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Germany

Agricultural Situation

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Report Highlights: The following report describes the agricultural situation in Germany and is mostly based on the German AgMinistry's Annual Report for the year 2000.

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General Summary

Germany, the leading economic power within the European Union with a population of 82.1 million people, is again following the general economic path of most EU nations. During most of the nineties, the German economy followed a separate economic path driven by reunification of the two Germanies. Economic growth in 2000 is forecast at 2.7 to 3.0 percent, still somewhat slower than most other Euro-countries. Unemployment is still unfavorably high at about 9.5 percent forecast for 2000. Marginal improvement is foreseen for the next few years partly due to demographic developments. In particular, the labor market in the eastern third of the country still suffers from the effects of converting from a planed economy to a market economy with an unemployment rate of about 17 percent. The two engines for German economic growth are booming export sales and slowly improving domestic demand. Inflation is still favorably low at just above one percent. High crude oil prices have been pushing inflation up and sweeping away the fear of deflation of 1999. The relative weakness of the Euro puts Germany into a conflicting position. On the one hand, the low Euro spurs export sales, while on the other hand, it increases energy costs which are at near record levels world wide in 2000. As a major exporting country the German economy is taking advantage of globally improving economies, e.g. the German trade balance with the United States is forecast to grow to about $15 billion in 2000.

Agriculture’s contribution to the German economy is limited, accounting for 1.5 percent of GDP and employing 1.8 percent of the labor force. The entire agricultural and food business sector employs 4.1 million labor units which is about 11.3 percent of total German labor force. Gastronomy and wholesale and retail trade employ about half of this labor force. Strongly depressed hog prices in 1998/99 led to a reduction of total agricultural production value of minus 3.6 percent to DM 84.4 billion ($42 billion). Farm income in full-time family farms which represent about 43 percent of all farms but farming 52 percent of all farmland, dropped by 7.3 percent. About 57 percent of the income comes from direct income transfers, mainly out of the EU. This is an increase of 4.7 percent resulting from higher price reduction compensation payments. Corporate farms in eastern Germany receive about 75 percent of their income from public income transfers because they are primarily active in grain and oilseed production.

German agriculture is characterized by two different structures, by small-sized family farms in the western part and by predominantly large-scale farms in the eastern part. While farm numbers in the west are shrinking by a long-term average of about three percent to 400,181 farms, farm numbers in the east were still rising by one percent to 27,890 in 1999. This indicates that a slow process of convergence is still underway in the east, nine years after unification. Full-time family farms have an average size of 47 hectares (116 acres) while part-time family farms have an average size of only 12 hectares (30 acres). These part-time farms make up for 57 percent of all family farms. The very competitive multi-family co-operation farms make up for 3.6 percent of all farms operating 12.2 percent of total farmland. The average size is 146 hectares (336 acres). Actually, multi-family co-operations are becoming more popular in western Germany since this type of cooperation provides excellent opportunities for cost reductions. Corporate farms are mainly found in eastern Germany. They are normally direct successor operations of former socialist farms with an average size of 1.010 hectares (2,500 acres).

The major portion of farm returns (54 percent) is derived from livestock production. However, it has been continuously shrinking over the past five years due to falling milk prices, BSE crisis and reduced demand for meat products. On the crop production side, farm returns took advantage of ever rising crop production. Falling prices are partly compensated by higher output.

Germany has long been the world’s largest importer of food, feed and forest products. German food and feed imports in 1999 exceeded German exports by $12.7 billion. About 64 percent of the imports originate from EU countries and 71 percent of German exports are sold to EU markets. The U.S. share of German imports amounted to 4.2 percent. Major commodities shipped to Germany are soybeans, corn gluten feed, tobacco, almonds and alcoholic beverages, accounting for 64 percent of total U.S. agricultural exports to Germany. German exports to the United States are less than half as big as U.S. shipments. However, they are mainly composed of high-value-added products

German export trade in agricultural and food products in 1999 amounted to $21 billion which represents about four percent of total German exports. If forest products are included the percentage share would rise to 4.5 percent of total exports. Two-thirds of the exports are to other European Union countries. German imports amounted to $34 billion in 1999 which is 7.3 percent of total imports. These few trade numbers prove that Germany continues to be a net importer of food products and therefore an interesting market for U.S. exporters. However, the vast majority of imports (64 percent) originates from other EU countries.

During Agenda 2000 negotiations in fall/winter of 1998/99 Germany held the presidency in the EU and therefore had major influence of the negotiation process. German agricultural policy representatives are generally satisfied with the outcome of the negotiations. It is often heard that the EU is now well prepared for the upcoming WTO negotiations and will speak with one voice as compared to the Uruguay Round negotiations when the EU had not developed a common negotiation position. The EU is confident that its protective system of multi-functional agriculture is cosistant with WTO rules. Farmers themselves seem to be paralyzed by developments on the agricultural policy scene. They fear that the international opening of the EU food markets will limit domestic marketing opportunities. They also fear that current income compensation payments resulting from reductions of guaranteed price for grains, oilseeds and protein crops will be gradually reduced because of public budget shortages.

The General Economy

The German economy seems to have overcome the two year crisis of low growth rates of below two percent in 1998 and 1999. Globally prospering economies and a strong U.S. dollar spur the German economy to a forecast real growth of 2.7 to 3.0 percent in 2000. Industry leaders have also slowly developed confidence in the new German Red/Green coalition government. In particular, the company tax reform which will lower company taxes is welcomed by the industry. This reform may also help to initiate foreign investment in Germany. Recent economic indicators show that there is an upward trend since the second half of 1999 which will accelerate in 2000. However, the positive trend is only recorded for the former western part of Germany while the east still suffers under the restructuring process.

The engine of the economic growth in eastern Germany until about 1997 was the construction industry. Supported by favorable subsidy and tax write-off programs, excessive construction projects were started. The result are surplus capacities in office space, housing and commercial buildings. Housing starts in 1999 dropped by more than 20 percent, and a recovery in this market is not foreseen for the next several years. Consequently, unemployment in eastern Germany is still very high at 17 percent in contrast to 7.5 percent in western Germany.

Due to the difficult economic situation during the past two years and due to unacceptably high unemployment rates, union have been cautiously demanding wage increases during the second half of the nineties. For 2000, wage increases of more than five percent are demanded by most unions which bear the risk for strikes this year. During recent years, labor strikes did not noticeably disturb the economy.

During the period of slow growth in 1998 and 1999, the export was the only engine which kept the economy running at acceptable speed. The domestic market did not spark initiatives. Because of high unemployment the private sector had slowed its spending, and fears about deflation developed. Also the public sector is reducing its spending to consolidate public budgets. Increasing tax revenues resulting from an improved economy and from phased out special tax write-off programs for eastern Germany, support the consolidation process and provide flexibility for income tax reduction programs.

The immense and speedy concentration process in most German and European industries is viewed with growing fear by most Germans. However, the extraordinary success of the stock markets, partly driven by company take-overs have converted many Germans to stock market gamblers. Until four years ago, private investment in the stock markets had been extremely reluctant in Germany. Only nine percent older than 14 years of age held stocks. Germans favored savings accounts and bonds for private savings. Since late 1999, there has been a real rush into the stock market with strong preference for technology stock. Many people feared missed opportunities. About fifteen percent of German households now hold stock.

Despite the current relative weakness of the Euro, Germans support and believe in the new currency. Particularly traveling in Europe will be a lot easier. Money markets have already fully switched over to accounting in Euro. Most prices on the retail level are already dual labeled in national currency and in Euro. These factors indicate that there is growing confidence into the domestic economy resulting in increased private consumption. Complaints about the shrinking international competitiveness of the German industry in the nineties have pretty much disappeared in German media. Today's economic reporting increasingly covers programmatic issues such as challenges and reforms, making Germany fit for international competition.

The main challenge for German economic politics is to bring down unemployment from the unfavorable high of ten percent. One way to lower company tax burdens to allow for higher investment within Germany. Another major challenge is changing political decision making structures in the EU. The principle of unanimous vote has to be changed to majority vote for most economic policy decision levels to allow the EU authorities in the longer term to influence national tax policies. Germany recently decided to give up its opposition against majority vote for most indirect taxes, including VAT, tobacco taxes and gasoline taxes.

Selected Economic Indicators for the Federal Republic of Germany							
Item	Units	1995	1996	1997	1998	1999	2000 1/
GDP Growth (real) FRG	%	1.8	1.4	2.2	1.6	1.6	2.7
West	%	1.5	1.3	2.2			
East	%	5.2	1.9	1.6			
Per capita GDP	$	29,572	28,729	25,594	26,205	25,721	24,250
Agriculture in % of GDP	%	1.4	1.5	1.5	1.5	1.5	1.4
West	%	1.3	1.3				
East	%	3.0	2.9				
Unemployment Rate	%	9.4	10.2	11.4	11.1	10.5	9.8
West	%	8.3	9.1	9.8	9.4	8.8	8.0
East	%	14.0	15.7	18.1	18.2	17.6	17.1
Agricultural Employment as % of FRG Work Force	%	2.0	2.0	1.9	1.9	1.8	1.9
Consumer Price Index	%	1.8	1.5	1.8	1.0	0.6	1.6
Current Account	DM Billion	-27.2	-8.4	-2.4	-6.5	-32.7	-20.0
Trade Balance							
World	DM Billion	85.3	102.9	116.5	127.0	124.8	100.0
U.S.	DM Billion	9.7	11.1	10.3	21.4	24.0	30.0
U.S.Share of FRG Imports by Value	%	6.8	7.3	7.0	8.2	8.2	8.2
U.S. Share of FRG Agric Imports by Value	%	4.0	4.3	4.3	4.3	4.2	4.0
Averge Annual Exchange Rate ($=German Mark)	DM	1.4338	1.5037	1.7348	1.7592	1.8351	2.0000
Agric Loans	%	8.0	7.9				
Population FRG	Million	81,662	81,896	82,088	82,037	82,087	82,100
West	Million	66,157	66,444	66,660	66,747	66,832	66,850
East	Million	15,505	15,451	15,428	15,290	15,255	15,250
1/ Forecast							

The Agricultural Sector

Ten years after reunification, German agricultural reporting is now focusing on Germany as a single country, though farm structure still differ significantly between the eastern and western part of the country. Beginning 1999, the German Ministry of Agriculture increased the minimum size of farms from one hectare to two hectares to be recorded as a farm. Consequently the total number of farms dropped to 428,964 in 1999, a reduction of five percent compared to 1998. Average farm size has increased due to the methodological change to 40 hectares (100 acres). In western Germany, farmers operate an average of 29 hectares (70 acres) of farmland while their colleagues in eastern Germany operate an average of 200 hectares (496 acres). While in western Germany only 19 farms have a farm size of more than 1,000 hectares; in eastern Germany 1,621 farms operate mega-sized farms. Another major difference between the east and the west is the fact that eastern Germany receives about 30 percent less precipitation than the west because of its more continental climate. Western Germany takes advantage of a milder maritime climate.

Of the total 429,000 farms in Germany 47.4 percent of the farms are classified as full-time. These are farms with more than 1.5 labor units per farm or 0.75 to 1.5 labor units per farm generating more than 50 percent of the farm household income from farm activities. All other farms are classified as part-time.

Most of the information contained in this report is based on the "2000 Annual Report on Agriculture" prepared by the Federal Ministry of Agriculture. Published data are based on a carefully selected sample of 8,865 full-time farms, and 1,665 part-time farms which are considered representative especially for western Germany. Of these 8,865 full-time farms, 7,767 farms are single family operations. The sample represents all farming regions, sizes and organizational structures.

Income

Single-Family Farms

In MY 1998/99 (July-June), average farm income in the group "single family full-time farms" dropped considerably by 7.3 percent due mainly to low hog prices. Farmers in the states of Nordrhein-Westfalen and Niedersachsen (Lower Saxony) with intensive hog production experienced the biggest losses. Bavaria was the only state with a marginal income improvement because of its above average concentration in dairy production. Recovering hog prices in MY 1999/2000 leave hope for improved farm income of up to plus three percent. Continuous average growth of farm size and reductions in the labor force lead to a relatively better income result, calculated on the basis of per capita compared to income per farm unit.

Average Income Developments in Single Family Full-Time Farms in Germany				
MY July-June	Per Capita (DM)	% Change	Per Farm (DM)	% Change
1994/95	34,451	n.a.	50,627	n.a.
1995/96	36,931	7.2	53,973	6.6
1996/97	38,170	3.4	55,815	3.4
1997/98	39,599	3.7	57,668	3.1
1998/99	37,612	-5.0	53,457	-7.3
1999/2000*	38,750	3.0	55,100	3.0
* Forecast				
Source: Federal Ministry of Agriculture, Annual Report on Agriculture, 2000				

Statistics detailing the income development by type of farm show that dairy farmers were the only group of farmers with income improvement in 1998/99. Low grain prices during most of the MY resulted in income losses of 16.9 percent. Mixed farms also heavily depend on hog production and suffered strongly under the hog baisse.

Full-Time Family-Farm Income by Production Sector						
Type of Production	% of Total	1995/96	1996/97	1997/98	1998/99	% Change
Cash Crops	19.5	68,618	76,517	74,425	61,870	16.9
Grazing/Forage 1/	59.6	49,028	44,899	51,355	57,843	12.6
Intense Livestock 2/	8.4	64,757	88,088	65,451	10,792	-83.5
Permanent Crops 3/	6.4	48,967	60,139	64,648	61,988	-4.1
Mixed Farms	6.1	53,724	62,526	53,032	33,661	-36.5
Aver. Farm Income	100.0	53,973	55,815	57,668	53,457	-7.3

1/ Primarily dairy and beef cattle
2/ Primarily pigs and poultry
3/ Fruit orchards, grapes and hops
Source: Federal Ministry of Agriculture, Annual Report on Agriculture, 2000, table 12

Income differentiation by farm size shows that smaller family farms performed better on average than large farms. Larger farms were more active in hog production while smaller farms are to a larger degree in milk production. The table below also indicates that German farmers would rather rent than sell farmland. A farm can only expand when a farmer rents additional land. Bigger farms' portion of rental land amounts to 86 percent while small farms have only 47 percent of rental land. The bigger the farms, the higher the production yields.

Comparison of Family-Farm Characteristics by Farm Size, 1998/99					
Item	Unit	Small Farms	Medium Farms	Large Farms	All
Sample Size	%	40.70	35.20	24.10	100.00
Farm Size	ha	29.03	48.49	91.42	50.91
Rental Land	ha	13.56	29.82	78.51	33.40
Work Force/Farm	LU/Farm	1.42	1.63	2.10	1.66
Livestock	AU/100ha	146.30	171.00	159.40	160.20
Grain Yield	MT/ha	5.68	6.20	6.55	6.30
Dairy Yield	kg/cow	5,299	5,932	6,503	5,974
Farm Returns	DM/ha	3,802	4,264	4,110	4,125
Other Returns	DM/ha	2,010	1,524	1,329	1,497
Income	DM/ha	1,378	1,127	814	1,050
Income	DM/LU	29,625	37,836	49,381	37,612
Income	DM/Farm	40,002	54,642	74,453	53,457
LU = Labor Unit; AU = Animal Unit					
Source: FedMinAg, Annual Report on Agriculture 2000 (Table 8, pg 22)					

Organic Farms

A special sector among single-family farms are organic farms which have grown to 9,213 by the end of 1998 and cultivate 416,000 hectares (about 2.5 percent of total German agricultural land)   The annual growth rate of organic farms is about ten percent. Organic farm income in 1998/99 improved by two percent. The current Red/Green coalition government is a great supporter of organic farming.

