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Report Name: Overview on the German Cherry Sector 2021

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Prepared By: Sabine Lieberz

Approved By: Kirsten Luxbacher

Report Highlights:

Germany is the third-largest importer of fresh cherries in the world after China/Hong Kong and Russia. The largest non-EU cherry suppliers are Turkey for sweet cherries and Serbia for sour cherries. Opportunities for fresh 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
COVID-19	Disease cause by the SARS-CoV 2 virus
Destatis	German Federal office of Statistics
EU	European Union "EU" 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 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 2020, 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 marketing year (MY) 2021/22 is difficult to forecast at this point as reliable assessments of the damage caused by heavy rains in mid-July are not yet available. Industry sources reckon the damage could be well over 25 percent. This would lead to a production of 34,000 MT compared to 49,990 MT in MY 2020/21. 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 but growing demand for dried cherries is met with imports.

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I. COVID-19

a) Impact on Production

The overall impact of the COVID-19 pandemic on production volumes was limited in 2020. However, production costs increased due to the imposition of COVID-19-related sanitary standards. These included minimal distancing rules, heightened standards for accommodation, transport, and new documentation requirements. This required adaptation of workflow organization and additional investments. The shortage of seasonal labor at the onset of the pandemic affected cherry production a lot less than other agricultural products. This is because unlike for some vegetables, in cherry production seasonal labor is only required for harvesting. By the time of harvest, the legal issues related to the arrival of seasonal workers had been resolved. For 2021, the COVID-19 related additional production costs are expected to remain in place. Industry sources report that fewer of the traditional seasonal workers from Poland and Bulgaria, who used to come to the same farms for years, are wanting to come this year. In part this is due to fears around changes in the COVID-19 situation might force them into quarantine either upon entry into Germany or upon return to their home countries. As a result, farmers are turning to seasonal workers from the Ukraine and Moldova.

b) Impact on Trade and Distribution

The closure of borders at the beginning of the pandemic led to some disruption of intra-EU cross-border trade but this was resolved quickly and in due time before the cherry season. However, industry experts have noted that social distancing measures continue to have an impact on the distribution process – requiring more time than was needed before the pandemic. This, in combination with general disruptions in logistics, has increased the costs of trading and distributing cherries.

II. Area

While the total German cherry area is estimated slightly lower (minus one percent) than in 2020 at 7,815 ha, the trend to sweet cherries and away from sour cherries continues. The harvested area for sweet and sour cherries is expected to amount to 6,020 and 1,795 ha, respectively, compared to 6,019 and 1,870 ha in 2020. Compared to 10 years ago, sweet cherry area increased by 13 percent, while sour cherry area declined by 37 percent. The latter is the result of strong competition from other EU member states. According to German industry, 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.

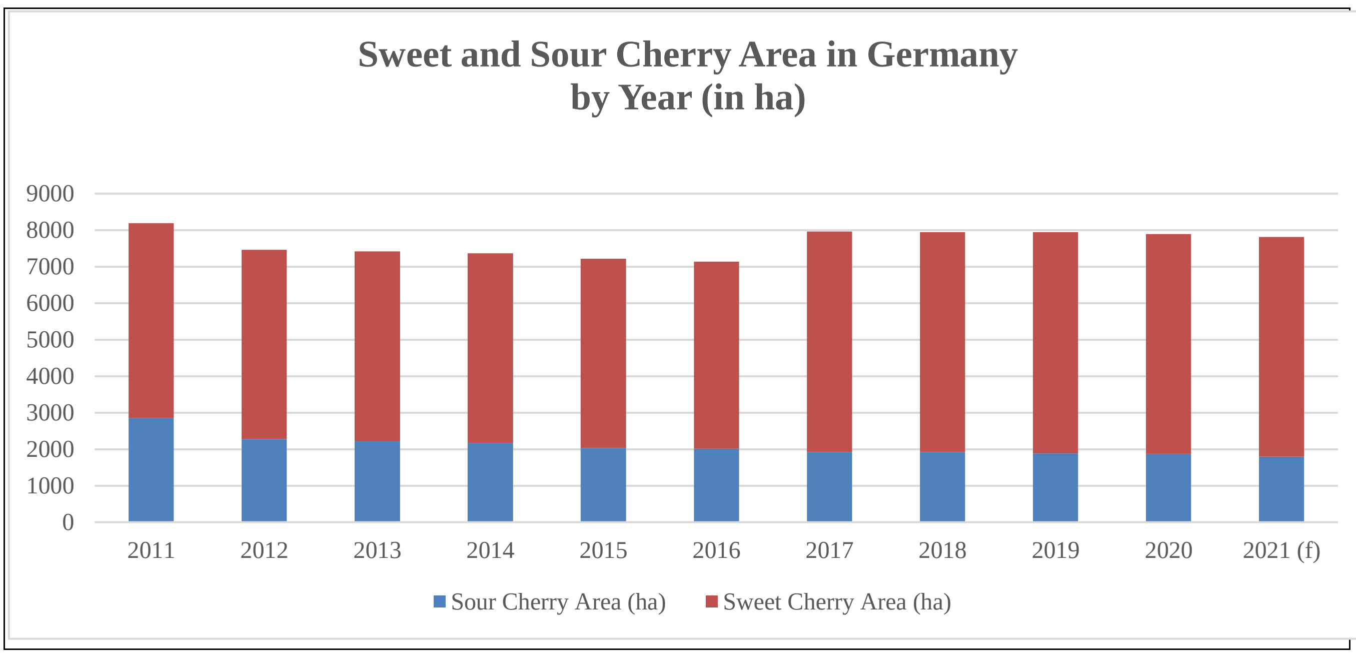
When farmers plant new sweet cherry orchards, the trend is towards shielded production. It requires a higher investment but offers protection against rain and enables the farmer to use predators as a pest management tool. According to a recent newspaper article[1] investment costs amount to approximately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

