United States Department of Agriculture
Foreign Agricultural Service

GAIN
Global Agricultural Information Network

Voluntary Report – Voluntary - Public Distribution **Date:** August 04, 2023

Report Number: GM2023-0011

Report Name: Overview on the German Cherry Sector - 2023

Country: Germany

Post: Berlin

Report Category: Product Brief, Fresh Fruit, Stone Fruit

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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 2022, 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 sour cherries. German cherry production for MY2023/24 (April/March) is estimated at 45,420 MT. This is a 6.7 percent decrease compared to the preceding year and 3.5 percent below the ten-year (2013-2022) average. The decrease is largely a result of unfavorable weather conditions during pollination. 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
EU	European Union, in this report refers to EU27
Ha	hectare; 1 ha = 2.471 acres
MT	Metric ton = 1000 kg
MY	Marketing year
TDM	Trade Data Monitor, LLC. www.TradeDataMonitor.com
USD	U.S. dollar

Executive Summary

Germany is the third-largest importer of fresh cherries in the world after China/Hong Kong and Russia. From 2010 to 2022, 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 sour cherries. German cherry production for MY[1] 2023/24 is estimated at 45,420 MT. This is a 6.7 percent decrease compared to the preceding year and 3.5 percent below the ten-year (2013-2022) average. The decrease is largely a result of unfavorable weather conditions during pollination. Opportunities for fresh U.S. sweet cherries are best in August/September, after the German domestic growing season. Processing of cherries into dried fruit is not common in Germany. The small demand for dried cherries is met with imports.

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[1] Marketing year 2023 = April 2023 through March 2024

I. Area

The harvested area for sweet and sour cherries is expected to amount to approximately 5,702 and 1,554 ha, respectively. Germany is more competitive for sweet cherries than for sour. Most of the sweet cherry production is for fresh consumption and consumers are willing to pay a premium for locally produced cherries. In contrast, most of the sour cherries are destined for processing.

When farmers plant new sweet cherry orchards, the trend is towards shielded production. It requires a higher investment but offers protection against rain and enables the farmer to use predators as a pest management tool. According to a newspaper article[2] investment costs amount to approximately 100,000 Euro per ha (roughly USD[3] 44,100 per acre). Popular varieties include *Bellise*, *Burlat*, *Kordia*, and *Regina* for sweet cherries and *Schattenmorelle* and *Morellenfeuer* for sour cherries.

The results of the 2022 German deciduous fruit tree census[4] showed that cherry area decreased compared to 2017 by nine percent. However, the decrease in tart cherries (minus 20 percent) was much more pronounced than for sweet cherries (minus 5.4 percent). This is a result of strong competition from other EU member states. According to German industry sources, other EU member states such as Hungary and Poland have lower production costs and are more competitive in tart cherry production than German producers.

II. Production

German cherry production for MY[5] 2023/24 is estimated at 45,420 MT. This is a 6.7 percent decrease compared to the preceding year and 3.5 percent below the ten-year (2013-2022) average. The decrease is largely a result of unfavorable weather conditions at pollination. A wet and cold spring reduced the activity of bees during the pollination time. This particularly affected early varieties. Additionally, late spring frosts in the south and west further reduced production. Sweet cherry production is estimated at 35,560 MT and sour cherries at 9,860 MT. In MY 2022/23, production amounted to 38,376 MT, including 38,471 MT of sweet cherries and 10,187 MT of sour cherries.

