



Views to european cherry market
Approach by Questionnaire

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Questionnaire with

1-step or 2-step approach:



1. Questionnaire to production and market situation in European countries (probably big difference in marketing and market approach)

Evaluation of questionnaire and (if first round was successful) development of second questionnaire more focusing the challenges in different regions and with view to common markets in Europe

2. Evaluation second Q. and recommendation



We need some data to market situation

What do we want (or have) to know ?

<u>Status quo</u>	<u>Future developement</u>
Quality and varieties	Chance for increase production
Production areas and volume	Higher quality
Producer organization	Logistical requirements
Prices on different levels	Possible Cooperations
Trade flows	Higher consumption
Packing and Logistics	Marketing aspects
Selling points	Market demand
Open market review	Exports
Seasonal aspects	etc.
Per capita consumption	
Market potential	Fields of Science cooperation
Marketing programs	Demand of praxis to science
Problems in market access	
etc.	

How can we get this knowledge?

1. Statistics



- + hard facts
- + objective, analytic, scientific
- retrospective
- rather sectional less holistic
- comparability of datas
- misleading conclusions
- future aspects missing

How can we get this knowledge?

2. Survey (advanced Delphi-method)



- + expert opinions
- + holistic and target-oriented
- + prognosis aspects
- Arbitrariness and subjective
- Extensive and costly

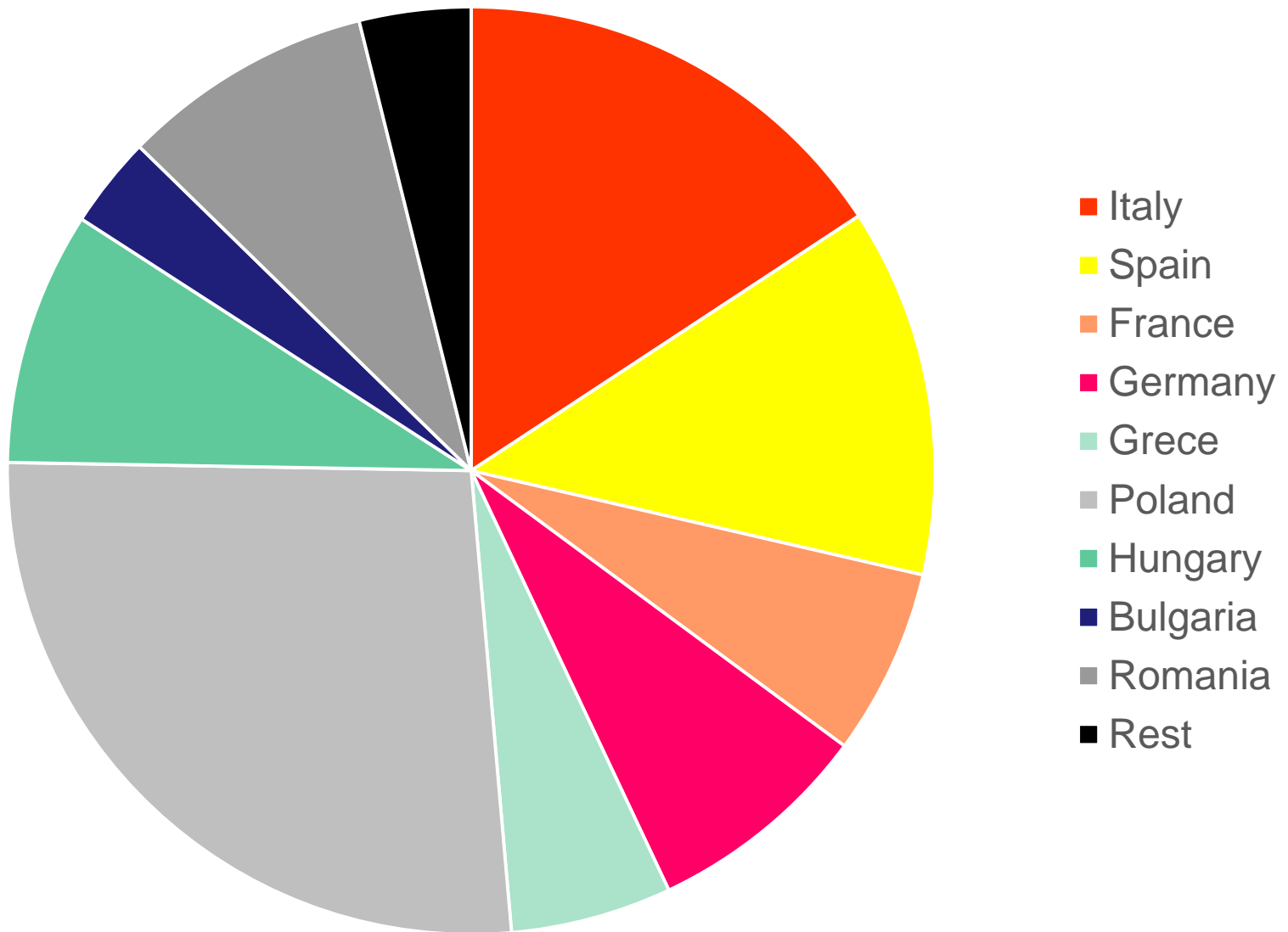
How can we get this knowledge?