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

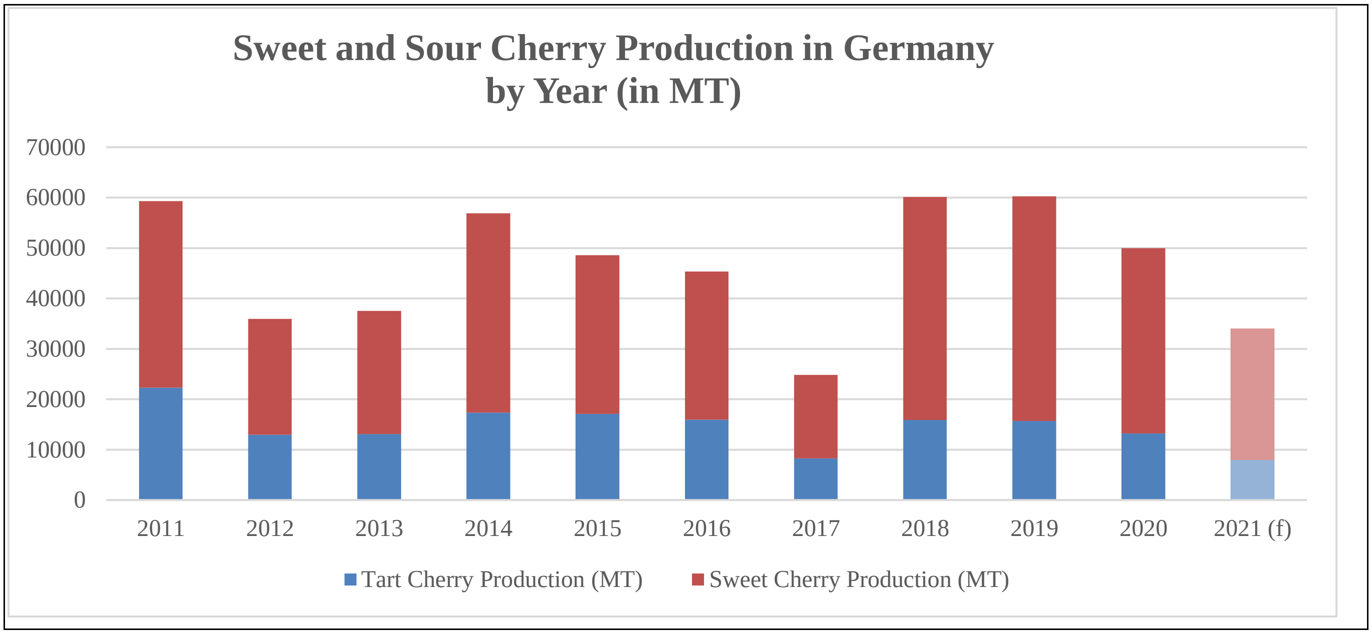
USD[2] 49,000 per acre.) Popular varieties include *Bellise*, *Burlat*, *Kordia*, and *Regina* for sweet cherries and *Schattenmorelle* and *Morellenfeuer* for sour cherries.

