



Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Voluntary Report - public distribution

Date: 4/07/1999

GAIN Report GM9025

Germany

Grain and Feed

Rice

1999

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Report Highlights:

German rice consumption is stagnant at about 2.2 to 2.4 kilogram per capita.

Imports of U.S. rice dropped by about five TMT in 1998. They were replaced by increased indica rice imports from Spain and increased imports of fragrant rice varieties from Asian countries.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
Unscheduled Report
Bonn [GM1],

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Executive Summary

Consumption

Germany is a traditional importer of about 210,000 to 250,000 tons of rice annually. About 50 percent of the rice imported is brown rice. Fully milled rice imports are mainly of EU origin (75%). There are five rice mills which process rice for supply of the domestic market and for exports.

German consumption of rice is stagnating at somewhere between 2.2 to 2.4 kilograms per capita. Growth in some market segments is offset by consumption reductions in other segments. Total consumption is estimated at about 180,000 to 190,000 metric tons. Germans and also the foreign population (estimated at about 7.5 million out of 82 million) are predominantly eaters of potato and grain products including pasta. Per capita consumption of potatoes amounts to 72.3 kilograms which is actually slowly decreasing. Per capita consumption of grain products including pasta is on a continuous upward trend amounting to 75.1 kilograms.

About 80 to 85 percent of rice consumption is comprised of long grain rice, mainly from the United States and Spain, of which about 48 percent was parboiled rice in 1998. During recent years fragrant rice varieties have gained market share in Germany. However, the total market share of fragrant rice currently amounts to only five percent, but with a tendency to increase further. The majority of fragrant rice is sold through the retail market. Ethnic food from Southeast Asia is gaining popularity, spurring the trend for fragrant rice. Unfortunately demand for new types of rice only replaces traditional rice varieties. An increase in rice consumption is not recorded. Harvesting problems for potatoes during last fall caused a significant price increase for french fries. Therefore, restaurants and caterers currently are increasing their demand for rice. Rice millers hope that this might result in a positive long term effect for their product.

Trade

German rice imports in 1998 dropped by five percent to 215TMT. These reductions mainly occurred in trade with the United States, Netherland Antilles, Guyana and Surinam. All these countries are predominantly suppliers of long grain indica rice varieties. Spain again was in a position to counter the negative trend and shipped 29 TMT to Germany in 1998, five TMT more than in 1997. Italy surpassed the U.S. as the number one supplier of rice for Germany in 1998. The U.S. market share amounts to 25.4 percent; Italy supplied 25.8 percent.

Due to the tariff rate quota for fully milled rice, U.S. exports of fully milled long grain parboiled rice went up by about 10 TMT to 14 TMT in 1998. During the same period, U.S. husked rice shipments to Germany dropped by 16 TMT to 31 TMT.

On the export side, German rice mills export almost exclusively fully milled rice. About 83 percent were shipped to other EU countries. Central European countries which were strong customers in the mid-nineties reduced their purchases in Germany significantly in 1998.

