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Foreign Agricultural Service

GAIN Global Agricultural Information Network

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Report Name: Overview on the German Cherry Sector 2020

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Post: Berlin

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Report Highlights:

Germany is the third-largest importer of cherries in the world after China/Hong Kong and Russia. From 2010 to 2019, between 52 and 77 percent of the cherries consumed in Germany were imported, with the majority of imports originating in other EU member states. The largest non-EU cherry suppliers are Turkey for sweet cherries and Serbia for tart cherries. Total German cherry production for marketing year (MY) 2020 is estimated at 53,490 MT. While this represents a decrease of 11 percent compared to MY 2019, it is still 12 percent above the historical (2010-2019) ten-year average. Opportunities for U.S. sweet cherries are best in August/September, after the German domestic growing season.

General Information:

Abbreviations and definitions used in this report

AMI	Agrarmarkt Informations-Gesellschaft mbH, a German market information company https://www.ami-informiert.de/ami-english/ami-about-us/about-us
Destatis	German Federal Office of Statistics
EU	European Union "EU" in this report refers to EU27+UK, the current EU Customs Union
Ha	hectare; 1 ha = 2.471 acres
MT	Metric ton = 1000 kg
MY	Marketing year
TDM	Trade Data Monitor www.TradeDataMonitor.com
USD	U.S. dollar

Production

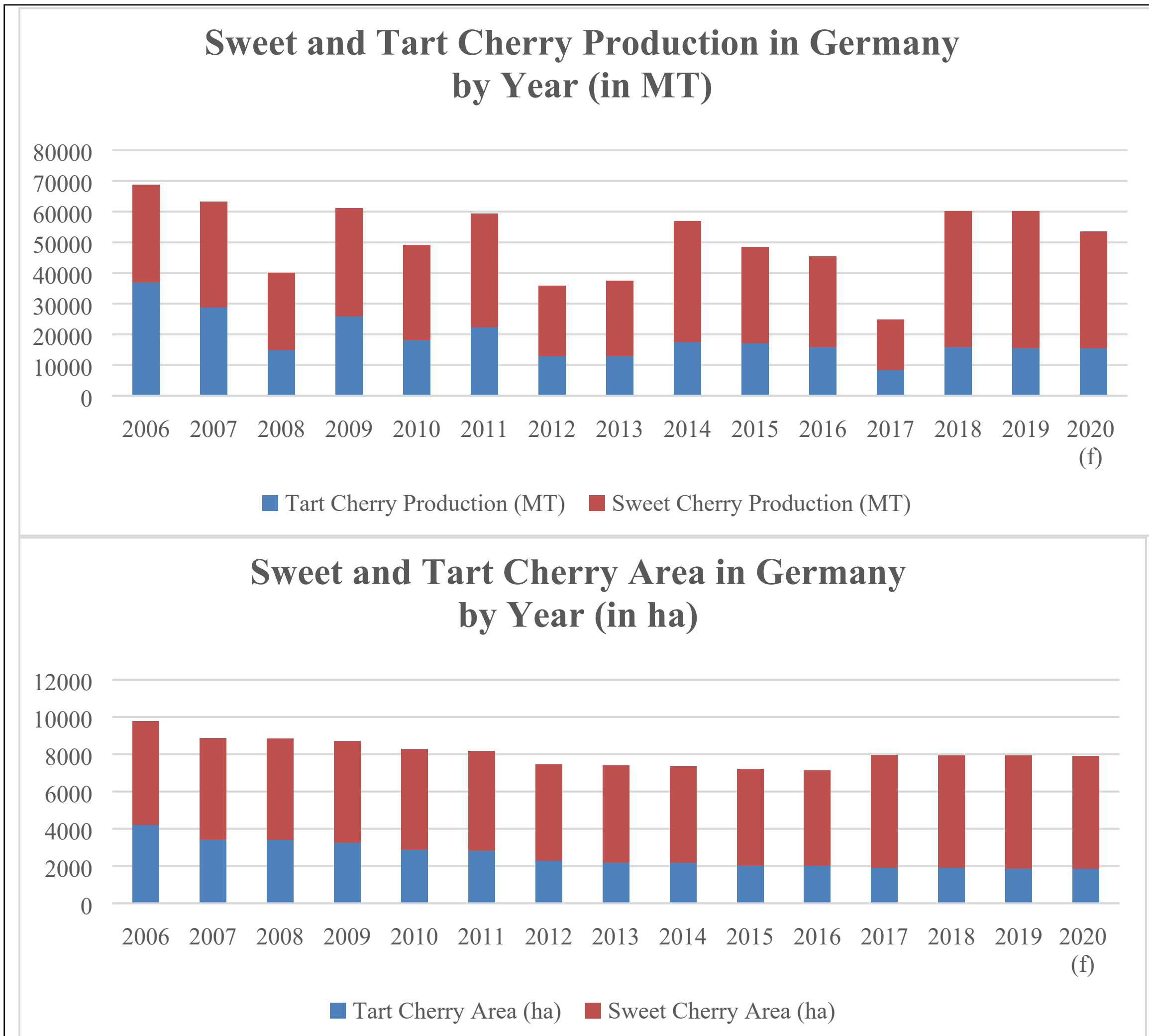
Total German cherry production for MY 2020 is estimated at 53,490 MT. This is an 11-percent decrease compared to the preceding year, but 12 percent above the ten-year (2010-2019) average. The decrease is largely a result of late spring frosts and drought. Sweet cherry production is estimated at 38,050 MT and tart cherries at 15,440 MT. In 2019, production amounted to 60,271 MT - 44,552 MT of sweet cherries and 15,719 MT of tart cherries.

