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Report Name: Overview on the German Cherry Sector - 2024

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Report Highlights:

Germany is the third-largest importer of sweet and sour cherries in the world. Between 52 and 77 percent of the cherries consumed in Germany are imported, mostly from other EU member states. The German Federal Office of Statistics estimates cherry production for MY2024/25 (April/March) at 41,085 MT, but final production may be lower due to weather conditions. 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
COVID-19	Disease cause by the SARS-CoV2 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 = 1,000 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 most imports originating in other EU member states. The largest non-EU cherry suppliers are Türkiye for sweet cherries and Serbia for sour cherries. German cherry production for MY[1] 2024/25 is estimated at 41,085 MT. This is a 2.3 percent increase compared to the very low production in the preceding year but 13 percent below the ten-year (2014-2023) average. The small production is largely a result of unfavorable weather conditions (late frosts and excess rain) during pollination. Additionally, actual harvested production may be substantially lower due to thunderstorms with heavy rains and hail that occurred after the production estimates were carried out in July. 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.

[1] Marketing year 20243 = April 2024 through March 2025

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I. Area

The harvested area for sweet and sour cherries is expected to amount to approximately 5,684 ha and 1,533 ha, respectively. Germany is more competitive in sweet cherries than in sour. Most sweet cherry production is for fresh consumption and consumers are willing to pay a premium for locally produced cherries. In contrast, most sour cherries are destined for processing.

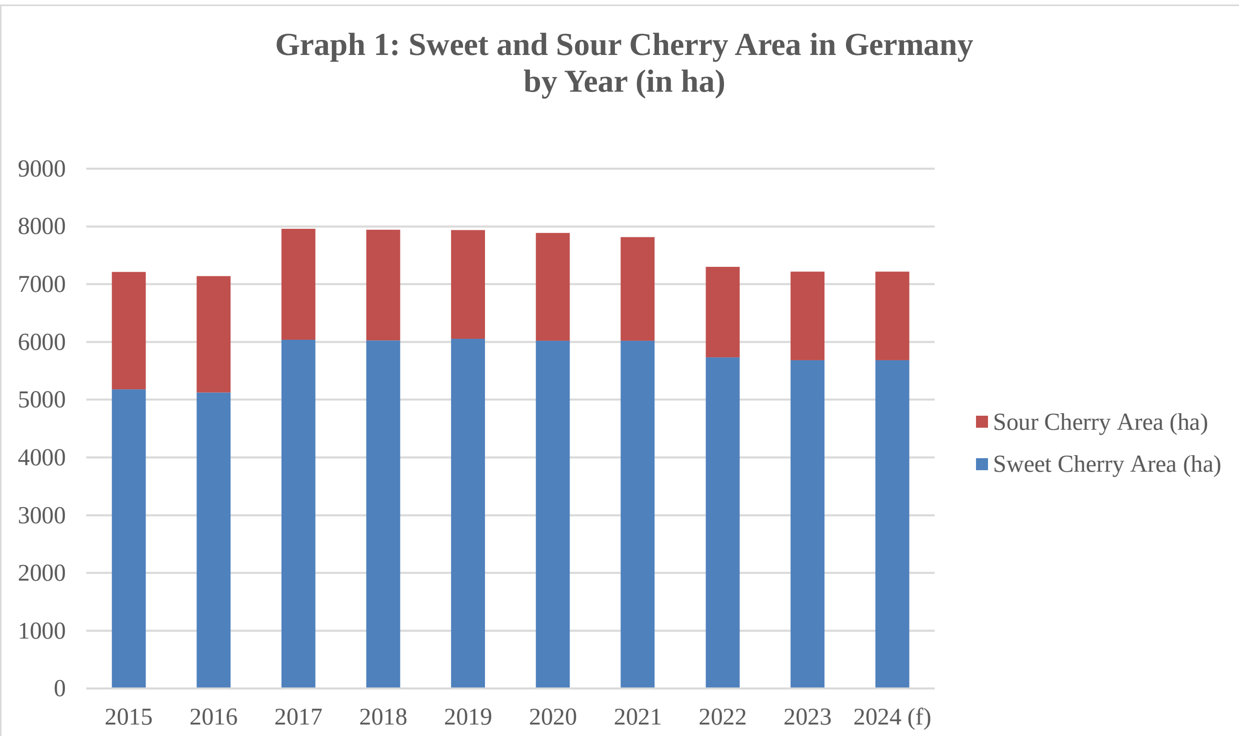
When farmers plant new sweet cherry orchards, the trend is towards shielded production. It requires a higher investment but offers protection against rain and enables the farmer to use predators as a pest management tool. According to a newspaper article[2], investment costs substantially exceed 100,000 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 latest German deciduous fruit tree census from 2022[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.