EXPORT			1995	1996	1997	1998	
PRODUCT			MT	MT	MT	MT	
	TO	INTRA-EU-15					
1006	10	210	ROUND GRAIN PADDY RICE, PARBO	18	-	24	18
1006	10	230	MEDIUM GRAIN PADDY RICE, PARB	2	5	1	-
1006	10	270	LONG GRAIN PADDY RICE = > 3, PA	-	1	1	1
1006	10	920	ROUND GRAIN PADDY RICE EXCL.P	3	11	8	0
1006	10	940	MEDIUM GRAIN PADDY RICE EXCL.	-	0	1	3
1006	10	960	LONG GRAIN PADDY RICE > 2, < 3 E	9	52	15	4
1006	10	980	LONG GRAIN PADDY RICE = > 3 EXC	1	1	1	0
1006	20	110	ROUND GRAIN HUSKED RICE, PARB	32	85	1	4
1006	20	130	MEDIUM GRAIN HUSKED RICE, PAR	4	-	1	1
1006	20	150	LONG GRAIN HUSKED RICE > 2, < 3,	135	128	188	196
1006	20	170	LONG GRAIN HUSKED RICE = > 3, P	304	491	264	300
1006	20	920	ROUND GRAIN HUSKED RICE EXCL.	36	237	48	54
1006	20	940	MEDIUM GRAIN HUSKED RICE EXCL	0	-	20	2
1006	20	960	LONG GRAIN HUSKED RICE > 2, < 3	19	13	52	55
1006	20	980	LONG GRAIN HUSKED RICE = > 3 EX	339	-	1043	300
1006	30	230	SEMI-MILLED MEDIUM GRAIN RICE	-	-	-	1
1006	30	250	SEMI-MILLED LONG GRAIN RICE	5	-	-	5
1006	30	270	SEMI-MILLED LONG GRAIN RICE	-	-	-	3
1006	30	420	SEMI-MILLED ROUND GRAIN RICE	31	0	0	-
1006	30	440	SEMI-MILLED MEDIUM GRAIN RICE	-	-	8	30
1006	30	460	SEMI-MILLED LONG GRAIN RICE	2	2	2	2
1006	30	480	SEMI-MILLED LONG GRAIN RICE	-	-	-	1
1006	30	610	WHOLLY MILLED ROUND GRAIN RIC	2	0	0	-
1006	30	630	WHOLLY MILLED MEDIUM GRAIN RI	15	13	-	-
1006	30	650	WHOLLY LONG GRAIN RICE	38	22	85	169
1006	30	670	WHOLLY LONG GRAIN RICE	21010	28979	19362	21607
1006	30	920	WHOLLY MILLED ROUND GRAIN RIC	3130	2752	2579	3238
1006	30	940	WHOLLY MILLED MEDIUM GRAIN RI	74	80	90	65
1006	30	960	WHOLLY LONG GRAIN RICE	141	215	567	108
1006	30	980	WHOLLY LONG GRAIN RICE	5737	5285	5136	5960
1006	40	0	BROKEN RICE	2529	3730	2982	2228
			ALL RICE	33616	42740	32480	34352
	TO	WORLD					

1006	10	210	ROUND GRAIN PADDY RICE, PARBO	18	1	24	18
1006	10	230	MEDIUM GRAIN PADDY RICE, PARB	3	6	6	8
1006	10	250	LONG GRAIN PADDY RICE, > 2,< 3,	15	17	16	23
1006	10	270	LONG GRAIN PADDY RICE = > 3, PA	0	1	6	3
1006	10	920	ROUND GRAIN PADDY RICE EXCL.P	41	62	34	6
1006	10	940	MEDIUM GRAIN PADDY RICE EXCL.	1	3	1	3
1006	10	960	LONG GRAIN PADDY RICE > 2,< 3 E	19	60	29	10
1006	10	980	LONG GRAIN PADDY RICE = > 3 EXC	21	2	2	0
1006	20	110	ROUND GRAIN HUSKED RICE, PARB	32	85	4	4
1006	20	130	MEDIUM GRAIN HUSKED RICE, PAR	4		1	1
1006	20	150	LONG GRAIN HUSKED RICE > 2,< 3,	143	132	195	200
1006	20	170	LONG GRAIN HUSKED RICE = > 3, P	306	527	335	360
1006	20	920	ROUND GRAIN HUSKED RICE EXCL.	39	243	59	55
1006	20	940	MEDIUM GRAIN HUSKED RICE EXCL	0		20	2
1006	20	960	LONG GRAIN HUSKED RICE > 2,< 3	20	13	55	59
1006	20	980	LONG GRAIN HUSKED RICE = > 3 EX	544	776	1119	440
1006	30	210	SEMI-MILLED ROUND GRAIN RICE,	-	-	1	-
1006	30	230	SEMI-MILLED MEDIUM GRAIN RICE	1	0	2	1
1006	30	250	SEMI-MILLED LONG GRAIN RICE	5	2	1	5
1006	30	270	SEMI-MILLED LONG GRAIN RICE	-	20	2	3
1006	30	420	SEMI-MILLED ROUND GRAIN RICE	31	0	0	-
1006	30	440	SEMI-MILLED MEDIUM GRAIN RICE	-	-	8	30
1006	30	460	SEMI-MILLED LONG GRAIN RICE	2	2	2	2
1006	30	480	SEMI-MILLED LONG GRAIN RICE	1	14	0	1
1006	30	610	WHOLLY MILLED ROUND GRAIN RIC	2	0	2	2
1006	30	630	WHOLLY MILLED MEDIUM GRAIN RI	16	15	0	0
1006	30	650	WHOLLY MILLED LONG GRAIN RICE	85	32	96	181
1006	30	670	WHOLLY MILLED LONG GRAIN RICE	22207	31047	21316	23706
1006	30	920	WHOLLY MILLED ROUND GRAIN RIC	5958	5533	4987	3784
1006	30	940	WHOLLY MILLED MEDIUM GRAIN RI	77	84	96	68
1006	30	960	WHOLLY MILLED LONG GRAIN RICE	273	231	568	118
1006	30	980	WHOLLY MILLED LONG GRAIN RICE	20529	14123	9097	9729
1006	40	0	BROKEN Rice	3071	4340	3506	2574
			ALL RICE	53463	57369	41590	41395
IMPORT				1995	1996	1997	1998
PRODUCT				MT	MT	MT	MT
	FROM		U.S.A.				
1006	10	210	ROUND GRAIN PADDY RICE, PARBO	-	-	3	-
1006	10	250	LONG GRAIN PADDY RICE, > 2,< 3,	9	-	-	-
1006	10	920	ROUND GRAIN PADDY RICE EXCL.P	2	20	-	-

