

Practical market insights for your product

# Cherimoya in Germany

As one of the main European markets for exotic fruit, Germany offers interesting opportunities for cherimoya. Producers in Developing Countries (DCs) have most potential by differentiating their products with high quality and marketing stories.

## PRODUCT DEFINITION

Cherimoya (*Annona cherimola*) is one of the many edible fruit species from the family Annonaceae. The Annonaceae family consists of 50 genera of which *Annona* (about 100 species) and *Rollinia* (about 50 species) are the most important commercially. The most esteemed of the fruits of this family is the *Annona cherimola*. The family is tropical and semi-deciduous in habit. The fruit is grown throughout Central & South America, Southern California, South Asia, Australia, the Mediterranean region and North Africa.

### CHERIMOYA FRUIT



[www.Blog.sogonas.com](http://www.Blog.sogonas.com)

### CHERIMOYA FRUIT IN A TREE



[www.livestrong.com](http://www.livestrong.com)

### CUSTARD APPLE



[www.buyfruit.com.au/custard-apples](http://www.buyfruit.com.au/custard-apples)

### ATEMOYA



[www.mygardenlife.com/plant-library/2524/annona/squamosa-a-cherimola](http://www.mygardenlife.com/plant-library/2524/annona/squamosa-a-cherimola)

### SOURSOP



[www.bubblews.com/news/361758-benefits-of-soursop-juice-because-of-its-nutrient-content](http://www.bubblews.com/news/361758-benefits-of-soursop-juice-because-of-its-nutrient-content)

### BIRIBA



[www.ninahorta.folha.blog.uol.com.br/arch2011-08-14\\_2011-08-20.html](http://www.ninahorta.folha.blog.uol.com.br/arch2011-08-14_2011-08-20.html)

Other members of the family that are grown for their fruit are:

- Sugar apple or custard apple (*Annona squamosa*)
- Atemoya (*A. squamosa* & *A. cherimola*)
- Soursop (*Annona muricata*)
- Ilama (*Annona diversifolia*)
- Bullock's heart (*Annona reticulata*)
- Biriba (*Rollinia deliciosa*)

The above mentioned species are sometimes seen as one and the same species in daily language due to their similar taste and appearance.

Cherimoya is primarily an exotic dessert fruit, consumed fresh and when fully ripe. It has a high content of carbohydrates (20 – 22 %) and low content of acids (1 %). Cherimoya fruit is also used in ice cream, milkshakes and sorbets. It is processed into yoghurt, flan, fruit juice and wine. Extracts of cherimoya fruit can be found in the cosmetics industry, in skin and hair care products.

#### CLASSIFICATION OF CHERIMOYA

- Harmonised System (HS) code: no separate HS code exists for cherimoya, instead trade statistics are recorded under 'fresh fruit, n.e.s.', the following HS-codes are possible:
  - 0810.9075
  - 0810.9080
  - 0810.9085
  - 0810.9090
  - 0810.9095

## PRODUCT SPECIFICATION

**QUALITY** The main quality indices are:

UNECE (United Nations Economic Commission for Europe) classifies cherimoyas in 3 different classes: 'Extra class', 'Class I' and 'Class II'. Extra class includes cherimoya of superior quality, free of defects; Class I comprises cherimoya of good quality and Class II-cherimoyas meet the minimum standards, but do not qualify for inclusion in the higher classes.

#### CONSIDERATIONS FOR ACTION

Control measures include good orchard sanitation to minimize sources of fungal spores, pre-harvest application of fungicides, careful handling to reduce physical damage, prompt cooling to 10°C (50°F), and subsequent maintenance of optimum temperature and relative humidity during marketing.

Please refer to the [UNECE standard for Annona](#) for more information on the quality requirements for the different classes.

Fruit size, colour, absence of defects and decay, firmness (cherimoya fruits are relatively soft fruits and must be handled with care to minimize bruising).

Size is determined by the weight of the fruit. According to the UNECE standard, the minimum weight of cherimoya is 100 gr.

Cherimoya has high concentrations of sugars (14 – 15 % when ripe) and moderate acidity (0.4 – 0.7 % when ripe). They are good sources of vitamin C (45 – 60mg/100g) and potassium (250 – 500mg/100g edible portion).

