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## Germany

### Dairy, Livestock and Poultry

## Dairy - Tendencies in 1998, Forecast for 1999

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### Report Highlights:

**Dairy products realized higher prices in 1998 due to strong domestic and foreign demand. Producer prices increased. Complete standstill of exports to Russia as of August/September 1998 affected prices only marginally in late 1998. However, in view of further depressed exports to this important market, dairy prices may further decline while production and storage of staples like butter and Nonfat Dry Milk Powder will likely increase in 1999.**

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

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## Executive Summary

German production of milk is estimated at 28.5 million MT in CY1998 and CY1999, slightly less than 28.7 million MT in CY1997. Production and consumption of cheeses are estimated at 1,001,000 MT and 1,013,000 MT respectively in CY1998, up 1.3 and 1.7 percent from CY1997. Production of cheeses is expected to be stable and consumption to rise by two percent for CY1999. Production of butter and Nonfat Dry Milk Powder (NFDM) dropped considerably in 1998 but are expected to rise in CY1999 to adjust for reduced exports. Private and intervention stock for these staples are likely to increase. The situation is stable for whole milk powder and casein in CY1998 and CY1999. Prices for butter and NFDM are likely to decline, forcing milk prices to producers down.

Domestic markets for butter, cheeses and yoghurt were stable in 1998 and almost unaffected by the economic crisis in Russia. Prices declined at the end of the year. Overall, higher prices were realized for most dairy products and farmers received higher prices in 1998 compared to 1997. Several factors which softened the effects of the crisis on German dairy markets include reduction of production of butter and sliced cheeses, increased domestic demand, reprocessing of cheese and redirection of exports to other, mainly EU, countries.

Economic and political turmoil and currency devaluation in Russia, together with the long-term consequences of economic downswing in Asia and Latin America may, however, have adverse effects on future sales and exports of German dairy products. Less cheese, butter and fresh dairy products may be exported and more staples like butter and NFDM may be produced and stored. Consequently, prices for butter and NFDM may be low and producer prices decline.

Note: For information on agricultural policy and marketing please refer to GM8036.

Note: In recent years the U.S. dollar/German mark exchange rate has been as follows:

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

Further exchange rates are for: Euro (i)/German mark: i 1 = DM 1.95583,  
i /U.S. dollar: i 1 = \$ 1.17 (1/13/1999).

## Section I: Situation and Outlook

### The German Dairy Market in 1998

German production of milk is estimated at 28.5 million MT in CY1998, slightly less than 28.7 million MT in CY1997. Farmers reduced production trying to avoid penalty for over-deliveries of quota. On the average, dairy operators received higher milk prices than the previous year due to strong domestic and - at least until mid-1998 - export demand. Beginning with the crisis in Asia but more so after the financial collapse in Russia in August '98, prices got under pressure. Especially Russia bought less cheese, butter and yoghurt. However, economic consequences were only felt late in 1998 and prices declined.

Production and consumption of fluid milk declined due to adverse cold weather throughout 1998; however, production of pasteurized milk was stable and production of UHT-milk declined, increasing fresh milk market shares for the first time in years. Consumption of fresh milk products increased slightly. Nevertheless, production of fresh milk products rose considerably due to strong exports to Russia and Eastern Europe in the first half of 1998. Overall, dairies received higher prices for fresh milk products, including fresh and UHT-milk, butter milk, sour and milk mix drinks, yoghurt and cream products.

Total production of cheese increased by one percent to 1.71 million MT and consumption to 1.69 million MT. The best selling cheese varieties are Edam, Gouda, Emmental, Chester, Tilsit and Butter Cheese (hard, semi-hard, soft and sliced cheeses). Fresh cheeses and curds (quarks) accounted for only moderate increases. Increased production was supported by strong exports and rising consumption.

Germany remained the largest exporter of cheeses in the EU with around 510,000 MT in 1998. Major export destinations were Russia and southern European countries. Exports to Russia ceased completely since August as a result of the economic crisis in this country. This caused some constraints and market pressure due to cheese varieties which were exclusively produced for the Russian market and could no longer be delivered. This excess supply was sold to processors of cheese at discounted prices and was channeled into domestic supplies and exports to South Europe. Despite this pressure, prices remained stable and dairies realized higher market prices for most standard cheese varieties in 1998 compared to 1997.