Average Income Developments in Organic Farms				
MY July-June	Per Capita (DM)	% Change	Per Farm (DM)	% Change
1995/96	37,331		51,526	
1996/97	36,536	-2.1	48,788	-5.3
1997/98	38,013	4.0	52,912	8.5
1998/99	40,105	5.5	53,972	2.0
1999/2000*	40,500	1.0	54,500	1.0
* Forecast				
Source: Federal Ministry of Agriculture, Annual Report on Agriculture, 2000				

Organic farmers are about as successful as conventional farmers when operating similar farm sizes. However, a larger portion of organic farm income results from higher subsidization. Premiums received for environmental safe farming for organic farms are about DM 236/hectare higher than for conventional farms. Without this additional subsidization, most organic farmers could not survive. Average per farm income would be about DM 14,000 lower if extra organic subsidies were not granted.

Comparison of Characteristics of Organic and Conventional Farms, 1998/99			
Item	Unit	Organic Farms	Conventional Farms
Sample Size	no.	135	325
Farm Size	ha	59.46	58.57
Work Force /Farm	LU/Farm	1.80	1.65
Livestock	AU/ha	74.20	137.60
Wheat Yield	MT/ha	3.80	6.43
Dairy Yield	kg/cow	4,917	6,194
Wheat Price	DM/MT	542.80	218.90
Potato Price	DM/MT	609.00	198.40
Milk Price	DM/100kg	67.29	61.73
Farm Returns			
- Crop Prod	DM/ha	736	398
- Livestock	DM/ha	1,535	3,118
Environm. Subsidies	DM/ha	271	35
Fertilizer Cost	DM/ha	15	154
Plant protection Cost	DM/ha	1	88
Livestock Input	DM/ha	80	208
Feed Cost	DM/ha	155	423
Labor Cost	DM/ha	215	117
Income	DM/ha	908	985
Income	DM/LU	40,105	40,825
Income	DM/Farm	53,972	57,696
LU = Labor Unit; AU = Animal Unit			
Source: FedMinAg, Annual Report on Agriculture 2000 (Table 14, pg 28)			

Multi-Family Partnership Farms

Farm income in multi-family partnership farms were better than single-family farm income in 1998/99. These farms concentrated more in crop production in eastern Germany and in dairy production in western Germany. Multi-family partnerships are gradually getting more popular in western Germany since they provide more opportunities for cost reduction, in particular machinery input and labor cost.

Average Income Developments in Multi-Family Partnership Farms in East Germany				
MY July-June	Per Capita (DM)	% Change	Per Farm (DM)	% Change
1996/97	69,792		176,651	
1997/98	89,040	27.6	225,273	27.5
1998/99	88,001	-1.2	220,623	-2.1
1999/2000*	85,500	-3.0	214,000	-3.0
Average Income Developments in Multi-Family Partnership Farms in West Germany				
MY July-June	Per Capita (DM)	% Change	Per Farm (DM)	% Change
1996/97	46,952		87,988	
1997/98	43,421	-7.5	82,341	-6.4
1998/99	44,235	1.9	84,793	3.0
1999/2000*	45,600	3.0	87,350	3.0
* Forecast				
Source: Federal Ministry of Agriculture, Annual Report on Agriculture, 2000				

Multi-family partnership farms in eastern Germany are usually about six times as big as similarly organized farms in western Germany and their profit per labor unit was about twice as high. Since eastern partnerships did not invest as heavily in livestock production, their farm debt per hectare is about 30 percent lower than the debt of their livestock raising colleagues in western Germany. Since the farms in the east are young their rental portion of land is close to 95 percent although land values in eastern Germany are only half as high as in western Germany.

Characteristics of Multi-Family Farm Partnerships						
Item	Unit	Farm Type		German Region		All
		Cash Crop	Dairy Farms	Western	Eastern	
Sample Size	%	225	340	495	235	730
Farm Size	ha	354.5	118.4	66.0	395.9	178.8
Rental Land	ha	329.1	101.5	48.5	375.7	160.4
Work Force /Farm	LU/Farm	4.2	3.0	2.3	5.2	3.3
- thereof Family Labor	LU/Farm	2.2	2.2	1.9	2.5	2.1
Livestock	AU/100ha	19.9	113.3	150.3	34.0	62.2
Income	DM/ha	616	893	1,285	557	734
Income	DM/LU	99,570	49,118	44,235	88,001	61,949
Income	DM/Farm	218,301	105,752	84,793	220,623	131,255
Farm Debt	DM/ha	1,655	4,384	3,495	2,483	2,729
Net Investment	DM/ha	94	150	333	82	143
Equity Increase	DM/ha	88	140	86	107	102
LU = Labor Unit; AU = Animal Unit						
Source: FedMinAg, Annual Report on Agriculture 2000 (Table 15, pg 29)						

Corporate Farms

The biggest German farms are organized in the legal form of corporate bodies, mainly cooperatives and limited liabilities predominantly found in eastern Germany. Corporate-body operations in western Germany are normally horticultural or other speciality operations with small areas of an average of 37 hectares. The average size of eastern German corperate-body farms are of 1,515 hectares (3,746 acres) with an average labor force of 35.2 labor units. There invested capital per hectare is on average the lowest compared to all other farm types. Only four percent of their land is in company ownership. Average rental contracts run for twelve years. If labor cost were deducted from the income, profit calculation of these farms produced an average loss of DM 12,538 in 1998/99. However, to make farm income data comparable for all types of farms, labor cost has to be re-added to farm income for corporate farms. Labor cost is usually included in farm income data for family farms. In 1998/99, cash crop farms were doing relatively better than dairy operations since they could take advantage of high EU income transfer payments based on farm land which can be especially demonstrated in the state of Mecklenburg-Vorpommern, a region with low soil fertility as well as lowest labor cost in Germany. There are predominantly very large grain and rapeseed farms with low labor intensity per hectare.

Characteristics of Corporate-Body Farms				
Item	Unit	Farm Type		Total
		Cash Crop	Dairy Farms	
Sample Size	%	189	142	368
Farm Size	ha	1,753.7	1,363.9	1,515.7
Rental Land	ha	1,670.3	1,311.5	1,449.5
Work Force /Farm	LU/Farm	31.8	36.4	35.2
Livestock	AU/100ha	47.8	86.5	81.9
Income*	DM/ha	776	1,079	948
Income*	DM/LU	42,748	40,419	40,780
Income*	DM/Farm	1,360,650	1,471,772	1,436,261
Income	DM/Farm	16,482	-2296	-12538
Farm Debt	DM/ha	1,690	2,049	2,001
Net Investment	DM/ha	69	15	19
Equity Increase	DM/ha	-34	-27	-42
LU = Labor Unit; AU = Animal Unit				
* incl. labor cost				
Source: FedMinAg, Annual Report on Agriculture 2000 (Table 16, pg 30)				

The following table summarizes characteristic data for all organizational types of farms which are managed on a full-time basis. Family farms usually have a larger portion of their farmland in ownership but also their debt rate per hectare is significantly higher that large scale farms. Since they specialize more on livestock production, they are more vulnerable to food scares such as BSE and other animal diseases, dioxin and sewage wastes in animal feeds. Cash crop farm incomes are more susceptible to policy decisions such as Agenda 2000. World market price variations do not yet have a direct impact on farm income as in the United States. For example the intervention price for grains in most years have been noticeably above world market prices. Sugar is well protected against the world market. Only oilseeds react to international price trends but are well-cushioned by EU price reduction compensation payments. Average labor cost per hectare is highest on corporate-type farms since they have to use hired labor. Reports indicate that most of these farms still seem to be overstaffed.

Comparison of Farm Characteristics by Legal Type of Farm				
Item	Unit	Legal Type of Farm		
		Single Family Full-Time	Multi-Family Partnership	Corporate Types
Sample Size	%	7767	730	368
Farm Size	ha	50.9	178.8	1,515.7
Rental Land	ha	29.3	160.4	1,449.5
Work Force /Farm	LU/Farm	1.7	3.3	35.2
- thereof Family Labor	LU/Farm	1.4	2.1	0.0
Livestock	AU/100ha	160.2	62.2	81.9
Total Equity	DM/ha	24,604.0	7,760.0	6,294.0
- Farmland	DM/ha	15,858.0	2,870.0	561.0
Farm Returns	DM/ha	4,125.0	2,551.0	2,700.0
Labor Cost	DM/ha	140.0	218.0	952.0
Farm Debt	DM/ha	3,429	2,729	2,001
Income	DM/ha	1,050	734	-8
Income*	DM/LU	36,511	51,700	40,780
Income*	DM/Farm	60,600	170,275	1,436,261
Income	DM/Farm	53,457	131,255	-12538
Equity Increase	DM/ha	88	140	86
LU = Labor Unit; AU = Animal Unit				
* incl. Labor Cost on Corporate Farms				
Source: FedMinAg, Annual Report on Agriculture 2000 (Table 15, pg 29)				

Part-Time Farms

Besides the 186,000 full-time farms, a majority of 243,000 farms are operated part-time. Most of these farms are located in southern Germany in Bayern and in Baden-Württemberg. Most of the small farms in eastern Germany (about 63%) are also operated part-time. In Thüringen the part-time portion of farms reaches a high of 79 percent. In this region unemployment is among the highest in Germany at above twenty percent. Average size of all part-time farms is calculated at 12.1 hectares (30 acres). Farms with a calculated long-term average income of more than DM 5,000 per farm operate an average 23.1 hectares (57 acres), so not much smaller than many full-time farms. The most efficient part-time farms achieved a farm profit of DM 84,718 in 1998/99; their total average household income was recorded at DM136,557 (as of April 07, 2000, US$=DM 2.04). A lot of these farms are active in hog production. Their average livestock numbers are recorded at 138 units per 100 hectares farmland. Their concentration in hog production resulted in significant income losses of minus 18.2 percent to DM 9,790 per farm in 1998/1999. Due to improving hog prices in 1999/2000, their income will also grow during the current marketing year.

Commercial Income in Germany

Art. 4 of the German Basic Farm law requires the Federal Ministry of Agriculture to compare farm income development with average economy income developments. Only about 20 percent of German farms achieved a farm income level exceeding average per capita income outside agriculture. The remaining 80 recorded below economy income in 1998/1999. The successful farms are usually bigger and operate with less labor compared to the less successful farms. They are located in regions with higher soil fertility and/or better market access. Their net-investments have been above average and they have been successful in reducing their portion of borrowed capital. Large size cash crop farms were particularly successful in 1998/1999. The less successful farms are generally smaller and concentrated in livestock production. There average income has been lagging behind the general economy by more than 50 percent for many years. These farmers do not give up their profession for lack of job alternatives in the region and because they want control over their daily job routine. Another important reason why they stay in business is because about 75 percent of their income is generated from public income transfers mainly out of Brussels EU budgets.

Government Support of German Agriculture

In 1999, German farm aid (including forestry and fishery) from federal and state budgets is reported at DM15.1 billion, DM 100 million less than in 1998. In addition to the national support, German farmers received another DM12.2 billion out of Brussels funds, DM 2.0 billion less than in 1998.. Due to general national tax reform programs effective 2000, German farmers expect to lose about DM500 million to one billion of national support.

Financial transfer payments per family farm unit went up by 4.7 percent in 1998/99 compared to 1997/98. The increase results mainly from higher transfers for price reduction compensation and animal premium as farms grew bigger and increased average livestock herds. Increases are also recorded for environment related measures, due to the growth of organic farms numbers. These transfer payments make up 57 percent of farm income.

Farm Related Government Support Payments for Family Farms, DM/Farm						
Type of Support	1997/98			1998/99		
	DM/Farm	DM/ha	%-share	DM/Farm	DM/ha	%-share
Product related	17,873	362	61.7	18,856	370	62.2
- Price Compensation	15,023	304	51.9	15,981	314	52.7
- Animal Premiums	2,060	42	7.1	2,184	43	7.2
Expenditure related	3,532	72	12.2	3,552	70	11.7
- Interest+ Investm Subsidies	1,100	22	3.8	1,009	20	3.3
- Fuel Subsidies	2,293	46	7.9	2,317	46	7.6
Farm related	7,545	153	16.1	7,903	155	26.1
- Set-aside Premiums	1,063	22	3.7	1,096	22	3.6
- Socio-structural Support	2,259	46	7.8	2,236	44	7.4
- Environm Protect Support	2,544	52	8.8	3,066	60	10.1
Total	28,951	586	100.0	30,312	595	100.0
Ave. Farm Income	57,668			53,457		

Compared to family farms the bigger partnership and corporate farms receive significantly higher support payments. Also per hectare support payments are higher on large sized farms because they concentrate on cash crop production. These statistics also indicate that eastern German large farms participate more in set-aside programs than smaller western German farms. In contrast, environmental programs are under-represented in eastern Germany.

Farm Related Government Support Payments for Partnerships and Legal Entities in 1998/99, DM/Farm						
Type of Support	Partnership Farms			Corporate Farms		
	DM/Farm	DM/ha	%-share	DM/Farm	DM/ha	%-share
Product related	80,732	451	67.7	686,573	453	63.7
- Price Compensation	75,717	423	63.5	642,014	424	59.6
- Animal Premiums	2,245	13	1.9	21,683	14	2.0
Expenditure related	17,801	100	14.9	151,139	100	14.0
- Interest+ Investm Subsidies	6,389	36	5.4	66,696	44	6.2
- Fuel Subsidies	7,221	40	6.1	62,363	41	5.8
Farm related	20,774	116	17.4	239,322	158	22.2
- Set-aside Premiums	6,721	38	5.6	75,045	50	7.0
- Socio-structural Support	3,535	20	3.0	59,777	39	5.6
- Environm Protect Support	7,064	40	5.9	59,345	39	5.5
Total	119,306	667	100.0	1,077,035	711	100.0
Ave. Farm Income	170,275			1,436,261		
Source: Federal Ministry of Agriculture, Annual Report on Agriculture 2000, pg. 38						

Structure

German agriculture is divided into two major size categories, large-scale farming in eastern Germany and much smaller farms in western Germany, particularly in the southern part of the country. The majority in number of family farms (64%) in eastern Germany are managed part-time, operating only five percent of the land. The rest of the single family farms, about 8,800 farms, work on farms of an average size of about 116 hectares (287 acres). However, the vast majority of farmland in eastern Germany (76%) is in the hands of multi-family partnerships or corporate-type farms. There average farm size amounts to about 700 hectares (1,740 acres), thereof 1,621 farms operating more than 1,000 hectares. Interestingly, the number of farms with more than 1,000 hectares has shrunk by 1.5 percent in 1999. Also the number of very small farms of two to ten hectares dropped by 1.7 percent. In total the number of farms is still marginally increasing in eastern Germany.