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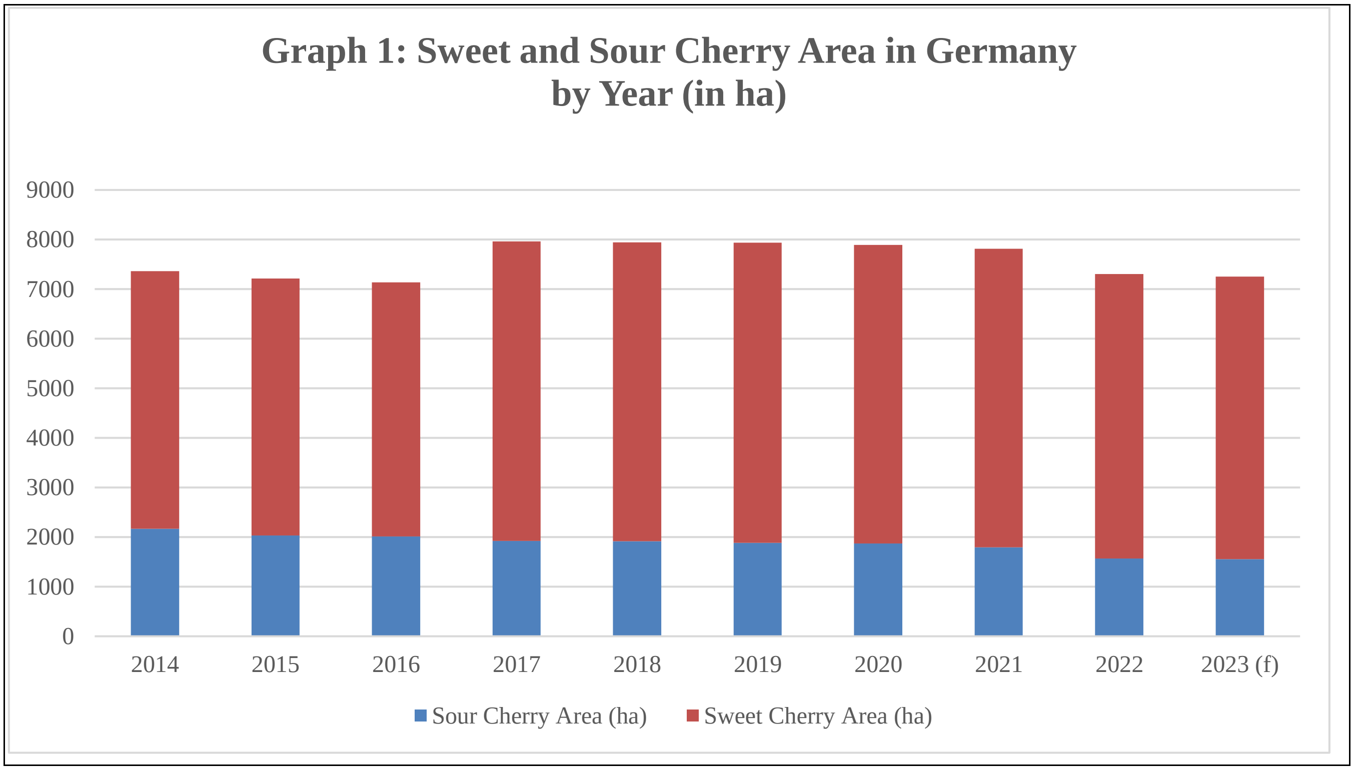
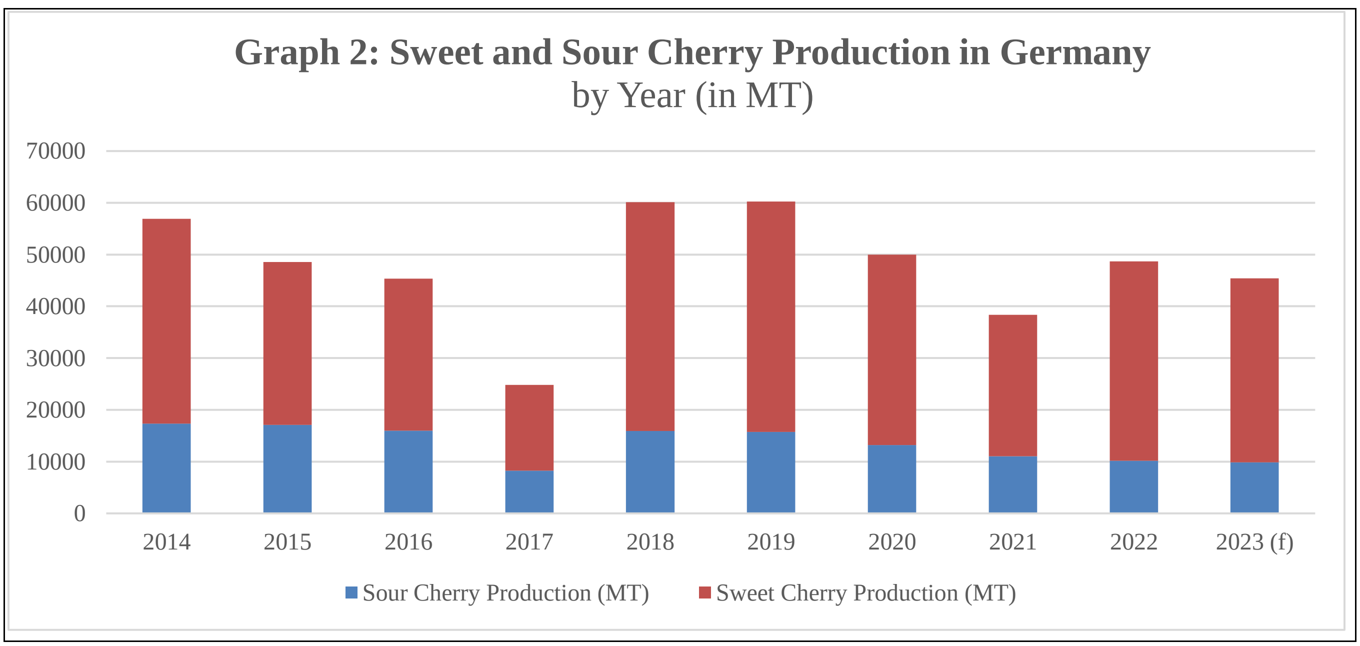
[2] Kirschenernte: Viele süße Früchte von bester Qualität erwartet, Pressemitteilungen : Landwirtschaftskammer Niedersachsen (lwk-niedersachsen.de)