Area

While the total cherry area is estimated slightly lower (minus 1 percent) than in 2019 remains stable at 7,866 ha, the trend to sweet cherries and away from tart cherries continues. The harvested area for sweet and tart cherries is expected to amount to 6,022 and 1,844 ha, respectively, compared to 6,054 and 1,886 ha in 2019. Compared to 10 years ago, sweet cherry area increased by 12 percent, while tart cherry area declined by 37 percent. The latter is a result of strong competition from other EU member states. According to German industry sources, other member states such as Hungary and Poland have lower production costs and are more competitive than German producers. Germany is more competitive for sweet cherries, since most of the production is for fresh consumption and consumers are willing to pay a premium for locally produced cherries.

When farmers plant new sweet cherry orchards, the trend is towards shielded production. It requires a higher investment, according to a recent newspaper article[1] investment costs amount to approximately 100,000 Euro per ha (roughly USD 45,300 per acre,) but offers protection against rain and enables the farmer to use predators as a pest management tool.

Popular varieties include *Bellise*, *Burlat*, *Kordia*, and *Regina* for sweet cherries and *Schattenmorelle* and *Morellenfeuer* for tart cherries.



Source: FAS Berlin; Data from German Federal Office of Statistics (destatis)[2], (f) = forecast

[1] https://www.fruchthandel.de/newsnet/aktuelle-news/einzelmeldung-newsnet/niedersachsen-rechnet-mit-bis-zu-6000-tonnen-suesskirschen/

[2] https://www.destatis.de/DE/Themen/Branchen-Unternehmen/Landwirtschaft-Forstwirtschaft-Fischerei/Obst-Gemuese-Gartenbau/Publikationen/Downloads-Obst/obst-jahr-2030321197144.html
https://www.destatis.de/DE/Presse/Pressemitteilungen/2020/06/PD20_243_412.html

Trade

Germany is the third largest importer of cherries in the world after China/Hong Kong and Russia. From 2010 to 2019, between 52 and 77 percent of the cherries consumed in Germany were imported, with imports varying between 45,000 and 73,000 MT of cherries annually. The majority originates from other EU member states—mainly Austria for sweet cherries and Hungary for tart cherries. The largest non-EU suppliers are Turkey for sweet cherries and Serbia for tart cherries.

For 2020, imports from other EU member states are expected to significantly decline because of lower exportable production in Hungary, Italy, and Spain, which were also hit by adverse weather conditions in spring. The void is expected to be filled with higher imports from Turkey and Serbia.

Opportunities for U.S. sweet cherries are best at either end of the German domestic production cycle, i.e., the end of May/beginning of June and August/September. Of the two periods, the latter is more promising as there is less competition from cheaper Turkish cherries. In recent years, U.S. cherry exports to Germany mostly occurred via other EU member states, mainly the Netherlands. In MY 2018 (April 2018/March 2019) for the first time since 2012, Germany imported U.S. cherries directly from the United States.