3. Best practise/ failures



- + expert opinions
- + holistic and target-oriented
- + prognosis aspects
- + confirmability
- Arbitrariness and subjective
- Not scientific
- portability

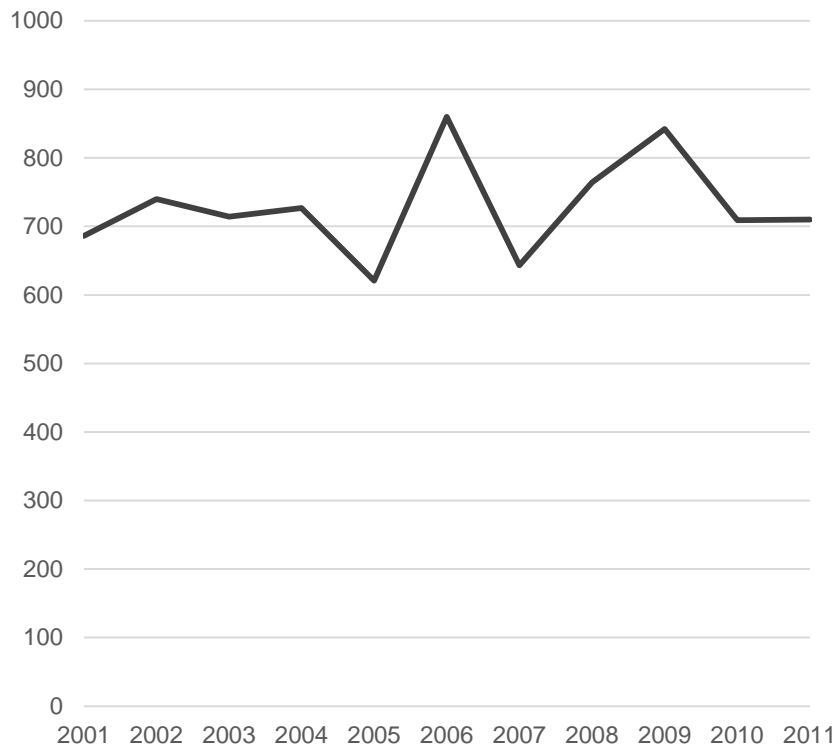
Cherry production EU 27 in 2011



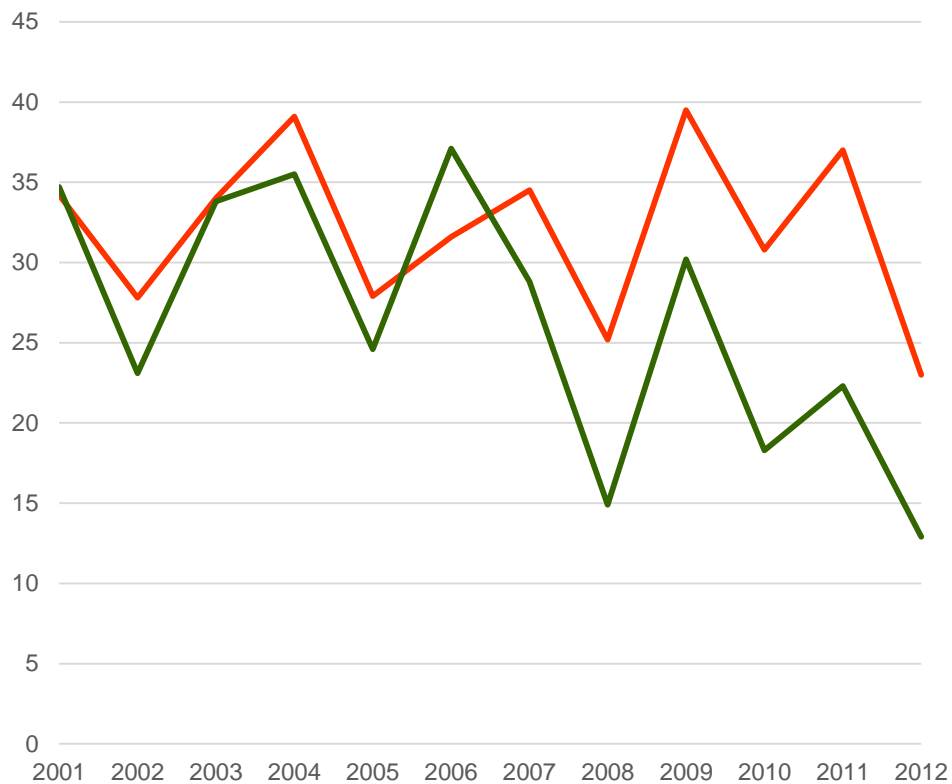
total production 750.000 t approx 50 : 50 % sweet : sour cherries

Cherry production in Europe and Germany

Europe cherry production



Titre du graphique



Sweet cherries

Sour Cherries

Cherrie production regions in Germany 2010 and 2011

Sweet cherries	2010			2011		
Region	Area (ha)	t	Yield t/ha	Area (ha)	t	Yield t/ha
B-W	2125	15789	7,4	2125	20380	9,6
Lower Saxony	536	4324	8,1	523	3635	7,0
Palatina	473	2653	5,6	473	3075	6,5
Rest	2255	8065	3,6	2217	9945	4,5
Germany total	5389	30831	5,7	5338	37035	6,9
Sour cherries	2010			2011		
Region	Area (ha)	t	Yield t/ha	Area (ha)	t	Yield t/ha
Thuringia	345	2204	6,4	327	3099	9,5
Saxony	610	4013	6,6	523	3635	7,0
Palatina	826	6543	7,9	826	7879	9,5
Rest	1127	5505	4,9	1179	7681	6,5
Germany total	2908	18265	6,3	2855	22294	7,8

Production

Which are the main production areas in your country?

name: _____ area (ha): _____ Average harvest (t): _____

name: _____ area (ha): _____ Average harvest (t): _____

name: _____ area (ha): _____ Average harvest (t): _____

Average farm size: _____ ha **Size/Share higher professionals :** _____

Name the most important varieties, their respective size ranges and harvest times:

variety: _____ share of production: _____

Size (mm dia) from _____ to _____ harvest time from _____ to _____

variety: _____ share of production: _____

Size (mm dia) from _____ to _____ harvest time from _____ to _____

variety: _____ share of production: _____

Size (mm dia) from _____ to _____ harvest time from _____ to _____

Percentage of producers who are member of a producer organisation: _____%

Use of cherries:

dessert fruit _____% juice _____% brandies _____%

fruit for processing _____% other _____

Average yield: _____ t/ha

Average tree density per hectare: _____

Market for cherries Germany 2010 in tsd. t

Sweet cherries		Sour cherries	
Production	31		18
Import	29		19
Turkey		13	Serbia 2
Spain		4	Poland 1
Italy		2	Austria 2
France		1	CSR 2
Austria		2	Hungary 11
Greece		3	
Hungary		0,1	
Bulgaria		0,2	
Consumption	60		37