[3] 1 Euro = 1,09 USD (June 27, 2023)
[4] The census is carried out every five years. For more information please refer to our report Results of the German Fruit Tree Census 2022
[5] Marketing year 2023 = April 2023 through March 2024





Source: FAS Berlin; Data from German Federal Office of Statistics (destatis)[6]
(f) = FAS Berlin forecast

[6] https://www-genesis.destatis.de/genesis/online?sequenz=statistikTabellen&selectionname=41243#abreadcrumb

IV. Trade

Import

Germany is the third largest importer of cherries in the world after China/Hong Kong and Russia. From 2010 to 2022, between 52 and 77 percent of the cherries consumed in Germany were imported, with imports varying between 47,000 and 75,000 MT of cherries annually. The majority originates from other EU member states—mainly Austria and Greece for sweet cherries and Hungary and Poland for sour cherries. The largest non-EU suppliers are Turkey for sweet cherries and Serbia for sour cherries. (**Note**: The data listed in the tables below shows trade data recorded by the exporting country which is not necessarily the country of origin.)

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. Direct imports from the United States are rare. They last occurred in MY 2018/19.

Table 1: German Cherry Imports (Sweet and Sour) by Origin and Marketing Year (MT)

	Marketing Year (April/March)				
	2018/19	**2019/20**	**2020/21**	**2021/22**	**2022/23**
World	**72,999**	**66,361**	**75,469**	**69,356**	**51,610**
Intra EU-27	60,637	53,460	65,578	63,601	48,540
Extra EU-27	12,362	12,902	9,890	5,756	3,070
Austria	14,244	14,434	14,402	14,306	10,172
Greece	3,915	5,484	10,130	9,276	9,962
Hungary	13,294	10,291	9,736	8,599	8,537
Spain	4,614	5,027	3,585	6,373	6,181
Netherlands	4,985	6,909	7,328	7,633	3,927
Italy	5,052	1,883	2,537	4,674	3,819
Poland	7,754	2,685	13,295	7,382	2,886
Czech Republic	4,421	2,878	2,730	3,503	1,909
Serbia	3,376	1,804	1,540	1,069	1,490
Turkey	8,529	10,846	8,027	4,162	1,206
France	632	700	703	716	646
United States	30	0	0	0	0
Other	2,153	3,420	1,446	1,663	875

Source: Trade Data Monitor, LLC. (TDM), MY2022/23 = April 2022- March 2023

Table 2: German Sweet Cherry Imports by Origin and MY (MT)

	Marketing Year (April/March)				
	2018/19	2019/20	2020/21	2021/22	2022/23
World	**44,780**	**49,167**	**49,563**	**49,073**	**37,465**
Intra EU-27	35,987	38,120	41,412	44,806	36,067
Extra EU-27	8,793	11,047	8,151	4,268	1,398
Austria	13,550	13,407	14,341	14,178	10,127
Greece	3,840	5,453	10,112	9,251	9,935
Spain	4,518	5,015	3,448	6,195	5,965
Italy	4,608	1,870	2,519	4,658	3,812
Netherlands	4,643	6,642	7,045	7,311	3,708
Hungary	3,065	3,520	2,861	1,625	1,749
Turkey	8,529	10,846	8,027	4,162	1,206
Poland	614	95	44	706	274
France	511	633	521	384	189
United States	10	0	0	0	0
Other	892	1,686	645	603	500

Source: Trade Data Monitor, LLC. (TDM), MY2022/23 = April 2022- March 2023

Table 3: German Sour Cherry Imports by Origin and MY (MT)

