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## Germany

### Citrus

### Trade Data

### 2003

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**Report Highlights:**

Total German imports of fresh citrus fruit amounted to 1.134 million MT in MY 2002/2003 (Oct/Sept), of which 1.6 percent or 18,693 MT originated in the United States. Grapefruit accounted for almost all of the U.S. citrus exports to Germany. Spain supplied 76 percent of all citrus imported into Germany. For MY 2002/2003 German citrus imports are expected to remain stable.

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Includes PSD Changes: No  
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## Production

Germany does not produce fresh citrus fruit.

## Consumption

Consumption of fresh citrus in Germany is met solely by imports. German citrus imports mainly depend on the size of the citrus crop and the export availability in Mediterranean countries, rather than on consumer demand.

## Trade

Differences between volumes given below and other sources may be due to the fact that the customs data used in this report states volumes by country of origin, while the German Federal Office for Statistics notifies Eurostat by country of shipping. For example, U.S. grapefruit entering Germany via Rotterdam would be stated in this report as import from the U.S. but Eurostat would label it as import from the Netherlands.

## Imports

Over 90 percent of the German citrus imports originate from Mediterranean countries. In MY 2002/2003 (October/September), Spain was the largest supplier of fresh citrus fruit to Germany with a total market share of 75 percent. For fresh tangerines, fresh oranges and fresh lemons, the market share was 89 percent, 78 percent and 68 percent, respectively.

Only grapefruit and lemons are sourced in substantial amounts from countries outside the Mediterranean Sea area. In MY 2002/03, 55 percent of imported grapefruit originated from non-Mediterranean countries, mainly the United States, South Africa, and Argentina with an import share of 28 percent, 11 percent, and 8 percent, respectively. Argentina supplied 22 percent of the imported lemons.

In general, U.S. exports of fresh citrus to Germany are marginal. In MY 2002/2003 (Oct/Sept) total U.S. citrus exports to Germany amounted to 18,693 MT, which represented merely 1.6 percent of total German citrus imports. However, the United States was the most important supplier of grapefruit in the German market with a 29 percent market share.

Total imports of all types of citrus amounted to 1.13 million MT in MY 2002/2003 (October/September). This is a 10 percent increase compared to the previous MY, and largely a result of the increased availability in Mediterranean countries and lower prices.

Fresh oranges (excluding bitter oranges) are the most popular citrus fruit in Germany, and made up 50 percent of all citrus German imports in MY 2002/03, which totaled 569,355 MT. This is an 11 percent increase from the previous marketing year. 78 percent of the imported oranges originated in Spain. Other important suppliers of fresh oranges were Greece, South Africa, Italy, and Morocco. U.S. shipments of oranges were negligible at only 25 MT.

Imports of fresh tangerine-type citrus amounted to 358,707 MT in MY 2002/03, up 15 percent from the previous year. Spain clearly dominates the German market with an import share of 89 percent, followed by Morocco (2.6 percent), Turkey (2.3 percent), and Greece (2.0 percent). Tangerines accounted for 32 percent of total German citrus imports.

Imports of fresh lemons dropped by 2.6 percent to 127,963 MT in MY 2002/2003 compared to MY 2001/2002. Spain, Argentina, Italy, and Greece were the main suppliers of fresh lemons to Germany, with market shares of 68 percent, 22 percent, 3 percent, and 2 percent,

respectively, in MY 2002/2003. Lemons comprised 11 percent of total German citrus imports.

In Germany, grapefruit is not as popular as the other citrus fruits. In MY 2002/2003 grapefruit comprised only 5 percent of citrus imports. They amounted to 65,168 MT, up 4 percent from the previous marketing year. The United States was the largest grapefruit exporter to Germany with an import market share of 29 percent (18,595 MT), followed by Turkey, Israel, South Africa, and Spain, with market shares of 21 percent, 19 percent, 11 percent, and 11 percent, respectively. Most U.S. grapefruit exports consist of the "ruby red" variety from Florida.

Imports of orange juice (figures converted to 65 degrees Brix) totaled 300,624 MT in MY 2002/2003. This is an increase of 7 percent compared to the previous marketing year, with Brazil supplying approximately 57 percent or 170,844 MT of the market followed by Switzerland with 58,102 MT and Poland with 13,021 MT. The United States is a marginal supplier of orange juice, accounting for only 1,492 MT or less than 1 percent of the import volume in Germany. Orange juice is the second most popular juice (behind apple juice) in Germany and accounts for 24 percent of the domestic juice consumption.

