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**Date:** 7/31/2019

**GAIN Report Number:** GM19028

## Germany

**Post:** Berlin

### Stone Fruit Report – Germany 2019

**Report Categories:**

Stone Fruit

Fresh Fruit

SP1 - Expand International Marketing Opportunities

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**Report Highlights:**

Total German cherry production for marketing year (MY) 2019 is estimated at 62,200 MT – an increase of 3.4 percent compared to MY 2018 and 30 percent compared to the historical (2009-2018) ten-year average. Germany is the third-largest importer of cherries in the world after China/Hong Kong and Russia. From 2009 to 2018, between 50 and 77 percent of the cherries consumed in Germany were imported, with the majority of imports originating in other EU-28 member states. For 2019, imports of sweet cherries are expected to remain high; opportunities for U.S. sweet cherries are best in August/September, after the German domestic growing season.

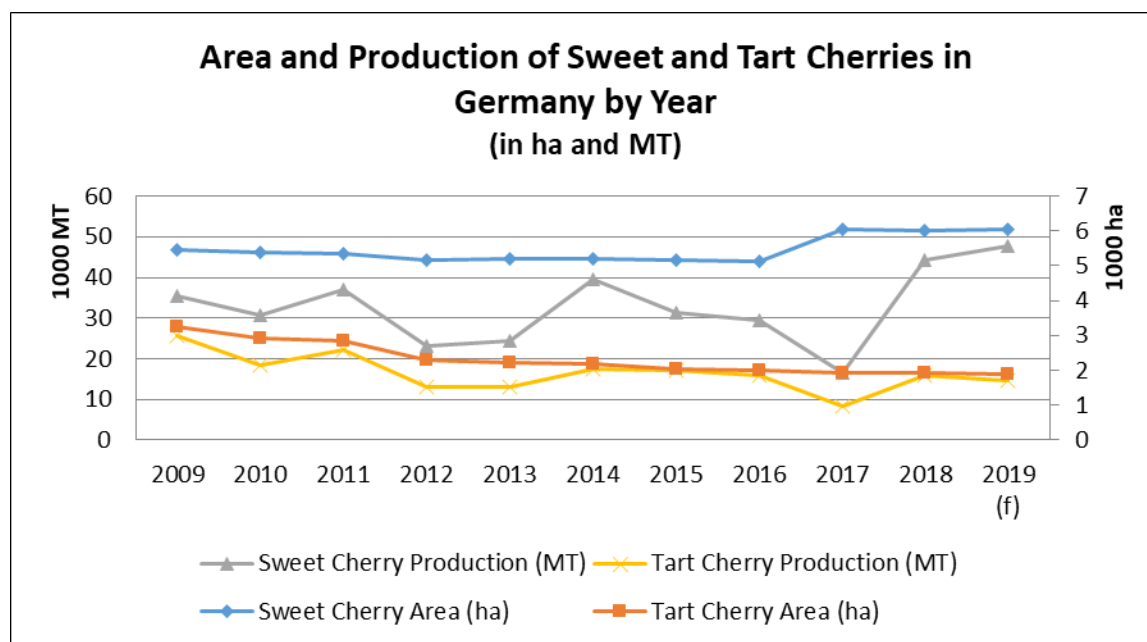
## Production

Total German cherry production for MY<sup>1</sup> 2019 is estimated at 62,200 MT. If this estimate is realized, this is a 3.4 percent increase compared to the preceding year. It would be the highest production since 2007, representing a 30 percent increase compared to the historical ten-year average (2009-2018). Sweet cherry production is estimated at 47,730 MT and tart cherries at 14,470 MT. In 2018, production amounted to 60,125 MT - 44,223 MT of sweet cherries and 15,902 MT of tart cherries.

## Area

While the total cherry area remains virtually unchanged at 7,702 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 6,046 and 1,886 ha, respectively, compared to 6,026 and 1,915 ha in 2018. Compared to a decade ago, sweet cherry area increased by 11 percent, while tart cherry area declined by 42 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 but offers protection against rain and enables the farmer to use predators as a pest management tool.