- LABELLING**
- Enable traceability of individual batches
  - Use the English language for labelling unless your buyer has indicated otherwise
  - Labels must include the following:
    - Product name
    - Class (Extra, I or II)
    - Batch code
    - Name and address of exporter
    - Size (code)
    - Number of units
    - Net weight in metric units
    - Recommended storage conditions
  - Additionally, you can mention the quality grade on the label. UNECE provides [standards](#) for both grading and labelling.

**PACKAGED CHERIMOYA**

Source: Freshplaza

- PACKAGING**
- Harvested fruit for wholesale markets are generally sized and packaged in single layers to prevent bruising. Stores selling unripe cherimoya often put them in chilled sections of the produce department, which will prevent the fruit from ripening. In some retail locations, individual fruits are placed inside foam netting to prevent bruising.
  - Please refer to the [Recommended International Code of Practice for Packaging and Transport of Tropical Fresh Fruit and Vegetables](#) and the [German Transport Information Service](#) for more information.

**LEGISLATIVE REQUIREMENTS**

Legal requirements are the minimum requirements which must be met by products marketed in the EU. Products which fail to meet these requirements are not allowed on the EU market. EU legislation sets the basis for legal requirements in the EU, which is generally implemented fully in Germany. Where Germany deviates from the EU legislation, information on the applicable German legislation has been added.

- GENERAL FOOD LAW** Food safety is the key issue in EU food legislation, in which the General Food Law is the framework regulation. The legislation also introduces requirements on traceability.

**CONSIDERATIONS FOR ACTION**

Familiarise yourself with [EU legislation on General food law](#). Also check the relevant [Regulation \(EC\) 178/2002](#).

- MAXIMUM RESIDUE LEVELS (MRLS) OF PESTICIDES IN FOOD** EU legislation has been laid down to regulate the presence of pesticide residues (MRLs) in food products.

Make sure that you comply with the MRLs in your cherimoyas, for more information on the levels check the relevant [EU legislation on MRLs](#). Be aware that large retailers, especially in Germany, often have more strict MRLs than specified by EU legislation. These retailers can allow even up to only 30% of the legal permitted levels, with a maximum of four components found.

More information on MRLs per product can be found on [EU Pesticides Database](#).

Apply GAP and integrated pest management.

**CONTAMINANTS IN FOOD** The EU food safety policy has set maximum levels for certain contaminants in specified products or product groups. Germany has established additional requirements on contaminants in food.

**CONSIDERATIONS FOR ACTION**

Make sure that you are well-informed on the [German legislation on contaminants in food](#), which is additional to the [EU Regulation \(EC\) 1831/2003](#).

**FOOD CONTROL** All food products entering the EU are subject to official controls to check whether they are in compliance with the relevant food legislation.

Familiarise yourself with the [Regulation \(EC\) 853/2004](#) on official controls to verify compliance with food law, which is applicable in Germany as well.

**FOOD CONTACT MATERIALS** The EU has laid down rules for materials and articles coming into contact with food (including for example packaging) in order to prevent any unacceptable change in the composition of the foodstuffs and to protect human health.

Germany has established [voluntary requirements on food contact materials](#) in addition to the EU legislation on food contact materials. Ensure that your materials are safe and do not transfer their components into cherimoya in unacceptable quantities.

**GOOD MANUFACTURING PRACTICE (GMP) FOR FOOD CONTACT MATERIALS** The EU has laid down rules for materials and articles coming into contact with food (including for example packaging) in order to prevent any unacceptable change in the composition of the foodstuffs and to protect human health.

The [GMP for food](#) contact materials is only obligatory for manufacturers within the EU. However, implementation of the GMP into your business may give you competitive advantage when searching for EU markets.

Check the [CBI overview of buyer requirements for Fresh Fruit and Vegetables](#) for more information.

## NON-LEGISLATIVE REQUIREMENTS

### GLOBAL GOOD AGRICULTURAL PRACTICE (GLOBAL G.A.P.)



Most German and EU retailers demand compliance with this global standard and certification for agricultural products. Large retailers increasingly require suppliers to show how they manage quality during (pre-harvest) production instead of only using post-harvest measures. Particularly in trade with large retailers, audits of quality control systems, by field managers of importers and third-party certifiers, are becoming more common.