### Exports

All exports of fresh citrus from Germany are re-exports. Exports amounted to 3 percent of total citrus imports and totaled 32,960 MT in MY 2002/2003, 3 percent less than in the previous MY.

With orange juice, the situation is different. Substantial amounts of imported concentrated juice are processed into juice and exported thereafter mainly to other EU countries, especially the Netherlands, France, Belgium, and the United Kingdom. In MY 2002/2003 Germany exported 73,203 MT of orange juice (65 degrees Brix equivalent). That is about 25 percent of the import volume.

### MY 2003/2004 Forecast

Mediterranean producers estimate a reduction in exports in MY 2002/2003 of about 1 percent, from 5.787 million MT to 5.754 million MT. Exports of oranges are expected to remain stable at 2.8 million MT. For tangerines and grapefruit a 2 percent reduction to 1.935 million and 229,000 MT is forecast. Only lemon exports are expected to increase, by 3 percent to 773,000 MT, due to the higher Spanish production.

German domestic citrus consumption correlates to a large extent with Mediterranean citrus exports, therefore German imports are expected to remain stable at about 1.13 million MT.

The biggest disadvantage for U.S. citrus fruit on the German market used to be the unfavorable exchange rate, which made U.S. products very expensive compared to products from other origins. The weakening U.S. dollar could help increase prospects for U.S. citrus on the German market.

Note: In recent years the U.S. dollar/Euro exchange rate has been as follows:

2001:	US\$ 1	= Euro 1.1165
2002:	US\$ 1	= Euro 1.0575

The current exchange rates (as of December 10, 2003, Handelsblatt) are for:

U.S. dollar/ Euro	US\$ 1	= Euro	0.8162
Euro/U.S. dollar	Euro 1	= U.S. dollar	1.2251

## Statistical Tables

Table 1: German Imports and Exports of Fresh Oranges

German Imports of Fresh Oranges, in MT

MY 2001/2002 (Oct/Sept)		MY 2002/2003 (Oct/Sept)		Import share (percent)
USA	46	USA	25	0.004
SPAIN	392,925	SPAIN	441,483	77.5
ITALY	35,591	GREECE	34,850	6.1
GREECE	23,477	SOUTH AFRICA	30,193	5.3
MOROCCO	17,286	ITALY	23,574	4.1
SOUTH AFRICA	15,120	MOROCCO	18,012	3.2
ARGENTINA	10,586	ARGENTINA	8,227	1.4
ZIMBABWE	6,701	ZIMBABWE	5,161	0.9
TURKEY	4,776	TURKEY	2,822	0.5
EGYPT	2,401	EGYPT	1,475	0.3
BRAZIL	1,311	FRANCE	824	0.1
OTHER	2,327	OTHER	2,709	0.5
TOTAL	512,547	TOTAL	569,355	100.0

German Exports of Fresh Oranges, in MT

MY 2001/2002 (Oct/Sept)		MY 2002/2003 (Oct/Sept)		Import share (percent)
USA	0	USA	0	0.0
AUSTRIA	2,876	NETHERLANDS	2,964	21.9
POLAND	2,008	AUSTRIA	2,635	19.5
FRANCE	1,895	FRANCE	2,014	14.9
NETHERLANDS	1,822	POLAND	1,107	8.2
DENMARK	811	DENMARK	962	7.1
FINLAND	770	SPAIN	789	5.8
ITALY	692	ITALY	646	4.8
BELGIUM	647	FINLAND	611	4.5
SPAIN	465	BELGIUM	359	2.7
SWEDEN	387	SWEDEN	322	2.4
Other	1,670	OTHER	1,099	8.1
TOTAL	14,043	TOTAL	13,508	100.0

Source: Data from the German Federal Office of Statistics, Wiesbaden

**Table 2: German Imports and Exports of Tangerines**

## German Imports of Fresh Tangerines, in MT

MY 2001/2002 (Oct/Sept)		MY 2002/2003 (Oct/Sept)		Import share (percent)
USA	17	USA	57	0.0
SPAIN	272,474	SPAIN	318,217	88.7
TURKEY	9,952	MOROCCO	9,265	2.6
ITALY	9,617	TURKEY	8,308	2.3
MOROCCO	6,796	GREECE	7,085	2.0
GREECE	4,989	ITALY	5,877	1.6
CYPRUS	3,792	CYPRUS	4,275	1.2
ARGENTINA	2,005	FRANCE	2,579	0.7
FRANCE	750	ARGENTINA	1,360	0.4
SOUTH AFRICA	445	SOUTH AFRICA	720	0.2
URUGUAY	378	URUGUAY	413	0.1
OTHER	654	OTHER	551	0.2
TOTAL	311,869	TOTAL	358,707	100.0