	Marketing Year (April/March)				
	2018/19	2019/20	2020/21	2021/22	2022/23
World	**28,219**	**17,194**	**25,906**	**20,283**	**14,144**
Intra EU-27	24,650	15,340	24,167	18,795	12,473
Extra EU-27	3,569	1,854	1,739	1,488	1,671
Hungary	10,229	6,770	6,875	6,974	6,788
Poland	7,139	2,590	13,251	6,676	2,612
Czech Republic	4,321	2,673	2,718	3,472	1,845
Serbia	3,376	1,804	1,540	1,064	1,471
France	121	67	182	332	457
Netherlands	342	267	283	322	219
Spain	96	13	137	178	216
North Macedonia	171	50	200	424	200
United States	**20**	**0**	**0**	**0**	**0**
Other	2,404	2,960	720	841	336

Source: Trade Data Monitor, LLC. (TDM), MY2022/23 = April 2022- March 2023

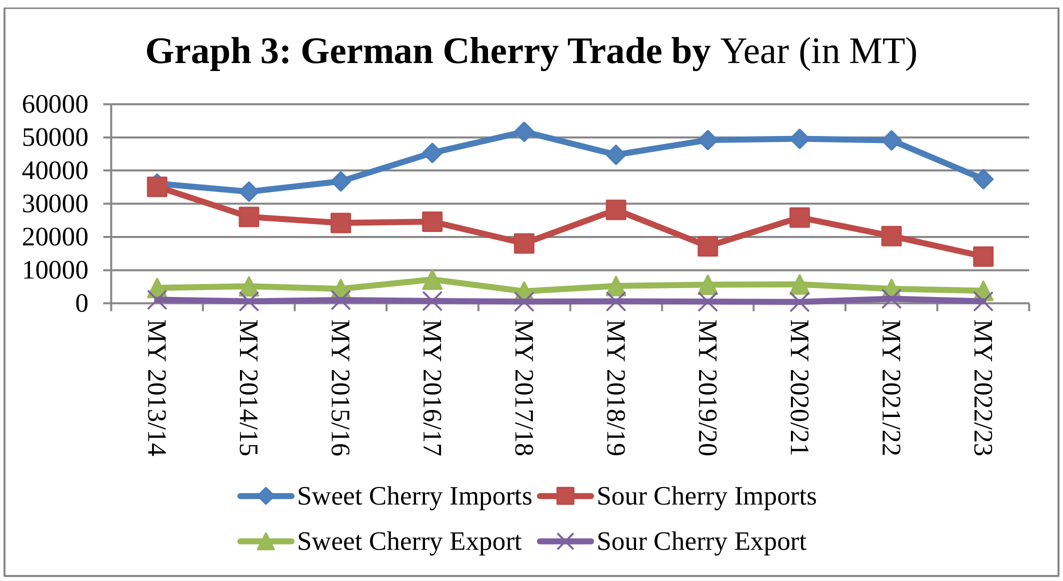
Export

Germany exports less than ten percent of its total cherry supply, between 4,000 to 7,800 MT in recent years. The main destinations are other EU member states, such as the Netherlands, Austria, Denmark, and Sweden. The largest and almost exclusive extra-EU destination for German cherries is Switzerland.

Table 4: German Cherry Exports by Destination and MY (MT)

	Marketing Year (April/March)				
	2018/19	**2019/20**	**2020/21**	**2021/22**	**2022/23**
World	**5,780**	**6,119**	**6,111**	**5,704**	**4,382**
Intra EU-27	4,781	5,406	5,349	5,268	3,026
Extra EU-27	999	712	762	436	1,356
Switzerland	718	665	709	434	1,356
Netherlands	942	1,074	821	1,003	662
Austria	1,173	1,071	1,274	1,534	624
Finland	441	515	396	441	409
Denmark	457	620	783	453	342
Italy	152	384	176	493	301
France	758	608	438	662	279
Poland	253	195	61	31	125
Sweden	417	317	800	443	104
Other	469	670	653	210	180

Source: Trade Data Monitor, LLC. (TDM), MY2022/23 = April 2022- March 2023



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

V. Consumption

In Germany, fresh cherries are considered a seasonal product and stocked in supermarkets mainly during the German marketing season (June/July). According to the German market information company Agrarmarkt Informations-Gesellschaft mbH (AMI) in 2022, 92.5 percent of private household purchases of sweet cherries occurred in June and July, and 5.2 percent in August[7]. In contrast, purchases of peaches, which are rarely grown in Germany, are more evenly distributed between May and October. This seasonal availability explains the lower per capita consumption[8] of cherries (2.2 kg) compared to peaches (2.8 kg). Nonetheless, per capita consumption of cherries is more than twice as high as for plums (1.0 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 June 12, 2023, the average wholesale price for domestic sweet cherries amounted to 8.03 Euro (USD 8.76[9]) per kg for larger cherries but only 6.00 Euro (USD 6.54) per kg for cherries smaller than 26 mm.[10]

The use of sour cherries for processing is relatively stable and roughly amounts to 70-90 percent of German domestic sour cherry production. Most sour 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. Due to lack of a product specific HS code, data on the dried cherry trade is not available.