#### CONSIDERATIONS FOR ACTION

Consider [GlobalGAP](#) standards which can help you to comply with global-wide accepted criteria for food safety, sustainable production methods, worker and animal welfare, and responsible use of water, compound feed and plant propagation materials. In order to supply German supermarkets, you need to comply with this standard.

### THE BUSINESS SOCIAL COMPLIANCE INITIATIVE (BSCI)



The BSCI code of conduct has been developed to improve social conditions in sourcing countries. Currently, this standard is only required for bananas in a few supermarkets, but it may become more important in the future.

Even though it is not yet required for mango producers, keep a close watch on the developments of BSCI in Germany, as it could become an industry requirement in the future. You may ask such information from your buyers or German importers. For more information, please refer to the [BSCI website](#).

### ORGANIC

The EU has established requirements on production and labelling with which an organic product of agricultural origin must comply, in order to be marketed in the EU as 'organic'.

If you choose to obtain a certificate for organic production, find out more about the following three Regulations: [Regulation \(EC\) 834/2007](#) on organic production and labelling, [Regulation \(EC\) 889/2008](#) on organic production, labelling and control, and [Regulation \(EC\) 1235/2008](#) on imports of organic products from third countries.

### DOCUMENTATION

European buyers demand a lot of information about the product and company before placing an actual order. Ideally, they should receive all the information together with their order in logically ordered documents.

Especially in Germany, background information on your fruit production is highly appreciated and even demanded by buyers. Have the following documents readily available:

- Certificate of origin: proves that the products are produced in your country
- Phytosanitary certificate: certifies that the products do not carry potentially dangerous diseases or plagues (e.g. insects, viruses, bacteria, fungi, nematodes)
- GMO-free certificate
- GlobalGAP certificate and other requested certificates, such as HACCP or ISO 9000.

**DELIVERY TERMS** Pay attention to strict compliance with delivery terms as agreed upon with your buyer.

#### CONSIDERATIONS FOR ACTION

Familiarise yourself with [German delivery terms](#), which are based on [international delivery terms](#).

## TRADE AND MACRO-ECONOMIC STATISTICS

No separate records for trade in cherimoyas are available; they are included in EU and German trade statistics of edible fresh fruit, not elsewhere specified. However, as it is unclear what share of this product group consists of cherimoyas, these data would not be representative for cherimoyas. Therefore, it is not included in this section. Instead, where applicable, an overview on the production and international or European trade in fresh cherimoya is given.

**PRODUCTION** There is no production of cherimoya in Germany due to climatic reasons. Instead, the fruit is imported along with other tropical fruits.

In Europe, the Cherimoya fruit is cultivated mainly in the Mediterranean region. Spain leads the world production in cherimoya, with 3,500 – 8,600 acres dedicated to the cultivation of cherimoya trees, producing around 38,000 tons of fruit per year. According to industry sources, Spanish production of cherimoya is expected to have amounted to 45 million in 2013. Technological advances made in recent years allows for out-of-season production, lasting from September to May. The main part of the Spanish cherimoya production is meant for domestic consumption.

In general, a large part of the cherimoyas that is consumed or sold comes from plants growing in home gardens or in the wild. Commercial plantations are found in Peru, Chile, Spain and the United States.

**CONSUMPTION** Data on consumption of cherimoya is not available. According to industry sources, cherimoya as an exotic fruit is relatively unknown and has a relatively small market share.

Consider that investment (money and time) are required to develop the German market as the fruit is relatively unknown.

Although the fruit is relatively unknown, industry sources expect a growing consumption of cherimoya, since exotic fruits, in general, are getting more popular.

Assist the German importer with sales promotion support, especially when the product is not well-known to German consumers.

Germany is one of the main markets for exotic fruit in Europe, and therefore, offers prospects for cherimoya.

**IMPORTS** Germany, France and the UK are the main European importers of cherimoya. Together they import 10% – 20% of the Spanish production. It is reported that compared to the same period last year, Spanish exports of this fruit have decreased by 15% during the first five months of the 2012 – 2013 season.