Only Central market

Sweet cherries	
Class 1	6,1
Class 2	0,35
Spirits	2,1
Industry	3,2
Sour cherries	
Class 1	0,2
Class 2	0,1
Conserve	15,3
Juice	3,8

Inside trade EU: 78 tsd. t; imports to EU: 38 tsd. t; Export ex EU 10 tsd. t

There should more cherries to be sold ...(not only in Germany)

Market aspects for cherries

Which are the main marketing channels (Percentage)?

Organized (PO)

Street market

Orchard gate sale

Other in %

Weekly average prices (€/kg) of the last harvest season (2014):

Yearly average prices (€/kg) of the last ten years:

Problems with access to market?

What kind of packing is used?

- Packing: methods (share, advantage)
- Logistics: Important ways from production to consumer. Situation? What could be done better?
- Market transparency: How is actual price estimated or fixed?

Trade for cherries

- **What were the total quantities harvested in the last five years?_**
- **Name the per capita consumption of cherries in your country:**
- **What's the total quantity of national consumption?_**
- **Export: What are the three most important destinations ?**
- **Import: What are the three most important countries of origin?**

Future outlook

Where do you see potential for future development?

- Chance for increase production
- Higher quality
- Logistical requirements
- Possible Cooperations
- Higher consumption
- Marketing aspects
- Market demand
- Exports
- Other:

What has to be changed to get better income for cherry producers

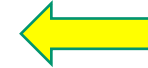
Are there fields of Science cooperation in your country? If yes, please explain further.

Are there practical demands from industry (either producers, marketers or processors) for science? If yes, please explain further with examples.

Are there „good practise“ examples of farms which could be pointed out?

Per capita consumption / marketvolume fruits

fruit	kg/year	Germany in t
apple	29,7	2.435
banana	10,4	853
orange	6,1	500
table grape	5,7	467
clementine	4,2	344
peach	3,6	295
strawberry	3,4	279
pear	2,8	230
cherry	2,2	180
wood berries	1,7	139
rasberry	1,4	115
citrus	1,4	115
plum	1,2	98
grapefruit	1	82
sweet cherry	0,8	66
apricot	0,8	66
others	7,4	607



Cherries are very tasty



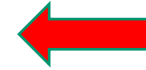
A considerable increase of market should be possible



Why are these chances not be used ?

Percentage consumers buying and price different fruits

	%	€/kg
apricot	34%	2,65
cherry	30%	4,54
plum	42%	1,55
nectarine	64%	1,54
peach	43%	1,9
apple	90%	1,28
pears	58%	1,78
strawberry	72%	3,2
table grapes	74%	2,57
orange	66%	1,03
easy peelers	80%	1,36
grapefruit	21%	1,82
citron	57%	1,85
banana	89%	1,17
ananas	38%	1,15
kiwi	59%	1,95
mango	30%	2,25
melon	50%	1,04



Cherries are expensive



But Strawberries too

How can more consumers be moved to buy cherries ?

Organization of questionnaire

Questionnaire in English and German language; translation if necessary by partners. Recommendation working with government data, asking experts like producers

Responsible person in each country to encourage participation

First round up to end January 2015

Second round Questionnaire approx. March 2015

Evaluation and discussion up to Summer

Description of „good practice“ farms

We will see how far we will get....

Economic research activities are different from trials in orchard or in lab

Do the people tell us the truth?

Even the statistical data from government often are exact or facing the situation

Are the people knowing the truth?

Are the people acting reasonable? Maybe they know better way but are they are following it? If no why not?

What is happening in competition from other fruits

What is influence from yearly changing weather?

What are correct conclusions?

So:

Don't be afraid of not exact data, opinions of market participants can be useful as well