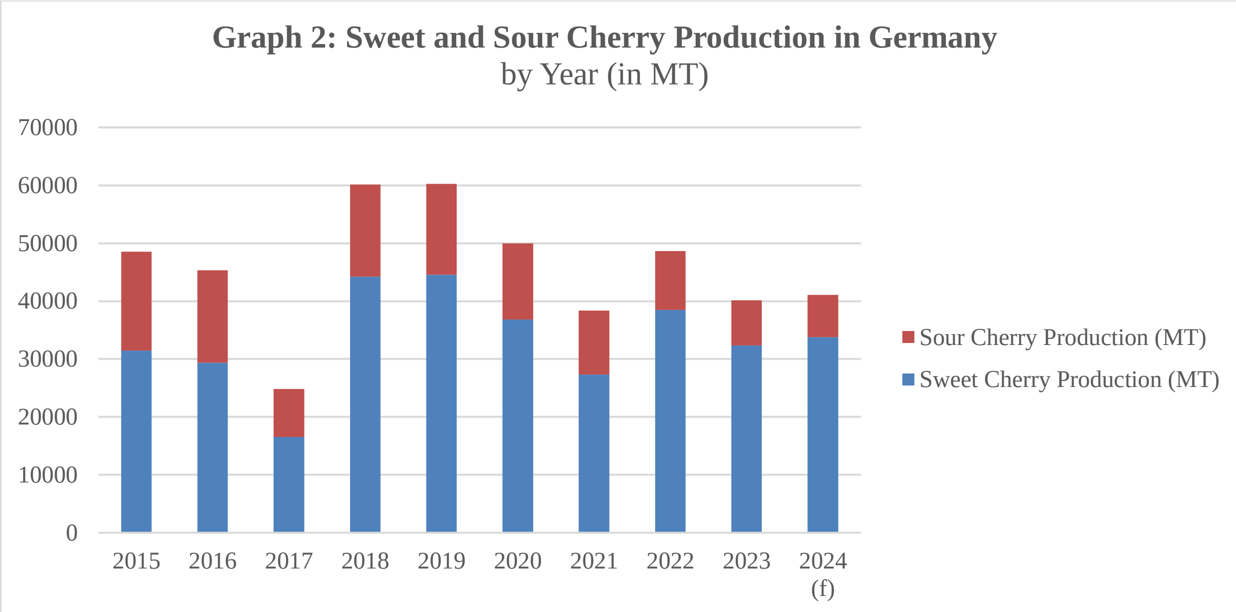
[2] LWK: Schöne, süße Kirschen von bester Qualität erwartet | Article | Fruitnet (German language)
[3] 1 Euro = 1,09 USD (June 27, 2023)
[4] The census is carried out every five years. For more information please refer to our report Results of the German Fruit Tree Census 2022

II. Production

Based on crop assessments carried out on June 10, the German Federal Office of Statistics (*destatis*) estimates German cherry production for MY[5] 2024/25 at 41,085 MT[6]. If this materializes, it would be a 2.3 percent increase compared to the very low production of the preceding year but 13 percent below the ten-year (2014-2023) average. This is largely a result of unfavorable weather conditions at time of pollination. Late spring frosts reduced production particularly in the East. Additionally, in the North, wet and cold weather reduced the activity of bees during the pollination time of late varieties. However, actual harvested production may be substantially lower due to summer thunderstorms with heavy rain and hail. At the time of writing (mid-July 2024) the extent to which recent thunderstorms that included hail and heavy rains affected production is unclear. Sweet cherry production is estimated at 33,764 MT and sour cherries at 7,321 MT. In MY 2023/24, production amounted to 40,156 MT, including 32,350 MT of sweet cherries and 7,806 MT of sour cherries. Depending on the region, harvest started in the weeks of May 27 and June 3. In the North this was roughly ten days earlier than average, in the South slightly later than usual. Picking is expected to conclude by mid-August.