Farm Numbers by Size Groups						
Size Group	Western Germany		Eastern Germany		Germany	
ha	1998	1999	1998	1999	1998	1999
2 - 10	155,556	139,409	9,467	9,302	165,023	148,711
10 - 20	84,977	83,391	3,697	3,719	88,674	87,110
20 - 30	54,826	49,572	1,693	1,778	56,519	51,350
30 - 50	62,507	61,194	1,883	1,938	64,390	63,132
50 - 100	51,333	51,932	2,449	2,475	53,782	54,407
100 - 200	12,890	13,511	2,643	2,715	15,533	16,226
200 - 500	1,760	1,908	2,745	2,884	4,505	4,792
500 - 1000	121	129	1,456	1,467	1,577	1,596
1000 and more	16	19	1,645	1,621	1,661	1,640
Total	423,986	401,065	27,678	27,899	451,664	428,964
Source: FedMinAg - Annual Report on Agriculture 2000, TB 8						

In western Germany the number of farms is shrinking by an average rate of about three percent per year. The reduction occurs only in the size groups of farms of fifty hectares and less. The number of farms with more than 200 hectares are continuously growing. The breakdown by farm size indicates that also in the northwestern lowlands of Germany the structural reform process of the past years resulted in the formation of large-scale farms. The restructuring process in western Germany concentrates in the forming of more farming partnerships, which went up by 67 percent to 12,333 in 1999. Instead the number of single-family farms dropped by 28,000 to 386,400.

Ownership Structures in German Agriculture										
Type of Holding	1998					1999				
	Eastern Germany									
	Farms		Area		Average size in ha	Farms		Area		Average size in ha
	Number	%-Share	1,000ha	%-Share		Number	%-Share	1,000ha	%-Share	
Single Family	21723	78.5	1273	22.7	59	21803	78.2	1314	23.5	60
Private Partnerships	2980	10.8	1277	22.8	428	3046	10.9	1280	22.8	420
Corporate Bodies	2901	10.5	3037	54.3	1047	2968	10.6	2996	53.5	1010
-Cooperatives	1213	4.4	1745	31.2	1438	1190	4.3	1702	30.4	1430
-Limited Liability	1536	5.6	1207	21.6	786	1579	5.7	1204	21.5	762
-Stock Corporation	58	0.2	79	1.4	1369	61	0.2	84	1.5	1370
-oth Corporations	94	0.3	7	0.1	71	138	0.5	7	0.1	50
oth Publically Owned Farms	60	0.2	9	0.2	147	73	0.3	11	0.2	151
Total	27664	100	5595	100	202	27890	100	5601	100	201
	Western Germany									
	Farms		Area		Average size in ha	Farms		Area		Average size in ha
	Number	%-Share	1,000ha	%-Share		Number	%-Share	1,000ha	%-Share	
Single Family	414102	97.9	10955	94.9	27	386400	96.9	10581	92.2	27
Private Partnerships	7371	1.7	501	4.3	68	12333	3.1	808	7	66
Corporate Bodies	794	0.2	50	0.4	63	807	0.2	48	0.4	60
-Cooperatives	109	0	9	0.1	85	130	0	9	0.1	72
-Limited Liability	306	0.1	15	0.1	49	314	0.1	15	0.1	46
-Stock Corporation	47	0	11	0.1	235	23	0	9	0.1	397
-oth Corporations	332	0.1	15	0.1	44	340	0.1	15	0.1	45
oth Publically Owned Farms	787	0.2	43	0.4	54	641	0.2	41	0.4	64
Total	423054	100	11549	100	27	400181	100	11479	100	29
	Germany									
	Farms		Area		Average size in ha	Farms		Area		Average size in ha
	Number	%-Share	1,000ha	%-Share		Number	%-Share	1,000ha	%-Share	
Single Family	435825	96.7	12227	71.3	28	408203	95.4	11895	69.6	29
Private Partnerships	10351	2.3	1778	10.4	172	15379	3.6	2088	12.2	136
Corporate Bodies	3695	0.8	3087	18	836	3775	0.9	3045	17.8	807
-Cooperatives	1322	0.3	1754	10.2	1327	1320	0.3	1711	10	1297
-Limited Liability	1842	0.4	1222	7.1	663	1893	0.4	1218	7.1	644
-Stock Corporation	105	0	980	0.5	861	84	0	93	0.5	1104
-oth Corporations	426	0.1	21	0.1	50	478	0.1	22	0.1	47
oth Publically Owned Farms	847	0.2	52	0.3	61	714	0.2	52	0.3	73
Total	450718	100	17144	100	38	428071	100	17080	100	40

Source: FedMinAg, Annual Report on Agriculture 2000, MB 10

In eastern Germany, the former 4,650 collective farms were broken up into about 18,000 farms in 1992. From then on another 10,000 farms were started, mostly private family farms and family partnerships. About 54 percent of the farmland is under control 2,968 corporations. About 95 percent of the farmland in the east is rental land.

Compared to western German standards, in eastern Germany competition for farmland is relatively weak. Farms do not yet have the financial means to buy their land. Also the interest to sell land is rather limited. Average rental prices for farm land in eastern Germany was only 40 percent of those paid in western Germany. Even more stringent is the difference in land value. In 1997, one hectare of farmland in the east cost DM 6,338 compared to DM 32,189 in western Germany. This is most likely a result of the high unemployment rate in the east and the still shrinking population in this part of the country. In addition the price differences for farmland in eastern Germany do not vary as widely as in the west. The lowest prices were paid in Mecklenburg-Vorpommern where soil fertility is very low - DM 5,450/hectare, and highest prices were paid in Sachsen-Anhalt, a region with best farmland - DM 11,600/hectare. In western Germany, land prices are much more influenced by outside agricultural competition for land and by the high level of livestock production in this region. Schleswig-Holstein farmers - a region with relatively little livestock production - have to pay only DM 17,200/hectare while
Bavarian farmers have to pay up to DM 56,500/hectare.

Farm Labor

According to official labor statistics, 1.9 percent of total German working population is employed in the agricultural sector. This compares to 3.2 percent in 1991, the first year of German unification. Reduction in agricultural employment took place mainly in eastern Germany. In 1999, a total of 1.43 million people were employed on farms. Since the majority of these people were part-timers, this represents 648,300 full-time jobs. While in western Germany about 75 percent of agricultural labor is family labor, in eastern Germany nearly 60 percent are hired labor. About 75 percent of the family labor is working part-time of their farms. Average hourly earnings of hired farm labor is recorded at DM 19.40 which is 23 percent less than an average industrial worker earns. In addition to part-time and full-time labor another 300,000 seasonable workers are employed on German farms. Two thirds of this group are foreign workers, predominantly from Poland or other Central and Eastern European countries. The average wage of the foreign workers ranges between DM13 and DM14 per hour. Particularly labor intensive crop such as tobacco, fruits and vegetables depend on these foreign workers. German workers despite an unemployment rate of ten percent are not willing to perform stressful harvest work.

Labor Units in German Agriculture (1,000 persons)							
	Family Labor		Hired Labor		Seasonal Labor	Total Agric Workers	Total Labor Units
	Full-time	Part-time	Full-time	Part-time			
1970	878	1598	83	48	101	2708	1526
1980	497	1331	71	22	85	2006	967
1990	373	1038	56	29	73	1570	749
1995*	289	858	147	31	85	1410	698
1996	277	821	143	31	83	1355	671
1997	256	786	151	42	81	1316	650
1198	990		193		79	1261	621
1999**	231	709	150	45	299	1435	648
* Beginning 1995 data represent Unified Germany, before only Western Germany							
** New reporting scheme for seasonal labor, not comparable with earlier years							
Source: FedMinAg, Annual Report on Agriculture, Materialband pg. 7							

Over the past thirty years employment in agriculture dropped by 65 percent based on west German data. The number of full-time jobs dropped by 75 percent during the same period. Due to a very high level of mechanization in crop production, farmers could reduce labor needs significantly to 1.7 labor units per family-farm. The age pyramid for farm managers and farm workers shows that 51 percent of all people active on farms are in the age group of 35 to 55 years. Only 22 percent are younger than 35. Compared to 1994, this is a reduction of 4.2 percentage points. During the same period, the age group of above 55 shrank by 1.8 percentage points to 26.9 percent. These numbers indicate that the age pyramid does not create any particular cause for an accelerating consolidation process in German agriculture. The number of farms is foreseen to continuously shrink by about three percent per year.

Agricultural Prices and Domestic Spending for Food

During MY 1998/99, agricultural market in Europe were determined by record low hog prices, falling by an average of 33 percent. Since then they recovered by about 20 to 25 percent in the second half of 1999. Average cattle price dropped by only four percent which roughly reflects the reduction of feed costs. Milk prices recovered by a marginal one percent. On the crop production side, grain prices dropped by about seven percent. During recent months, grain prices recovered to early 1998 levels due to increased EU exports. However, internal European grain prices are fairly well decoupled from world market developments. High import tariffs protect domestic grain farmers from international competition. Surplus production of grains is sold to the German intervention agency and then dumped into international markets with the assistance of EU export subsidies.

Due to liberalization efforts for the European agricultural markets as documented in the Agenda 2000 decisions of March 1999, prices for food products in Germany and other EU countries will further decline. As a result, the portion of household expenditures spent on food items is continuously declining and reached a low of 15.1 percent in 1998 in medium income households in western Germany. Due to still comparatively lower income in eastern Germany, its spending rate on food items levels at a higher rate of 16.3 percent. However, spending rates for food items are slowly narrowing in both parts of Germany. If expenditures in canteens and restaurants are included, the spending portion on food items climbs to 16.9 percent in western Germany and 19.7 percent in the east. Tea, coffee, alcohol and tobacco are excluded from this calculation.

The development of declining household spending on food items is certainly not attributed to reduced consumption of food products. As the overall inflation rate is calculated at 0.6 percent for calender year 1999, consumer prices for food products dropped by an average of 1.3 percent. An intensive competition on the food retail level attributed considerably to this consumer-friendly development.

Supply and Distribution by Commodity

Detailed information on major commodity groups is available through the USDA/FAS reporting system. Reports are prepared for following commodities and commodity groups:

Asparagus
Citrus
Cotton
Dairy Products
Forest Products
Fresh Deciduous Fruit
Grains and Feeds
Honey
Livestock and Livestock Products
Oilseeds and Products
Organic Products
Poultry
Processed Sweet Corn
Seafood
Seeds
Stone Fruit
Sugar
Tobacco
Wine

Trade tables indicating the importance of these markets for U.S. farmers are attached to this report in the statistical appendix.

Foreign Trade

Germany is one of the world's leading food importing countries with total annual imports of $34 billion and also a well established market for American exporters. The strength of the German economy and the relative affluence of its population make it an attractive market for agricultural and processed food products.

German Trade Balance

In 1999, Germany's trade balance amounted to a surplus of $60.8, about 16 percent less than in 1998. Due to the current strength of the dollar and the weakness of the Euro, Germany's export surplus in 2000 is forecast to rise significantly. High oil prices since the end of 1999, however, darken the shining German export picture . Exports are the main economic engine for Germany. The majority of the trade, about 56 percent in 1999, is with other EU countries. This portion of German trade is not been spurred by currency devaluation advantages. Since the begin of the Euro-system in 1999 European business interaction has intensified, and the exchange of goods and services between European countries will keep growing.

Agricultural Imports

Germany is traditionally a net importer of agricultural and forest products. Its agricultural imports account for about nine percent of total imports. In 1999, total German agricultural import amounted to US$ 33.97 billion plus US$ 3.39 billion worth of forest products (excluding wood pulp). About 64 percent of the imported products came from EU countries and 4.2 percent from the United States. The German trade balance in agricultural products with the United States is negative. Imports from the United States were twice as high as German shipments to the U.S. Compared to 1998, German imports in 1999 dropped by 17 percent if expressed in $-value. When expressed in DM, imports dropped by only 13.8 percent. However, total German agricultural imports during the same period also dropped by 16 percent. In part this was due to lower world market prices for many agricultural commodities, reduced imports of animal feed ingredients, increased use of domestic feed products as result of the lower EU intervention prices for grains. The high unemployment rate of more than ten percent may also have contributed to reluctant import development in 1999. The major U.S. export item to Germany are soybeans which lost 32 percent in market value but only minus 16 percent in volume. Soybeans still represent 22 percent of German agricultural imports from the United States followed by raw tobacco (18 percent) and almonds (ten percent). U.S. soybeans exports suffered under the controversial situation about genetically modified food and feed products in Europe. An end to this discussion and an end to trade problems based on the GMO discussion is not foreseen. Trade success stories for 1999 can be reported for rice, increasing by 29 percent to 68,000 tons (milled equiv.), for citrus (plus 13 percent) and for raw tobacco (plus 19 percent). Trade in hard liquors improved by three percent in volume but by 14 percent in U.S. value. Other specialty exports to Germany are fruits and vegetables, fresh and processed, nuts, flowers and ornamentals, pet food and other feed ingredients. Due to reduced shipments of soybeans and feed ingredients, the share of unprocessed bulk commodities and processing wastes for feed purposes dropped to 30 percent in 1999, compared to 40 percent in 1998.

In addition to food and feed products, the United States also exports a significant volume of forest products to Germany, worth US$214 million plus wood pulp for the paper industry at a value of US$204 million. Compared to 1998, this is a reduction of 28 percent due to the high value of the U.S. dollar and also due to a generally very high price level for forest products in the United States. The majority of the timber shipments are hardwood veneers and hardwood lumber. Traditionally high imports of softwood plywood collapsed to only 16,400 sqm in 1999 due to high domestic prices for wooden construction panels in the United States.

The outlook for U.S. agricultural and forest products exports to Germany in 2000 are not optimistic. The continued unfavorably high exchange rate of the US$ creates significant hurdles. In addition, the ongoing dispute about the public acceptance of agricultural products produced with the assistance of modern biotechnology hampers sales of soybeans to German customers. During the first three months of 2000 soybean shipments to Germany dropped by 34 percent.

Agricultural Exports

German agricultural and forest products exports totaled US$24.0 billion in 1999, a reduction of eleven percent over 1998 if expressed in US$. In DM-terms German exports dropped only by eight percent. About 70 percent of German export trade is with other EU countries. The vast majority of German exports are processed goods with significant value added. Grain and feed exports account for only six percent of total exports. Exports of animal origin products accounted for 32 percent; food and feed exports of plant origin products accounted for 36 percent. The third major group of luxury items such as coffee, tobacco products, beer, wine and spirits accounted for 18 percent.

German agricultural and forest products shipments to the United States amounted to US$792 million, a reduction of two percent if expressed in US$ over 1998. Major products are beer, coffee, bakery products, candy chocolate and cheese. Exports of life animals have shown steady growth over the past five years.

