

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

THIS REPORT CONTAINS ASSESSMENTS OF COMMODITY AND TRADE ISSUES MADE BY
USDA STAFF AND NOT NECESSARILY STATEMENTS OF OFFICIAL U.S. GOVERNMENT
POLICY

Voluntary Public

Date: 8/3/2015

GAIN Report Number: GM15028

Germany

Post: Berlin

Stone Fruit Report

Report Categories:

Stone Fruit

Fresh Fruit

Approved By:

Kelly Stange

Prepared By:

Sabine Lieberz

Report Highlights:

German total cherry production for CY 2015 is estimated at 50,700 MT. This is an 11 percent decrease compared to the excellent production in CY 2014, and a 5 percent decrease compared to the average of the preceding ten years. Germany is the third largest importer of cherries in the world, after Russia and China. The majority of imports originate in other EU-28 member states. Largest non-EU suppliers are Turkey for sweet cherries and Serbia for tart cherries.

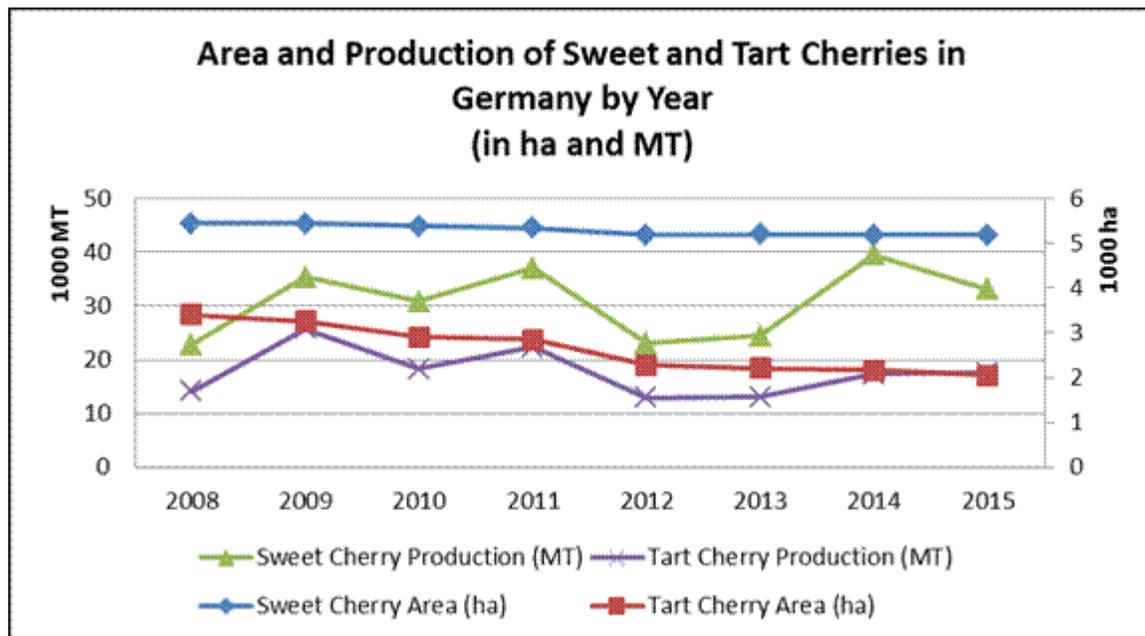
General Information:

Production:

German total cherry production for CY 2015 is estimated at 50,700 MT. This is an 11 percent decrease compared to the excellent production in CY 2014, and a 5 percent decrease compared to the average of the preceding ten years. However, this masks a different development in the sweet and tart cherry sector. Sweet cherry production is estimated at 33,100 MT, a decrease of 16 percent compared to CY2014, while tart/sour cherry production is estimated at 17,600 MT, a marginal increase of 1 percent.

Area

While the German sweet cherry area remained stagnant at 5,183 ha in 2015, the area for tart cherries continued its steady decline of recent years and amounted to 2,055 ha. The decline in area 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. For sweet cherries Germany is more competitive as most of the production is for fresh consumption and consumers are willing to pay a premium for locally produced cherries.



Source: FAS Berlin based on data from German Federal Office of Statistics (destatis)

Consumption:

In Germany, fresh cherries are considered a seasonal product and stocked in supermarkets mainly during the German marketing season (July/August). In contrast, peaches are stocked year round but are hardly grown in Germany. This explains the lower per capita consumption of cherries (2.2 kg) compared to peaches (3.7 kg). Nonetheless, consumption of cherries is twice as high as for plums (1.1

kg). Consumer preferences clearly trend towards larger sizes (>28 mm).

The use of tart cherries for processing is relatively stable and roughly amounts to 75-90% of the German domestic production. The majority of tart cherries are used for canning (over 80 %), while the remainder finds its way into juice production. The percentage of sweet cherries used for processing fluctuates between 20 and 50 percent depending on the weather during harvest. The better the weather, the lower is the processing share. However, rain damage increases the percentage of that goes into canning and distillation into spirits.

Trade:

Imports

Germany is the third largest importer of cherries in the world, after Russia and China. German imports vary between 45,000 and 70,000 MT of cherries annually; the majority originates from other EU member states, mainly Austria, Spain, and Italy for sweet cherries and Hungary, Poland, and the Czech Republic for tart cherries. Largest non-EU suppliers are Turkey for sweet cherries and Serbia for tart cherries. Separate customs codes for sweet and tart cherries were only introduced in 2012. Since then Turkey has increased its market share in German sweet cherry imports from 3 to 13 %. For 2015, imports are forecast to remain flat despite the lower domestic production, as the major tart cherry supplier to Germany, Poland, Serbia, and Hungary, all report a lower production.

