



Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Required Report - public distribution

Date: 12/11/2001

GAIN Report #GM1035

Germany

Citrus

Trade Report

2001

Approved by:

Richard K. Petges

U.S. Embassy

Prepared by:

Sabine Lieberz

Report Highlights:

In the first eleven month of MY 2000/2001 (Oct/Aug) total German imports of fresh citrus fruit amounted to 1,055,812 MT, 1.9 percent or 20,424 MT of which originated from the United States. Grapefruit accounted for almost all of the US citrus exports to Germany. Spain supplies 75 percent of all citrus imported into Germany.

For MY 2001/2002 German citrus imports are expected to rise in response to increased production, and an estimated 12 percent export increase from Mediterranean countries. Imports from the US face the disadvantage of a high US\$/Euro exchange rate and are therefore expected to decline.

Includes PSD changes: No
Includes Trade Matrix: Yes
Trade Report
Berlin [GM1], GM

Table of Contents

Executive Summary	1
General	2
Table 1: German Import and Export of Fresh Oranges	5
Table 2: German Import and Export of Fresh Crossbreeds	6
Table 3: German Import and Export of Fresh Lemons	7
Table 4: German Import and Export of Fresh Grapefruit	8
Table 5: German Import and Export of Orange Juice	9
Table 6: Citrus Exports of Mediterranean Countries	10
Table 7: Per Capita Consumption of Fruit Juices and Nectars 1995-2000 (in liter)	11

Executive Summary

Note : The data shown in the trade matrices are based on the local marketing year October through September, however, as data for September 2001 is not yet available, for comparisons only the months of October through August are used. This seems to be more accurate than extrapolating, as September is a month with few imports.

Germany does not produce fresh citrus fruit therefore consumption is met solely by imports. Most of the imports originate from Mediterranean countries, mainly Spain. Only grapefruit and lemons originate in substantial amounts from countries outside the Mediterranean Sea area. In MY 2000/01 (Oct/Aug) the United States held an import share of 28 percent for grapefruit and Argentina supplied 11 percent of the imported lemons. Spain is the largest supplier of fresh citrus fruit to Germany with a 75 percent market share in total, 88 percent market share in fresh crossbreeds (e.g. tangerines and mandarins), 75 percent in fresh lemons, and 72 percent in fresh oranges, in MY 2000/2001 (Oct/Aug). Brazil is the largest supplier of orange juice to Germany with a market share of 59 percent in MY 2000/2001 (Oct/Aug).

In general, U.S. exports of fresh citrus to Germany are negligible. For the first eleven month of MY 2000/2001(Oct/Aug) total citrus exports to Germany amounted to 20,424 MT, which represented merely 1.9 percent of total German citrus imports. However, the United States is the most important supplier of grapefruit in the German market (mainly the Ruby Red variety) with a 28 percent share of the grapefruit import volume.

Germany re-exports limited quantities of fresh citrus fruits (34,173 MT in MY 2000/2001 (Oct/Aug)). However, considerable quantities of orange juice concentrate are imported into Germany, processed into juice, then exported mainly to other EU countries, especially France, Spain, the Netherlands, Belgium and Great Britain.

Data for MY 2000/2001 are still preliminary. Total citrus imports declined by about 3 percent mainly because of bad weather conditions in Spain and Morocco resulting in decreased imports of crossbreeds and oranges. The price for 1 kg of citrus fruit at the consumer level averaged DM 2.41 (about US\$ 1.08) in MY 2000/2001 versus DM 2.13 (about US\$ 0.96) in MY 1999/2000.

Forecast: For MY2001/2002, German citrus imports are expected to increase compared to MY2000/2001 in response to considerably higher production of citrus fruit in Mediterranean countries and a forecast 12 percent rise in exports during the winter of 2001/2002.

General

MY2000/2001

Demand and consumption of all fresh citrus fruit in Germany mainly depend on the size of citrus crop and export availability in Mediterranean countries. Total imports of all types of citrus amounted to 1.056 million tons in the first eleven month of MY 2000/2001 (October/August), about 3 percent less than during the same time of the previous year.

German imports of fresh oranges (excluding bitter oranges) in MY 2000/2001 (October/August) totaled 514,072 MT, down 1 percent from the same period of the previous marketing year. Most of the imported oranges originated from Spain (MY 2000/2001 (October/August): 72 percent). Other important suppliers of fresh oranges were Italy, Greece, South Africa and Morocco. U.S. shipments of oranges are negligible. Oranges accounted for 49 percent of Germany's total citrus imports.