German Cherry Imports by Origin and Marketing Year (MT)

	Marketing Year (April/March)				
	2015	**2016**	**2017**	**2018**	**2019**
World	**61053**	**70014**	**69741**	**72998**	**66114**
Intra EU	54027	58479	58672	60706	53215
Extra EU	7025	11534	11069	12292	12899
Austria	12674	22681	15418	14244	14281
Turkey	5218	7677	7858	8529	10846
Hungary	12683	10630	13035	13294	10290
Netherlands	2893	4728	5740	4984	6834
Greece	4067	3778	3815	3915	5484
Spain	4732	3276	6110	4614	5022
Czech Republic	3424	3567	2271	4421	2878
Poland	5312	4456	430	7754	2685
Italy	5379	2331	10057	5052	1878
Serbia	1136	3224	2794	3376	1804
Bulgaria	29	162	266	429	1171
Belgium	621	89	113	90	808
Slovenia	0	0	0	0	779
France	224	152	423	632	694
Denmark	1184	1310	725	1089	406
United States	**0**	**0**	**0**	**30**	**0**
Other	1477	1953	686	545	254

Source: Trade Data Monitor, MY2019 = April 2019- March 2020

German Sweet Cherry Imports by Origin and MY (MT)

	Marketing Year (April/March)				
	2015	**2016**	**2017**	**2018**	**2019**
World	**36779**	**45356**	**51721**	**44779**	**48926**
Intra EU	31414	37554	43723	36056	37881
Extra EU	5365	7802	7998	8723	11045
Austria	11789	21159	14889	13550	13255
Turkey	5218	7677	7858	8529	10846
Netherlands	2707	4464	5277	4642	6567
Greece	3925	3625	3702	3840	5453
Spain	4683	3221	6088	4518	5012
Hungary	1579	1058	3308	3065	3520
Italy	5371	2295	9486	4608	1867
Bulgaria	29	147	266	387	1171
United States	**0**	**0**	**0**	**10**	**0**
Other	1478	1710	847	1630	1235

Source: Trade Data Monitor, MY2019 = April 2019- March 2020

German Tart Cherry Imports by Origin and MY (MT)

	Marketing Year (April/March)				
	2015	**2016**	**2017**	**2018**	**2019**
World	**24274**	**24658**	**18019**	**28219**	**17188**
Intra EU	22614	20925	14949	24650	15334
Extra EU	1660	3733	3070	3569	1854
Hungary	11104	9572	9727	10229	6769
Czech Republic	3244	3442	2236	4321	2673
Poland	5232	4162	405	7139	2590
Serbia	1136	3223	2794	3376	1804
Austria	885	1522	529	694	1026
Slovenia	0	0	0	0	779
Belgium	542	30	4	14	704
Denmark	1170	1309	724	1085	406
United States	**0**	**0**	**0**	**20**	**0**
Other	961	1398	1600	1341	437

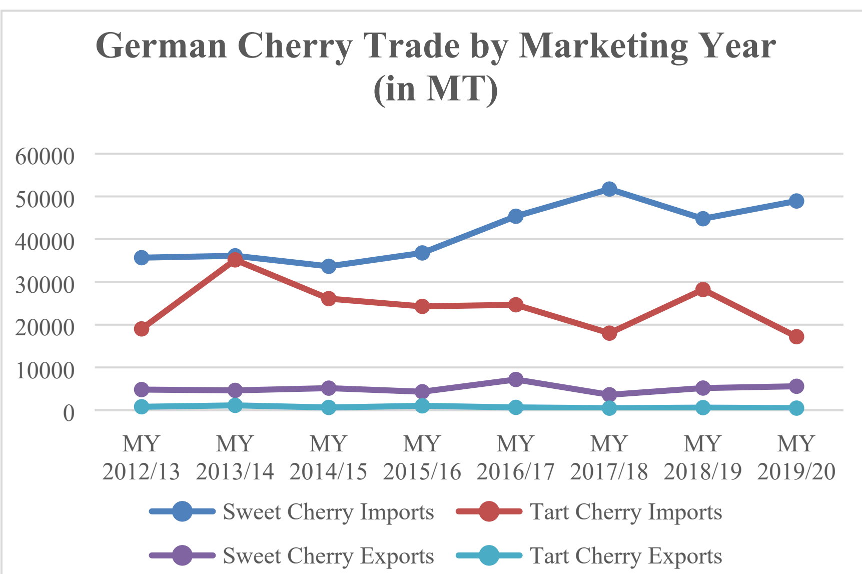
Source: Trade Data Monitor, MY2019 = April 2019- March 2020

Germany exports less than 10 percent of its total cherry supply, between 4,000 to 9,000 MT in recent years. Main destinations are other EU member states, such as the Netherlands, Austria, the United Kingdom, Denmark, and Sweden. The largest and almost exclusive extra-EU destination for German cherries is Switzerland.