For details please refer to the statistical section of this report.

German Agricultural Policies

European agricultural policies and policy strategies are predominantly prepared and determined in Brussels by the European Commission and by negotiations in the EU Council of Agricultural ministers. Also the European Parliament expresses its strong interest to actively participate in the development of the European agricultural policy which represents the generally growing importance and influence of the Parliament. National ministries tend to become administrative bodies, bearing major responsibility for social well-being of their respective farming communities. The increasing concentration of power and decision at the European Commission in Brussels is viewed skeptically by many German regional politicians. Especially, the Bavarian conservative government demands a reconsideration of this trend. The basic idea of this new thinking is that issues which can be better handled in the region should also be decided in the region itself. E.g. regional development programs should be developed, decided and funded regionally. Regions are requesting increased regional autonomy and flexibility in their own support programs.

What runs like a red thread through German federal agricultural policy goals is the conservation of the cultural landscape formed over the years by millions of family operated farms. In view of the population density of Germany and most other European countries the countryside serves on the one side as a food basket but also as the major recreation area for 82 million Germans. This dual or multi-purpose approach for agriculture constitutes the European principle of multi-functionality of the farm sector. The split up of farmland into many small field units, especially in central western and southern Germany, does not allow competitive farming compared to New Zealand, Australia, Argentina, Canada or the United States. To keep as many farms operational as possible, the agricultural system in Germany and all other European countries require from the European perspective, a significant level of protection against competition from outside EU.

As a result of the Uruguay Round negotiations in 1994 the European system of variable levies had been transferred into fixed tariff rates with the obligation of reducing import tariffs by 36 percent until the year 2000. This obligation of improving market access for non-EU suppliers to the European market forced the EU to also lower their internal system of support prices noticeably. For example, in the grain sector the EU lowered intervention prices by 30 percent over a period of three years. To avoid collapsing farm incomes, the support scheme for farmers was changed to increased direct income support based on managed farmland and historical yield levels. Since this initial step of the EU farm support reform of 1996 was not yet sufficient to meet all commitments of Uruguay Round negotiations, the EU in March 1999 during German presidency decided their

Agenda 2000 package, which basically is a further shift towards direct farm income support, away from the old price support scheme. The target of Agenda 2000 is to make EU agricultural production internationally more competitive by lowering EU support prices.

Driving forces for the Agenda 2000 decision package were the Uruguay Round commitments to improve market access for third country suppliers; to reduce the level of trade distorting export subsidies; and to prepare the EU for the accession of Central and Eastern European member countries to the European Union possibly beginning 2006. A third strong argument for EU agricultural reform in Agenda 2000 were EU budget limitations. About half of the EU budget is destined for the agricultural sector. To avoid further growth of public spending for agriculture, a maximum annual financial cap of Euro 40.5 billion for the period 2000-2006 was implemented. The financial cap is foreseen to serve as an important tool in future agricultural reform steps in view of the accession of CEE countries. It is the EU's goal to not increase agricultural spending even if the EU is enlarged.

During the previous conservative government which exited office in the fall of 1998, the German government generally focused on conversation of political status quo in agriculture. The new Social-Democrats/Greens government is less conservative and more open to international competitiveness. Market forces have to regain more influence in agricultural markets. The leading goal of the current government is to limit overall budget deficit growth. Since farmers traditionally have been voting for conservative parties their support by the current government is rather limited. Special income tax breaks for farmers as well as fuel subsidies have already been reduced.

National Budget

Since 1993, the German national government has undertaken significant efforts to lower its national spending for the agricultural sector. The budgets for 1991 through 1993 were inflated as a result of enormous public spending associated with the restructuring of eastern German agriculture. About 70 percent of the national budget is spent for social programs. In particular, old age and health insurance programs are costly. The government is discussing streamlining special old age and health insurance systems for farmers to bring them in line with systems for the general public. In particular, overhead cost provide opportunities for reduction. Increases in the budget are namely in the area of renewable resource, meaning in the development of new markets for agricultural crops.

Compared to the total German federal budget spending for agriculture makes up for only 2.28 percent of the total budget.

Budgets of the German Federal Ministry of Agriculture, in DM Million				
	2000	2001	Change	
Item			in DM Mill.	in %
Agricultural Social Policy	7,311.5	7,643.5	332.0	4.5%
- Old Age Incusrance	4,146.0	4,260.0	114.0	2.7%
- Accident Insurance	500.0	500.0		
- Annuities to Give up Farming	192.0	175.0	-17.0	-8.9%
- Health Insurance	2,060.0	2,325.0	265.0	12.9%
- Supplem. Old Age Insur.	23.5	23.5		
- Early Retirement Pension	390.0	360.0	-30.0	-7.7%
Market Promotion	15.4	13.5	-1.9	-12.3%
Research	61.6	63.0	1.4	2.3%
Fishery Support	51.5	53.0	1.5	2.9%
Previous Obligations from				
Structural Improve. Measures	5.8	5.1	-0.7	-12.1%
Fuel Subsidies	835.0	375.0	-460.0	-55.1%
Internat. Organizations	55.6	62.4	6.8	12.2%
Renewable Resources	51.0	51.0		
Renew. Fuels + Lubricants	5.0	20.0	15.0	300.0%
Various other Appropriations	49.8	50.7	0.9	1.8%
Sub-Total	8,442.2	8,337.2	-105.0	-1.2%
Federal Contrib. to Joint				
Fed./State Agric. Measures	1700.0	1,700.0		
National Market Order Costs				
(not refunded by EU)	328.9	355.3	26.4	8.0%
Precaution Measures f. National				
Food Security	20.2	17.1	-3.1	-15.3%
Other Admin Cost e.g.				
Upkeep of FedMinAg Research Inst.	544.4	533.5	-10.9	-2.0%
Total	11035.7	10943.1	-92.6	-0.8%
Source: FedMinAg				

National Policy Trends

Shortly after the takeover of German government by the Social Democrat/Greens coalition in the fall of 1998 Germany also had to take over for six months the presidency of the European Union during the first half of 1999. This was the period when the European Agenda 2000 had to be decided. In contrast to the previous conservative government which was strongly opposing European Commission proposals for Agenda 2000, the current coalition took a strong leadership role to come to a successful result. The EU's and as such also Germany's position is that the EU is fully prepared for the starting WTO negotiations. For most commodities the EU claims to have developed a position which does not require them to further liberalize their markets and requirements resulting from Uruguay Round are according to the EU fully met by the steps taken laid down in Agenda 2000.

If the US$ remains at its current strong position and world grain and oilseed prices will recover again by about ten to fifteen percent (CBoT wheat prices on July 19 - 245ct/bu) it might be possible that the EU can export grains without the assistance of export subsidies. Only Germany then still will have a problem because of its sizeable rye production. In MY 1999/2000 about 75 percent of the German rye crop ended up in intervention stocks because domestic use of rye is gradually shrinking.

Although the German government is opting for more liberalized markets they are not prepared and not willing to lower current high tariff rates for agricultural commodities. The argument is that EU farmers need the protection against third country suppliers because of more stringent environmental rules applied in Germany and most other EU countries. Building codes for farm buildings especially animal barns are stricter than in most other competing countries. Also the idea of animal welfare increases production costs in livestock production. Despite the general idea of demanding more open markets, German agricultural policy makers strongly favor the tools of supply management such as set aside rates in crop production and production quotas for sugar and milk. The instrument of intervention purchases should be only available for emergency situations. However, an abrupt change of the current system is not intended.

Farm groups are strongly opposing trends of a more open market oriented EU agricultural policy. They call for higher product prices instead of lower minimum guarantee prices. Farm incomes have been compensated for reductions of guaranteed prices resulting from the 1996 and the 1999 policy reforms by direct income transfers based on managed farmland. Farm groups argue that farmers have to spend more time to carefully and correctly fill out EU compensation application forms than work on their fields. These groups favor more stringent production limitations accompanied by higher prices and reduced market access for third country competitors. Luckily their political influence is no longer strong enough to influence government decisions.

The instrument of direct income transfer payments had been implemented in 1996 to compensate for reductions of administered prices. Since this line of arguments cannot continue indefinitely, a new system of arguments for continued farm support had to be developed. The new reasoning for farm subsidies labels under the term 'multi-functionality'. Since the value of farm work cannot solely be expressed in product prices, farmers require additional compensation for environmental protection measures; for shaping the cultural landscape; for providing a cost-free recreation area for the general public. All these external benefits are to be compensated for.

EU Enlargement

During the French presidency in the EU - beginning July 1, 2000 and lasting six months - it is expected that the enlargement negotiations, namely with Poland, Hungary, Slovakia, Romania, Bulgaria and the Czech Republic, will show significant progress. Because of its geographical location, this enlargement process is of vital interest to the German farming sector and the food processing industry. Currently, the German food industry ships about five percent of its exports to these accession candidate countries. Since the food processing industries in the accession region is not yet as advanced as western European processors, the German food industry is expected to take advantage of this promising market for the long hand.

In view of the upcoming EU enlargement, German farmers fear that they will have to compete with producers who have significant production advantages of lower labor cost, lower rental cost and lower production and environmental standards. German farmers demand a long transition period for the accession until farmers in these candidate countries meet all EU production and quality standards.

With respect to EU income support programs for agriculture, most EU and member country agricultural politicians claim that farmers in accession countries should not be eligible to EU income transfer payments, mainly because that would be too burdensome for EU budgets. German farmers fear that the total budget spending for agriculture will not be increased for the accession countries with the result that the current level of support payment for EU farmers will have to be lowered.

Biotechnology

The EU phobia against modern technology in food production finds its strongest expression in the opposition to biotechnology in crop production. Driven by anti-biotech activist organization Greenpeace, the general public is concerned about the utilization of biotechnology. Opinion polls claim that about 80 percent of the German population would reject food products produced with the assistance of biotechnology. This high number, however, is only hypothetical since consumers do not have any choice. There are no products on the shelves labeled to contain biotech. Actually, the public's knowledge about biotechnology in plant production is rather limited; also the interest in receiving additional education about the complex issue seems to be limited.

On the political side there is a practical standstill with respect to approvals of new biotech plant varieties. As the EU is currently in the process to revise their genetech regulations (EC 90/220) politicians have factually agreed to not approve any new varieties before the 90/220 is finalized. And this may probably take another two to three years. Political rather than scientific factors cause the delays in the approval procedures. In particular, the grossly undefined 'precautionary principle' acts as a convenient tool to delay GMO approval decisions.

In addition to the fundamental opposition by environmental activist groups who have their political counterparts in the coalition party Alliance90/The Greens, the food processing industry is extraordinarily reluctant to make supportive statements for foods containing genetically modified organisms (GMO). Also competition on the German food retail market is extremely intense so that profit margins hardly exist. Retailers argue that GMO containing foods do not provide any benefits to the consumers and might cause

However, there is hope for biotech food products. German Chancellor Schroeder made a very supportive statement for the biotech industry. Schroeder initiated a voluntary research and monitoring program for green biotechnology for the next three years to prepare ground for gradual improvement of the general acceptance level for biotech products. In the pharmaceutical area, genetech products are widely accepted and no longer controversially discussed. The development of the voluntary research program will be under the guidance of the Chancellery which has expressed more support for the industry side than the Federal Ministry of Health.

Beef Hormones

German farmers and farm organizations, the food industry and consumer representatives continue to strongly oppose imports of beef coming from cattle treated with hormones. The German government as well as interested groups contributes to the sensitivity of this issue among the German public. In light of the BSE crisis, it is feared that the approval of hormone-treated beef would again scare people away from beef consumption which recovered with difficulties to 17 kilograms in 1999 from a low of 14.5 kilograms in 1997. The longer term trend in meat consumption in total had been declining since the beginning of the 1990s.

On May 1, 1999, the EU made available a report on the potential human health risk associated with consumption of beef from animals treated with U.S. approved growth-promoting hormones. However, the opinion is not consistent with numerous scientific reviews conducted by reputable international organizations and represent a significant departure from conclusions reached by all previous international review panels. The EU's opinion focuses on only one growth promotant, estradiol, and in particular its potential genotoxoicity. In May 2000, the European Commission, following an EU Scientific committee opinion, proposed to ban definitely the use of estradiol in farm animals both for growth promotion and therapeutic purposes and to remain thecurrent prohibition on the five other hormones on a provisional basis while it seeks more complete scientific information. The Commission states that this provisional ban would be in line with the ruling of the WTO Appellate Body. As this legislation is under co-decision with the European parliament, final implementation will not be for 12-18 months.

Annex-Table 1: Annual Food Consumption 1/ (kg/Per Capita)					
Product	1994/95	1995/96	1996/97	1997/98	1998/99
A. Plant Products					
Total Grain (Flour Equiv.)2/	72.3	74.6	74.9	74.9	76.2
Wheat Flour	55.1	56.6	57.2	57.4	58.6
Rye Flour	10.9	10.8	10.8	10.7	10.5
Rice	2.6	2.5	3.2	3.0	3.0
Pulses	0.6	0.9	1.0	1.5	1.4
Potatoes	72.8	72.8	73.3	72.3	70.6
Sugar, Refined	33.1	32.6	33.5	32.5	33.0
Glucose	4.4	5.1	5.0	4.9	5.0
Honey (Prod Weight)	1.1	1.4	1.0	1.1	1.1
Vegetables, incl. Prod.s					
(Fresh Equiv.)	81.6	86.7	89.9	87.7	86.9
Fruits, incl. Prod.s	92.9	87.8	96.4	89.5	93.6
Citrus Fruit	28.0	29.8	29.3	31.5	32.4
Nuts	3.7	3.5	3.8	3.5	3.4
Dried Fruits	1.4	1.5	1.4	1.4	1.3
	1994	1995	1996	1997	1998
B. Animal Products					
Total Meat, excl. Fats 3/	93.0	92.0	91.4	89.9	93.2
Human Meat Cons.	62.6	61.8	61.3	60.4	62.7
Beef & Veal, excl. Fats	17.5	16.6	15.2	14.5	15.1
Pork	55.5	54.9	54.7	53.8	56.0
Sheep & Goat Meat	1.0	1.1	1.1	1.0	1.2
Offals	4.5	4.5	4.6	4.3	4.3
Poultry Meat	12.8	13.4	14.1	14.7	15.0
Oth Meats, Game	1.4	1.4	1.4	1.4	1.5
Fish (Fillet Weight)	14.2	13.6	13.4	13.2	14.0
Fresh Milk Prod.s	89.3	91.0	89.9	87.7	89.3
Cream	7.3	7.5	7.7	7.8	7.7
Condensed Milk	5.2	5.4	5.1	5.0	5.0
Milk Powder (Whole + Nonfat)	1.9	1.7	1.6	2.0	2.1
Cheese	19.2	19.8	20.1	20.3	20.4
thereof Fresh Cheese	8.5	8.9	8.6	8.7	8.5
C. Fats, Edible					
Total Fats (Pure Basis)	27.3	28.4	30.3	30.2	29.3
Animal Fats (Pure Basis)	11.0	11.2	11.3	11.1	10.9
thereof Butter	6.9	7.1	7.3	7.1	6.8
Vegetable Fats (Pure Basis)	16.3	17.2	18.8	19.1	18.3
thereof Margarine	7.2	7.1	7.3	7.3	7.2
Oils, Edible	9.5	10.7	12.1	12.4	11.7
Hardened Fats, Edible	1.0	0.8	0.9	0.8	0.9
Eggs and Prod.s	13.3	13.7	13.6	13.9	13.8
Number of Eggs	219	224	225	227	225
1/incl. imported foods and food products					
2/ incl. glucose and isoglucose products from grain					
3/ Represents total Disappearance, incl. bones etc.					
Source: FedMinAg, Statischer Monatsbericht 12/99					