Source: FAS Berlin; Data from German Federal Office of Statistics (destatis)<sup>2</sup>

<sup>1</sup> Marketing year 2019 = April 2019 through March 2020

<sup>2</sup> <https://www.destatis.de/DE/Service/Bibliothek/publikationen-fachserienliste-3.html?nn=206136>

<https://www.destatis.de/DE/Themen/Branchen-Unternehmen/Landwirtschaft-Forstwirtschaft-Fischerei/Obst-Gemuese-Gartenbau/Publikationen/Downloads-Obst/obst-jahr->

**Trade**

Germany is the third largest importer of cherries in the world after China/Hong Kong and Russia. From 2009 to 2018, between 50 and 77 percent of the cherries consumed in Germany were imported, with the majority of imports originating in other EU-28 member states.

German imports vary between 45,000 and 72,000 MT of cherries annually. The majority originates from other EU member states—mainly Austria, Italy, and Spain for sweet cherries and Hungary, Poland, and the Czech Republic for tart cherries. The largest non-EU suppliers are Turkey for sweet cherries and Serbia for tart cherries. In 2018, in contrast to previous expectations, imports increased by 3.45 percent despite the rebound in production. This is partly because fresh cherry consumption increased due to the unusually warm summer and lower than usual apple stocks. In addition, the processing industry took advantage of low prices resulting from ample tart cherry production in Poland, Hungary, and the Czech Republic.

For 2019, imports of sweet cherries are expected to remain high due to continued consumer demand, while imports of tart cherries are expected to decline because of lower production in important supplier countries such as Hungary and Poland.

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 Calendar Year (MT)**

	<b>Marketing Year (April/March)</b>				
	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>
<b>World</b>	<b>59,744</b>	<b>61,053</b>	<b>70,014</b>	<b>69,725</b>	<b>71,915</b>
Intra EU-28	50,878	54,027	58,479	58,657	59,623
Extra EU-28	8,865	7,025	11,534	11,069	12,292
Austria	10,650	12,674	22,681	15,418	13,608
Hungary	16,620	12,683	10,630	13,035	13,031
Turkey	4,500	5,218	7,677	7,858	8,529
Poland	1,608	5,312	4,456	430	7,743
Italy	4,378	5,379	2,331	10,057	5,045
Netherlands	2,830	2,893	4,728	5,730	4,905
Spain	6,007	4,732	3,276	6,110	4,560
Czech Republic	1,882	3,424	3,567	2,271	4,421
Greece	2,938	4,067	3,778	3,815	3,887
Serbia	3,730	1,136	3,224	2,794	3,376
Denmark	763	1,184	1,310	725	1,089
United States	-	-	-		30
Other	3,838	2,351	2,356	1,482	1,691

Source: Global Trade Atlas

**German Sweet Cherry Imports by Origin and MY (MT)**

	<b>Marketing Year (April/March)</b>				
	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>
<b>World</b>	<b>33,651</b>	<b>36,779</b>	<b>45,356</b>	<b>51,706</b>	<b>44,001</b>
Austria	8,717	11,789	21,159	14,889	12,914
Turkey	4,475	5,218	7,677	7,858	8,529
Italy	4,351	5,371	2,295	9,486	4,602
Netherlands	2,701	2,707	4,464	5,267	4,568
Spain	5,823	4,683	3,221	6,088	4,464
United States	-	-	-	-	10
Other	7,584	7,011	6,540	8,118	8,914