Imports of fresh crossbreeds thus far (Oct/Aug) in MY 2000/2001 amounted to 337,696 MT, down 7 percent from the previous year's pace. This was mainly due to a reduction of exports by Spain and Morocco because of bad weather conditions. Nevertheless Spain still clearly dominates the German market with an import share of 88 percent, followed by Italy (2.8 percent) and Turkey (2.5 percent). Morocco dropped to fourth place with 2.2 percent of German imports. Crossbreeds accounted for 32 % of the total German citrus imports.

Imports of fresh lemons dropped by 4 percent to 123,536 MT in MY 2000/2001 (October/August) compared to the same period of MY 1999/2000. Spain, Argentina, Italy, and Turkey were the main suppliers of fresh lemons to Germany with Spain supplying 75 percent in MY 2000/2001 (October/August). Twelve percent of total German citrus import were lemons.

In Germany, grapefruit is not as popular as the other citrus fruits. In MY 2000/2001 (October/August) only 7 percent or 73,652 MT of the citrus imports were grapefruits. For the

same period of the previous marketing year the German Federal Office of Statistics states imports of merely 46,715 MT, that would mean a 58 percent increase for MY 2000/2001 (October/August) over MY1999/2000 (October/August) . However, according to the Zentrale Markt- und Preisberichtsstelle (central market and price reporting agency), which reports on a calendar year basis, imports of Grapefruit amounted to 84,048 MT in CY 1998, 106,819 MT in CY 1999 and 73,749 MT in CY 2000. Taking into account the results of consumer panels, the ZMP figures seem to be the more reliable numbers. That suggests that imports of Grapefruit in MY 2000/2001 were at about the same level as in MY 1999/2000.

The United States is the most important exporter of grapefruit to Germany with the highest import market share of about 28 percent (20,344 MT), followed by Israel (15,722 MT; 21 percent market share) Turkey (11,627 MT; 16 percent market share) , and South Africa (7,888 MT; 11 percent market share) in MY 2000/2001 (October/August). US exporters were the first to introduce pink grapefruit varieties to the German market. As these varieties have constantly gained popularity in Germany, other grapefruit exporting countries like Israel have reacted and now offer pink varieties too.

Imports of orange juice (65 degrees brix) totaled 287,176 MT in MY 2000/2001 (October/August). This is an increase of 16 percent compared to the previous marketing year (October/August), with Brazil supplying approximately 59 percent (168,403 MT) of the market followed by Switzerland (42,236 MT) and the Netherlands (14,935 MT). The United States is a marginal supplier of orange juice and accounted for 2,612 MT or around one percent of the import volume in Germany. Orange juice is the second most popular juice (behind apple juice) in Germany and accounts for 25 percent of the human domestic juice consumption.

All trade data for orange juice was converted to 65 degrees brix. Imports of orange juice cover all categories of orange juice with varying concentrations depending on the country of origin. Therefore all imports were first converted to a single-strength equivalent (i.e. 11.2 degrees brix or 45 oexle), which differs slightly from the 11.8 degrees 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 degrees brix equivalent by dividing them by a factor of 5.8.

All exports of fresh citrus from Germany are re-exports and totaled 34,173 MT in MY 2000/2001 (October/August), 17 percent less than in the previous MY (October/August). About 3 percent of the total imports are re-exported.

With orange juice the situation is different. Substantial amounts of imported concentrated juice are processed into juice and exported thereafter mainly to other EU countries, especially France, Spain, the Netherlands, Belgium and Great Britain. Converted into 65 degrees brix 115,721 MT of orange juice were exported in MY 2000/2001 (October/August). That is about 40 percent of the import volume.

MY 2001/2002

Mediterranean producers expect a 12 percent rise in citrus exports in MY 2001/2002, up from 5.014 million MT to 5.604 million MT (all data referring to October/September). Exports of lemons are expected to rise by as much as 17 percent to 846,000 MT, followed by orange exports (up 12 percent to 2.7 million MT), easy peelers (up 11 percent to 1.8 million MT), and Grapefruits (up 2 percent to 238,000 MT). Because German domestic consumption usually reflects Mediterranean citrus exports quite closely, German imports are expected to rise, too.

