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Germany

Fresh Deciduous Fruit

Annual

2001

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Report Highlights:
German commercial apple production in CY 2001 is estimated at 890,000 MT, down 21 percent compared to CY 2000. Production of pears is estimated at 45,000 MT (down 31 percent), and production of concentrated apple juice (CAJ) is estimated at 75,000 MT (down 39 percent). Imports and exports of fresh apples and pears from and to the United States are low. The United States is the largest single export market for German CAJ.

Includes PSD changes: Yes
Includes Trade Matrix: No
Annual Report
Berlin [GM1], GM

Executive Summary

German apple production in CY 2001 is estimated at 1.490 million MT (890,000 MT commercial production and 600,000 MT noncommercial production). Compared to CY 2000 this is a drop of 43 percent in total crop production, with commercial Production down 21 percent and noncommercial production down 60 percent. Production of pears is estimated at 45,000 MT (down 31 percent). Production of concentrated apple juice (CAJ) is estimated at 75,000 MT (down 39 percent).

German apple production in CY 2000 was a record 2.631 million MT, an increase of 36 percent compared to the 1998 crop of 1.936 million MT. Total German production of pears in 2000 was 65,162 MT, 20 percent more than the 54,042 MT in 1999. German production of CAJ (70.5 degrees brix) was 122,199 MT in 2000, a considerable 40 percent jump from 98,560 MT in 1999. The United States is the largest single export market for German CAJ. After a sharp drop in MY 1999/00 to 18,741 MT exports to the U.S. recovered in MY 2000/01 to an estimated 25,562 MT reached previous levels.

Traditionally, the German apple juice industry depends heavily on imports of apple juice concentrates of various densities. Major suppliers are Poland, Italy, Turkey and the Czech Republic. Nevertheless, domestic production of must and cider apples in house gardens and from meadows are important to the German juice industry because of assured quality (acid content) and price.

Note: Area and tree numbers are for commercial production only. Commercial production includes market production of apples and pears by commercial orchards. This generally includes the production of fresh table apples. During individual years, depending on the size or quality of the crop, varying quantities of commercial production may be used for the production of juice, sauce and spirits, marmalade and baby foods and for intervention (charity).

Note: Noncommercial production includes apple and pear trees in house gardens and from meadows. Only a very small proportion of this production is used for fresh consumption; while the bulk is for processing into juice, sauce and spirits. Little information is available on area and trees in noncommercial production, and harvest numbers are only rough estimates. Nevertheless, particularly high or low noncommercial apple harvests may significantly influence overall apple balances, e.g., by substituting for apple imports and fresh table apple consumption or increasing processing in case of a bumper must apple crop. PSD's for pears only include "*Commercial Production*" since there is no reliable data available for *"Noncommercial Production."* Furthermore, quantities of pears from *"Noncommercial Production"* that enter the market either in form of fresh or must pears are negligible. Most noncommercial production is consumed directly by households or on farms or distilled into spirits.

Section I: Situation and Outlook

Apples

German apple production in CY 2000 is an estimated 1,490,000 MT, of which noncommercial production is 600,000 MT and commercial production is 890,000 MT. (In 2000 total apple production amounted to 2,630,800 MT; noncommercial production was 1,500,000 MT; and commercial production was 1,130,800 MT). This sharp drop is largely due to a phenomenon called "alternance", which describes the fact a year of record production is followed by a year with a rather low crop, because during the blossom setting stage (July/August) for next year's crop the trees need all their strength to support present year's fruit. This phenomenon especially appears in noncommercial production, as in commercial orchards thinning is used to prevent the trees from overexerting themselves. Late blossoming and cold weather during June led to smaller fruit sizes except with triploid varieties such as Jonagold. Fruit quality is good, neither scab nor russeting is a problem this season. However, hail damage - especially in the Lake Constance area - may result in the conversion of table apples away from fresh to processing into apple juice.

Noncommercial production includes apples grown in house gardens and extensive production in meadows. Typically, noncommercial production is used for fresh consumption, must and spirit production, baking (cakes, tarts) or preserved foods (canned, dried, cooked). Approximately 50 percent of this production is grown in house gardens and is consumed by private households; 40 percent is comprised of must apples used in apple juice production; and the remaining 10 percent is processed into spirits. These percentages may vary depending on the price for must apples.

Domestic fresh consumption was 2.081 million MT in MY 2000/01 (July/June). This figure includes 207,000 MT for processing purposes other than apple juice. Consumption for processing into apple juice was 1.108 million MT. For the first time after the reform of the EU Common Market Organization for fruit and vegetables, which was designed to decrease intervention, the large CY 2000 crop caused sales to intervention to rise to 11,549 MT compared to only 2,589 MT in MY 1999/00. In MY 2000/01 fresh consumption is estimated at 1.723 million MT and processing is expected to go back to 600,000 MT due to a lower noncommercial crop and the well filled CAJ stocks of processors. Intervention is estimated at 3,000 MT.

