	811
CZECH REPUBLIC	452	SPAIN	664
OTHER	1,139	OTHER	1,945
WORLD	21,862	WORLD	28,258

Note: MY October/September

MY 1997/98 includes data from October 1997 to August 1998.

Source: FAS/Bonn based on official trade statistics.

Table 2: German Imports of Fresh Oranges (in MT)

MY 1996/97		MY 1997/98	
U.S.A.	12	U.S.A.	18
SPAIN	268,950	SPAIN	356,850
MOROCCO	50,776	ITALY	55,822
ITALY	43,423	MOROCCO	43,085
SOUTH AFRICA	39,079	SOUTH AFRICA	24,853
GREECE	20,795	GREECE	22,734
ARGENTINA	7,082	ARGENTINA	6,404
CYPRUS	3,923	ISRAEL	6,121
TURKEY	3,596	CYPRUS	2,836
ISRAEL	3,066	FRANCE	2,664
URUGUAY	1,621	URUGUAY	1,751
OTHER	6,396	OTHER	4,740
WORLD	448,721	WORLD	527,877

Note: MY October/September

MY 1997/98 includes data from October 1997 to August 1998.

Source: FAS/Bonn based on official trade statistics.

Table 3: German Exports of Fresh Crossbreeds (in MT)

MY 1996/97		MY 1997/98	
U.S.A.	-	U.S.A.	-
POLAND	8,417	SWEDEN	10,898
SWEDEN	6,990	POLAND	9,643
FINLAND	6,392	FINLAND	6,259
NETHERLANDS	1,910	RUSSIA	3,368
ITALY	1,857	DENMARK	2,700
AUSTRIA	1,434	AUSTRIA	2,512
CZECH REPUBLIC	997	NETHERLANDS	2,241
RUSSIA	991	ITALY	2,143
DENMARK	904	FRANCE	465
GREAT BRITAIN	882	CZECH REPUBLIC	320
OTHER	1,195	OTHER	1,366
WORLD	31,968	WORLD	41,915

Note: MY October/September

MY 1997/98 includes data from October 1997 to August 1998.

Source: FAS/Bonn based on official trade statistics.

Table 4: German Imports of Fresh Crossbreeds (in MT)

MY 1996/97		MY 1997/98	
U.S.A.	143	U.S.A.	137
SPAIN	330,991	SPAIN	591,082
MOROCCO	30,620	MOROCCO	32,406
ITALY	14,747	ITALY	11,191
GREECE	11,573	TURKEY	10,738
TURKEY	9,121	SOUTH AFRICA	6,411
SOUTH AFRICA	3,215	GREECE	6,399
ARGENTINA	2,458	ISRAEL	5,245
ISRAEL	1,386	ARGENTINA	4,181
FRANCE	1,125	CYPRUS	3,886
URUGUAY	834	FRANCE	2,423
OTHER	2,584	OTHER	1,755
WORLD	408,796	WORLD	675,853

Note: MY October/September

MY 1997/98 includes data from October 1997 to August 1998.

Source: FAS/Bonn based on official trade statistics.

Table 5: German Exports of Lemons in (in MT)

MY 1996/97		MY 1997/98	
U.S.A.	-	U.S.A.	-
RUSSIA	1,822	RUSSIA	2,087
POLAND	1,312	AUSTRIA	1,576
AUSTRIA	952	POLAND	789
NETHERLANDS	464	NETHERLANDS	724
DENMARK	332	DENMARK	461
SWEDEN	303	FINLAND	346
ITALY	261	ITALY	330
FINLAND	225	SWEDEN	278
BELARUS	150	GREAT BRITAIN	105
UKRAINE	81	FRANCE	97
OTHER	242	OTHER	298
WORLD	6,143	WORLD	7,091

Note: MY October/September

MY 1997/98 includes data from October 1997 to August 1998.

Source: FAS/Bonn based on official trade statistics.