The biggest disadvantage for U.S. citrus fruit on the German market is the unfavorable U.S./DM and U.S./Euro exchange rate, which makes U.S.products very expensive compared to other origins.

Note: In recent years the U.S. dollar/German mark exchange rate has been as follows:

1991: US\$1 = DM 1.66;	1996: US\$1 = DM 1.50;
1992: US\$1 = DM 1.52;	1997: US\$1 = DM 1.70;
1993: US\$1 = DM 1.65;	1998: US\$1 = DM 1.76,
1994: US\$1 = DM 1.61;	1999: US\$1 = DM 1.66,
1995: US\$1 = DM 1.43;	2000: US\$1 = DM 2.12.

Further exchange (as of December 03, 2001, Handelsblatt Nr. 234, page 28) rates are for:

Euro /German mark: Euro 1 = DM 1.95583,	
U.S. dollar/ i	US\$1 = Euro 1.1213
U.S. \$/ DM:	US\$1 = DM 2.19 .

Table 1: German Import and Export of Fresh Oranges

German Imports of Fresh Oranges, in MT					
MY 1999/2000*			MY 1999/2000**	MY 2000/2001**	share of imports (percent)
USA	84	USA	84	17	0.003
Spain	401,705	Spain	395,167	368,695	71.7
Italy	41,584	Italy	41,412	40,538	7.9
South Africa	26,590	Greece	14,404	29,622	5.8
Morocco	24,253	South Africa	17,204	21,352	4.2
Greece	14,404	Morocco	24,246	18,487	3.6
Zimbabwe	7,818	Zimbabwe	7,392	9,884	1.9
Argentina	7,106	Argentina	4,999	6,693	1.3
France	4,679	Turkey		5,602	1.1
Israel	3,711	France	4,548	4,064	0.8
Brazil	1,442	Israel	3,711	3,940	0.8
Other	5,156	Other	6,347	5,178	1.0
TOTAL	538,532	TOTAL	519,514	514,072	100.0
German Exports of Fresh Oranges, in MT					
MY 1999/2000*			MY 1999/2000**	MY 2000/2001**	share of exports (percent)
USA	0	USA	0	0	0.0
Austria	4,158	Netherlands	1,451	3,312	25.3
Netherlands	3,018	Austria	3,983	2,738	20.9
Sweden	2,530	Poland	1,520	1,405	10.7
Denmark	2,000	France	1,110	1,220	9.3
Poland	1,544	Denmark	1,813	1,079	8.2
France	1,391	Italy	854	755	5.8
Italy	1,261	Spain		688	5.3
Belgium	1,040	Sweden	2,292	546	4.2
Finland	820	Finland	815	497	3.8
Great Britain	635	Great Britain	557	204	1.6
Other	1,335	Other	2,121	646	4.9
TOTAL	19,732	TOTAL	16,516	13,090	100.0
*Period Oct/Sep					
* *Period Oct/ Aug					
Source: FAS Berlin based on official statistics					

Table 2: German Import and Export of Fresh Crossbreeds

German Imports of Fresh Crossbreeds, in MT					
MY 1999/2000*			MY 1999/2000**	MY 2000/2001**	import share (percent)
USA	11	USA	11	35	0.0
Spain	328,964	Spain	322,183	298,351	88.3
Morocco	14,700	Italy	8,129	9,387	2.8
Italy	8,130	Turkey	6,132	8,486	2.5
Turkey	6,136	Morocco	14,700	7,262	2.2
Cyprus	3,212	Greece	3,000	5,036	1.5
Greece	3,000	Cyprus	3,212	3,132	0.9
France	1,486	Israel	1,032	1,921	0.6
Argentina	1,301	Argentina	1,015	1,317	0.4
Israel	1,042	South Africa	626	1,178	0.3
South Africa	1,029	France	1,465	763	0.2
Other	667	Other	629	828	0.2
TOTAL	369,678	TOTAL	362,134	337,696	100.0
German Exports of Fresh Crossbreeds, in MT					
MY 1999/2000*			MY 1999/2000**	MY 2000/2001**	export share (percent)
USA	0	USA		0	0.0
Sweden	2,988	Austria	791	1,567	19.9
Poland	1,999	Poland	1,965	1,434	18.2
Italy	1,715	Sweden	2,988	907	11.5
Denmark	1,194	Netherlands	905	803	10.2
Austria	1,120	France	692	701	8.9
Netherlands	1,038	Italy	925	551	7.0
Finland	858	Denmark	1,194	484	6.2
France	696	Finland	858	400	5.1
Czech Republic	371	Lithuania		311	4.0
Russia	329	Latvia		228	2.9
Other	856	Other	1,537	482	6.1
TOTAL	13,164	TOTAL	11,855	7,868	100.0
*Period Oct/Sep					
* *Period Oct/ Aug					
Source: FAS Berlin based on official statistics					