Production of butter dropped to 430,000 MT in 1998, the lowest level since reunification of Germany in 1990. Several supply and demand factors attributed to this drop: First, there was lower milk production. Second, use of milk fat in increased cheese production. Third, there has been rising fat content of fresh milk products and cheeses (less production of “light”/low fat varieties). Fourth, there was replacement of butter by cream in food production. Fifth, there was low export demand. Sixth, there was lower household consumption. Despite lower demand, as butter production followed the downswing in both domestic consumption, which declined to 570,000 MT, and exports, which stood at 40,000 MT in 1998, butter prices reached record levels and no butter was sold into intervention.

Production of Nonfat Dry Milk Powder (NFDM) declined to 320,000 MT (revised from the estimated 330,000 MT) in 1998. Less skim milk was available for the production of NFDM because of a lower milk supply and increase in production of cheeses and fresh milk products. Total consumption dropped to 95,000 MT and exports to 280,000 MT (revised from 110,000 MT and 290,000 MT respectively). Therefore, despite the reduction in production, considerable over-supply of NFDM forced market prices down and German dairies sold 20,000 MT into intervention.

Consumption of NFDM in feed accounts for the downswing in total consumption. Four factors accounted for and aggravated this trend in 1998: Reduced use of NFDM in milk replacers, lower numbers of slaughter calves, increased use of so called “zero” milk replacers with no portion of NFDM, and increased feeding of whole milk on dairy farms to avoid the penalty for over-production.

Exports of NFDM declined in response to the economic crisis in Asia and Latin America resulting in lower German exports overall.

Production of Whole Milk Powder rose slightly, supported by strong exports during the first half of 1998. Prices remained stable at the 1997 level. Production of whey powder increased (in connection with higher

cheese production) and found increasing use in feed and in food production. Prices increased over 1997.

Production and consumption of casein are stable.

### **The German Dairy Market in 1999**

Production of milk is expected to be stable at 28.5 million MT. Consequently, development on the different markets for dairy products depends on changes in production patterns, consumption and exports. Although exports account only for marginal quantities of milk use, they represent a valve for surplus production with a considerable influence on prices.

The beginning of CY1999 did not show signs for sustainable recovery from the downswing in exports of cheese, butter and fresh milk products (notably to Russia) which depressed prices in late 1998. Our predictions account therefore for lower prices in 1999 which will result in higher production of staples like NFDM and butter and less production of yoghurt and cheeses, especially of fresh cheeses and curds which did not enjoy the same strong increases in consumer demand as did hard, semi-hard, soft and sliced cheeses. (Thus, PSD for cheese production in 1999 will be stable.) NFDM will likely be sold into intervention, butter may be stored in private storage facilities.

### **Section II: Tables**

The following section includes PSD's, price tables, trade matrices and additional tables.

1: PSD for Fluid Milk (in 1,000 MT, 1,000 head), average monthly Import Prices (in DM per MT)

		1997		1998		1999
	Old	New	Old	New	Old	New
Calendar Year Begin		01/1997		01/1998		01/1999
Cows In Milk	5,195	5,195	5,091	5,091	4,989	4,880
Cows Milk Production	28,700	28,700	28,700	28,500	28,500	28,500
Other Milk Production	0	0	0	0	0	0
TOTAL Production	28,700	28,700	28,700	28,500	28,500	28,500
Intra EC Imports	276	276	300	300	300	300
Other Imports	0	0	0	0	0	0
TOTAL Imports	276	276	300	300	300	300
TOTAL SUPPLY	28,976	28,976	29,000	28,800	28,800	28,800
Intra EC Exports	1,958	1,958	2,000	2,000	2,000	2,000
Other Exports	51	51	60	60	60	60
TOTAL Exports	2,009	2,009	2,060	2,060	2,060	2,060
Fluid Use Dom. Consum.	5,700	5,292	5,700	5,200	5,200	5,200
Factory Use Consum.	19,967	20,275	19,940	20,140	20,140	20,140
Feed Use Dom. Consum.	1,300	1,400	1,300	1,400	1,400	1,400
TOTAL Dom. Consumption	26,967	26,967	26,940	26,740	26,740	26,740
TOTAL DISTRIBUTION	28,976	28,976	29,000	28,800	28,800	28,800
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