## German Exports of Fresh Tangerines, in MT

MY 2001/2002 (Oct/Sept)		MY 2002/2003 (Oct/Sept)		Export share (Percent)
USA	0	USA	0	0.0
AUSTRIA	1,653	POLAND	1,507	17.4
FINLAND	1,477	AUSTRIA	1,413	16.3
POLAND	1,381	FINLAND	1,288	14.9
FRANCE	603	SPAIN	1,062	12.3
SWEDEN	485	FRANCE	1,044	12.1
NETHERLANDS	418	NETHERLANDS	856	9.9
DENMARK	292	DENMARK	424	4.9
ITALY	156	BELGIUM	279	3.2
LITHUANIA	120	SWEDEN	267	3.1
RUSSIA	82	ITALY	127	1.5
OTHER	286	OTHER	393	4.5
TOTAL	6,953	TOTAL	8,660	100.0

Source: Data from the German Federal Office of Statistics, Wiesbaden

**Table 3: German Imports and Exports of Lemons**

## German Imports of Fresh Lemons, in MT

MY 2001/2002 (Oct/Sept)		MY 2002/2003 (Oct/Sept)		Import share (percent)
USA	0	USA	0	0.0
SPAIN	92,083	SPAIN	87,356	68.3
ARGENTINA	24,828	ARGENTINA	27,837	21.8
ITALY	6,005	ITALY	4,657	3.6
TURKEY	3,379	GREECE	2,741	2.1
CYPRUS	1,672	SOUTH AFRICA	2,334	1.8
GREECE	1,573	CYPRUS	1,280	1.0
SOUTH AFRICA	1,256	TURKEY	911	0.7
URUGUAY	344	URUGUAY	502	0.4
FRANCE	67	BRAZIL	105	0.1
BRAZIL	51	ZIMBABWE	83	0.1
OTHER	112	OTHER	157	0.1
TOTAL	131,370	TOTAL	127,963	100.0

## German Exports of Fresh Lemons, in MT

MY 2001/2002 (Oct/Sept)		MY 2002/2003 (Oct/Sept)		Export share (Percent)
USA	0	USA	0	0.0
AUSTRIA	1,055	AUSTRIA	1,677	38.0
NETHERLANDS	708	DENMARK	521	11.8
ITALY	533	NETHERLANDS	498	11.3
DENMARK	502	FRANCE	476	10.8
FRANCE	402	BELGIUM	460	10.4
GREECE	262	ITALY	387	8.8
SPAIN	253	FINLAND	147	3.3
POLAND	242	GREECE	98	2.2
SWEDEN	117	RUSSIA	68	1.5
FINLAND	102	POLAND	51	1.2
OTHER	146	OTHER	27	0.6
TOTAL	4,322	TOTAL	4,410	100.0

Source: Data from the German Federal Office of Statistics, Wiesbaden

**Table 4: German Imports and Exports of Grapefruit**

## German Imports of Fresh Grapefruit, in MT

MY 2001/2002 (Oct/Sept)		MY 2002/2003 (Oct/Sept)		Import share (percent)
U.S.	18,183	USA	18,595	28.5
TURKEY	12,779	TURKEY	12,616	19.4
SPAIN	6,332	ISRAEL	6,975	10.7
SOUTH AFRICA	5,927	SOUTH AFRICA	6,964	10.7
ARGENTINA	5,834	SPAIN	6,890	10.6
ISRAEL	5,511	ARGENTINA	5,080	7.8
HONDURAS	2,052	HONDURAS	1,745	2.7
CYPRUS	1,769	CYPRUS	1,663	2.6
CUBA	1,610	BRAZIL	1,288	2.0
BRAZIL	677	MEXICO	950	1.5
MEXICO	576	CUBA	638	1.0
OTHER	1,414	OTHER	1,764	2.7
TOTAL	62,664	TOTAL	65,168	100.0

## German Exports of Fresh Grapefruit, in MT

MY 2001/2002 (Oct/Sept)		MY 2002/2003 (Oct/Sept)		Export share (Percent)
USA	0	USA	0	0.0
POLAND	3,115	POLAND	1,482	27.9
ITALY	1,279	ITALY	1,482	27.9
NETHERLANDS	1,220	NETHERLANDS	977	18.4
GREECE	526	FRANCE	461	8.7
FRANCE	513	AUSTRIA	356	6.7
DENMARK	269	DENMARK	253	4.8
AUSTRIA	258	BELGIUM	142	2.7
SWEDEN	102	GREECE	54	1.0
UNITED KINGDOM	76	SPAIN	37	0.7
SPAIN	69	SWEDEN	26	0.5
OTHER	162	OTHER	51	1.0
TOTAL	7,589	TOTAL	5,321	100.0

