

COMPETITOR ANALYSIS

PAPAYA IN GERMANY

- Ghana exported slightly over 1.5 million USD of papaya in 2016. Almost two-thirds went to Germany and therewith Ghana is the fourth largest supplier in the German market. In total, Germany imported 27 million USD in 2016 and the dominant export partner was Brazil (74%). This makes Germany the second largest importer of papaya worldwide.
- Brazilian total exports of papaya reached almost 95 million USD in 2016. Brazil is the second largest exporter worldwide. Germany (21% export share) is the largest destination, followed by Portugal (18%), Spain (15%), The Netherlands (13%) and U.K. (12%). From these destinations, Brazil realized good average annual growth in The Netherlands (+13%), Spain (+11%) and France (+11%) from 2012-2016.
- Ecuador exported just over 7 million USD. Germany (46%) and The Netherlands (43%) are the two large destinations for Ecuadorian exports. Spain exported around 5 million USD of papaya. Portugal (24%) and Germany (21%) were main export markets. Furthermore, Spain realized +150% average annual growth in exporting papaya to the French market during 2012-2016. This makes France the third largest Spanish destination in 2016, with 723,000 USD in exports.
- Thailand export value to Germany is comparable with Ghana's. Total exports of papaya from Thailand reached 5.1 million USD in 2016. Germany was with 16% export share the second largest destination, after France (17%). Other significant markets for Thailand include Switzerland (13%) and The Netherlands (11%). With +31% growth on average per year from 2012-2016, exports to Switzerland became more important.
- There are no African competitors in the German market for papaya. Ghana is the largest African exporter of papaya. Actually, the only other significant African supplier of papaya is South Africa (1 million USD exports in 2016).
- Ghanaian exports to Germany showed great growth from 2012, where exports were practically non-existing, to 2 million USD in 2014. However, after 2014 it dropped back to 1 million USD in 2015 and 2016. The same trend can be found for Brazil and Ecuador. Spain realized constant annual growth from 2012 onwards. Exports grew from 133,000 USD to almost 1.1 million USD.

Table 1 – import performance of main suppliers and regional competitors in Germany

Supplier	Import value in 2016 (USD thousand)	Market share	Average annual growth 12-16	Annual growth 2016
Total	26,697	100%	+8%	-9%
Brazil	19,721	73.9%	+5%	-12%
Ecuador	3,254	12.2%	+25%	-10%
Spain	1,096	4.1%	+68%	+56%
Ghana	971	3.6%	+109%	-11%
Thailand	828	3.1%	-12%	-5%
Other	827	3.1%		

Source: Trademap (May, 2017).

- Germany is the second largest importer of papaya worldwide. The German market is dominated by exports from Brazil (74%), while Ghana holds 3.6% market share. Other competitors are Ecuador, Spain and Thailand.
- Ghana shows a good average annual growth during 2012-2016, but this is because of large increases in exports in 2013 and 2014.
- Based on the analysis of its competitors, France and The Netherlands could be interesting markets for Ghanaian exports of papaya as well.