1006	10	940	MEDIUM GRAIN PADDY RICE EXCL.	-	1	4	1
1006	10	960	LONG GRAIN PADDY RICE > 2,< 3 E	44	7	-	2
1006	10	980	LONG GRAIN PADDY RICE => 3 EXC	1	1	1	0
1006	20	110	ROUND GRAIN HUSKED RICE, PARB	0	-	20	6
1006	20	130	MEDIUM GRAIN HUSKED RICE, PAR	-	-	1	1
1006	20	150	LONG GRAIN HUSKED RICE > 2,< 3,	1	-	3	-
1006	20	170	LONG GRAIN HUSKED RICE => 3, P	47964	49610	41445	26507
1006	20	920	ROUND GRAIN HUSKED RICE EXCL.	46	18	16	71
1006	20	940	MEDIUM GRAIN HUSKED RICE EXCL	13	13	-	27
1006	20	960	LONG GRAIN HUSKED RICE > 2,< 3	5	2	4	-
1006	20	980	LONG GRAIN HUSKED RICE => 3 EX	16608	12842	5934	4626
1006	30	210	SEMI-MILLED ROUND GRAIN RICE,	17	-	-	-
1006	30	230	SEMI-MILLED MEDIUM GRAIN RICE	2	-	-	-
1006	30	250	SEMI-MILLED LONG GRAIN RICE >	-	-	0	-
1006	30	440	SEMI-MILLED MEDIUM GRAIN RICE	-	29	-	-
1006	30	480	SEMI-MILLED LONG GRAIN RICE =	-	75	52	100
1006	30	630	WHOLLY MILLED MEDIUM GRAIN RI	4	4	-	-
1006	30	650	WHOLLY MILLED LONG GRAIN RICE	333	531	360	56
1006	30	670	WHOLLY MILLED LONG GRAIN RICE	2233	3093	3266	13995
1006	30	920	WHOLLY MILLED ROUND GRAIN RIC	393	163	154	72
1006	30	940	WHOLLY MILLED MEDIUM GRAIN RI	3722	5086	2660	2459
1006	30	960	WHOLLY MILLED LONG GRAIN RICE	24	30	6	2
1006	30	980	WHOLLY MILLED LONG GRAIN RICE	2847	13143	3936	4910
1006	40	0	BROKEN RICE	20	524	110	12
			ALL RICE	74287	85190	57975	52848
	1010		INTRA-EU-15				
1006	10	100	PADDY RICE FOR SOWING	-	-	20	197
1006	10	210	ROUND GRAIN PADDY RICE, PARBO	1132	821	75	3
1006	10	230	MEDIUM GRAIN PADDY RICE, PARB	33	37	69	325
1006	10	250	LONG GRAIN PADDY RICE, > 2,< 3,	287	308	326	325
1006	10	270	LONG GRAIN PADDY RICE => 3, PA	0	23	1	-
1006	10	920	ROUND GRAIN PADDY RICE EXCL.P	392	861	436	404
1006	10	940	MEDIUM GRAIN PADDY RICE EXCL.	43	4	161	40
1006	10	960	LONG GRAIN PADDY RICE > 2,< 3 E	207	227	152	159
1006	10	980	LONG GRAIN PADDY RICE => 3 EXC	120	63	934	1262
1006	20	110	ROUND GRAIN HUSKED RICE, PARB	54	94	144	140
1006	20	130	MEDIUM GRAIN HUSKED RICE, PAR	33	2	74	55
1006	20	150	LONG GRAIN HUSKED RICE > 2,< 3,	1532	973	1076	937
1006	20	170	LONG GRAIN HUSKED RICE => 3, P	13347	15529	26242	17830
1006	20	920	ROUND GRAIN HUSKED RICE EXCL.	1844	1098	1505	2139