Annex-Table 2: Rate of Self-Sufficiency in Major Food Products in Percent 1/					
Product	1994/95	1995/96	1996/97	1997/98	1998/99
A. Plant Products					
Wheat	108	114	128	132	127
Rye	129	152	141	18	168
Barley	109	112	121	133	124
Oats	102	93	105	106	97
Corn	76	70	79	84	78
Triticale	99	102	107	112	106
Total Grains	106	110	120	127	122
Pulses	47	57	57	39	31
Potatoes	96	96	102	99	102
Sugar, Refined	135	142	151	148	144
Vegetables, incl. Prod.s					
(Fresh Equiv.)	38	38	41	40	41
Fruit 2/	43	36	40	32	42
	1994	1995	1996	1997	1998
B. Animal Products					
Meat, excl. Slaughter Fats	81	81	82	85	85
thereof Beef	108	114	126	129	118
Pork	77	77	77	79	82
Poultry Meat	61	61	60	61	64
Offals	87	87	85	92	93
Fish (Catch Weight Basis)	23	26	27	28	28
Milk + Milk Prod.s	98	99	97	98	98
Fresh Milk Prod.s	109	110	113	115	114
Cream	104	104	105	105	105
Condensed Milk	124	125	128	138	135
Whole Milk Powder	161	217	187	146	145
NFDM	350	328	309	286	279
Cheese	96	96	99	102	102
Fresh Cheese	102	102	105	105	108
Eggs + Egg Prod.s	75	72	73	72	74
C. Fats + Oils (Edible)					
Vegetable Origin	49	53	43	42	48
Animal Origin	112	107	109	110	113
Marine Fats	10	10	9	12	33
Butter	83	84	81	77	77
1/ Domestic production as a percent of total consumption for all uses					
2/ Excl. citrus fruits, nuts, dried fruits; but incl. tropical fruits					
Source: FedMinAg, Statitischer Monatsbericht 12/99					

Annex-Table 3: Selected Price Indices for German Agriculture - 1991 = 100					
Item	1995/96	1996/97	1997/98	1998/99	
A. Producer Prices					
Non-Agric. Prod.s 1/	104.0	103.5	104.7	103.9	
Agricultural Prod.s 1/	n.a.	91.2	91.5	84.0	
Plant Products		84.3	84.9	83.8	
Grains	74.3	76.4	68.8	64.4	
Potatoes	108.4	50.8	76.6	130.5	
Sugar Beets	96.5	67.7	100.4	100.4	
Fruits	70.1	66.3	71.1	65.0	
Vegetables	90.4	83.2	81.4	85.9	
Wine Must	117.9	126.0	141.3	103.6	
Cut Flowers/Potted Plants	103.8	105.9	105.7	108.1	
Animal Products		94.7	94.8	84.1	
Cattle for Slaughter	91.6	87.0	94.2	90.7	
Hogs for Slaughter	88.8	99.9	118.0	102.5	
Poultry for Slaughter	85.0	89.6	89.1	83.2	
Milk	95.8	93.7	97.7	98.7	
Eggs	97.2	104.0	95.7	84.5	
B. Purchase Prices 1/					
Agricultural Inputs	101.4	105.2	104.5	98.0	
Fetilizer	101.4	99.5	94.0	89.7	
Feedstuffs	91.9	99.1	95.6	84.9	
Seeds	103.1	100.9	99.1	98.7	
Breeding Animals	91.7	94.6	98.7	79.2	
Plant Protectants	102.7	106.6	106.7	104.1	
Energy	102.7	110.0	107.5	101.2	
Building Maintenance	120.1	121.1	121.7	121.6	
Machinery Maintainance	120.2	124.8	128.5	131.9	
New Buildings	115.3	114.7	114.1	113.2	
New Machinery	110.7	111.9	112.9	113.9	
C. Consumer Prices 2/	101.4	103.3	104.3	104.9	
D. Foods only 2/	91.1	92.5	87.1	82.7	
E. All Imported Goods 2/	100.4	104.0	100.7	100.2	
Imported Foods only	98.3	105.3	102.7		
1/ excl. VAT					
2/ 1995 = 100					
Source: FedMinAg Agricultural Statistics Yearbook 1999 / Deutsche Bundesbank					

Annex-Table 4: Farm Land Use by Major Category in 1000 ha									
'Year	1992	1993	1994	1995	1996	1997	1998	1999	2000
Wheat	2,599	2,395	2,435	2,579	2,594	2720	2803	2601	2971
Rye	614	662	722	861	809	843	936	748	843
Barley	2,408	2,201	2,070	2,109	2,208	2274	2181	2210	2072
Oats	358	358	392	309	302	312	264	268	237
Triticale + WMG + SMG	240	277	271	344	422	497	517	437	538
Corn	296	331	345	325	372	368	341	371	363
TOTAL GRAIN	6,515	6,224	6,235	6,527	6,707	7014	7042	6635	7024
Pulses	56	86	96	123	149	185	225	212	185
Potatoes	361	312	293	315	336	304	297	309	300
Sugar beets	534	522	500	513	515	504	503	489	452
other row crops	52	40	31	29	24	22	18	16	16
Veget. / other hort.	94	91	94	103	104	103	105	111	107
Rapeseed	1,001	1,007	1,058	974	854	914	1007	1198	1080
Sunflowerseed	65	82	189	52	44	34	34	33	25
Linseed, oth. oilseed	90	38	42	66	92	98	114	200	140
Hops	23	23	22	22	22	21	20	19	19
Grass seed, tobacco,etc	48	40	38	37	39	43	46	46	45
Silage corn	1,243	1,264	1,205	1,252	1,327	1294	1235	1203	1153
Clover, /grass mixtures	243	238	244	236	227	227	224	201	210
Alfalfa	75	67	61	49	44	37	36	32	35
Grass, oth. feed crops	311	284	259	256	264	282	288	273	280
Fallow land, set-aside	757	1,357	1,439	1,282	1,085	749	730	846	820
TOTAL ARABLE LAND	11,468	11,675	11,805	11,836	11,833	11831	11924	11823	11891
Horticultural area	29	27	22	19	20	18	16	16	16
Fruit and tree crops	74	70	69	69	70	70	72	72	72
Nurseries	27	27	27	28	27	27	26	26	26
Permanent pasture	5,243	5,251	5,271	5,282	5,273	5268	5265	5265	5265
Vineyards	103	103	103	102	101	101	101	101	101
Other agric. crops	8	8	11	10	12	12	13	13	13
Total Agricultural Area	16,952	17,161	17,308	17,346	17,336	17327	17417	17316	17384
Source: FedMinAg									

Annex-Table 5: Livestock, Dairy and Poultry Production						
Item	1994	1995	1996	1997	1998	1999
Number of Livestock at the Beginning of the Year (1,000 Head)						
Cattle, Total	15,962	15,890	15,760	15,227	14,942	14,657
Milk Cows	5,273	5,229	5,195	5,026	4,833	4,710
Hogs. Total	24,698	23,737	24,283	24,795	26,294	26,003
Bred Sows	2,613	2,529	2,547	2,614	2,656	2,582
Sheep	2,340	2,395	2,324	2,302	n.a.	2,621
Laying Hens						
Annual Average	51,700	50,700	50,600	50,500	50,200	50,200
Production (1,000 MT)						
Milk	27,866	28,621	28,779	28,702	28,378	28,400
Cheese	864	876	949	989	1,008	1,006
Butter	461	486	489	442	426	427
NFDM	374	399	395	334	326	331
Beef, Veal	1,542	1,541	1,573	1,535	1,449	1,374
Pork	3,462	3,430	3,435	3,505	3,744	4,113
Lamb, Mutton, Goat	39	40	43	44	44	45
Total Red Meat	5,043	5,011	5,051	5,084	5,237	5,532
Poultry	639	664	693	734	790	807
Eggs (Million Pieces)	13,960	13,838	13,944	14,065	14,164	14,341
Source: Who in the World Knows						

Annex-Table 6: Crop Production + Yield for Major Agric. Products									
	Production					Yield			
Item	1996	1997	1998	1999		1996	1997	1998	1999
	1,000 Mt					dt/ha			
Wheat	18,942	19,827	20,187	19,615		72.9	72.9	72.0	75.4
Rye	4,169	4,580	4,775	4,329		52.1	54.3	51.0	57.9
Barley	12,064	13,399	12,512	13,301		54.7	58.9	57.4	60.2
Oats	1,604	1,599	1,279	1,339		53.2	51.2	48.4	50.0
Triticale	2,379	2,893	3,039	2,611		58.4	59.9	60.1	61.4
Corn	2,926	3,188	2,782	3,257		78.6	87.2	82.6	88.4
Total Grains	42,084	45,486	44,574	44,452		62.8	64.9	63.3	67.0
Pulses 1/	379	492	683	695		35.1	33.9	35.0	37.2
Sugar Beets	26,064	25,769	26,940	26,264		534.0	511.6	535.2	538.7
Potatoes	13,100	11,659	11,338	11,077		390.1	384.1	381.4	372.1
Vegetables 2/	2,773	2,596	2,706	2,850		293.0	283.0	282.0	297.0
Commercial Fruit,									
incl. Berries	1,109	947	1,218	1,331					
Wine Must 3/	8,642	8,495	10,834	11,023		84.4	82.9	106.6	108.4
Rapeseed	1,970	2,867	3,388	4,212		23.1	31.4	33.6	35.1
Raw Hops	40	34	31	28		18.1	15.9	15.6	15.3
Tobacco 4/	8	9	10	11		24.4	24.3	25.5	24.1
Total Hay									
Crops 5/	36,599	37,236	38,950	37,830		79.0	80.3	83.5	82.7
Silage Corn	57,657	56,844	54,328	51,500		434.1	438.3	438.4	430.5
Feed Beets	1,980	1,660	1,331	1,040		999.5	957.5	971.6	983.1
1/ incl. edible peas and field beans									
2/ Commercial production, incl. greenhaouse									
3/ Production in 1,000 hl; yield in hl/ha									
4/ Farm weight									
5/ Hay equivalent									
Source: FedMinAg									

Annex-Table 7: Average Producer and Input Prices for Major Agricultural Products					
Product	Unit	1995/96	1996/97	1997/98	1998/99
Wheat	DM/100kg	26.08	25.55	23.25	21.93
Brewing Barley	DM/100kg	33.96	28.09	24.68	24.66
Feed Barley	DM/100kg	23.25	23.24	21.91	21.24
Potatoes	DM/100kg	22.50	11.60	14.80	13.10
Sugar Beets	DM/100kg	9.40	9.80	9.90	9.76
Young Bulls					
Best Class	DM/kg slwht	5.40	5.23	5.60	5.49
Heifers, Best Class					
for Slaughter	DM/kg slwht	5.22	4.93	5.20	5.06
Cattle, Average					
all Classes	DM/kg slwht	4.68	4.35	4.66	4.49
Hogs, Average					
all Classes	DM/kg slwht	2.90	3.28	2.88	1.92
Milk 2/	DM/100kg	55.83	56.41	58.74	59.45
Eggs	DM/kg	2.66	2.71	2.43	2.36
1/ Farm gate; milk delivered to dairy; all prices incl. VAT					
2/ 3.7% fat and 3.4% protein					
Source: FedMinAg. Statistischer Monatsbericht					

Annex-Table 8: Selected Trade Data, $-Value and Market Shares								
Item	1,996		1,997		1,998		1999 1/	
	Mill $	%	Mill $	%	Mill $	%	Mill $	%
A. Total Foreign Trade								
1. All Countries								
Imports	459,133		445,094		470,782		474,261	
Exports	524,664		512,230		542,957		544,004	
Balance	65,531		67,136		72,175		69,743	
2. United States								
Imports	32,911	7.17	34,032	7.65	38,828	8.25	38,783	8.18
Exports	39,977	7.62	44,165	8.62	51,018	9.40	54,949	10.10
Balance	7,066		10,133		12,190		16,166	
3. EU Members								
Imports	258,401	56.28	244,656	54.97	256,956	54.58	255,876	53.95
Exports	301,012	57.37	284,502	55.54	306,840	56.51	312,677	57.48
Balance	42,611		39,846		49,884		56,801	
B. Agricultural Trade 2/								
1. All Countries								
Imports	43,273		39,408		40,406		33,974	
Exports	25,795		23,192		24,300		21,274	
Balance	(17,478)		(16,216)		(16,106)		(12,700)	
2. United States								
Imports	2,075	4.80	1,753	4.45	1,718	4.25	1,420	4.18
Exports	712	2.76	708	3.05	721	2.97	694	3.26
Balance	(1,363)		(1,045)		(997)		(726)	
3. EU Members								
Imports	28,668	66.25	25,075	63.63	26,154	64.73	21,715	63.92
Exports	19,715	76.43	16,164	69.70	17,514	72.07	15,083	70.90
Balance	(8,953)		(8,911)		(8,640)		(6,632)	
1/ Estimate								
2/ incl. agricultural products for non-food use, excl. wood products								
Source: Federal Statistics Office Wiesbaden								

Annex-Table 9: Selected Trade Data, DM-Value and Market Shares								
Item	1,996		1,997		1,998		1999 1/	
	Mill DM	%	Mill DM	%	Mill DM	%	Mill DM	%
A. Total Foreign Trade								
1. All Countries								
Imports	690,399		772,149		828,200		870,307	
Exports	788,937		888,616		955,170		998,291	
Balance	98,538		116,467		126,970		127,984	
2. United States								
Imports	49,488	7.17	59,039	7.65	68,307	8.25	71,171	8.18
Exports	60,114	7.62	76,617	8.62	89,751	9.40	100,837	10.10
Balance	10,626		17,578		21,444		29,666	
3. EU Members								
Imports	388,558	56.28	424,430	54.97	452,037	54.58	469,554	53.95
Exports	453,715	57.51	493,554	55.54	539,793	56.51	573,788	57.48
Balance	65,157		69,124		87,756		104,234	
B. Agricultural Trade 2/								
1. All Countries								
Imports	65,070		68,364		71,083		62,345	
Exports	38,787		40,233		42,749		39,040	
Balance								
2. United States								
Imports	3,120	4.79	3,041	4.45	3,022	4.25	2,606	4.18
Exports	1,071	2.76	1,228	3.05	1,269	2.97	1,273	3.26
Balance								
3. EU Members								
Imports	43,019	66.11	43,500	63.63	46,010	64.73	39,849	63.92
Exports	26,938	69.45	28,041	69.70	30,811	72.07	27,679	70.90
Balance								
1/ Estimate								
2/ incl. agricultural products for non-food use, excl. wood products								
Source: Federal Statistics Office Wiesbaden								