Imports in MY 2000/01 are estimated at 642,047 MT, a drop from the 787,692 MT of MY 1999/00 , triggered by the favorable European supply situation. For MY 2001/02 a rise of imports of apples to 900,000 MT is expected due to the estimated lower domestic crop. Germany exports only small quantities of apples, 72,720 MT in MY 2000/01.

Prospects for U.S. table apple exports to Germany are low. First of all, German consumers have a preference for striped (or two-colored) varieties with a sweet and sour taste versus single-colored "just sweet" varieties. Consequently varieties like "Elstar", "Gala" and "Braeburn" are much more popular than varieties like "Golden Delicious" or "Red Delicious". Secondly Germany is a price driven market. And although prices are expected to rise in MY2001/02, they still remain on a low level, and the U.S.$-DM-exchange rate is unfavorable for U.S. exports.

In MY 1999/00, U.S. table apple exports dropped to a mere 190 MT from 721 MT in MY 1998/99, but rose in MY 2000/01 to 387 MT. However, this is less than 1 percent of Germany's total imports of 642,047 MT.

Pears

Germany is not a big pear producer, and commercial pear production in 2001 is estimated at 45,000 MT (down 31 percent). Final German pear production in 2000 was 65,162 MT compared to 54,042 MT in 1999; no reliable data for noncommercial production of pears is available. Also, only small quantities of noncommercial pear production enter the pear market; most are consumed directly by households or on farms either fresh or processed. Therefore, Post doesn’t enter any data for the noncommercial pear crop into the PSD table.

Consumption of fresh table pears in MY 2000/01 (July/June) was 203,039 MT. Total imports of pears are estimated at 150,757 MT in MY 2000/01, more than 50 percent originating from Italy. Pear imports supplied roughly 70 percent of domestic consumption. Pears for processing, mainly for spirits, originating from commercial production, amounted to 2,184 MT. Due to the low domestic crop, in MY 2001/02 pear imports are expected to rise to 170,000 MT (up 11 percent).

Imports from the United States were at 2,103 MT in MY 2000/01 up from 1,797 MT in MY 1999/00. This makes the United States the number eight supplier of fresh table pears to Germany (number four for non-EU suppliers). While the low German harvest generally favors imports, the high exchange rate for the U.S. $ is an important obstacle for a further increase of U.S. pear exports to Germany.

Exports of pears from Germany in MY 2001/02 are expected at 8,500 MT. In MY 2000/01 they were at 10,654 MT.

Concentrated Apples Juice (CAJ)

The total volume of must apples pressed ("Eigenkelterung" or production from domestic and imported must or diverted table apples) into apple juice concentrate (70.5 degrees brix) is a reflection of the record apple crop in 2000 and was at 122,199 MT, up from 98,560 MT in 1999. For 2001 apple juice production is estimated at 75,000 MT due to high stocks of CAJ and a significantly lower noncommercial apple crop of only 600,000 MT in 2001. Although hail damage to commercial apples may result in the additional conversion of approximately 100,000 MT of table apples for must production, the total amount of domestic apples available for processing is estimated at only 54 percent of last year’s figure .

German must apples - and to a small extent domestic table apples - form the basis of apple juice production in Germany, especially since German must apples provide the quality (acid content) and price required by the German apple juice processors. For 1999 and 2000, 838,000 MT and 1.108 million MT respectively, of apples entered juice production. For 2000 this number is expected to drop to approximately 600,000 MT of must apples processed into apple juice.

Traditionally, the German apple juice industry depends heavily on imports of apple juice concentrates of various densities. In MY 2000/01, German imports of apple juice concentrate are estimated at 312,567 MT. Poland is by far the most important supplier of concentrated apple juice (CAJ) to German processors and bottlers. In MY 2000/01, Poland supplied 125,794 MT of CAJ of 70.5 brix to Germany. Poland is followed by Italy with 37,415 MT and Turkey with 32,286 MT. Imports and of apple juice are expected to decline as stocks are very high.

Because of EU customs regulations, German trade statistics distinguish between apple juice concentrates below 1.33 density (representing approximately 60 percent of imports) and above 1.33 density. Poland was the main supplier of CAJ of below 1.33 density, and held an import market share of around 54 percent in CY 2000. Other major suppliers of CAJ with a density below 1.33 are Switzerland and the Czech Republic, with an import market share of thirteen percent each. Significant EU suppliers were Austria, Ireland and Italy, which together held a market share of only three percent in CY 2000.

Italy was the largest supplier of CAJ above 1.33 density in CY 2000 with an import share of about 28 percent. Turkey, the second-largest supplier of this density, had an import share of around 18 percent for this density in CY 2000.