[5] Marketing year 2024 = April 2024 through March 2025
[6] [Kirschenernte 2024 voraussichtlich 13,2 % unter Zehnjahresdurchschnitt - Statistisches Bundesamt (destatis.de)]
Published on July 1, 2024 and based on a crop on June 10, 2024



Source: FAS Berlin; Data from German Federal Office of Statistics (destatis)[7]
(f) = FAS Berlin forecast

IV. Trade

Germany is the third largest importer of cherries in the world after China/Hong Kong and Russia. From 2010 to 2023, 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 consisted of sweet cherries, depending on the year between 60 and 81 percent. Türkiye is by far the largest supplier with a share of 40 percent of the total import market and 49 percent when only looking at sweet cherries. Hungary, Poland, and Serbia are the largest suppliers of sour cherries.

Imports from the United States are small. 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.

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

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

	Marketing Year (April/March)				
	2019/20	**2020/21**	**2021/22**	**2022/23**	**2023/24**
World	**66,362**	**75,469**	**69,364**	**52,896**	**50,197**
Intra EU-27	31,372	43,995	43,751	38,444	28,710
Extra EU-27	34,989	31,474	25,613	14,453	21,487
Türkiye	32,405	29,189	23,307	12,432	19,878
Spain	5,199	3,773	7,402	6,930	5,994
Greece	5,729	10,607	9,498	10,345	5,895
Netherlands	1,186	1,456	1,535	2,157	5,186
Hungary	8,304	8,318	7,207	7,462	4,557
Poland	2,662	13,555	7,846	3,297	3,175
Italy	2,786	3,177	6,463	5,544	2,549
Serbia	2,115	1,803	1,205	1,514	1,273
Czech Republic	2,879	2,429	2,497	1,417	582
Other	3,097	1,162	2,404	1,798	1,108

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

	Marketing Year (April/March)				
	2019/20	2020/21	2021/22	2022/23	2023/24
World	**49,167**	**49,563**	**49,080**	**38,742**	**40,603**
Intra EU-27	16,356	20,107	25,098	25,984	20,503
Extra EU-27	32,812	29,456	23,982	12,758	20,100
Türkiye	32,392	29,184	23,289	12,431	19,863
Greece	5,695	10,580	9,473	10,318	5,892
Spain	5,179	3,633	6,864	6,299	5,607
Netherlands	941	1,214	1,281	1,952	5,030
Italy	1,951	2,765	6,445	5,534	2,539
Hungary	1,534	1,431	27	585	848
Poland	93	41	706	278	265
Chile	229	122	325	121	111
Other	1,153	593	670	1,224	448

Source: Trade Data Monitor, LLC. (TDM), MY2023/24 = April 2023- March 2024

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

	Marketing Year (April/March)				
	2019/20	2020/21	2021/22	2022/23	2023/24
World	17,194	25,906	20,285	14,155	9,594
Intra EU-27	15,017	23,889	18,653	12,460	8,207
Extra EU-27	2,178	2,018	1,632	1,695	1,387
Hungary	6,771	6,888	7,179	6,877	3,709
Poland	2,569	13,514	7,140	3,019	2,910
Serbia	2,115	1,803	1,188	1,494	1,271
Czech Republic	2,673	2,429	2,482	1,352	572
Spain	21	140	539	630	387
Austria	621	21	102	24	277
Slovenia	779	0	517	0	175
Netherlands	244	243	254	205	156
North Macedonia	50	200	425	200	100
Other	1,351	668	459	354	37