III. Production

German cherry production for MY[3] 2021/22 is hard to estimate at this point as heavy rains in the week of July 12, 2021, resulted in substantial damage. While reliable assessments of the damage are not yet available, industry sources expect a damage of up to 50 percent depending on the region. Regions with a large share of shielded area (e.g. Lower Saxony/Hamburg and Lake Constance) are less affected than regions with largely unprotected cherry orchards (e.g. Rhineland-Palatinate, Western Baden-Wuerttemberg, and Saxony.) For Germany as a whole, a reduction of at least 25 percent seems realistic and would translate into a production of only 34,000 MT. However, this estimate may well change over the next couple weeks when the harvest progresses and the extent of the damage becomes clearer. Prior to the rains, the German Office of Statistics (destatis) had estimated German cherry harvest at 45,800 MT, thereof 34,700 MT of sweet cherries and 11,100 MT of sour cherries. In 2020, production amounted to 49,990 MT - 36,797 MT of sweet cherries and 13,193 MT of sour cherries.



[2] 1 Euro = 1,21 USD (May 2021)
[3] Marketing year 2020 = April 2020 through March 2021



Source: FAS Berlin; Data from German Federal Office of Statistics (destatis)[4]
(f) = FAS Berlin forecast

[4] https://www.destatis.de/DE/Themen/Branchen-Unternehmen/Landwirtschaft-Forstwirtschaft-Fischerei/Obst-Gemuese-Gartenbau/_inhalt.html#sprg239482
and
https://www.destatis.de/DE/Presse/Pressemitteilungen/2021/06/PD21_311_412.html

IV. Trade

Germany is the third largest importer of cherries in the world after China/Hong Kong and Russia. From 2010 to 2020, 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 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 exporting country which is not necessarily the country of origin. For example, comparing data listed for German imports with corresponding data for Greek and Turkish exports suggests that a substantial amount of the increase shown for Greece in MY 2020/21 could actually consist of transshipments from Turkey.

For MY2021/22, imports are expected to substantially increase both from other EU member states as well as from Turkey and Serbia to compensate for the lower German domestic production.

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.

German Cherry Imports by Origin and Marketing Year (MT)

	Marketing Year (April/March)				
	2016/17	**2017/18**	**2018/19**	**2019/20**	**2020/21**
World	**70014**	**69741**	**72999**	**66360**	**67110**
Intra EU-27	58469	58655	60637	53458	57220
Extra EU-27	11544	11086	12362	12902	9890
Austria	22681	15418	14244	14434	14384
Greece	3778	3815	3915	5484	10129
Hungary	10630	13035	13294	10291	9736
Turkey	7677	7858	8529	10846	8027
Netherlands	4728	5740	4985	6908	7284
Poland	4456	430	7754	2685	6033
Spain	3276	6110	4614	5027	3582
Italy	2331	10057	5052	1883	2538
Czech Republic	3567	2271	4421	2878	1729
Serbia	3224	2794	3376	1804	1540
France	152	423	632	700	694
Belgium	89	113	90	809	503
Slovenia	0	0	0	779	223
North Macedonia	526	152	171	50	200
United States	**0**	**0**	**30**	**0**	**0**
Other	2899	1525	1922	1782	508

Source: Trade Data Monitor, MY2020/21 = April 2020- March 2021

German Sweet Cherry Imports by Origin and MY (MT)

	Marketing Year (April/March)				
	2016/17	**2017/18**	**2018/19**	**2019/20**	**2020/21**
World	45356	51721	44780	49166	49488
Intra EU-27	37544	43706	35987	38118	41336
Extra EU-27	7812	8015	8793	11047	8151
Austria	21159	14889	13550	13407	14322
Greece	3625	3702	3840	5453	10111
Turkey	7677	7858	8529	10846	8027
Netherlands	4464	5277	4643	6641	7005
Spain	3221	6088	4518	5015	3446
Hungary	1058	3308	3065	3520	2861
Italy	2295	9486	4608	1870	2526
France	150	315	511	633	521
Bulgaria	147	266	387	1171	187
United States	**0**	**0**	**10**	**0**	**0**
Other	1560	532	1119	610	482

Source: Trade Data Monitor, MY2020/21 = April 2020- March 2021

German Sour Cherry Imports by Origin and MY (MT)