Annex-Tables 10: Imports of Agricultural Products				
	WORLD			
IMPORT		1998	1999	
		1000-$	1000-$	%CHANGE
HF1	TOTAL LIVE ANIMALS	409,969	317,338	-22.6
HF204	MEAT AND MEAT PRODUCTS	4,805,362	3,752,906	-21.9
	TO.OTH.PRODUCTS OF ANIMAL ORI	6,841,145	5,690,201	-16.8
HF2	TOTAL PRODUCTS OF ANIMAL ORIG	11,646,507	9,443,107	-18.9
HF301	WHEAT	179,233	168,397	-6
HF305	CORN	268,552	233,941	-12.9
	TO.SORGUM, BARLEY, OATS, RYE	108,813	100,185	-7.9
HF307	RICE	165,928	150,927	-9
	SUB.TO.GRAIN AND RICE	722,525	653,450	-9.6
HF311	PULSES	63,154	53,838	-14.8
HF316	TO.VEGETABLES AND KITCHEN HER	3,345,712	2,835,626	-15.2
HF317	TO.FRUIT,EXCL.TROPICAL FRUIT	2,774,868	2,323,082	-16.3
HF318	TO. CITRUS,OTH. TROPICAL FRUI	1,256,255	1,057,155	-15.8
HF319	TO.FRUITS/VEGET.,CANNED,JUICE	919,068	879,872	-4.3
HF3242	PEANUTS	91,933	77,588	-15.6
HF3241	SOYBEANS	937,718	884,385	-5.7
	TO.SUNFLOWERSEED OTH.OILCROPS	669,004	503,771	-24.7
	TO.FATS OILS MARGARINE	586,042	444,270	-24.2
HF3273	CORN GERM MEAL	753	1,196	58.9
HF3271	SOYBEAN MEAL	430,375	306,007	-28.9
	TO. OTH.OILSEED MEALS	111,766	90,378	-19.1
	TO. CORN GLUTEN,ALL TYPES	110,871	75,838	-31.6
HF3293	BREWERS AND DESTILL. BY-PROD.	1,946	1,905	-2.1
	TO.CITRUS PELLETS+OTH.RESIDUE	114,164	95,892	-16
	TO. OTH.PRODUCTS PLANT ORIGIN	5,647,294	4,805,365	-14.9
HF332	TO.ORNAMENT.+OTH.PLANTS,FLOWE	2,194,406	1,678,700	-23.5
HF3	TOTAL PRODUCTS, PLANT ORIGIN	19,977,852	16,768,315	-16.1
	TO. HOPS,COFFEE,TEE	2,645,649	2,038,206	-23
	TO. TOBACCO INCL. PRODUCTS	1,448,885	1,508,368	4.1
HF406	BEER	168,492	164,829	-2.2
HF407	ETHYL ALCOHOL, SPIRITS	728,678	789,920	8.4
HF408	WINE INCL. SPARKLING WINE	2,106,397	2,000,781	-5
HF4	TO.HOPS,COFFEE,TEA,ALCOHOL,ET	7,098,101	6,502,104	-8.4
HF	TO.AGRIC.PROD.FOOD USE,FLOWER	39,132,429	33,030,865	-15.6
	TO.WOOL,RAWPELT-HIDES,FEATHER	466,607	327,646	-29.8
	TO. COTTON-FLAX- RAW,PROCESSE	330,706	227,709	-31.1
	TO. FATS,OILS FOR INDUSTR. US	117,667	91,940	-21.9
HI	TO.AGRIC.RAW PROD.-INDUST.USE	1,273,960	943,100	-26
	TO.AGRIC.PROD.FOOD+INDUST.USE	40,406,389	33,973,965	-15.9
HW6	ALL WOOD PRODUCTS EXCL PULP	3,821,026	3,391,610	-11.2
% Quantity/Value represents market shares of total trade.				
Source: Based on Data obtained from Federal Office of Statistics				
Office of Agricultural Affairs, Bonn, Aug/22/2000				

Imports of Agricultural Products				
	U.S.A.			
IMPORT		1998	1999	
		1000-$	1000-$	%CHANGE
HF1	TOTAL LIVE ANIMALS	7,585	7,724	1.8
HF204	MEAT AND MEAT PRODUCTS	7,435	8,475	14
	TO.OTH.PRODUCTS OF ANIMAL ORI	66,690	51,961	-22.1
HF2	TOTAL PRODUCTS OF ANIMAL ORIG	74,125	60,436	-18.5
HF301	WHEAT	7,697	5,863	-23.8
HF305	CORN	7,582	7,005	-7.6
	TO.SORGUM, BARLEY, OATS, RYE	3,947	3,083	-21.9
HF307	RICE	31,773	37,844	19.1
	SUB.TO.GRAIN AND RICE	50,999	53,795	5.5
HF311	PULSES	4,148	3,403	-18
HF316	TO.VEGETABLES AND KITCHEN HER	14,547	13,223	-9.1
HF317	TO.FRUIT,EXCL.TROPICAL FRUIT	87,930	59,836	-32
HF318	TO. CITRUS,OTH. TROPICAL FRUI	219,029	187,649	-14.3
HF319	TO.FRUITS/VEGET.,CANNED,JUICE	17,247	16,182	-6.2
HF3242	PEANUTS	17,275	14,449	-16.4
HF3241	SOYBEANS	476,991	318,315	-33.3
	TO.SUNFLOWERSEED OTH.OILCROPS	41,708	41,270	-1.1
	TO.FATS OILS MARGARINE	3,059	3,211	5
HF3273	CORN GERM MEAL	14	470	3347.7
HF3271	SOYBEAN MEAL	53,106	2,401	-95.5
	TO. OTH.OILSEED MEALS	1,104	1,065	-3.6
	TO. CORN GLUTEN,ALL TYPES	91,434	55,307	-39.5
	TO.CITRUS PELLETS+OTH.RESIDUE	27,420	22,735	-17.1
	TO. OTH.PRODUCTS PLANT ORIGIN	89,596	77,765	-13.2
HF332	TO.ORNAMENT.+OTH.PLANTS,FLOWE	30,784	27,299	-11.3
HF3	TOTAL PRODUCTS, PLANT ORIGIN	1,226,391	898,373	-26.7
	TO. HOPS,COFFEE,TEE	8,154	3,513	-56.9
	TO. TOBACCO INCL. PRODUCTS	238,284	276,416	16
HF406	BEER	3,099	3,195	3.1
HF407	ETHYL ALCOHOL, SPIRITS	77,152	88,141	14.2
HF408	WINE INCL. SPARKLING WINE	39,083	47,456	21.4
HF4	TO.HOPS,COFFEE,TEA,ALCOHOL,ET	365,773	418,721	14.5
HF	TO.AGRIC.PROD.FOOD USE,FLOWER	1,673,874	1,385,253	-17.2
	TO.WOOL,RAWPELT-HIDES,FEATHER	10,347	6,163	-40.4
	TO. COTTON-FLAX- RAW,PROCESSE	14,588	10,426	-28.5
	TO. FATS,OILS FOR INDUSTR. US	1,723	1,144	-33.6
HI	TO.AGRIC.RAW PROD.-INDUST.USE	44,222	34,663	-21.6
	TO.AGRIC.PROD.FOOD+INDUST.USE	1,718,095	1,419,917	-17.4
HW6	ALL WOOD PRODUCTS EXCL PULP	295,458	214,074	-27.5
% Quantity/Value represents market shares of total trade.				
Source: Based on Data obtained from Federal Office of Statistics				
Office of Agricultural Affairs, Bonn, Aug/22/2000				

Imports of Agricultural Products				
	INTRA-EU-15			
IMPORT		1998	1999	
		1000-$	1000-$	%CHANGE
HF1	TOTAL LIVE ANIMALS	348,125	266,960	-23.3
HF204	MEAT AND MEAT PRODUCTS	3,772,587	2,721,229	-27.9
	TO.OTH.PRODUCTS OF ANIMAL ORI	4,456,466	3,731,845	-16.3
HF2	TOTAL PRODUCTS OF ANIMAL ORIG	8,229,054	6,453,074	-21.6
HF301	WHEAT	130,629	151,186	15.7
HF305	CORN	225,560	210,830	-6.5
	TO.SORGUM, BARLEY, OATS, RYE	91,095	86,468	-5.1
HF307	RICE	99,560	86,409	-13.2
	SUB.TO.GRAIN AND RICE	546,844	534,893	-2.2
HF311	PULSES	28,462	17,354	-39
HF316	TO.VEGETABLES AND KITCHEN HER	2,961,238	2,471,333	-16.5
HF317	TO.FRUIT,EXCL.TROPICAL FRUIT	1,577,766	1,282,936	-18.7
HF318	TO. CITRUS,OTH. TROPICAL FRUI	676,589	538,662	-20.4
HF319	TO.FRUITS/VEGET.,CANNED,JUICE	364,877	309,998	-15
HF3242	PEANUTS	17,390	7,875	-54.7
HF3241	SOYBEANS	70,975	233,552	229.1
	TO.SUNFLOWERSEED OTH.OILCROPS	390,313	157,085	-59.8
	TO.FATS OILS MARGARINE	395,322	336,301	-14.9
HF3273	CORN GERM MEAL	58	248	327.6
HF3271	SOYBEAN MEAL	140,190	100,105	-28.6
	TO. OTH.OILSEED MEALS	13,248	12,964	-2.1
	TO. CORN GLUTEN,ALL TYPES	17,743	19,019	7.2
HF3293	BREWERS AND DESTILL. BY-PROD.	646	812	25.7
	TO.CITRUS PELLETS+OTH.RESIDUE	45,537	44,178	-3
	TO. OTH.PRODUCTS PLANT ORIGIN	4,416,436	3,731,631	-15.5
HF332	TO.ORNAMENT.+OTH.PLANTS,FLOWE	2,003,751	1,503,181	-25
HF3	TOTAL PRODUCTS, PLANT ORIGIN	13,667,385	11,302,129	-17.3
	TO. HOPS,COFFEE,TEE	174,229	167,276	-4
	TO. TOBACCO INCL. PRODUCTS	771,883	734,291	-4.9
HF406	BEER	136,616	135,329	-0.9
HF407	ETHYL ALCOHOL, SPIRITS	523,224	573,122	9.5
HF408	WINE INCL. SPARKLING WINE	1,876,933	1,757,722	-6.4
HF4	TO.HOPS,COFFEE,TEA,ALCOHOL,ET	3,482,885	3,367,741	-3.3
HF	TO.AGRIC.PROD.FOOD USE,FLOWER	25,727,449	21,389,905	-16.9
	TO.WOOL,RAWPELT-HIDES,FEATHER	237,490	140,199	-41
	TO. COTTON-FLAX- RAW,PROCESSE	37,911	31,006	-18.2
	TO. FATS,OILS FOR INDUSTR. US	44,787	39,952	-10.8
HI	TO.AGRIC.RAW PROD.-INDUST.USE	426,546	325,014	-23.8
	TO.AGRIC.PROD.FOOD+INDUST.USE	26,153,994	21,714,918	-17
HW6	ALL WOOD PRODUCTS EXCL PULP	1,935,096	1,481,916	-23.4
% Quantity/Value represents market shares of total trade.				
Source: Based on Data obtained from Federal Office of Statistics				
Office of Agricultural Affairs, Bonn, Aug/22/2000				

Imports of Agricultural Products				
	WORLD			
IMPORT		1998	1999	
		1000-DM	1000-DM	%CHANGE
HF1	TOTAL LIVE ANIMALS	721,218	582,348	-19.3
HF204	MEAT AND MEAT PRODUCTS	8,453,592	6,886,960	-18.5
	TO.OTH.PRODUCTS OF ANIMAL ORI	12,034,939	10,442,097	-13.2
HF2	TOTAL PRODUCTS OF ANIMAL ORIG	20,488,531	17,329,057	-15.4
HF301	WHEAT	315,306	309,025	-2
HF305	CORN	472,436	429,306	-9.1
	TO.SORGUM, BARLEY, OATS, RYE	191,424	183,849	-4
HF307	RICE	291,900	276,967	-5.1
	SUB.TO.GRAIN AND RICE	1,271,066	1,199,147	-5.7
HF311	PULSES	111,100	98,798	-11.1
HF316	TO.VEGETABLES AND KITCHEN HER	5,885,775	5,203,662	-11.6
HF317	TO.FRUIT,EXCL.TROPICAL FRUIT	4,881,546	4,263,090	-12.7
HF318	TO. CITRUS,OTH. TROPICAL FRUI	2,210,003	1,939,986	-12.2
HF319	TO.FRUITS/VEGET.,CANNED,JUICE	1,616,824	1,614,654	-0.1
HF3242	PEANUTS	161,728	142,382	-12
HF3241	SOYBEANS	1,649,634	1,622,935	-1.6
	TO.SUNFLOWERSEED OTH.OILCROPS	1,176,911	924,470	-21.4
	TO.FATS OILS MARGARINE	1,030,965	815,280	-20.9
HF3273	CORN GERM MEAL	1,324	2,194	65.7
HF3271	SOYBEAN MEAL	757,115	561,553	-25.8
	TO. OTH.OILSEED MEALS	196,618	165,852	-15.6
	TO. CORN GLUTEN,ALL TYPES	195,044	139,170	-28.6
HF3293	BREWERS AND DESTILL. BY-PROD.	3,424	3,495	2.1
	TO.CITRUS PELLETS+OTH.RESIDUE	200,837	175,972	-12.4
	TO. OTH.PRODUCTS PLANT ORIGIN	9,934,716	8,818,333	-11.2
HF332	TO.ORNAMENT.+OTH.PLANTS,FLOWE	3,860,399	3,080,584	-20.2
HF3	TOTAL PRODUCTS, PLANT ORIGIN	35,145,029	30,771,557	-12.4
	TO. HOPS,COFFEE,TEE	4,654,225	3,740,313	-19.6
	TO. TOBACCO INCL. PRODUCTS	2,548,879	2,768,006	8.6
HF406	BEER	296,411	302,477	2
HF407	ETHYL ALCOHOL, SPIRITS	1,281,890	1,449,584	13.1
HF408	WINE INCL. SPARKLING WINE	3,705,573	3,671,634	-0.9
HF4	TO.HOPS,COFFEE,TEA,ALCOHOL,ET	12,486,978	11,932,014	-4.4
HF	TO.AGRIC.PROD.FOOD USE,FLOWER	68,841,756	60,614,976	-12
	TO.WOOL,RAWPELT-HIDES,FEATHER	820,855	601,263	-26.8
	TO. COTTON-FLAX- RAW,PROCESSE	581,777	417,870	-28.2
	TO. FATS,OILS FOR INDUSTR. US	206,999	168,720	-18.5
HI	TO.AGRIC.RAW PROD.-INDUST.USE	2,241,149	1,730,684	-22.8
	TO.AGRIC.PROD.FOOD+INDUST.USE	71,082,905	62,345,660	-12.3
HW6	ALL WOOD PRODUCTS EXCL PULP	6,721,949	6,223,947	-7.4
% Quantity/Value represents market shares of total trade.				
Source: Based on Data obtained from Federal Office of Statistics				
Office of Agricultural Affairs, Bonn, Aug/22/2000				