Source: Data from the German Federal Office of Statistics, Wiesbaden



**Table 5: German Imports and Exports of Orange Juice (converted to 65 brix basis)**

## German Imports of Orange Juice, in MT at 65 Brix

MY 2001/2002 (Oct/Sept)		MY 2002/2003 (Oct/Sept)		Import share (percent)
U.S.	1,871 a	U.S.	1,492	0.5
BRAZIL	153,450	BRAZIL	170,844	56.8
SWITZERLAND	50,387	SWITZERLAND	58,102	19.3
BELGIUM	14,058	POLAND	13,021	4.3
POLAND	8,873	NETHERLANDS	12,532	4.2
NETHERLANDS	10,429	ITALY	10,212	3.4
ITALY	10,108	SPAIN	5,929	2.0
SPAIN	7,769	CZECH REPUBLIC	6,474	2.2
CZECH REPUBLIC	5,900	CUBA	6,566	2.2
CUBA	4,188	COSTA RICA	2,392	0.8
COSTA RICA	3,201	UNITED KINGDOM	3,334	1.1
OTHER	11,159	OTHER	9,726	3.2
TOTAL	281,394	TOTAL	300,624	100.0

## German Exports of Orange Juice, in MT at 65 Brix

MY 2001/2002 (Oct/Sept)		MY 2002/2003 (Oct/Sept)		Export share (Percent)
U.S.	11	U.S.	39	0.1
FRANCE	29,203	NETHERLANDS	20,991	28.7
NETHERLANDS	15,651	FRANCE	18,593	25.4
UNITED KINGDOM	12,597	BELGIUM	12,251	16.7
BELGIUM	10,290	UNITED KINGDOM	9,743	13.3
SPAIN	7,951	DENMARK	2,052	2.8
DENMARK	3,548	SWEDEN	1,888	2.6
PORTUGAL	2,971	ITALY	1,418	1.9
ITALY	2,501	SPAIN	1,702	2.3
GREECE	1,974	IRELAND	974	1.3
SWEDEN	1,671	AUSTRIA	823	1.1
OTHER	3,094	OTHER	2,730	3.7
TOTAL	91,462	TOTAL	73,203	100.0

Source: Data from the German Federal Office of Statistics, Wiesbaden

Note: All trade data for orange juice has been converted to 65 degrees Brix. To convert to single strength (11.2 brix) multiply with 5.8.

**Table 6: Citrus Exports from Mediterranean Countries****Citrus Exports of Mediterranean Countries, in 1,000 metric tons**

ranked by volume of 2003/2004

	1998/99	1999/2000	2000/01	2001/02	2002/03	2003/04*	change	
<b>Oranges</b>	2,462	2,640	2,427	2,671	2,814	2,813		0
Spain	1,214	1,430	1,187	1,449	1,409	1,425	+	1
Egypt	211	211	207	284	407	455	+	12
Greece	260	268	355	256	337	287	-	15
Morocco	361	326	257	240	274	267	-	3
Turkey	102	86	121	187	194	200	+	3
Italy	75	123	125	128	78	65	-	16
Other	239	196	175	127	115	114	-	1
<b>Tangerines</b>	1,579	1,880	1,623	1,800	1,982	1,935	-	2
Spain	1,102	1,317	1,143	1,185	1,370	1,358	-	1
Turkey	137	123	160	245	256	250	-	2
Morocco	223	271	136	190	208	203	-	2
Israel	30	35	29	25	23	23	+	0
Other	87	134	155	155	125	101	-	19
<b>Lemons</b>	665	734	725	814	752	773	+	3
Spain	451	455	505	482	501	550	+	10
Turkey	154	195	135	282	191	170	-	11
Greece	22	24	31	8	24	20	-	18
Italy	11	26	24	19	18	15	-	15
Other	27	34	30	23	18	18	+	0
<b>Grapefruits</b>	243	254	234	236	233	229	-	2
Turkey	63	85	83	112	100	110	+	10
Israel	123	115	94	69	64	63	-	2
Spain	22	25	24	27	34	28	-	17
Cyprus	33	23	27	25	28	26	-	6
Other	2	6	6	3	7	2	-	71
<b>All Citrus</b>	4,954	5,512	5,014	5,526	5,787	5,754	-	1

Source: Central Market and Price Reporting Agency (ZMP)

\*Forecast