The United States remains the largest single export market for German CAJ. These deliveries are mainly reprocessed concentrates from eastern European countries or blends of such concentrates with domestic production. Exports to the United States totaled 18,741 MT in MY 1999/00 and 25,562 MT in MY 2000/01. Exports may rise due to the German Mark-US$ exchange rate which favors German exports.

Fruit juices and fruitjuice drinks are very popular in Germany. The per capita consumption of more than 40 liter per year is the highest in the EU and 30 percent above per capita consumption in the United States. Traditionally most of the juices consumed were comprised of citrus juices, followed by apple juice. In the mid-1990ies apple juice became more and more popular and since 1997 has been the number one juice consumed in Germany. (See table 20). In CY 2000 per capita consumption of apple juice reached 21.11 liter.

Section II: Statistical Tables

Note: Figures for "Processing" in the PSD for apples only include apples for juice production. Apples for other processing purposes (e.g. applesauce, canned apples, spirits, bakeries) are included in "Domestic consumption".

Note: Trade data in PS&D's, trade matrices and text for CAJ are converted to 70.5 brix using a conversion factor of 0.158865 from 11.2 brix or single strength.

Note: U.S. dollar/German mark exchange rates have been as follows:

1991:	$1 = DM 1.66;	1996:	$1 = DM 1.50;
1992:	$1 = DM 1.52;	1997:	$1 = DM 1.70;
1993:	$1 = DM 1.65;	1998:	$1 = DM 1.76;
1994:	$1 = DM 1.61;	1999:	$1 = DM 1.66;
1995:	$1 = DM 1.43;	2000:	$1 = DM 2.12.

Euro (**i**)/German mark: **i** 1 = DM 1.95583,
i /U.S. dollar: **i** 1 = $ 0.8881 (*Handelsblatt* 9/04/2001) .

Table 1: PSD for Fresh Apples (in MT) and Import Prices (in US$ per MT)

PSD Table						
Country	Germany					
Commodity	Fresh Apples				(HA)(1000 TREES)(MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		07/1999		07/2000		07/2001
Area Planted	35,793	35,793	35,793	35,793	0	35,793
Area Harvested	35,793	35,793	35,793	35,793	0	35,793
Bearing Trees	58,412	58,412	58,412	58,412	0	58,412
Non-Bearing Trees	0	0	0	0	0	0
Total Trees	58,412	58,412	58,412	58,412	0	58,412
Commercial Production	1,036,000	1,036,000	1,000,000	1,130,802	0	890,000
Non-Comm. Production	900,000	900,000	1,500,000	1,500,000	0	600,000
TOTAL Production	1,936,000	1,936,000	2,500,000	2,630,802	0	1,490,000
TOTAL Imports	787,692	787,692	650,000	642,047	0	900,000
TOTAL SUPPLY	2,723,692	2,723,692	3,150,000	3,272,849	0	2,390,000
Domestic Fresh Consump	1,665,149	1,815,149	1,800,000	2,080,580	0	1,723,000
Exports, Fresh Only	67,954	67,954	75,000	72,720	0	65,000
For Processing	988,000	838,000	1,265,000	1,108,000	0	600,000
Withdrawal From Market	2,589	2,589	10,000	11,549	0	2,000
TOTAL UTILIZATION	2,723,692	2,723,692	3,150,000	3,272,849	0	2,390,000

Year	1999	2000	% Change		Year	1999	2000	% Change
Jan	597.50	448.56	-24.93%		Jul	676.20	603.19	-10.80%
Feb	622.95	380.40	-38.94%		Aug	705.74	576.96	-18.25%
Mar	590.35	515.29	-12.71%		Sep	419.92	429.14	2.20%
Apr	601.87	525.02	-12.77%		Oct	346.79	322.51	-7.00%
May	681.87	580.11	-14.92%		Nov	267.54	243.06	-9.15%
Jun	762.55	598.45	-21.52%		Dec	300.26	339.71	13.14%

Source: Federal Office of Statistics, ZMP (Central Market and Price Reporting Agency), FAS/Berlin estimates.

Table 2: German Import of Fresh Apples (in MT)

Time period	Jul/Jun	Units:	MT
Imports from:	1999		2000
U.S.	193	U.S.	387
Others		Others	
Italy	254,926	Italy	273,838
Netherlands	185,241	Netherlands	88,431
France	106,623	France	70,818
Belgium	69,299	New Zealand	54,417
New Zealand	59,441	Belgium	35,196
Argentina	23,174	Argentina	26,092
Brazil	17,155	Czech Republic	23,272
South Africa	17,011	Austria	18,405
Czech Republic	15,631	South Africa	14,309
Chile	14,880	Brazil	12,608
Total for Others	763,381		617,386
Others not Listed	24,118		24,274
Grand Total	**787,692**		**642,047**
Intra EU	634,830		491,496
Extra EU	152,862		150,551

Note: 1999 trade data cover July 1999 through June 2000.
2000 trade data cover July 2000 through June 2001.