Imports of Agricultural Products				
	U.S.A.			
IMPORT		1998	1999	
		1000-DM	1000-DM	%CHANGE
HF1	TOTAL LIVE ANIMALS	13,343	14,174	6.2
HF204	MEAT AND MEAT PRODUCTS	13,080	15,552	18.9
	TO.OTH.PRODUCTS OF ANIMAL ORI	117,321	95,354	-18.7
HF2	TOTAL PRODUCTS OF ANIMAL ORIG	130,401	110,906	-15
HF301	WHEAT	13,541	10,759	-20.5
HF305	CORN	13,338	12,855	-3.6
	TO.SORGUM, BARLEY, OATS, RYE	6,944	5,658	-18.5
HF307	RICE	55,895	69,448	24.2
	SUB.TO.GRAIN AND RICE	89,718	98,720	10
HF311	PULSES	7,298	6,245	-14.4
HF316	TO.VEGETABLES AND KITCHEN HER	25,591	24,265	-5.2
HF317	TO.FRUIT,EXCL.TROPICAL FRUIT	154,686	109,805	-29
HF318	TO. CITRUS,OTH. TROPICAL FRUI	385,315	344,355	-10.6
HF319	TO.FRUITS/VEGET.,CANNED,JUICE	30,341	29,695	-2.1
HF3242	PEANUTS	30,390	26,515	-12.8
HF3241	SOYBEANS	839,122	584,139	-30.4
	TO.SUNFLOWERSEED OTH.OILCROPS	73,372	75,734	3.2
	TO.FATS OILS MARGARINE	5,382	5,893	9.5
HF3273	CORN GERM MEAL	24	863	3495.8
HF3271	SOYBEAN MEAL	93,424	4,406	-95.3
	TO. OTH.OILSEED MEALS	1,943	1,954	0.6
	TO. CORN GLUTEN,ALL TYPES	160,850	101,493	-36.9
	TO.CITRUS PELLETS+OTH.RESIDUE	48,238	41,721	-13.5
	TO. OTH.PRODUCTS PLANT ORIGIN	157,617	142,706	-9.5
HF332	TO.ORNAMENT.+OTH.PLANTS,FLOWE	54,156	50,096	-7.5
HF3	TOTAL PRODUCTS, PLANT ORIGIN	2,157,467	1,648,605	-23.6
	TO. HOPS,COFFEE,TEE	14,344	6,447	-55.1
	TO. TOBACCO INCL. PRODUCTS	419,190	507,251	21
HF406	BEER	5,452	5,864	7.6
HF407	ETHYL ALCOHOL, SPIRITS	135,726	161,747	19.2
HF408	WINE INCL. SPARKLING WINE	68,755	87,086	26.7
HF4	TO.HOPS,COFFEE,TEA,ALCOHOL,ET	643,467	768,395	19.4
HF	TO.AGRIC.PROD.FOOD USE,FLOWER	2,944,678	2,542,080	-13.7
	TO.WOOL,RAWPELT-HIDES,FEATHER	18,203	11,309	-37.9
	TO. COTTON-FLAX- RAW,PROCESSE	25,664	19,133	-25.4
	TO. FATS,OILS FOR INDUSTR. US	3,031	2,100	-30.7
HI	TO.AGRIC.RAW PROD.-INDUST.USE	77,795	63,611	-18.2
	TO.AGRIC.PROD.FOOD+INDUST.USE	3,022,473	2,605,691	-13.8
HW6	ALL WOOD PRODUCTS EXCL PULP	519,769	392,848	-24.4
% Quantity/Value represents market shares of total trade.				
Source: Based on Data obtained from Federal Office of Statistics				
Office of Agricultural Affairs, Bonn, Aug/22/2000				

Imports of Agricultural Products				
	INTRA-EU-15			
IMPORT		1998	1999	
		1000-DM	1000-DM	%CHANGE
HF1	TOTAL LIVE ANIMALS	612,422	489,899	-20
HF204	MEAT AND MEAT PRODUCTS	6,636,735	4,993,729	-24.8
	TO.OTH.PRODUCTS OF ANIMAL ORI	7,839,814	6,848,313	-12.6
HF2	TOTAL PRODUCTS OF ANIMAL ORIG	14,476,549	11,842,042	-18.2
HF301	WHEAT	229,803	277,442	20.7
HF305	CORN	396,805	386,894	-2.5
	TO.SORGUM, BARLEY, OATS, RYE	160,254	158,678	-1
HF307	RICE	175,145	158,569	-9.5
	SUB.TO.GRAIN AND RICE	962,007	981,583	2
HF311	PULSES	50,070	31,846	-36.4
HF316	TO.VEGETABLES AND KITCHEN HER	5,209,410	4,535,145	-12.9
HF317	TO.FRUIT,EXCL.TROPICAL FRUIT	2,775,605	2,354,316	-15.2
HF318	TO. CITRUS,OTH. TROPICAL FRUI	1,190,256	988,500	-17
HF319	TO.FRUITS/VEGET.,CANNED,JUICE	641,891	568,877	-11.4
HF3242	PEANUTS	30,593	14,451	-52.8
HF3241	SOYBEANS	124,860	428,591	243.3
	TO.SUNFLOWERSEED OTH.OILCROPS	686,638	288,267	-58
	TO.FATS OILS MARGARINE	695,450	617,147	-11.3
HF3273	CORN GERM MEAL	102	455	346.1
HF3271	SOYBEAN MEAL	246,623	183,703	-25.5
	TO. OTH.OILSEED MEALS	23,305	23,791	2.1
	TO. CORN GLUTEN,ALL TYPES	31,214	34,902	11.8
HF3293	BREWERS AND DESTILL. BY-PROD.	1,137	1,491	31.1
	TO.CITRUS PELLETS+OTH.RESIDUE	80,108	81,072	1.2
	TO. OTH.PRODUCTS PLANT ORIGIN	7,769,393	6,847,918	-11.9
HF332	TO.ORNAMENT.+OTH.PLANTS,FLOWE	3,524,999	2,758,488	-21.7
HF3	TOTAL PRODUCTS, PLANT ORIGIN	24,043,661	20,740,543	-13.7
	TO. HOPS,COFFEE,TEE	306,503	306,969	0.2
	TO. TOBACCO INCL. PRODUCTS	1,357,896	1,347,497	-0.8
HF406	BEER	240,335	248,343	3.3
HF407	ETHYL ALCOHOL, SPIRITS	920,456	1,051,737	14.3
HF408	WINE INCL. SPARKLING WINE	3,301,901	3,225,596	-2.3
HF4	TO.HOPS,COFFEE,TEA,ALCOHOL,ET	6,127,091	6,180,142	0.9
HF	TO.AGRIC.PROD.FOOD USE,FLOWER	45,259,723	39,252,626	-13.3
	TO.WOOL,RAWPELT-HIDES,FEATHER	417,792	257,280	-38.4
	TO. COTTON-FLAX- RAW,PROCESSE	66,693	56,900	-14.7
	TO. FATS,OILS FOR INDUSTR. US	78,790	73,316	-6.9
HI	TO.AGRIC.RAW PROD.-INDUST.USE	750,379	596,433	-20.5
	TO.AGRIC.PROD.FOOD+INDUST.USE	46,010,102	39,849,059	-13.4
HW6	ALL WOOD PRODUCTS EXCL PULP	3,404,221	2,719,464	-20.1
% Quantity/Value represents market shares of total trade.				
Source: Based on Data obtained from Federal Office of Statistics				
Office of Agricultural Affairs, Bonn, Aug/22/2000				

Annex-Tables 11: Exports of Agricultural Products				
	WORLD			
EXPORT		1998	1999	
		1000-$	1000-$	%CHANGE
HF1	TOTAL LIVE ANIMALS	744,890	530,574	-28.8
HF203	CHEESE	1,670,847	1,377,087	-17.6
HF205	CASINGS	242,690	198,140	-18.4
	TO.OTH.PRODUCTS OF ANIMAL ORI	6,372,666	5,621,036	-11.8
HF2	TOTAL PRODUCTS OF ANIMAL ORIG	8,286,203	7,196,263	-13.2
HF301	WHEAT	976,835	655,287	-32.9
	TO.SORGHUM,BARLEY,OATS,CORN,R	342,077	483,444	41.3
HF310	SEEDS	232,859	213,926	-8.1
HF311	PULSES	15,918	14,352	-9.8
HF316	TO.VEGETABLES AND KITCHEN HER	267,476	232,572	-13
HF317	TO.FRUIT,EXCL.TROPICAL FRUIT	247,403	187,194	-24.3
HF318	TO. CITRUS,OTH. TROPICAL FRUI	157,879	111,250	-29.5
	TO. JUICES	502,668	490,806	-2.4
	TO.FRUITS/VEGET.,CANNED	41,011	34,851	-15
HF321	COCOA PRODUCTS	1,377,947	1,054,538	-23.5
HF324	TO.OIL CROPS FOR FOOD PURPOSE	194,465	220,187	13.2
	TO.FATS OILS MARGARINE	308,924	301,666	-2.3
HF327	TO. OILCAKES AND MEALS	539,284	349,231	-35.2
HF329	TO.OTH.PLANT WASTE / FEED USE	196,268	204,145	4
HF3311	CANDIES,ALL TYPES W/O COCOA	383,658	346,706	-9.6
HF3312	SWEETS FROM NON-NUTRIT.SWEETN	186,322	171,949	-7.7
HF3313	BAKERY PRODUCTS	979,365	901,386	-8
HF3314	MISC.OTH.FOODS FOR HUMAN CONS	729,282	615,264	-15.6
HF3315	PET FOODS,OTH. PROCESSED FEED	579,886	492,271	-15.1
	TO. OTH.PRODUCTS PLANT ORIGIN	1,739,621	1,574,047	-9.5
HF3	TOTAL PRODUCTS, PLANT ORIGIN	10,006,068	8,664,509	-13.4
	TO. HOPS,COFFEE,TEE	1,281,122	992,602	-22.5
	TO. TOBACCO INCL. PRODUCTS	1,633,428	1,849,766	13.2
HF406	BEER	627,642	586,169	-6.6
HF407	ETHYL ALCOHOL, SPIRITS	344,088	299,135	-13.1
HF408	WINE INCL. SPARKLING WINE	479,189	471,123	-1.7
HF4	TO.HOPS,COFFEE,TEA,ALCOHOL,ET	4,365,468	4,198,794	-3.8
HF	TO.AGRIC.PROD.FOOD USE,FLOWER	23,402,629	20,590,140	-12
	TO.WOOL,RAWPELT-HIDES,FEATHE	554,246	404,213	-27.1
	TO.COTTON-FLAX- RAW,PROCESSE	79,680	64,328	-19.3
	TO. FATS,OILS FOR INDUSTR. US	103,166	71,392	-30.8
HI	TO.AGRIC.RAW PROD.-INDUST.USE	897,644	683,941	-23.8
	TO.AGRIC.PROD.FOOD+INDUST.USE	24,300,273	21,274,081	-12.5
HW6	ALL WOOD PRODUCTS EXCL PULP	2,810,780	2,740,817	-2.5
% Quantity/Value represents market shares of total trade.				
Source: Based on Data obtained from Federal Office of Statistics				
Office of Agricultural Affairs, Bonn, Aug/22/2000				

Exports of Agricultural Products				
	U.S.A.			
EXPORT		1998	1999	
		1000-$	1000-$	%CHANGE
HF1	TOTAL LIVE ANIMALS	30,886	34,156	10.6
HF203	CHEESE	24,876	35,259	41.7
HF205	CASINGS	5,933	4,850	-18.3
	TO.OTH.PRODUCTS OF ANIMAL ORI	5,721	5,347	-6.5
HF2	TOTAL PRODUCTS OF ANIMAL ORIG	36,529	45,456	24.4
HF301	WHEAT	64	202	213.9
	TO.SORGHUM,BARLEY,OATS,CORN,R	316	85	-73.1
HF310	SEEDS	7,619	7,043	-7.6
HF311	PULSES	179	228	27.2
HF316	TO.VEGETABLES AND KITCHEN HER	2,336	2,549	9.1
HF317	TO.FRUIT,EXCL.TROPICAL FRUIT	578	453	-21.5
HF318	TO. CITRUS,OTH. TROPICAL FRUI	124	155	24.7
	TO. JUICES	41,945	27,932	-33.4
	TO.FRUITS/VEGET.,CANNED	196	223	14
HF321	COCOA PRODUCTS	28,716	33,177	15.5
HF324	TO.OIL CROPS FOR FOOD PURPOSE	102	147	43.3
	TO.FATS OILS MARGARINE	2,319	2,097	-9.6
HF327	TO. OILCAKES AND MEALS	0	0	
HF329	TO.OTH.PLANT WASTE / FEED USE	18,013	18,343	1.8
HF3311	CANDIES,ALL TYPES W/O COCOA	32,020	29,833	-6.8
HF3312	SWEETS FROM NON-NUTRIT.SWEETN	5,605	15,252	172.1
HF3313	BAKERY PRODUCTS	28,711	38,056	32.5
HF3314	MISC.OTH.FOODS FOR HUMAN CONS	1,417	1,187	-16.2
HF3315	PET FOODS,OTH. PROCESSED FEED	22,519	22,668	0.7
	TO. OTH.PRODUCTS PLANT ORIGIN	31,453	21,158	-32.7
HF3	TOTAL PRODUCTS, PLANT ORIGIN	224,233	220,789	-1.5
	TO. HOPS,COFFEE,TEE	199,993	161,392	-19.3
	TO. TOBACCO INCL. PRODUCTS	8,513	8,327	-2.2
HF406	BEER	132,841	140,459	5.7
HF407	ETHYL ALCOHOL, SPIRITS	32,502	34,473	6.1
HF408	WINE INCL. SPARKLING WINE	34,283	37,481	9.3
HF4	TO.HOPS,COFFEE,TEA,ALCOHOL,ET	408,132	382,131	-6.4
HF	TO.AGRIC.PROD.FOOD USE,FLOWER	699,780	682,532	-2.5
	TO. WOOL,RAWPELT-HIDES,FEATHE	6,938	2,964	-57.3
	TO. COTTON-FLAX- RAW,PROCESSE	188	246	31
	TO. FATS,OILS FOR INDUSTR. US	312	148	-52.4
HI	TO.AGRIC.RAW PROD.-INDUST.USE	21,306	11,408	-46.5
	TO.AGRIC.PROD.FOOD+INDUST.USE	721,086	693,939	-3.8
HW6	ALL WOOD PRODUCTS EXCL PULP	85,760	98,016	14.3
% Quantity/Value represents market shares of total trade.				
Source: Based on Data obtained from Federal Office of Statistics				
Office of Agricultural Affairs, Bonn, Aug/22/2000				