1006	20	940	MEDIUM GRAIN HUSKED RICE EXCL	77	96	403	331
1006	20	960	LONG GRAIN HUSKED RICE > 2, < 3	2099	1573	1796	1294
1006	20	980	LONG GRAIN HUSKED RICE = > 3 EX	6824	2528	6873	14291
1006	30	210	SEMI-MILLED ROUND GRAIN RICE,	81	113	1185	174
1006	30	230	SEMI-MILLED MEDIUM GRAIN RICE	40	7	94	-
1006	30	250	SEMI-MILLED LONG GRAIN RICE	113	296	177	236
1006	30	270	SEMI-MILLED LONG GRAIN RICE	33	-	-	-
1006	30	420	SEMI-MILLED ROUND GRAIN RICE	8372	6803	883	21
1006	30	440	SEMI-MILLED MEDIUM GRAIN RICE	159	31	39	5
1006	30	460	SEMI-MILLED LONG GRAIN RICE	631	205	94	209
1006	30	480	SEMI-MILLED LONG GRAIN RICE	500	52	34	13
1006	30	610	WHOLLY MILLED ROUND GRAIN RIC	189	115	30	67
1006	30	630	WHOLLY MILLED MEDIUM GRAIN RI	42	33	84	1
1006	30	650	WHOLLY MILLED LONG GRAIN RICE	708	1097	1138	1478
1006	30	670	WHOLLY MILLED LONG GRAIN RICE	7844	6589	9993	12826
1006	30	920	WHOLLY MILLED ROUND GRAIN RIC	25058	30355	22698	23329
1006	30	940	WHOLLY MILLED MEDIUM GRAIN RI	456	1078	1610	845
1006	30	960	WHOLLY MILLED LONG GRAIN RICE	5364	8261	4799	8671
1006	30	980	WHOLLY MILLED LONG GRAIN RICE	32758	18093	18352	17024
1006	40	0	BROKEN RICE	11997	14990	13391	12142
			ALL RICE	122368	112353	114888	116777
	1000		WORLD				
1006	10	100	PADDY RICE FOR SOWING	1	1	21	197
1006	10	210	ROUND GRAIN PADDY RICE, PARBO	1132	821	79	3
1006	10	230	MEDIUM GRAIN PADDY RICE, PARB	69	81	114	370
1006	10	250	LONG GRAIN PADDY RICE, > 2, < 3,	347	326	327	329
1006	10	270	LONG GRAIN PADDY RICE = > 3, PA	0	29	12	8
1006	10	920	ROUND GRAIN PADDY RICE EXCL.P	409	948	457	518
1006	10	940	MEDIUM GRAIN PADDY RICE EXCL.	71	12	172	59
1006	10	960	LONG GRAIN PADDY RICE > 2, < 3 E	254	238	155	167
1006	10	980	LONG GRAIN PADDY RICE = > 3 EXC	152	68	975	1284
1006	20	110	ROUND GRAIN HUSKED RICE, PARB	54	99	163	146
1006	20	130	MEDIUM GRAIN HUSKED RICE, PAR	81	24	81	63
1006	20	150	LONG GRAIN HUSKED RICE > 2, < 3,	1570	1064	1161	957
1006	20	170	LONG GRAIN HUSKED RICE = > 3, P	64795	66789	67830	44797
1006	20	920	ROUND GRAIN HUSKED RICE EXCL.	1897	1137	2503	2223
1006	20	940	MEDIUM GRAIN HUSKED RICE EXCL	126	145	414	360
1006	20	960	LONG GRAIN HUSKED RICE > 2, < 3	2157	1621	1886	1317
1006	20	980	LONG GRAIN HUSKED RICE = > 3 EX	32680	43336	34071	38768
1006	30	210	SEMI-MILLED ROUND GRAIN RICE,	98	125	1198	174