#### CONSIDERATIONS FOR ACTION

Monitor developments in Spanish production and the activities of EU exporters to Germany, as they are the competitors for the German market for cherimoya.

Both online and offline (trade fairs) market research will be an invaluable way for DC exporters to understand market needs and to discover ways to differentiate. Refer to the section [Useful Sources](#) for more information.

Exports from Peru are expected to have amounted to 50 metric tons in 2013, 20% of which is destined to main markets in Bolivia and Ecuador. Destinations in Europe include mainly France and Spain.

Consider reaching Germany through other European countries, which also import cherimoya from developing countries, such as France and Spain.

Other supplier from DCs mentioned by industry sources is Brazil, which exports only small volumes to Europe year around. Other suppliers outside Europe are Chile and New Zealand.

**EXPORTS** Data on German exports of cherimoya is not available. In general, export to trans-continental markets is particularly hampered by the short shelf life of cherimoya and the consequent need for costly air transport.

Germany can be used as an entry point to reach other markets, especially buyers with an existing trade channels to other surrounding countries are interesting.

## MARKET TRENDS

**PROMISING MARKET** In general, consumption of fresh fruits in Germany shows an upward trend. The German consumers are becoming very health conscious and this attitude is also encouraged by the government. The government makes many efforts to encourage the consumption of fresh fruits.

### CONSIDERATIONS FOR ACTION

For more information on general trends in the European market for fresh fruits and vegetables, please refer to [CBI Trend mapping](#).

**ETHNIC MINORITIES** Germany has a high number of immigrants, particularly from Turkey and other Mediterranean countries, whose diet includes a higher percentage of fruits than the traditional German diet and who spend a higher percentage of their income on food

**VARIETY DIFFERENTIATION** The new variety of cherimoya from Peru – called Cumbe Rayan – is making its way to the global market. The main feature of this fruit is that it has a longer shelf life, which is an advantage as the use of ascorbic acid or citric acid to preserve it is not necessary. Furthermore, its tree has an excellent natural pollination, reducing production costs by 20%.

### PACKAGED CHERIMOYA



Source: Freshfruitportal

Be aware that new technologies and innovations allow for extended shell life, sea freight (over longer distances), more competitive prices, premiums and access to new markets.

Currently, this variety can only be found on the Dutch and Japanese market. Yet, it is expected that in the future, this variety will make some steps to Germany.

Stay informed on the developments of seedless cherimoya.

**SEEDLESS CHERIMOYA** For a couple of years, researchers have been looking into seedless cherimoyas, which could represent a huge step in developing mass markets for the fruit. A question to be answered in the future: would the taste of the seedless cherimoya be changed.

Research possibilities for introducing your fruit in the food industry.

**TOWARDS FOOD PROTECTION** Initiatives have been taken to introduce this fruit in the food processing industry, also to increase its popularity.

**ORGANIC CERTIFICATION** Industry sources indicated that opportunities for organically certified cherimoyas exist on the German market. However, it is deemed to be difficult to produce good quality cherimoyas, as insect infestations are difficult to treat with organic pesticides.

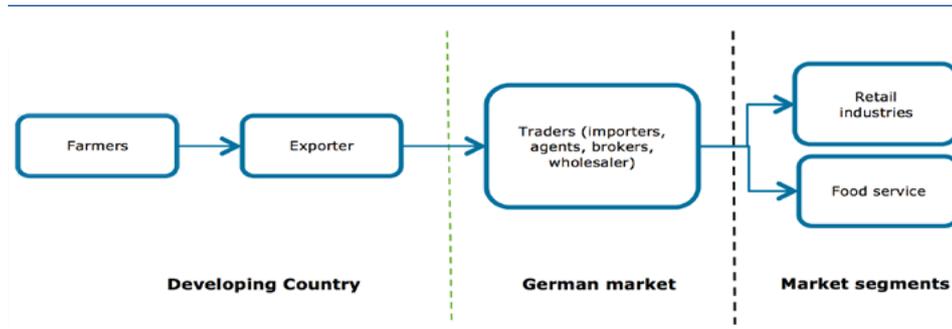
Before converting to complete organic production of your cherimoyas, determine your capacity to produce good quality fruits with organic pesticides. Always discuss your options for organic certification with your (potential) buyers.