Top 12 Origins for German Cherry Imports by Calendar Year (MT)

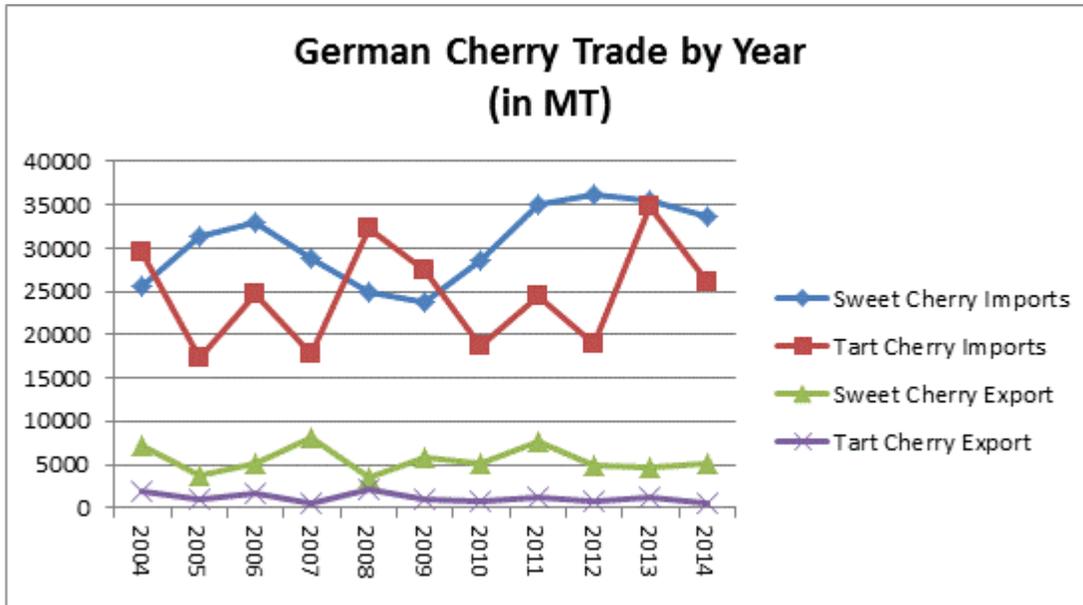
Partner Country	Calendar Year				
	2010	2011	2012	2013	2014
World	47,378	59,374	55,126	70,656	59,691
Intra-EU-28	44,217	55,905	50,010	58,457	50,818
Extra EU-28	3,161	3,469	5,116	12,199	8,874
Hungary	12,662	14,810	9,898	15,540	16,324
Austria	12,889	12,948	14,477	14,289	10,891
Spain	4,102	5,410	4,762	4,536	5,985
Turkey	915	896	1,052	4,067	4,500
Italy	2,217	9,016	5,256	5,067	4,382
Serbia	1,765	2,121	3,492	7,974	3,730
Greece	2,842	1,821	1,885	3,236	2,930
Netherlands	2,921	2,707	3,314	3,643	2,748
Czech Republic	1,966	3,420	2,211	2,069	1,881
Poland	1,110	1,625	4,752	4,984	1,614
Sweden	1,010	328	454	35	1,377
Belgium	1,279	1,160	590	1,536	1,044
Other	1,700	3,112	2,983	3,680	2,285

Source: Global Trade Atlas

Exports

Germany exports less than 10 percent of its total cherry supply; 5,000 to 9,000 MT in recent years. Main destinations are other EU member states such as Austria, Belgium, France, and the United

Kingdom. Largest destination outside of the EU is Switzerland.



Source: FAS Berlin based on data from Global Trade Atlas

Marketing:

Trade fairs

In the EU, trade fairs play a key role in presenting new products to the trade or in finding additional buyers and importers. The major international trade fair for the fruit and vegetable trade is held each February in Berlin, Germany:

<p>FRUIT LOGISTICA Berlin, Germany (Interval: yearly) Target Market: Germany/EU/Central & Eastern Europe Good venue for exhibiting fresh and dried fruit, nuts, and related products http://www.fruitlogistica.de</p>	<p>Next Fair: February 03-05, 2016</p>
---	---

For organic products there is a special trade fair held annually in Nuremberg, Germany:

<p>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</p>	<p>Next Fair: February 10-13, 2016</p>
--	---

Author Defined:

Related reports:

Product Brief Fresh Fruits**Fresh Deciduous Fruit Citrus Stone Fruit Strawberries|Berlin|Germany|2/10/2015**

Germany is one of the largest markets for fruit in Europe. The relative affluence of its population of 82 million people makes it an attractive outlet for exporters from many countries. This product brief highlights certain aspects of the German fruit market to aid U.S. exporters in successfully marketing their products in Germany.

[Product Brief Fresh Fruits Berlin Germany 1-27-2015](#)

Results of German Fruit Tree Census**[Fresh Deciduous Fruit Stone Fruit|Berlin|Germany|2/28/2013**

This report summarizes the results of the 2012 German fruit tree census and developments in the variety mix of apples and pears. While 14 percent of the German deciduous fruit farms have stopped operating since the previous census in 2007, total planted area only decreased by 3 percent. However, there was a shift towards apples whose area was expanded by 1 percent at the expense of tart cherries, plums, and pears, whose area decreased by 33, 11, and 4 percent, respectively.

[Results of German Fruit Tree Census Berlin Germany 2-22-2013](#)