Source: FAS/Berlin based on official data from the German Federal Office of Statistics in Wiesbaden.
FAS/Berlin estimate.

Table 3: German Export of Fresh Apples (in MT)

Time period	Jul/Jun	Units:	MT
Exports to:	1999		2000
U.S.	-	U.S.	-
Others		Others	
Denmark	11,761	Netherlands	12,922
Finland	6,141	Denmark	10,998
Netherlands	5,662	Finland	7,551
Russia	5,026	Austria	5,081
Great Britain	4,446	France	4,848
France	4,216	Russia	4,435
Sweden	4,055	Belgium	3,822
Lithuania	3,534	Sweden	3,247
Belarus	3,317	Lithuania	3,170
Belgium	3,267	Belarus	2,647
Total for Others	51,425		58,721
Others not Listed	16,529		13,999
Grand Total	67,954		72,720
Intra EU	45,117		54,408
Extra EU	22,837		17,312

Note: 1999 trade data cover July 1999 through June 2000.
2000 trade data cover July 2000 through June 2001.

Source: FAS/Berlin based on official data from the German Federal Office of Statistics in Wiesbaden.
FAS/Berlin estimate.

Table 4: PSD for Fresh Pears (in MT) and German Import Prices for Fresh Pears (in US$ per MT)

PSD Table						
Country	Germany					
Commodity	Fresh Pears				(HA)(1000 TREES)(MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		07/1999		07/2000		07/2001
Area Planted	2,372	2,372	2,372	2,372	0	2,372
Area Harvested	2,372	2,372	2,372	2,372	0	2,372
Bearing Trees	2,342	2,342	2,342	2,342	0	2,342
Non-Bearing Trees	0	0	0	0	0	0
Total Trees	2,342	2,342	2,342	2,342	0	2,342
Commercial Production	54,000	54,042	55,000	65,162	0	45,000
Non-Comm. Production	0	0	0	0	0	0
TOTAL Production	54,000	54,042	55,000	65,162	0	45,000
TOTAL Imports	170,328	167,770	190,000	150,757	0	170,000
TOTAL SUPPLY	224,328	221,812	245,000	215,919	0	215,000
Domestic Fresh Consump	214,339	211,892	235,790	203,039	0	205,750
Exports, Fresh Only	8,814	8,754	8,000	10,654	0	8,500
For Processing	1,172	1,163	1,200	2,184	0	750
Withdrawal From Market	3	3	10	42	0	0
TOTAL UTILIZATION	224,328	221,812	245,000	215,919	0	215,000

Year	1999	2000	% Change		Year	1999	2000	% Change
Jan	827.29	884.68	6.94%		Jul	741.06	786.21	6.09%
Feb	843.66	869.61	3.08%		Aug	672.77	638.98	-5.02%
Mar	881.15	839.40	-4.74%		Sep	681.00	610.80	-10.31%
Apr	810.65	747.11	-7.84%		Oct	740.40	616.67	-16.71%
May	772.42	747.11	-3.28%		Nov	775.63	632.73	-18.42%
Jun	855.99	748.69	-12.54%		Dec	825.67	676.55	-18.06%

Source: Federal Office of Statistics, ZMP (Central Market and Price Reporting Agency), FAS/Berlin estimates.

Table 5: German Imports of Fresh Pears (in MT)

Time period	Jul/Jun	Units:	MT
Imports from:	1999		2000
U.S.	1,797	U.S.	2,103
Others		Others	
Italy	66,736	Italy	70,168
Argentina	31,193	Argentina	29,340
Spain	22,433	Spain	11,602
France	12,324	South Africa	8,069
Chile	9,102	France	7,895
South Africa	8,909	Belgium	7,392
Belgium	6,781	Netherlands	6,074
Netherlands	6,125	Chile	6,064
Turkey	1,191	Turkey	1,070
New Zealand	331	China	276
Total for Others	165,125		147,950
Others not Listed	848		704
Grand Total	**167,770**		**150,757**
Intra EU	114,536		103,213
Extra EU	53,234		47,544

Note: 1999 trade data cover July 1999 through June 2000.
2000 trade data cover July 2000 through June 2001.

Source: FAS/Berlin based on official data from the German Federal Office of Statistics in Wiesbaden.
FAS/Berlin estimate.

Table 6: Exports of Fresh Pears (in MT)

Time period	Jul/Jun	Units:	
Exports to:	1999		2000
U.S.	-	U.S.	-
Others		Others	
Denmark	2,098	Denmark	3,002
Netherlands	1,340	France	1,753
France	898	Italy	1,385
Spain	897	Netherlands	1,175
Italy	772	Austria	799
Austria	754	Great Britain	475
Poland	698	Sweden	463
Portugal	240	Finland	423
Great Britain	222	Russia	250
Finland	180	Portugal	192
Total for Others	8,099		9,917
Others not Listed	655		737
Grand Total	**8,754**		**10,654**
Intra EU	7,634		10,132
Extra EU	1,120		522

Note: 1999 trade data cover July 1999 through June 2000.
2000 trade data cover July 2000 through June 2001.