[7] AMI Marktbilanz Obst 2023, p. 114, table 7.16
[8] AMI Marktbilanz Obst 2023, p. 109, table 7.5
[9] Exchange rate on June 27, 2023: 1 USD = 0.9168 Euro
[10] BLE Marktbericht Obst, Gemuese, Suedfruchte KW 24/2023, page 11
https://www.bmel-statistik.de/preise/obst-und-gemuese/

VI. Marketing

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 7-9, 2024

BIOFACH Nuremberg, Germany (Interval: yearly) Target Market: Germany/Europe Biofach is the leading European trade show for organic food and non-food products. http://www.biofach.de/en	Next Fair: February 13-16, 2024

Conferences

The following conference provides good opportunities to learn more about German/EU production and market as well as for connecting with key market players.

German Fruit and Vegetable Congress (Deutscher Obst & Gemuese Kongress, DOGK)

The German Fruit and Vegetable Congress (Deutscher Obst & Gemuese Kongress, DOGK) is a one-day event with presentation and networking opportunities more specific to the German market. It is preceded by an optional field trip and held annually in Duesseldorf. Simultaneous translation into English is provided.

Next edition: September 20, 2023, in Duesseldorf/Germany

For more information please see: https://www.dogkongress.de/home/

VII. Post Contact

For more information, please contact:

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14191 Berlin, Germany
E-mail: agberlin(at)usda.gov
https://fas-europe.org/countries/germany/
Twitter: @FasEurope

VIII. Related reports:

These and other reports can be accessed through the FAS GAIN reports database at https://gain.fas.usda.gov/#/search

Retail Foods | GM2023-0010Berlin | Germany
Published On: June 13, 2023

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, distilled spirits, wine, and food preparations. While e-commerce sales grew during the pandemic, online purchases across different product categories decreased in 2022. However, online grocery sales still recorded an increase. The war in Ukraine raised prices for energy, feed, and fertilizer, and subsequently groceries. As a result, many German consumers have cut back spending even on essential products.

Retail Foods_Berlin_Germany_GM2023-0010

FAIRS Annual Country Report Annual | GM2023-0005Berlin | Germany
Published On: May 18, 2023

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 are summarized in the EU FAIRS report.

FAIRS Annual Country Report Annual_Berlin_Germany_GM2023-0005

FAIRS Export Certificate Report Annual | GM2023-0006Berlin | Germany
Published On: May 10, 2023

This report provides Germany specific information that complements the EU-27 FAIRS Export Certificate Annual Report, which covers the harmonized EU certificate requirements.

FAIRS Export Certificate Report Annual_Berlin_Germany_GM2023-0006

Exporter Guide | GM2022-0038Berlin | Germany
Published On: December 19, 2022

Germany has more than 84 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 2021, total U.S. exports of agricultural and related products to Germany reached $2.5 billion. The largest segments were – apart from soybeans – tree nuts, seafood products, wine, beef, and condiments. This report provides U.S. exporters with background information and suggestions for entering the German market. COVID-19 related measures continued to impact the German food sector throughout 2021. Recovery to pre-pandemic levels began with the end of restrictions in spring 2022. Rising food prices are also impacting the market.

Exporter Guide_Berlin_Germany_GM2022-0038

Results of the German Fruit Tree Census 2022 | GM2022-0033Berlin | Germany
Published On: October 25, 2022

This report summarizes the results of the 2022 German deciduous and stone fruit tree census and focuses on developments in the planted varieties of apples and pears. Since the 2017 census, total planted area decreased by 1.45 percent, and 9.2 percent of German fruit farms ended operations. Apples continue to be the most planted fruit trees and account for 67 percent of total fruit tree area, followed by sweet cherries, plums, and pears. The area planted with tree nuts is negligible but growing.

Results of the German Fruit Tree Census 2022_Berlin_Germany_GM2022-0033

Attachments:

No Attachments.