Year	1996	1997	% Change			1996	1997	% Change
Jan	640	537	-16.1%		Jul	494	510	3.2%
Feb	554	619	11.7%		Aug	531	515	-3.0%
Mar	526	508	-3.4%		Sep	574	600	4.5%
Apr	578	513	-11.2%		Oct	521	627	20.3%
May	383	514	34.2%		Nov	628	650	3.5%
Jun	492	510	3.7%		Dec	586	594	1.4%

Exchange Rate: June 1998.

Date of Quote: US\$1=DM1.79.

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

Table 2: German Import and Export of Fluid Milk (in MT)

Imports for	1997		1998
U.S.	0	U.S.	0
Others		Others	
Belgium/Lux.	137,124	Belgium/Lux.	150,000
Austria	100,188	Austria	110,000
France	33,338	France	30,000
Denmark	2,531	Netherlands	5,000
Netherlands	2,430	Sweden	3,000
Italy	507	Denmark	1,000
Poland	137	Greece	500
Greece	17	Italy	200
Switzerland	13	Switzerland	200
Great Britain	9	Great Britain	100
Total for Others	276,294	Total for Others	300,000
Others not listed	1	Others not listed	100
Grand Total	276,295	Grand Total	300,100

Exports for	1997		1998
U.S.	0	U.S.	0
Others		Others	
Italy	1,222,937	Italy	1,200,000
Netherlands	318,528	Netherlands	320,000
France	176,694	Belgium/Lux.	210,000
Belgium/Lux.	168,558	France	150,000
Croatia	29,107	Croatia	40,000
Great Britain	20,705	Great Britain	30,000
Spain	19,693	Greece	20,000
Greece	16,693	Denmark	10,000
Mauritania	7,570	Austria	10,000
Austria	6,139	Mauritania	5,000
Total for Others	1,986,624	Total for Others	1,995,000
Others not listed	21,905	Others not listed	65,000
Grand Total	2,008,529	Grand Total	2,060,000

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

Table 3: PSD for Cheese (in 1,000 MT) and average monthly Import Prices (in DM per MT)

		1997		1998		1999
	Old	New	Old	New	Old	New
Calendar Year Begin		01/1997		01/1998		01/1999
Beginning Stocks	40	40	35	35	30	30
Production	988	988	1,001	1,001	1,021	1,001
Intra EC Imports	407	407	399	399	400	400
Other Imports	21	21	23	23	20	20
TOTAL Imports	428	428	422	422	420	420
TOTAL SUPPLY	1,456	1,456	1,458	1,458	1,471	1,451
Intra EC Exports	290	290	295	295	294	294
Other Exports	135	135	120	120	115	95
TOTAL Exports	425	425	415	415	409	389
Human Dom. Consumption	956	956	973	973	992	992
Other Use, Losses	40	40	40	40	40	40
Total Dom. Consumption	996	996	1,013	1,013	1,032	1,032
TOTAL Use	1,421	1,421	1,428	1,428	1,441	1,421
Ending Stocks	35	35	30	30	30	30
TOTAL DISTRIBUTION	1,456	1,456	1,458	1,458	1,471	1,451
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	6	6	6	6	0	6

Year	1996	1997	% Change			1996	1997	% Change
Jan	7,409	7,509	1.3%		Jul	7,159	7,736	8.1%
Feb	7,840	7,698	-1.8%		Aug	7,792	7,511	-3.6%
Mar	8,197	8,003	-2.4%		Sep	7,427	7,815	5.2%
Apr	7,359	8,216	11.6%		Oct	7,873	7,612	-3.3%
May	8,094	7,230	-10.7%		Nov	7,672	7,760	1.1%
Jun	7,776	7,807	0.4%		Dec	7,660	8,253	7.7%

Exchange Rate: June 1998.