Source: FAS/Berlin based on official data from the German Federal Office of Statistics in Wiesbaden.
FAS/Berlin estimate.

Table 7: PSD for Concentrated Apple Juice (CAJ) (in MT) and German Import Prices for Concentrated Apple Juice (in US$ per MT)

PSD Table						
Country	Germany					
Commodity	Concentrated Apple Juice				(MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		07/1999		07/2000		07/2001
Deliv. To Processors	988,000	838,000	1,265,000	1,108,000	0	600,000
Beginning Stocks	128,903	107,631	171,294	127,092	171,294	169,986
Production	98,560	98,560	140,000	122,199	0	75,000
Imports	279,690	266,658	200,000	312,567	0	300,000
TOTAL SUPPLY	507,153	472,849	511,294	561,858	171,294	544,986
Exports	79,536	76,048	85,000	86,484	0	90,000
Domestic Consumption	256,323	269,709	255,000	305,388	0	274,986
Ending Stocks	171,294	127,092	171,294	169,986	0	180,000
TOTAL DISTRIBUTION	507,153	472,849	511,294	561,858	0	544,986

Year	1999	2000	% Change		Year	1999	2000	% Change
Jan	756.75	953.18	25.96%		Jun	605.59	830.22	37.09%
Feb	740.03	974.25	31.65%		Jul	626.86	840.80	34.13%
Mar	742.56	887.14	19.47%		Aug	752.15	825.91	9.81%
Apr	664.17	916.92	38.06%		Sep	891.46	737.62	-17.26%
May	649.09	848.01	30.65%		Oct	1,091.19	613.72	-43.76%
Jun	605.59	830.22	37.09%		Nov	1,080.69	642.40	-40.56%

Source: Federal Office of Statistics, ZMP (Central Market and Price Reporting Agency), FAS/Berlin estimates. Fruit Juice Association Bonn

Table 8: German Import of Concentrated Apple Juice (in MT at 70.5 brix)

Time period	Jul/Jun	Units:	MT
Imports for:	1999		2000
U.S.	32	U.S.	69
Others		Others	
Poland	63,364	Poland	125,794
Italy	36,345	Italy	37,415
Turkey	26,454	Turkey	32,286
Switzerland	20,127	Czech Republic	24,973
China	20,335	Hungary	16,964
Czech Republic	17,949	Switzerland	15,064
Austria	15,216	Ukraine	14,101
Hungary	13,298	Austria	13,036
Iran	13,704	China	12,378
Spain	11,470	Iran	8,007
Total for Others	238,262		300,018
Others not Listed	28,364		15,269
Grand Total	**266,658**		**315,356**
Intra EU	69,578		55,419
Extra EU	197,080		259,937

Note: 1999 trade data cover July 1999 through June 2000.
2000 trade data cover July 2000 through June 2001.

Source: FAS/Berlin based on official data from the German Federal Office of Statistics in Wiesbaden.
FAS/Berlin estimate.

Table 9: German Export of Concentrated Apple Juice (in MT at 70.5 brix)

Time period	Jul/Jun	Units:	MT
Exports for:	1999		2000
U.S.	18,741	U.S.	25,562
Others		Others	
Denmark	11,761	Netherlands	12,546
Finland	6,141	Denmark	12,051
Netherlands	5,662	Finland	5,632
Russia	5,026	Austria	5,128
Great Britain	4,446	France	5,048
France	4,216	Russia	3,563
Sweden	4,055	Belgium	3,381
Lithuania	3,534	Sweden	3,152
Belarus	3,317	Great Britain	2,714
Belgium	3,267	Lithuania	2,146
Total for Others	51,425		55,361
Others not Listed	5,485		6,334
Grand Total	**75,651**		**87,257**
Intra EU	49,163		53,279
Extra EU	26,885		33,978

Note: 1999 trade data cover July 1999 through June 2000.
2000 trade data cover July 2000 through June 2001.

Source: FAS/Berlin based on official data from the German Federal Office of Statistics in Wiesbaden.
FAS/Berlin estimate.