German Cherry Exports by Destination and MY (MT)

	Marketing Year (April/March)				
	2015	**2016**	**2017**	**2018**	**2019**
World	**5339**	**7835**	**4080**	**5780**	**6081**
Intra EU	4391	6705	3363	5041	5409
Extra EU	948	1132	718	739	672
Netherlands	598	486	174	942	1069
Austria	585	1746	817	1173	1068
Switzerland	942	1123	717	718	665
Denmark	471	489	357	457	620
France	325	406	167	758	604
Finland	296	403	242	441	515
Italy	317	554	175	152	358
Sweden	406	1286	252	417	317
Lithuania	0	49	54	18	205
Poland	140	40	529	253	195
Hungary	1	94	0	19	117
Other	1258	1159	596	432	348

Source: Trade Data Monitor, MY2019 = April 2019- March 2020



Source: FAS Berlin; Data from Trade Data Monitor (TDM)

Consumption

In Germany, fresh cherries are considered a seasonal product and stocked in supermarkets mainly during the German marketing season (June/July). According to AMI, in 2019, 89 percent of private household purchases of sweet cherries occurred in June and July, and nine percent in August.[3] In contrast, purchases of peaches, which are hardly grown in Germany, are more evenly distributed between May and October. This seasonal availability explains the lower per capita consumption[4] of cherries (2.7 kg) compared to peaches (3.4 kg). Nonetheless, per capita consumption of cherries is more than twice as high as for plums (1.1 kg). In recent years, sweet cherries have become a trend item that benefitted from increased health consciousness and the growing popularity of snacking. In contrast, plums are mostly used for baking and cooking.

For sweet cherries, consumer preferences clearly trend toward larger sizes (>26 mm/1.024 inches). Smaller cherries sell at a large discount. For example, in the week of July 6, 2020, the average wholesale price for domestic sweet cherries amounted to 5.55 Euro (USD 6.28[5]) per kg for larger cherries but only 3.52 Euro (USD 3.99) per kg for cherries smaller than 26 mm.[6]

The use of tart cherries for processing is relatively stable and roughly amounts to 70-90 percent of German domestic production. The majority of tart cherries are used for canning (over 70 percent), while the remainder is used in juice production. The percentage of sweet cherries used for processing fluctuates between 30 and 50 percent depending on the weather during harvest, as rain damage increases the percentage that goes into canning or distilling into spirits. Processing of cherries into dried fruit is not common in Germany. The small but growing demand for dried cherries is met with imports.

Trade fairs

Trade fairs play a key role in presenting new products to the trade or in finding additional buyers and importers. The most important trade shows related to the fruit and vegetable sectors are:

FRUIT LOGISTICA Berlin, Germany (Interval: yearly) Target Market: Germany/EU/Central & Eastern Europe FRUIT LOGISTICA is the leading European trade show for fresh and dried fruit, nuts, and related products. More than 2,400 companies from across the entire fresh produce value chain will participate, including major global players, as well as small and medium-sized suppliers from around the world. https://www.fruitlogistica.de/en/	Next Fair: February 3 -5, 2021

[3] AMI Marktbilanz Obst 2020, p. 114, table 7.16
[4] AMI Marktbilanz Obst 2020, p. 109, table 7.5
[5] Exchange rate on July 10, 2020: 1 USD = 0.88319 Euro
[6] BLE Marktbericht Obst, Gemuese, Suedfruchte KW 28/2020 https://www.ble.de/SharedDocs/Downloads/DE/BZL/Daten-Berichte/ObstGemuese/2020/Wochenbericht_2020_28.pdf?__blob=publicationFile&v=2