	Marketing Year (April/March)				
	2016/17	**2017/18**	**2018/19**	**2019/20**	**2020/21**
World	**24658**	**18019**	**28219**	**17194**	**17622**
Intra EU-27	20925	14949	24650	15340	15883
Extra EU-27	3733	3070	3569	1854	1739
Hungary	9572	9727	10229	6770	6875
Poland	4162	405	7139	2590	5989
Czech Republic	3442	2236	4321	2673	1717
Serbia	3223	2794	3376	1804	1540
Belgium	30	4	14	704	401
Netherlands	264	462	342	267	279
Slovenia	0	0	0	779	223
North Macedonia	510	149	171	50	200
United States	**0**	**0**	**20**	**0**	**0**
Other	3455	2242	2607	1557	398

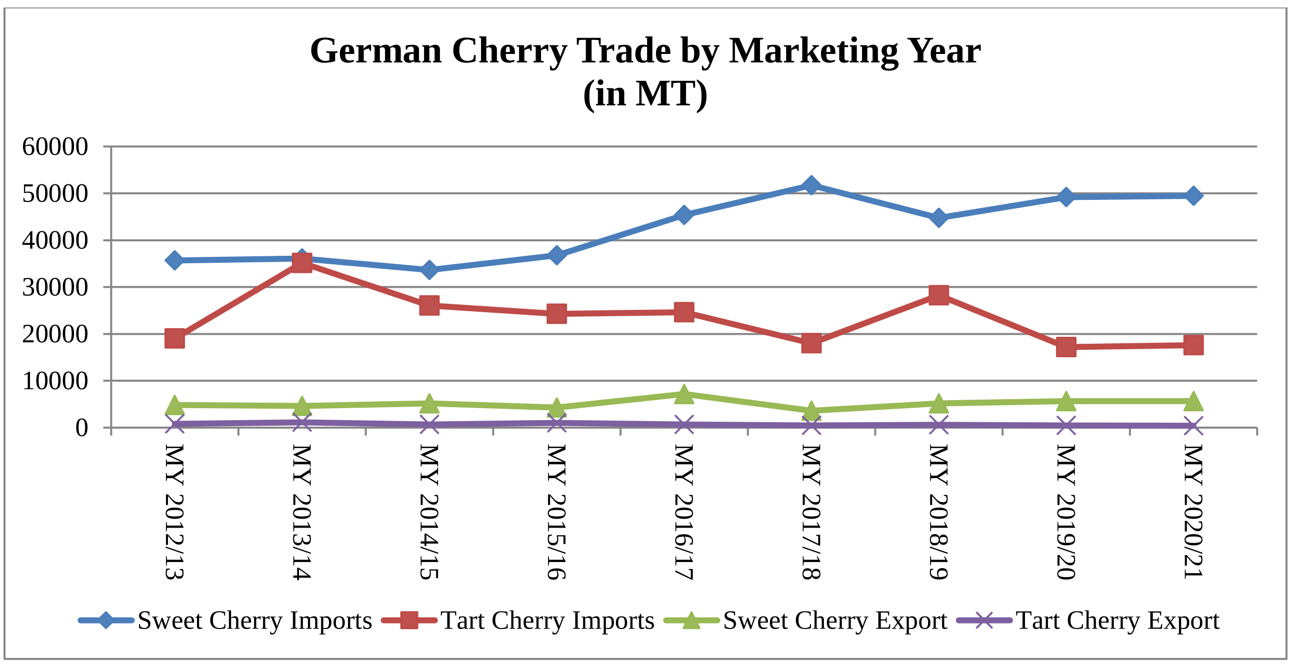
Source: Trade Data Monitor, MY2020/21 = April 2020- March 2021

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, Denmark, and Sweden. The largest and almost exclusive extra-EU destination for German cherries is Switzerland. For MY 2021/22, exports are expected to decline because of the lower German production.

German Cherry Exports by Destination and MY (MT)

	Marketing Year (April/March)				
	2016/17	**2017/18**	**2018/19**	**2019/20**	**2020/21**
World	**7835**	**4080**	**5780**	**6118**	**6068**
Intra EU-27	6125	3004	4781	5405	5306
Extra EU-27	1710	1077	999	712	762
Austria	1746	817	1173	1070	1273
Netherlands	486	174	942	1074	821
Denmark	489	357	457	620	783
Sweden	1286	252	417	317	758
Switzerland	1123	717	718	665	709
France	406	167	758	608	438
Finland	403	242	441	515	396
Hungary	94	0	19	117	332
Italy	554	175	152	384	176
Other	1248	1179	703	748	382

Source: Trade Data Monitor, MY2020/21 = April 2020- March 2021



Source: FAS Berlin; Data from Trade Data Monitor (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 2020, 92 percent of private household purchases of sweet cherries occurred in June and July, and six percent in August[5]. 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[6] 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 June 21, 2021, the average wholesale price for domestic sweet cherries amounted to 5.42 Euro (USD 6.47[7]) per kg for larger cherries but only 4.24 Euro (USD 5.06) per kg for cherries smaller than 26 mm.[8]

The use of sour cherries for processing is relatively stable and roughly amounts to 70-90 percent of German domestic production. The majority of 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 dried cherry trade is not available.