Table 10: Commercial Production of Apples in Germany (in 1,000 MT)

Variety	1997	1998	1999	2000	2001[1]	Change
Boskoop	76	91	96	92	64	- 31
Braeburn	4	7	8	15	15	- 1
Cox Orange	56	58	65	56	49	- 13
Elstar	98	116	149	151	125	- 17
Gala	15	21	24	27	28	2
Gloster	88	98	87	76	63	- 16
Golden	69	80	73	78	67	- 14
Idared	45	68	60	70	60	- 14
Jonagold	138	188	198	218	158	- 27
Jonagored	45	63	78	93	77	- 17
Other[2]	131	188	199	256	184	- 28
Total	765	977	1,036	1,131	891	- 21

1/ Forecast.
2/ Includes Gravensteiner, James Grieve, Glockenapfel, Ingrid Marie

Source: ZMP - Der Markt Obst & Gemüse 8/2001 page 5.

Table 11: EU Market Production of Apples by Country (in 1,000 MT)

Country	1992	1997	1998	1999	2000	2001[1]	Change
Italy	2,368	2,041	2,243	2,196	2,206	2,035	-8
France	2,344	2,051	1,750	2,030	2,260	2,030	-10
Germany	1,108	765	977	1,036	1,131	890	-21
Spain	1,005	821	680	837	699	880	26
United Kingdom	388	152	194	256	195	216	11
Netherlands	640	470	507	575	500	475	-5
Belgium	482	367	407	534	500	314	-38
Greece	305	274	306	257	288	216	-25
Portugal	275	250	125	227	206	240	17
Denmark	43	33	29	32	31	30	-4
Ireland	9	8	8	8	5	5	0
Luxembourg	5	4	4	4	3	3	0
Austria	86	162	128	148	161	143	-12
Sweden	27	20	18	19	23	21	-12
TOTAL [2]	9.085	7,428	7,385	8,037	8,208	7,497	-9

1/ Forecast.
2/ Discrepancies are due to rounding.

Source: ZMP - Der Markt - Obst & Gemüse 8/2001 page 3/ Prognosfruit Convention 2001, St. Truiden, Belgium.

Table 12: Market Production of Apples in the EU by Variety (in 1,000 MT)

Variety	1992	1997	1998	1999	2000	2001[1]	Change
Golden Delicious	3,232	2,962	2,698	2,950	2,542	2,574	1
Red Delicious	1,101	750	761	858	729	721	-1
Gala	110	412	454	561	619	688	11
Jonagold [2]	791	618	714	842	805	587	-27
Elstar	314	314	354	429	399	381	-4
Granny Smith	418	423	377	385	401	349	-13
Braeburn	-	104	100	174	200	215	8
CoxOrange	321	164	169	202	144	148	2
Boskop	255	140	151	196	179	139	-23
Jonagored	-	81	116	151	165	131	-21
Morgenduft	290	229	202	158	153	229	153
Idared	153	125	137	137	145	120	-17
Kanada Renette	123	84	109	106	105	94	-10
Gloster	260	142	129	113	98	78	-20
Fuji	-	34	36	56	65	74	13
Pink Lady	-	1	5	15	26	50	92
Other	1,535	790	805	910	1,362	909	-43
TOTAL	9,085	7,453	7,410	8,360	8,208	7,497	-9

1/ Forecast.
2/ Includes mutants except Jonagored.
Source: ZMP Der Markt - Obst & Gemüse 8/2001 page 4, based on Prognosfruit Convention 2001, St. Truiden, Belgium, FAS calculation.

Table 13: Fresh Apples Purchased by EU Intervention Agency (in MT)

Crop Year	1992/93	1996/97	1997/98	1998/99	1999/00	2000/01
Total EU	976,000	349,000	358,000	274,151	209,347	255,693
Germany	46,300	3,914	1,846	7,912	2,589	11,549

Source: BLE Frankfurt

Table 14: EU Market Production of Pears by Country (in 1,000 MT)

Country	1992	1997	1998	1999	2000	2001[1]	Change
Italy	1,264	659	1,115	784	876	824	-6
France	394	246	244	288	259	230	-11
Germany	55	37	55	54	65	45	-31
Spain	602	577	563	682	595	679	14
United Kingdom	25	25	25	18	34	26	-24
Netherlands	115	145	140	135	195	70	-64
Belgium	111	130	151	165	180	79	-56
Greece	94	41	63	62	53	45	-16
Portugal	97	165	15	140	94	160	70
Denmark	6	6	5	4	6	3	-45
Sweden	–	1	1	2	2	2	-19
TOTAL	2,762	2,032	2,377	2,334	2, 359	2,162	-8

1/ Forecast.

Source: ZMP Der Markt - Obst & Gemüse 8/2001 page 12, based on Prognosfruit.