Exports of Agricultural Products				
	INTRA-EU-15			
EXPORT		1998	1999	
		1000-$	1000-$	%CHANGE
HF1	TOTAL LIVE ANIMALS	556,216	348,883	-37.3
HF203	CHEESE	1,368,539	1,195,124	-12.7
HF205	CASINGS	106,054	84,314	-20.5
	TO.OTH.PRODUCTS OF ANIMAL ORI	5,434,280	4,554,353	-16.2
HF2	TOTAL PRODUCTS OF ANIMAL ORIG	6,908,873	5,833,790	-15.6
HF301	WHEAT	753,033	428,206	-43.1
	TO.SORGHUM,BARLEY,OATS,CORN,R	239,569	164,495	-31.3
HF310	SEEDS	162,189	147,477	-9.1
HF311	PULSES	13,953	11,496	-17.6
HF316	TO.VEGETABLES AND KITCHEN HER	213,947	188,213	-12
HF317	TO.FRUIT,EXCL.TROPICAL FRUIT	208,304	145,943	-29.9
HF318	TO. CITRUS,OTH. TROPICAL FRUI	133,350	95,046	-28.7
	TO. JUICES	418,807	431,080	2.9
	TO.FRUITS/VEGET.,CANNED	37,816	31,478	-16.8
HF321	COCOA PRODUCTS	1,010,175	802,060	-20.6
HF324	TO.OIL CROPS FOR FOOD PURPOSE	129,100	98,865	-23.4
	TO.FATS OILS MARGARINE	149,382	163,793	9.6
HF327	TO. OILCAKES AND MEALS	370,346	230,730	-37.7
HF329	TO.OTH.PLANT WASTE / FEED USE	104,930	116,705	11.2
HF3311	CANDIES,ALL TYPES W/O COCOA	239,822	227,390	-5.2
HF3312	SWEETS FROM NON-NUTRIT.SWEETN	110,203	93,273	-15.4
HF3313	BAKERY PRODUCTS	790,889	762,030	-3.6
HF3314	MISC.OTH.FOODS FOR HUMAN CONS	461,180	465,165	0.9
HF3315	PET FOODS,OTH. PROCESSED FEED	344,013	295,399	-14.1
	TO. OTH.PRODUCTS PLANT ORIGIN	982,781	924,025	-6
HF3	TOTAL PRODUCTS, PLANT ORIGIN	6,879,302	5,831,142	-15.2
	TO. HOPS,COFFEE,TEE	768,017	563,255	-26.7
	TO. TOBACCO INCL. PRODUCTS	925,023	1,201,960	29.9
HF406	BEER	406,684	388,147	-4.6
HF407	ETHYL ALCOHOL, SPIRITS	178,086	149,741	-15.9
HF408	WINE INCL. SPARKLING WINE	302,144	304,309	0.7
HF4	TO.HOPS,COFFEE,TEA,ALCOHOL,ET	2,579,954	2,607,413	1.1
HF	TO.AGRIC.PROD.FOOD USE,FLOWER	16,924,345	14,621,229	-13.6
	TO.WOOL,RAWPELT-HIDES,FEATHE	364,375	288,416	-20.8
	TO.COTTON-FLAX- RAW,PROCESSE	59,353	46,734	-21.3
	TO. FATS,OILS FOR INDUSTR. US	84,778	56,281	-33.6
HI	TO.AGRIC.RAW PROD.-INDUST.USE	589,838	462,125	-21.7
	TO.AGRIC.PROD.FOOD + INDUST.USE	17,514,184	15,083,354	-13.9
HW6	ALL WOOD PRODUCTS EXCL PULP	1,862,148	1,643,926	-11.7
% Quantity/Value represents market shares of total trade.				
Source: Based on Data obtained from Federal Office of Statistics				
Office of Agricultural Affairs, Bonn, Aug/22/2000				

Exports of Agricultural Products				
	WORLD			
EXPORT		1998	1999	
		1000-DM	1000-DM	%CHANGE
HF1	TOTAL LIVE ANIMALS	1,310,410	973,657	-25.7
HF203	CHEESE	2,939,353	2,527,094	-14
HF205	CASINGS	426,941	363,607	-14.8
	TO.OTH.PRODUCTS OF ANIMAL ORI	11,210,789	10,315,178	-8
HF2	TOTAL PRODUCTS OF ANIMAL ORIG	14,577,083	13,205,879	-9.4
HF301	WHEAT	1,718,448	1,202,517	-30
	TO.SORGHUM,BARLEY,OATS,CORN,R	601,781	887,168	47.4
HF310	SEEDS	409,645	392,576	-4.2
HF311	PULSES	28,003	26,337	-5.9
HF316	TO.VEGETABLES AND KITCHEN HER	470,543	426,797	-9.3
HF317	TO.FRUIT,EXCL.TROPICAL FRUIT	435,230	343,521	-21.1
HF318	TO. CITRUS,OTH. TROPICAL FRUI	277,741	204,157	-26.5
	TO. JUICES	884,293	900,681	1.9
	TO.FRUITS/VEGET.,CANNED	72,146	63,956	-11.4
HF321	COCOA PRODUCTS	2,424,083	1,935,185	-20.2
HF324	TO.OIL CROPS FOR FOOD PURPOSE	342,102	404,066	18.1
	TO.FATS OILS MARGARINE	543,459	553,588	1.9
HF327	TO. OILCAKES AND MEALS	948,708	640,873	-32.4
HF329	TO.OTH.PLANT WASTE / FEED USE	345,274	374,626	8.5
HF3311	CANDIES,ALL TYPES W/O COCOA	674,930	636,241	-5.7
HF3312	SWEETS FROM NON-NUTRIT.SWEETN	327,777	315,544	-3.7
HF3313	BAKERY PRODUCTS	1,722,898	1,654,135	-4
HF3314	MISC.OTH.FOODS FOR HUMAN CONS	1,282,953	1,129,072	-12
HF3315	PET FOODS,OTH. PROCESSED FEED	1,020,135	903,368	-11.4
	TO. OTH.PRODUCTS PLANT ORIGIN	3,060,338	2,888,542	-5.6
HF3	TOTAL PRODUCTS, PLANT ORIGIN	17,602,663	15,900,271	-9.7
	TO. HOPS,COFFEE,TEE	2,253,750	1,821,525	-19.2
	TO. TOBACCO INCL. PRODUCTS	2,873,526	3,394,505	18.1
HF406	BEER	1,104,147	1,075,679	-2.6
HF407	ETHYL ALCOHOL, SPIRITS	605,318	548,946	-9.3
HF408	WINE INCL. SPARKLING WINE	842,987	864,561	2.6
HF4	TO.HOPS,COFFEE,TEA,ALCOHOL,ET	7,679,728	7,705,216	0.3
HF	TO.AGRIC.PROD.FOOD USE,FLOWER	41,169,884	37,785,023	-8.2
	TO.WOOL,RAWPELT-HIDES,FEATHE	975,030	741,772	-23.9
	TO.COTTON-FLAX- RAW,PROCESSE	140,173	118,049	-15.8
	TO. FATS,OILS FOR INDUSTR. US	181,490	131,013	-27.8
HI	TO.AGRIC.RAW PROD.-INDUST.USE	1,579,134	1,255,104	-20.5
	TO.AGRIC.PROD.FOOD + INDUST.USE	42,749,018	39,040,127	-8.7
HW6	ALL WOOD PRODUCTS EXCL PULP	4,944,722	5,029,678	1.7
% Quantity/Value represents market shares of total trade.				
Source: Based on Data obtained from Federal Office of Statistics				
Office of Agricultural Affairs, Bonn, Aug/24/2000				

Exports of Agricultural Products				
	U.S.A.			
EXPORT		1998	1999	
		1000-DM	1000-DM	%CHANGE
HF1	TOTAL LIVE ANIMALS	54,335	62,679	15.4
HF203	CHEESE	43,761	64,704	47.9
HF205	CASINGS	10,437	8,900	-14.7
	TO.OTH.PRODUCTS OF ANIMAL ORI	10,064	9,813	-2.5
HF2	TOTAL PRODUCTS OF ANIMAL ORIG	64,262	83,417	29.8
HF301	WHEAT	113	370	227.4
	TO.SORGHUM,BARLEY,OATS,CORN,R	556	156	-71.9
HF310	SEEDS	13,404	12,924	-3.6
HF311	PULSES	315	418	32.7
HF316	TO.VEGETABLES AND KITCHEN HER	4,109	4,678	13.8
HF317	TO.FRUIT,EXCL.TROPICAL FRUIT	1,016	832	-18.1
HF318	TO. CITRUS,OTH. TROPICAL FRUI	219	285	30.1
	TO. JUICES	73,790	51,258	-30.5
	TO.FRUITS/VEGET.,CANNED	344	409	18.9
HF321	COCOA PRODUCTS	50,517	60,884	20.5
HF324	TO.OIL CROPS FOR FOOD PURPOSE	180	269	49.4
	TO.FATS OILS MARGARINE	4,080	3,849	-5.7
HF327	TO. OILCAKES AND MEALS	0	0	
HF329	TO.OTH.PLANT WASTE / FEED USE	31,688	33,661	6.2
HF3311	CANDIES,ALL TYPES W/O COCOA	56,330	54,746	-2.8
HF3312	SWEETS FROM NON-NUTRIT.SWEETN	9,860	27,989	183.9
HF3313	BAKERY PRODUCTS	50,509	69,837	38.3
HF3314	MISC.OTH.FOODS FOR HUMAN CONS	2,493	2,179	-12.6
HF3315	PET FOODS,OTH. PROCESSED FEED	39,615	41,598	5
	TO. OTH.PRODUCTS PLANT ORIGIN	55,332	38,828	-29.8
HF3	TOTAL PRODUCTS, PLANT ORIGIN	394,470	405,170	2.7
	TO. HOPS,COFFEE,TEE	351,827	296,170	-15.8
	TO. TOBACCO INCL. PRODUCTS	14,976	15,280	2
HF406	BEER	233,694	257,756	10.3
HF407	ETHYL ALCOHOL, SPIRITS	57,178	63,262	10.6
HF408	WINE INCL. SPARKLING WINE	60,311	68,781	14
HF4	TO.HOPS,COFFEE,TEA,ALCOHOL,ET	717,986	701,249	-2.3
HF	TO.AGRIC.PROD.FOOD USE,FLOWER	1,231,053	1,252,515	1.7
	TO. WOOL,RAWPELT-HIDES,FEATHE	12,205	5,439	-55.4
	TO. COTTON-FLAX- RAW,PROCESSE	330	451	36.7
	TO. FATS,OILS FOR INDUSTR. US	548	272	-50.4
HI	TO.AGRIC.RAW PROD.-INDUST.USE	37,481	20,934	-44.1
	TO.AGRIC.PROD.FOOD+INDUST.USE	1,268,534	1,273,449	0.4
HW6	ALL WOOD PRODUCTS EXCL PULP	150,869	179,870	19.2
% Quantity/Value represents market shares of total trade.				
Source: Based on Data obtained from Federal Office of Statistics				
Office of Agricultural Affairs, Bonn, Aug/24/2000				

Exports of Agricultural Products				
	INTRA-EU-15			
EXPORT		1998	1999	
		1000-DM	1000-DM	%CHANGE
HF1	TOTAL LIVE ANIMALS	978,496	640,236	-34.6
HF203	CHEESE	2,407,533	2,193,173	-8.9
HF205	CASINGS	186,570	154,724	-17.1
	TO.OTH.PRODUCTS OF ANIMAL ORI	9,559,984	8,357,698	-12.6
HF2	TOTAL PRODUCTS OF ANIMAL ORIG	12,154,087	10,705,595	-11.9
HF301	WHEAT	1,324,736	785,801	-40.7
	TO.SORGHUM,BARLEY,OATS,CORN,R	421,450	301,865	-28.4
HF310	SEEDS	285,323	270,636	-5.1
HF311	PULSES	24,546	21,096	-14.1
HF316	TO.VEGETABLES AND KITCHEN HER	376,376	345,390	-8.2
HF317	TO.FRUIT,EXCL.TROPICAL FRUIT	366,449	267,821	-26.9
HF318	TO. CITRUS,OTH. TROPICAL FRUI	234,589	174,419	-25.6
	TO. JUICES	736,766	791,075	7.4
	TO.FRUITS/VEGET.,CANNED	66,525	57,766	-13.2
HF321	COCOA PRODUCTS	1,777,100	1,471,860	-17.2
HF324	TO.OIL CROPS FOR FOOD PURPOSE	227,113	181,428	-20.1
	TO.FATS OILS MARGARINE	262,792	300,576	14.4
HF327	TO. OILCAKES AND MEALS	651,513	423,412	-35
HF329	TO.OTH.PLANT WASTE / FEED USE	184,592	214,165	16
HF3311	CANDIES,ALL TYPES W/O COCOA	421,894	417,284	-1.1
HF3312	SWEETS FROM NON-NUTRIT.SWEETN	193,869	171,165	-11.7
HF3313	BAKERY PRODUCTS	1,391,331	1,398,402	0.5
HF3314	MISC.OTH.FOODS FOR HUMAN CONS	811,307	853,625	5.2
HF3315	PET FOODS,OTH. PROCESSED FEED	605,187	542,086	-10.4
	TO. OTH.PRODUCTS PLANT ORIGIN	1,728,907	1,695,680	-1.9
HF3	TOTAL PRODUCTS, PLANT ORIGIN	12,102,066	10,700,736	-11.6
	TO. HOPS,COFFEE,TEE	1,351,096	1,033,630	-23.5
	TO. TOBACCO INCL. PRODUCTS	1,627,301	2,205,717	35.5
HF406	BEER	715,438	712,289	-0.4
HF407	ETHYL ALCOHOL, SPIRITS	313,288	274,791	-12.3
HF408	WINE INCL. SPARKLING WINE	531,531	558,439	5.1
HF4	TO.HOPS,COFFEE,TEA,ALCOHOL,ET	4,538,654	4,784,866	5.4
HF	TO.AGRIC.PROD.FOOD USE,FLOWER	29,773,303	26,831,433	-9.9
	TO.WOOL,RAWPELT-HIDES,FEATHE	641,009	529,273	-17.4
	TO.COTTON-FLAX- RAW,PROCESSE	104,414	85,762	-17.9
	TO. FATS,OILS FOR INDUSTR. US	149,142	103,281	-30.7
HI	TO.AGRIC.RAW PROD.-INDUST.USE	1,037,643	848,046	-18.3
	TO.AGRIC.PROD.FOOD + INDUST.USE	30,810,946	27,679,479	-10.2
HW6	ALL WOOD PRODUCTS EXCL PULP	3,275,890	3,016,769	-7.9
% Quantity/Value represents market shares of total trade.				
Source: Based on Data obtained from Federal Office of Statistics				
Office of Agricultural Affairs, Bonn, Aug/24/2000				