BIOFACH Nuremberg, Germany (Interval: yearly) Target Market: Germany/Europe The leading European trade show for organic food and non-food products. http://www.biofach.de/en	Next Fair: February 17-20, 2021

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Product Brief Fresh Fruits | Citrus, Fresh Deciduous Fruit, Fresh Fruit, Fruit, Product Brief, SP1 - Expand International Marketing Opportunities, Stone Fruit, Strawberries | Berlin | Germany | February 15, 2019 | GM2019-2785

Germany is one of the largest markets for fruit in Europe. The relative affluence of its population of 83 million people makes it an attractive outlet for exporters from many countries. This product brief highlights certain aspects of the German fruit market and provides marketing, trade, and regulatory information for U.S. exporters.

Product Brief Fresh Fruits_Berlin_Germany_2-5-2019

Results of the German Fruit Tree Census | Fresh Deciduous Fruit, Fruit, Stone Fruit | Berlin | Germany | December 22, 2017 | GM2017-3213

This report summarizes the results of the 2017 German fruit tree census and developments in the planted varieties of apples and pears. Total planted area increased by 10 percent, although 4 percent of German fruit farms have stopped operating since the previous census in 2012. Apples are the most planted fruit trees and account for 68 percent of total fruit tree area, followed by sweet cherries, plums, and pears.

Results of the German Fruit Tree Census_Berlin_Germany_12-22-2017

Retail Foods | Retail Foods | Berlin | Germany | June 29, 2020 | GM2020-0039

Germany is by far the biggest market for food and beverages in the European Union. The food retail sector is saturated, highly consolidated, and competitive. There is good sales potential on the German market for U.S. exporters of nuts, fish and seafood products, dried fruits, bakery products, organic products, and sweet potatoes. The Covid-19 related lockdown measures have impacted German consumers' shopping and consumption patterns. It remains to be seen if and to what extent consumers continue to stick to these patterns once the pandemic is over.

Retail Foods_Berlin_Germany_06-30-2020

Exporter Guide | Exporter Guide | Berlin | Germany | November 26, 2019 | GM2019-0041

Germany has 83 million of the world's wealthiest consumers and is by far the biggest market in the European Union. The German market offers good opportunities for U.S. exporters of consumer-oriented agricultural products. In 2018, total U.S. exports of agricultural products to Germany reached $ 1.7 billion. The largest segments were soybeans, tree nuts, Alaskan pollock, wine, beef, and other consumer-oriented products. This report provides U.S. food and agriculture exporters with background information and suggestions for entering the German market.

Exporter Guide_Berlin_Germany_12-31-2019

Food and Agricultural Import Regulations and Standards Export Certificate Report | FAIRS Export Certificate Report | Berlin | Germany | December 16, 2019 | GM2019-0048

Germany is a Member State of the European Union (EU) and applies the certification requirements described in the EU-28 Food and Agricultural Import Regulations and Standards (FAIRS) Certification Report. Products not yet harmonized are subject to German national rules.

Food and Agricultural Import Regulations and Standards Export Certificate Report_Berlin_Germany_12-31-2019

Food and Agricultural Import Regulations and Standards Country Report | FAIRS Annual Country Report | Berlin | Germany | December 16, 2019 | GM2019-0047

Germany is a member of the European Union (EU) and generally follows EU directives and regulations, including those relating to the importation of food products. This report provides an overview of food laws in force in Germany that cover areas, which are not yet harmonized. Food laws currently in force in the EU-28 are summarized in the EU 28 FAIRS report.

Food and Agricultural Import Regulations and Standards Country Report_Berlin_Germany_12-31-2019

Changes to Germany's Packaging Laws – An Exporter's Guide | FAIRS Subject Report, Trade Policy Monitoring | Berlin | Germany | August 02, 2019 | GM2019-2105

On January 1, 2019, Germany updated their waste management laws in an attempt to advance the country's environmental protection goals and correct regulatory loopholes. Companies selling packaged goods must register with the German government before placing any packaged products on the German market. Although these responsibilities will typically fall to the German importer, U.S. companies should be aware and clearly allocate regulatory compliance duties in their sales agreements with German firms. Failure to register may result in a sales ban and fines of up to €200,000.

Changes to Germany's Packaging Laws – An Exporter's Guide_Berlin_Germany_8-2-2019

Attachments:

No Attachments.