Table 3: German Import and Export of Fresh Lemons

German Imports of Fresh Lemons, in MT					
MY 1999/2000*			MY 1999/2000**	MY 2000/2001**	share of imports (percent)
USA	1	USA	1	1	0.0
Spain	96,473	Spain	92,191	92,882	75.2
Argentina	18,796	Argentina	13,979	13,551	11.0
Turkey	7,526	Italy	6,058	7,491	6.1
Italy	6,664	Greece	4,067	3,362	2.7
Greece	4,067	Cyprus	3,435	2,451	2.0
Cyprus	3,435	Turkey	7,164	1,802	1.5
South Africa	2,005	South Africa	1,054	1,529	1.2
France	352	Uruguay	145	141	0.1
Uruguay	190	Netherlands		129	0.1
Brazil	125	France	278	61	0.0
Other	251	Other	350	136	0.1
TOTAL	139,885	TOTAL	128,722	123,536	100.0
German Exports of Fresh Lemons, in MT					
MY 1999/2000*			MY 1999/2000**	MY 2000/2001**	share of exports (percent)
USA	0	USA	0	0	0.0
Finland	1,481	Finland	1,481	1,308	27.5
Austria	1,279	France	362	784	16.5
Poland	760	Netherlands	267	661	13.9
Netherlands	759	Denmark	381	480	10.1
Denmark	394	Austria	1,182	389	8.2
France	378	Russia	345	232	4.9
Russia	345	Spain	321	215	4.5
Italy	338	Italy	192	201	4.2
Spain	321	Sweden		170	3.6
Czech Republic	210	Poland	760	146	3.1
Other	573	Other	669	170	3.6
TOTAL	6,838	TOTAL	5,960	4,756	100.0
*Period Oct/Sep					
* *Period Oct/ Aug					
Source: FAS Berlin based on official statistics					

Table 4: German Import and Export of Fresh Grapefruit

German Imports of Fresh Grapefruit, in MT					
MY 1999/2000*			MY 1999/2000**	MY 2000/2001**	share of imports (percent)
USA	14,758	USA	14,409	20,344	27.6
Turkey	9,171	Israel	7,573	15,722	21.3
Israel	7,577	Turkey	9,168	11,627	15.8
South Africa	7,440	South Africa	2,796	7,888	10.7
Spain	5,270	Spain	5,259	5,620	7.6
Argentina	3,847	Argentina	2,730	3,252	4.4
Cyprus	1,291	Honduras	1,119	2,590	3.5
Honduras	1,174	Zimbabwe		1,859	2.5
France	1,140	Cuba	469	1,838	2.5
Cuba	492	Cyprus	1,291	1,189	1.6
Italy	371	Swaziland		599	0.8
Other	1,146	Other	1,901	1,124	1.5
TOTAL	53,677	TOTAL	46,715	73,652	100.0
German Exports of Fresh Grapefruit, in MT					
MY 1999/2000*			MY 1999/2000**	MY 2000/2001**	share of exports (percent)
USA	0	USA		0	0.0
Poland	1,843	Netherlands	886	2,951	37.4
Netherlands	1,376	France	441	1,995	25.3
France	454	Italy	238	850	10.8
Denmark	345	Poland	1,746	693	8.8
Italy	312	Denmark	332	506	6.4
Austria	184	Austria	167	384	4.9
Czech Republic	111	Spain		163	2.1
Greece	72	Great Britain	40	98	1.2
Great Britain	70	Sweden	59	70	0.9
Sweden	59	Greece	63	59	0.7
Other	49	Other	139	128	1.6
TOTAL	4,875	TOTAL	4,111	7,897	100.0
*Period Oct/Sep					
* *Period Oct/ Aug					
Source: FAS Berlin based on official statistics					