Table 6: German Imports of Lemons (in MT)

MY 1996/97		MY 1997/98	
U.S.A.	21	U.S.A.	4
SPAIN	81,043	SPAIN	95,723
ARGENTINA	14,462	ARGENTINA	8,430
ITALY	12,275	ITALY	7,030
TURKEY	10,164	SOUTH AFRICA	3,016
CYPRUS	2,811	GREECE	2,597
GREECE	1,951	CYPRUS	2,016
SOUTH AFRICA	1,726	TURKEY	763
URUGUAY	1,183	URUGUAY	587
NETHERLANDS	197	NETHERLANDS	147
AUSTRIA	167	BRAZIL	146
OTHER	377	OTHER	342
WORLD	126,376	WORLD	120,801

Note: MY October/September

MY 1997/98 includes data from October 1997 to August 1998.

Source: FAS/Bonn based on official trade statistics.

Table 7: German Exports of Grapefruit (in MT)

MY 1996/97		MY 1997/98	
U.S.A.	-	U.S.A.	-
POLAND	4,630	POLAND	2,029
NETHERLANDS	1,154	NETHERLANDS	1,101
ITALY	809	BEL/LUX	649
SWEDEN	535	DENMARK	458
DENMARK	377	AUSTRIA	417
AUSTRIA	293	GREAT BRITAIN	383
BEL/LUX	245	ITALY	338
FRANCE	178	SWEDEN	199
GREAT BRITAIN	146	FRANCE	99
SPAIN	72	GREECE	67
OTHER	52	OTHER	100
WORLD	8,491	WORLD	5,840

Note: MY October/September

MY 1997/98 includes data from October 1997 to August 1998.

Source: FAS/Bonn based on official trade statistics.

Table 8: German Imports of Grapefruit (in MT)

MY 1996/97		MY 1997/98	
U.S.A.	20,086	U.S.A.	20,638
SOUTH AFRICA	14,591	ISRAEL	16,524
TURKEY	13,290	SOUTH AFRICA	11,493
ISRAEL	9,266	SPAIN	7,115
CUBA	5,718	TURKEY	6,191
ARGENTINA	5,046	ARGENTINA	4,667
SPAIN	4,591	CUBA	3,669
CYPRUS	4,169	CYPRUS	3,094
HONDURAS	2,210	HONDURAS	1,833
SWAZILAND	1,605	SWAZILAND	733
URUGUAY	448	MEXICO	318
OTHER	1,892	OTHER	808
WORLD	82,912	WORLD	77,083

Note: MY October/September

MY 1997/98 includes data from October 1997 to August 1998.

Source: FAS/Bonn based on official trade statistics.

Table 9: German Exports of Orange Juice (in MT)

MY 1996/97		MY 1997/98	
U.S.A.	-	U.S.A.	102
FRANCE	27,806	FRANCE	28,530
BEL/LUX	14,467	NETHERLANDS	14,784
NETHERLANDS	13,655	BEL/LUX	13,803
GREAT BRITAIN	5,988	DENMARK	6,014
SPAIN	2,613	GREAT BRITAIN	5,368
DENMARK	2,467	SWEDEN	3,129
ITALY	2,446	SPAIN	2,363
SWEDEN	1,431	ITALY	2,102
CZECH REPUBLIC	1,235	PORTUGAL	1,087
PORTUGAL	878	CZECH REPUBLIC	583
OTHER	4,010	OTHER	3,519
WORLD	76,996	WORLD	81,384

Note: MY October/September

MY 1997/98 includes data from October 1997 to August 1998.

Source: FAS/Bonn based on official trade statistics.

Table 10: German Imports of Orange Juice (in MT)

MY 1996/97		MY 1997/98	
U.S.A.	3,266	U.S.A.	2,552
BRAZIL	181,862	BRAZIL	178,963
NETHERLANDS	31,387	NETHERLANDS	31,979
SWITZERLAND	5,398	SWITZERLAND	6,775
ITALY	4,738	SPAIN	5,578
SPAIN	4,628	ITALY	5,404
BEL/LUX	3,517	BEL/LUX	5,192
POLAND	2,230	POLAND	2,767
CZECH REPUBLIC	2,025	CZECH REPUBLIC	1,327
CUBA	1,813	GREECE	1,354
FRANCE	1,737	FRANCE	1,292
OTHER	6,579	OTHER	6,425
WORLD	249,181	WORLD	249,608

Note: MY October/September

MY 1997/98 includes data from October 1997 to August 1998.

Source: FAS/Bonn based on official trade statistics.