VI. 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:

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[5] AMI Marktbilanz Obst 2021, p. 114, table 7.16
[6] AMI Marktbilanz Obst 2021, p. 109, table 7.5
[7] Exchange rate on June 24, 2021: 1 USD = 0.8379 Euro
[8] BLE Marktbericht Obst, Gemuese, Suedfruchte KW 25/2021, page 3
https://www.ble.de/SharedDocs/Downloads/DE/BZL/Daten-Berichte/ObstGemuese/2021/Wochenbericht_2021_25.pdf?__blob=publicationFile&v=2

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 9-11, 2022

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 15-18, 2022

VII. Post Contact

For more information, please contact:

Embassy of the United States of America
Office of Agricultural Affairs
Clayallee 170
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 | Retail Foods | Berlin | Germany | July 13, 2021 | GM2021-0016 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, and organic products. The COVID-19 related lockdown measures heavily impacted the German food sector as well as consumers' eating and purchasing patterns. Whereas online grocery shopping was still a niche market in Germany in 2019, it showed the highest growth in e-commerce in 2020. Retail Foods_Berlin_Germany_06-30-2021
Opportunities for Organic Exports to Germany | Agricultural Situation, Coffee, Export Accomplishments - Marketing, Trade Events and Shows, Strawberries, Fresh Deciduous Fruit, Special Certification - Organic/Kosher/Halal, Vegetables | Berlin | Germany | January 19, 2021 | GM2021-0002 Germany is the second largest organic market in the world with good prospects for U.S. organic products, such as tree nuts, fruits and vegetables, and processed food products. This report sets out information on the German organic market, including best prospects, and opportunities such as participation in BioFach eSPECIAL, the world's largest organic trade fair, taking place online February 17 – 19, 2021. Opportunities for Organic Exports to Germany_Berlin_Germany_01-08-2021
Food and Agricultural Import Regulations and Standards Country Report | FAIRS Annual Country Report | Berlin | Germany | December 23, 2020 | GM2020-0066 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 USEU FAIRS report. Food and Agricultural Import Regulations and Standards Country Report_Berlin_Germany_12-31-2020
Food and Agricultural Import Regulations and Standards Export Certificate Report | FAIRS Export Certificate Report | Berlin | Germany | December 23, 2020 | GM2020-0067 Germany is a Member State of the European Union (EU) and applies the certification requirements described in the EU Food and Agricultural Import Regulations and Standards (FAIRS) Certificate Report. Products not yet harmonized are subject to German national rules. This report provides Germany specific information that complements the USEU FAIRS Export Certificate Report. Food and Agricultural Import Regulations and Standards Export Certificate Report_Berlin_Germany_12-31-2020
Exporter Guide | Exporter Guide | Berlin | Germany | December 17, 2020 | GM2020-0065 Germany is home to more than 83 million of the world's wealthiest consumers and is by far the largest market in the European Union. The German market offers good opportunities for U.S. exporters of consumer-oriented agricultural products. In 2019, total U.S. exports of agricultural and related products to Germany reached USD 1.9 billion. The largest segments were soybeans, tree nuts, fish products, wine, beef, condiments, and other consumer-oriented products. This report provides U.S. food and agriculture exporters with background information and suggestions for entering the German market. The COVID-19 related lock-down and physical distancing measures heavily impacted the German food sector. Effects will be visible in next year's report when

the data from 2020 is evaluated. Exporter Guide_Berlin_Germany_12-31-2020
Product Brief Dried Fruits and Nuts | Product Brief, Dried Fruit, Tree Nuts, SP1 - Expand International Marketing Opportunities | Berlin | Germany | January 13, 2020 | GM2020-0002 With 83 million of the world's wealthiest consumers, Germany is the largest market for dried fruits and nuts in Europe and a very important destination for U.S. almonds, walnuts, prunes, and other products. This report provides marketing, trade, and regulatory information for U.S. exporters. Product Brief Dried Fruits and Nuts_Berlin_Germany_01-07-2020
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
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.