Additionally, determine the potential of your organic cherimoyas on the German market, e.g. by talking to organic importers. For more information on where to find these, please refer to the Market Channels and Segments. For more information on the EU requirements for organic certification, refer to the Non-legislative requirements.

## MARKET CHANNELS AND SEGMENTS

German wholesale companies import the fruit mainly from Spain and then distribute it to wholesale markets or deliver to retail chains. Small green grocers, including the popular Turkish green grocers, buy their produce from wholesale markets. Retail chains very rarely import themselves.

FIGURE 1 MAJOR MARKET CHANNELS FOR CHERIMOYAS



Please refer to [CBI Market channels & Segments](#) for more information.

**HIGH TRANSPORTATION COSTS** A large part of the cherimoya is transported by truck from Spain to Germany. Off-season cherimoyas are transported by air-freight from countries in Latin America and Asia. Transportation costs, therefore, make up a large part of the added value for cherimoya.

### CONSIDERATIONS FOR ACTION

Collaboration with importers is highly recommended, as they have a lot of experience with import certificates, labelling and other import requirements.

Find out what the best transportation is for your product and consumer segment. Discuss the options with your buyers.

If you want to find out more on the market potential for organic cherimoyas in Germany, contact organic importers. For an overview of organic importers, please refer to [www.Bio-market.info](http://www.Bio-market.info) or [www.Organic-bio.com](http://www.Organic-bio.com).

**PRICES** Prices for cherimoya vary based on variety, size, country of origin and time of year. They can vary from € 3 per kg when supplies are plentiful, to € 6 per kg, for the same variety, off-season. This indicates that temporary changes in supply can have large effects on prices.

Source your supply as much as possible outside the Spanish season, as Spain is the main threat for DCs.

If your supply is in the same season as Spain, pay attention to the presentation of your product.

## MARKET COMPETITIVENESS

**MARKET GLOBAL CHERIMOYA MARKET** Different cherimoya varieties from outside of Europe are available all year round, as production is spread around different tropical regions. In Spain, the main European producer of cherimoyas, the fruits are only available from November to January. As a producer outside of Europe, you have a competitive advantage over Spanish producers during the rest of the year.

Worldwide, the production of cherimoya is increasing, which leads to a higher rate of global competition. Often, there is fierce rivalry between competitors on the market.

Cherimoyas are relatively unknown whereas many other fruits are already consumed in large volumes. Competition between fruits is therefore fierce.

### CONSIDERATIONS FOR ACTION

Like in other EU countries, German consumers demand a variety of fruits year-round. Even though German demand is not significant, seasonality is an important factor. The best season for exports would be the European spring as well as just before festivities (especially in December).

Keep a close watch on cherimoya production in other regions which have the same harvesting season. You may request such information from your buyers.

Use marketing (e.g. storytelling, novel packaging, and recipes) or premium quality production to differentiate yourself on the market as a supplier. As such, you do not compete on price alone, which can be difficult.

Explore your potential for cherimoya products in addition to fresh cherimoyas, to reach market diversification. Examples include processing cherimoyas into pulp, juice for the food industry or oil for the cosmetics industry.

Producers of cherimoyas can cooperate to share the investments in equipment for cooling and transporting the cherimoyas.

Please refer to [CBI Market Competitiveness for Fresh Fruit & Vegetables](#) for more information.

## USEFUL SOURCES

**TRADE FAIRS** Visiting or even participating in trade fairs is highly recommended as one of the most efficient methods of testing market receptivity, obtaining market information and finding prospective business partners. The most relevant trade fairs for exporters of cherimoyas are:

- [Fruit Logistica](#) in Berlin, Germany, is an international trade fair for fresh produce trade
- Biofach ([www.biofach.de](http://www.biofach.de)) in Nuremberg, Germany (for organic producers)

**OTHER** [Cherimoya project](#): a Spanish initiative; its core members exist of a group of industrialists, business people, managers, technicians and agricultural producers who join forces to bring the fruit to the international food and cosmetics market.

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This survey was compiled for CBI by ProFound – Advisers In Development, in collaboration with CBI sector expert Piet Schotel

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