Table 5: German Import and Export of Orange juice

German Imports of Orange Juice, in MT at 65 Brix					
MY 1999/2000*			MY 1999/2000**	MY 2000/2001**	share of imports (percent)
USA	3,946	USA	3,854	2,612	0.9
Brazil	168,344	Brazil	155,006	168,403	58.6
Switzerland	31,140	Switzerland	28,980	42,236	14.7
Netherlands	13,590	Netherlands	12,149	14,935	5.2
Poland	8,223	Spain	7,540	10,371	3.6
Spain	8,150	Poland	7,328	10,341	3.6
Cuba	6,612	Italy	6,095	8,415	2.9
Italy	6,014	Belgium	5,652	7,568	2.6
Belgium	3,674	Cuba	3,129	5,738	2.0
Costa Rica	3,440	Czech Republic	3,004	2,814	1.0
Czech Republic	3,341	Costa Rica	2,290	2,584	0.9
Other	14,289	Other	12,736	11,159	3.9
TOTAL	270,762	TOTAL	247,762	287,176	100.0
German Exports of Orange Juice, in MT at 65 Brix					
MY 1999/2000*			MY 1999/2000**	MY 2000/2001**	share of exports (percent)
USA	81	USA	81	82	0.1
France	45,323	France	42,222	40,439	34.9
Netherlands	17,143	Spain	12,656	16,769	14.5
Great Britain	15,297	Netherlands	16,012	14,544	12.6
Belgium	15,203	Belgium	14,257	12,688	11.0
Spain	13,537	Great Britain	13,726	12,224	10.6
Denmark	9,684	Denmark	9,142	4,652	4.0
Portugal	4,992	Portugal	4,361	3,859	3.3
Italy	3,219	Greece	2,427	2,682	2.3
Greece	2,851	Italy	2,974	2,655	2.3
Sweden	2,597	Sweden	2,438	1,744	1.5
Other	2,979	Other	2,734	3,382	2.9
TOTAL	132,905	TOTAL	123,029	115,721	100.0
*Period Oct/Sep					
* *Period Oct/ Aug					
Source: FAS Berlin based on official statistics					

Table 6: Citrus Exports of Mediterranean Countries

Citrus Exports of Mediterranean Countries (October/September), in 1,000 tons						
	1997/98	1998/99	1999/2000	2000/01	2001/02*	change
Oranges	2720	2462	2640	2427	2718	+12
Spain	1281	1214	1430	1187	1358	+14
Greece	325	260	268	355	374	+5
Morocco	395	361	326	257	301	+17
Egypt	259	211	211	207	241	+17
Italy	120	75	123	125	133	+6
Turkey	45	102	86	121	125	+3
Other	295	239	196	175	186	+6
Easy Peeler	1799	1579	1880	1623	1797	+11
Spain	1323	1102	1317	1143	1178	+3
Morocco	216	223	271	136	243	+79
Turkey	107	137	123	160	180	+13
Israel	47	30	35	29	36	+24
Other	106	87	134	155	160	+3
Lemons	670	665	734	725	846	+17
Spain	541	451	455	505	550	+9
Turkey	39	154	195	135	220	+63
Italy	24	11	26	24	24	0
Other	66	49	58	61	52	-15
Grapefruits	230	243	254	234	238	+2
Israel	137	123	115	94	97	+3
Cyprus	32	33	23	27	25	-7
Other	61	87	116	113	116	+3
All Citrus	5425	4954	5512	5014	5604	+12
Source: ZMP						
*Forecast						

Table 7: Per Capita Consumption of Fruit Juices and Nectars 1995-2000 (in liter)

	1995	1996	1997	1998	1999	2000
Apple Juice	11.79	12.15	12.17	11.64	12.00	12.11
Orange Juice	9.83	10.25	10.17	10.03	9.51	9.53
Citrus Nectar	8.57	8.30	8.28	8.30	7.81	7.75
Grape Juice	1.19	1.21	1.30	1.30	1.32	1.32
Grapefruit Juice	0.33	0.33	0.36	0.38	0.38	0.39
Pear Juice	0.13	0.15	0.17	0.17	0.18	0.18
Vegetable Juice	0.86	0.87	0.87	0.96	0.96	0.96
Other Juice/Nectar	8.02	7.96	7.89	8.19	8.26	8.31
Total	40.72	41.21	41.21	40.97	40.42	40.55

Source: VdF, Association of the German Fruit Juice Industry, Annual Report 2000, page 42.