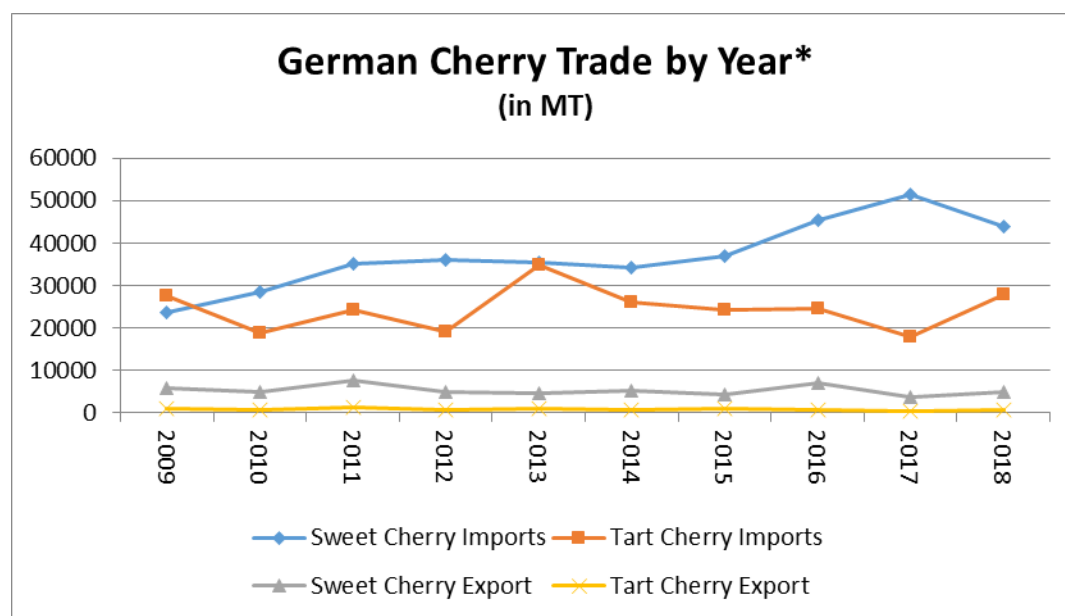
Source: Global Trade Atlas

### German Tart Cherry Imports by Origin and MY (MT)

	Marketing Year (April/March)				
	2014	2015	2016	2017	2018
<b>World</b>	<b>26,093</b>	<b>24,274</b>	<b>24,658</b>	<b>18,019</b>	<b>27,914</b>
Hungary	14,435	11,104	9,572	9,727	9,967
Poland	1,598	5,232	4,162	405	7,131
Czech Republic	1,637	3,244	3,442	2,236	4,321
Serbia	3,730	1,136	3,223	2,794	3,376
Denmark	761	1,170	1,309	724	1,085
United States	-	-	-	-	20
Other	3,932	2,388	2,950	2,133	2,014

Source: Global Trade Atlas

Germany exports less than 10 percent of its total cherry supply, between 5,000 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.



\* Calendar year

Source: FAS Berlin; Data from Global Trade Atlas (GTA)

## 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 2016, 90 percent of private household purchases of sweet cherries occurred in June and July.<sup>3</sup> In contrast, peaches are stocked year-round but are hardly grown in Germany. This seasonal availability explains the lower per capita consumption of cherries (2.4 kg) compared to peaches (3.7 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 1, 2019, the average wholesale price for domestic sweet cherries amounted to 4.57 Euro (USD 5.12<sup>4</sup>) per kg for larger cherries but only 2.78 Euro (USD 3.12) per kg for cherries smaller than 26 mm.<sup>5</sup>

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 20 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. As an aside, we see growing demand for dried cherries from the US. Two major retailers are advertising the “Montmorency” variety and highlighting the U.S. origin on the packaging of some of their dried cherry items.

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<sup>3</sup> AMI Marktwoche Obst & Gemuese Nr. 25/2017, p 3

<sup>4</sup> Exchange rate on July 10, 2019: 1 USD = 0.892 Euro

<sup>5</sup> BLE Marktbericht Obst, Gemuese, Suedfruchte KW 27/2019

[http://www.ble.de/DE/BZL/Daten-Berichte/Obst-Gemuese/obst-gemuese\\_node.html#doc8978758bodyText1](http://www.ble.de/DE/BZL/Daten-Berichte/Obst-Gemuese/obst-gemuese_node.html#doc8978758bodyText1)

## 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:

<b>FRUIT LOGISTICA</b> Berlin, Germany (Interval: yearly) Target Market: Germany/EU/Central & Eastern Europe The leading European trade show for fresh and dried fruit, nuts, and related products <a href="http://www.fruitlogistica.de">http://www.fruitlogistica.de</a>	Next Fair:  February 5-7, 2020
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FRUIT LOGISTICA is the major trade show for fresh and dried fruits in Europe. The next show will take place on **February 5-7, 2020**. 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.

<b>BIOFACH</b> Nuremberg, Germany (Interval: yearly) Target Market: Germany/Europe The leading European trade show for organic food and non-food products <a href="http://www.biofach.de">http://www.biofach.de</a>	Next Fair:  February 12-15, 2020
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BIOFACH is one of the most important trade shows for organic products in Europe. The next show will take place on **February 12-15, 2020**.

## Contact Information

If you have questions or comments regarding this report or need assistance exporting to Germany, please contact the Foreign Agricultural Service in Berlin. Importer listings are available from the Foreign Agricultural Service for use by U.S. exporters of American food and beverage products.

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**Related reports:**

**Product Brief Fresh Fruits | Product Brief Fresh Fruit Fresh Deciduous Fruit Stone Fruit Strawberries Citrus SP1 - Expand International Marketing Opportunities | Berlin | Germany | 2/16/2019**

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 Stone Fruit | Berlin | Germany | 1/9/2018**

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](#)