Table 15: EU Market Production of Pears by Variety (in 1,000 MT)

Variety	*1992*	*1997*	*1998*	*1999*	*2000*	*2001*[1]	*Change*
Conference	*427*	*470*	*551*	*587*	*570*	*487*	*-14*
Williams Christ (=Bartlett)	*326*	*192*	*309*	*254*	*286*	*247*	*-14*
Abate Fetel	*274*	*180*	*309*	*212*	*242*	*239*	*-1*
Rocha	*-*	*140*	*10*	*100*	*?*	*135*	
Guyot	*217*	*142*	*112*	*135*	*107*	*127*	*19*
Doyenne de Comice	*201*	*116*	*177*	*107*	*131*	*88*	*-33*
Kaiser Alexander	*141*	*41*	*88*	*51*	*51*	*51*	*0*
Passa Crassana	*134*	*45*	*58*	*45*	*24*	*38*	*57*
Blanquilla	*183*	*236*	*226*	*233*	*218*	*240*	*10*
Coscia	*170*	*76*	*80*	*116*	*107*	*109*	*2*
Red Bartlett	*41*	*19*	*44*	*29*	*30*	*30*	*-1*
Kristalli	*35*	*24*	*26*	*25*	*28*	*24*	*28*
Other	*617*	*351*	*388*	*440*	*565*	*347*	*-39*
TOTAL	*2,766*	*2,032*	*2,377*	*2,334*	*2, 359*	*2,162*	*-8*

1/ Forecast.

Source: ZMP Der Markt - Obst & Gemüse 8/2001 page 12, based on Prognosfruit.

Table 16: Fresh Pears Purchased by EU Intervention Agency (in MT)

Crop Year	*1992/93*	*1996/97*	*1997/98*	*1998/99*	*1999/00*	*2000/01*
Total EU	*197,000*	*177,000*	*86,000*	*67,444*	*88,750*	*71,668*
Germany	*333*	*92*	*-*	*20*	*3*	*42*

Source: BLE, Frankfurt

Table 17: Production of Fruit Juices/ Nectars, Mineral Waters, Carbonated Fruit Juices (in 1,000 liter)

	1997	1998	1999	2000
Fruit/Vegetable Juices	2,532,655	2,582,221		
- Citrus			1,060.4	1,079.2
- Pome Fruit			955.3	959.7
- Grape			88.3	91.5
- Other			506.1	597.3
Fruit/Vegetable Nectars	1,353,365	1,297,803		
- Citrus			315.5	276.6
- Other			664.7	626.6
Dietary Fruit Juices			240.7	247.5
Vegetable Juices			77.8	78.1
Vegetable Nectars			6.2	5.3
Carbonated Fruit Juices	6,432,659	6,510,229		
Other Fruit Juices	811,223	915,499		
- without CO2			780.9	812.7
- with CO2			239.9	252.5
Total			4,936	5,027

Note: (Data are in 11.2 brix = single strength. To convert 11.2 degrees brix into 70.5 degrees brix, a conversion factor of 0.158865 may be used).

Source: VdF, Association of the German Fruit Juice Industry, Annual Report 2000, page 24.

Table 18: Per Capita Consumption of Fruit Juices and Nectars 1995-2000 (in liter)

	1995	1996	1997	1998	1999	2000
Apple Juice	11.79	12.15	12.17	11.64	12.00	12.11
Orange Juice	9.83	10.25	10.17	10.03	9.51	9.53
Grape Juice	1.19	1.21	1.30	1.30	1.32	1.32
Grapefruit Juice	0.33	0.33	0.36	0.38	0.38	0.39
Pear Juice	0.13	0.15	0.17	0.17	0.18	0.18
Vegetable Juice	0.86	0.87	0.87	0.96	0.96	0.96
Citrus Nectar	8.57	8.30	8.28	8.30	7.81	7.75
Other Juice/Nectar	8.02	7.96	7.89	8.19	8.26	8.31
Total	40.72	41.21	41.21	40.97	40.42	40.55

Source: VdF, Association of the German Fruit Juice Industry, Annual Report 2000, page 42.

Table 19: Per Capita Consumption of Beverages in Germany (in liter)

	1995	1996	1997	1998	1999	2000
Total non-alcoholic	231.7	230.6	239.9	240.7	248.3	252.5
thereof: Fruit Juices/Nectars	40.7	41.1	41.2	41.0	40.4	40.6
Carbonated drinks	93.1	92.8	98.7	99.6	103.7	105.9
Mineral/ table waters	97.9	96.7	100.0	100.1	104.2	106.0
Total alcoholic	168.3	162.5	161.9	157.9	158.4	156.5
thereof: Beer	137.7	131.7	131.2	127.5	127.5	125.5
Wine	17.4	18.2	18.2	18.1	18.5	19.0
Fruit wine	1.7	1.6	1.6	1.6	1.6	1.5
Sparkling wine	4.8	4.6	4.8	4.7	4.9	4.7
Spirits	6.5	6.3	6.1	6.0	5.9	5.8
Housedrinks [2]	273.5	278.0	266.4	271.9	277.5	n.a.
TOTAL	673.5	671.1	668.2	670.5	684.2	684.3

1/ Preliminary.
2/ Milk, coffee, tea, coffee substitutes.