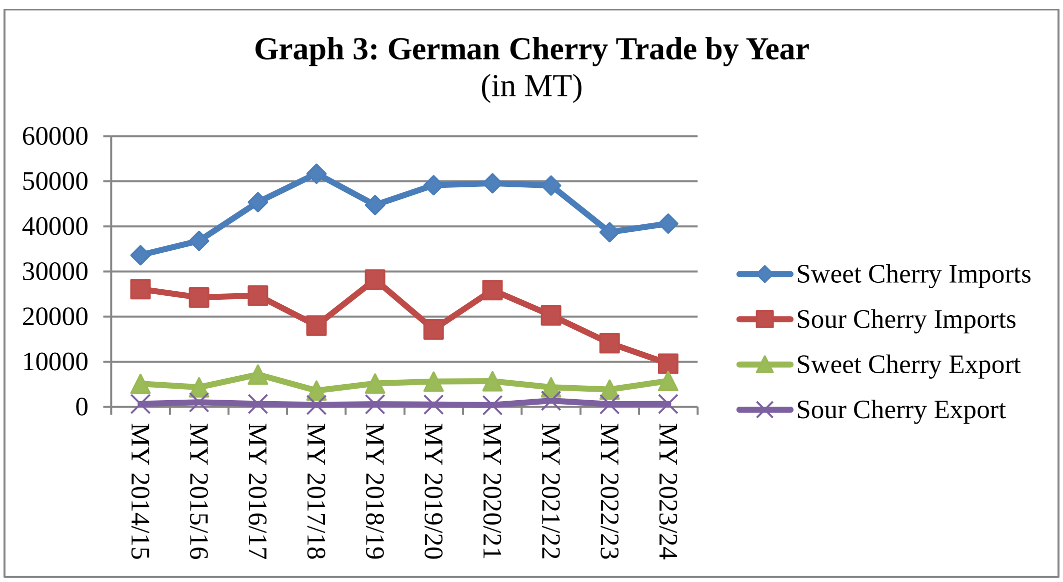
Source: Trade Data Monitor, LLC. (TDM), MY2023/24 = April 2023- March 2024

Germany exports less than ten percent of its total cherry supply, between 4,000 to 6,400 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.

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

	Marketing Year (April/March)				
	2019/20	2020/21	2021/22	2022/23	2023/24
World	**6,119**	**6,111**	**5,704**	**4,395**	**6,381**
Intra EU-27	5,406	5,349	5,268	3,266	4,862
Extra EU-27	712	762	436	1,129	1,518
Switzerland	665	709	434	1,129	1,493
Austria	1,071	1,274	1,534	638	891
Denmark	620	783	453	342	759
Poland	195	61	31	260	663
Netherlands	1,074	821	1,003	666	563
Sweden	317	800	443	104	416
France	608	438	662	279	395
Italy	384	176	493	301	316
Spain	35	98	23	115	283
Finland	515	396	441	409	246
Other	635	555	187	152	356

Source: Trade Data Monitor, LLC. (TDM), MY2023/24 = April 2023- March 2024



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[8]. 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[9] 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 July 1, 2024, the average wholesale price for domestic sweet cherries amounted to 5.92 Euro (USD 6.23[10]) per kg for larger cherries but only 4.23 Euro (USD 4.59) per kg for cherries smaller than 26 mm.[11]

Demand for fresh sour cherries is steadily decreasing, as the popularity of the traditional sour cherry fruit tart is dwindling. In MY23/24, 89 percent of domestically produced sour cherries went into processing, mainly for canning or freezing (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 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.

[8] AMI Marktbilanz Obst 2023, p. 114, table 7.16
[9] AMI Marktbilanz Obst 2023, p. 109, table 7.5
[10] Exchange rate on July 12, 2024: 1 USD = 0.92115 Euro
[11] BLE Marktbericht Obst, Gemuese, Suedfruchte KW 27/2024, page 3 of the annex
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 5-7, 2025

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 11-14, 2025

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 23/24, 2024, in Duesseldorf/Germany

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

VII. Policy

Germany is a member of the European Union and generally follows EU directives and regulations, including those relating to the importation of food products. Please refer to the EU Stone Fruit Annual Report available in the GAIN report database at Search | Global Agricultural Information Network (usda.gov)

VIII. Post Contact

For more information, please contact:

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14191 Berlin, Germany
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IX. Related reports:

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

Exporter Guide Annual | GM2024-0006Berlin | Germany
Published On: July 02, 2024

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 2023, total U.S. exports of agricultural and related products to Germany reached USD 2.9 billion, a 3.5% increase as compared to 2022. The largest segments were – apart from soybeans – tree nuts, seafood products, whisky, wine, and condiments. This report provides U.S. exporters with background information and suggestions for entering the German market.

Exporter Guide Annual_Berlin_Germany_GM2024-0006

FAIRS Country Report Annual | GM2024-0001Berlin | Germany

Published On: April 30, 2024

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 in the EU. Food laws currently in force in the EU are summarized in the EU FAIRS country report.

FAIRS Country Report Annual_Berlin_Germany_GM2024-0001

FAIRS Export Certificate Report Annual | GM2024-0002Berlin | Germany
Published On: April 19, 2024

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_GM2024-0002

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

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.