1006	30	230	SEMI-MILLED MEDIUM GRAIN RICE	50	34	114	-
1006	30	250	SEMI-MILLED LONG GRAIN RICE	119	322	195	319
1006	30	270	SEMI-MILLED LONG GRAIN RICE	131	-	4	4
1006	30	420	SEMI-MILLED ROUND GRAIN RICE	8372	6803	884	45
1006	30	440	SEMI-MILLED MEDIUM GRAIN RICE	179	107	51	16
1006	30	460	SEMI-MILLED LONG GRAIN RICE	690	221	137	331
1006	30	480	SEMI-MILLED LONG GRAIN RICE	10789	13248	8356	5078
1006	30	610	WHOLLY MILLED ROUND GRAIN RIC	190	130	36	67
1006	30	630	WHOLLY MILLED MEDIUM GRAIN RI	46	53	102	3
1006	30	650	WHOLLY MILLED LONG GRAIN RICE	1349	1851	1756	1933
1006	30	670	WHOLLY MILLED LONG GRAIN RICE	10950	12045	14524	28588
1006	30	920	WHOLLY MILLED ROUND GRAIN RIC	25459	30529	23040	23423
1006	30	940	WHOLLY MILLED MEDIUM GRAIN RI	4270	6223	4293	3371
1006	30	960	WHOLLY MILLED LONG GRAIN RICE	5763	8770	5641	9679
1006	30	980	WHOLLY MILLED LONG GRAIN RICE	41013	35466	30483	27103
1006	40	0	BROKEN RICE	20534	26581	24856	23444
			ALL RICE	235795	259244	226091	215144

Source: German Statistics Office

Marketing

The tariff rate quota of 38 TMT for semi and wholly milled rice provides a good opportunity for profitable rice sales to Europe. A significant portion of about 10 TMT of the quote had been sold to Germany in 1998. Consumer trends towards fragrant rice varieties in Germany, however, should not be overlooked. This market provides potential for growth. The traditional long grain indica rice market is very price sensitive and other suppliers such as Spain and Greece may be able to gain additional market shares if sufficient supplies are available.

PSD Table						
Country:	Germany					
Commodity:	Rice, Milled					
		1997		1998		1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1997		01/1998		01/1999
Area Harvested	0	0	0	0	0	0
Beginning Stocks	22	11	31	24	31	17
Milled Production	0	0	0	0	0	0
Rough Production	0	0	0	0	0	0
Milling Rate(.9999)	0	0	0	0	0	0
TOTAL Imports	256	226	250	215	0	225
Jan-Dec Imports	250	215	240	220	0	225
Jan-Dec Import U.S.	66	53	0	50	0	50
TOTAL SUPPLY	278	237	281	239	31	242
TOTAL Exports	57	42	60	40	0	40
Jan-Dec Exports	60	40	50	40	0	45
TOTAL Dom. Consumption	190	171	190	182	0	182
Ending Stocks	31	24	31	17	31	20

Import Trade Matrix			
Country:		Units:	MT
Commodity:			
Time period:	Jan/Dec		
Imports for	1997		1998
U.S.	57975	U.S.	52848
Others		Others	
Italy	58157	Italy	59100
Bel/Lux	16547	Bel/Lux	14066
Spain	24931	Spain	28995
Surinam	13389	Surinam	10216
Neth. Antilles	11056	Neth. Antilles	4421
Thailand	14182	Thailand	16257
India	7156	India	7883
Guyana	5256	Guyana	3885
France	5103	France	2825
Greece	3055	Greece	4324
Total for Others	158832		151972
Others not listed	9284		10324
Grand Total	226091		215144

Export Trade Matrix			
Country:		Units:	MT
Commodity:			
Time period:	Jan/Dec		
Exports for	1997		1998
U.S.	0	U.S.	0
Others		Others	
Denmark	13120	Denmark	14632
Bel/Lux	3794	Bel/Lux	3691
Netherlands	2943	Netherlands	2817
Great Britain	2113	Great Britain	2454
Sweden	4459	Sweden	3783
Poland	2485	Poland	2868
Austria	2154	Austria	2143
Norway	1413	Norway	792
Italy	1070	Italy	827
Total for Others	33551		34007
Others not listed	8039		7388
Grand Total	41590		41395