Source: VdF, Association of the German Fruit Juice Industry, Annual Report 2000, page 10.

Table 20: Per Capita Consumption of Apple Juice/Apple Fruit Drinks and Citrusjuice/Cirtus Fruit drinks in Germany (in kg)

	1995	1996	1997	1998	1999	2000
Applejuice	14.76	18.82	19.79	19.71	21.00	21.11
Citrusjuice	18.73	18.88	18.81	18.71	17.70	17.67

Source: VdF, Association of the German Fruit Juice Industry, Annual Report 2000, several issues.

Table 21: Per Capita Consumption of Fruit Juices/Nectars in European Countries and the USA (in liter)

	1995	1996	1997	1998	1999	2000 [1]
Germany	40.7	41.2	41.2	41.0	40.5	40.6
France	16.5	18.0	18.0	18.1	18.6	20.5
Netherlands	24.4	26.0	26.7	26.7	26.5	26.1
Belgium/Lux.	19.4	20.2	20.8	20.8	20.5	20.5
Italy	9.0	9.5	9.6	9.6	10.0	10.5
Great Britain	19.6	19.1	19.5	19.5	20.2	19.0
Ireland	10.4	11.7	12.0	12.3	12.5	13.3
Denmark	18.5	16.9	17.5	17.5	18.0	19.0
Greece	6.6	6.7	6.8	6.8	7.0	8.5
Spain	15.4	15.6	15.6	15.6	25.8	16.5
Portugal	5.3	6.2	6.5	6.5	6.8	7.1
Austria	31.4	33.0	34.5	36.1	37.4	37.8
Sweden	20.1	20.6	20.6	20.6	21.0	21.5
Finland	23.6	25.1	25.1	25.1	25.5	26.1
TOTAL EU-15	21.3	21.9	21.9	22.0	22.3	22.6
Norway	19.5	18.6	18.6	23.8	24.5	25.5
Switzerland	30.0	28.6	30.0	30.0	30.0	30.0
United States	30.0	30.0	30.0	30.0	30.0	30.0

1/ Estimates.
Source: VdF, Association of the German Fruit Juice Industry, Annual Report 2000, page 43.

Table 22: Structure of the German Fruit Juice Industry (2000, (1999), in million DM)

Turnover in DM	Number of Companies[1]	%	Total turnover 2000 in million DM	%
up to 500,000	53 (51)	26.1	11	0.2
over 500,000 - 1 million	25 (29)	12.3	18	0.3
over 1 - 2 million	26 (24)	12.8	34	0.6
over 2 - 5 million	29 (33)	14.3	97	1.7
over 5 - 10 million	20 (18)	9.9	141	2.4
over 10 - 20 million	10 (8)	4.9	131	2.3
over 20 - 50 million	22 (25)	10.8	719	12.4
over 50 - 100 million	5 (2)	2.5	308	5.3
over 100 - 200 million	6 (6)	3.0	874	15.1
over 200 million	7 (7)	3.4	3,451	59.7
Total[2]	203 (203)	100.0	5,783	100.0

1/ Members of the Association as per January 1, 2001 (2000); not included are the approx. 242 smaller members being organized in regional associations as well as about 17 "outsiders."
2/ Industry's total turnover in 2000 (domestic and abroad) was approximately DM 5.9 billion (1999: about DM 5.8 billion).

Source: VdF, Association of the German Fruit Juice Industry, Annual Report 2000, page 5.

Table 23: Regional Distribution of Fruit Juice Producers

Association's area	Number of companies 1/					Turnover in Million DM				
	1996	1997	1998	1999	2000	1996	1997	1998	1999	2000
Baden-Wuerttemberg	34	34	33	34	35	598	660	557	591	593
Bavaria	19	21	21	20	21	223	187	191	152	187
Brandenburg/Berlin	16	14	13	12	13	42	50	56	61	59
Hesse	13	14	13	11	11	410	357	743	822	677
Mecklenburg-Western Pomerania	3	3	3	3	3	40	38	40	38	40
North (Hamburg, Bremen, Lower-Saxony, Schleswig-Holstein)	28	30	29	31	30	1,302	1,325	1,195	1,477	1,646
North-RhineWestphalia	28	29	29	32	33	1,250	1,298	1,385	1,477	1,486
Rhineland-Palatinate/Saarland	28	27	29	32	32	885	889	879	917	923
Saxony	16	15	14	16	13	55	72	73	79	79
Saxony-Anhalt	8	7	7	7	7	45	50	62	64	78
Thuringia	5	5	5	5	5	9	11	11	11	13
TOTAL	198	199	196	203	203	4,862	4,936	5,193	5,689	5,783

1/ Members of the Association: stated as per January 1 each year - here not included affiliated companies.
Source: VdF, Association of the German Fruit Juice Industry, Annual Report 2000, page 6 .