Date of Quote: US\$1=DM1.79.

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



Table 4: German Import and Export of Cheese (in MT)

Imports for	1997		1998
U.S.	44	U.S.	50
Others		Others	
Netherlands	199,645	Netherlands	200,000
France	108,291	France	100,000
Denmark	47,763	Denmark	50,000
Italy	20,212	Italy	20,000
Switzerland	11,866	Switzerland	15,000
Belgium/Lux.	10,792	Belgium/Lux.	10,000
Greece	8,211	Austria	10,000
Great Britain	5,340	Greece	8,000
New Zealand	4,726	New Zealand	4,000
Austria	4,504	Great Britain	3,000
Total for Others	421,350	Total for Others	420,000
Others not listed	7,214	Others not listed	2,300
Grand Total	428,608	Grand Total	422,350

Exports for	1997		1998
U.S.	5,731	U.S.	6,000
Others		Others	
Italy	122,555	Italy	140,000
Russia	96,203	Russia	80,000
France	32,714	France	35,000
Netherlands	28,538	Netherlands	30,000
Belgium/Lux.	23,784	Belgium/Lux.	25,000
Great Britain	23,249	Great Britain	25,000
Denmark	14,498	Denmark	20,000
Spain	12,061	Greece	15,000
Greece	11,999	Spain	10,000
Austria	11,720	Austria	10,000
Total for Others	377,321	Total for Others	390,000
Others not listed	41,623	Others not listed	19,000
Grand Total	424,675	Grand Total	415,000

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

Table 5: PSD for Butter (in 1,000 MT) and average monthly Import Prices (in DM per MT)

		1997		1998		1999
	Old	New	Old	New	Old	New
Calendar Year Begin		01/1997		01/1998		01/1999
Beginning Stocks	18	18	12	12	10	10
Production	462	462	443	430	430	440
Intra EC Imports	159	159	180	180	180	180
Other Imports	5	5	5	5	5	5
TOTAL Imports	164	164	185	185	185	185
TOTAL SUPPLY	644	644	640	627	625	635
Intra EC Exports	29	29	33	33	33	33
Other Exports	25	25	17	17	17	17
TOTAL Exports	54	54	50	50	50	50
Domestic Consumption	578	578	580	567	565	565
TOTAL Use	632	632	630	617	615	615
Ending Stocks	12	12	10	10	10	20
TOTAL DISTRIBUTION	644	644	640	627	625	635
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

Year	1996	1997	% Change			1996	1997	% Change
Jan	6,001	6,352	5.8%		Jul	6,177	6,564	6.3%
Feb	6,236	5,895	-5.5%		Aug	6,273	6,234	-0.6%
Mar	6,423	5,955	-7.3%		Sep	6,094	6,283	3.1%
Apr	6,506	6,156	-5.4%		Oct	5,877	6,625	12.7%
May	6,243	6,218	-0.4%		Nov	5,608	6,641	18.4%
Jun	6,321	6,308	-0.2%		Dec	5,818	6,927	19.1%

Exchange Rate: June 1998.

Date of Quote: US\$1=DM1.79.

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

Table 6: German Import and Export of Butter (in DM per MT)

Imports for	1997		1998
U.S.	1	U.S.	1
Others		Others	
Netherlands	64,962	Netherlands	70,000
Ireland	47,940	Ireland	50,000
Belgium/Lux.	18,925	Belgium/Lux.	20,000
France	5,282	France	6,000
Denmark	5,162	Denmark	5,000
Finland	4,528	Finland	5,000
Italy	3,677	Italy	4,000
Great Britain	2,798	Great Britain	3,000
Portugal	2,331	Portugal	3,000
New Zealand	1,264	New Zealand	3,000
Total for Others	156,869	Total for Others	169,000
Others not listed	6,700	Others not listed	16,000
Grand Total	163,570	Grand Total	185,001

Exports for	1997		1998
U.S.	34	U.S.	
Others		Others	
Russia	15,444	Netherlands	9,000
France	6,338	France	7,000
Italy	6,200	Italy	5,000
Netherlands	4,362	Belgium/Lux.	5,000
Belgium/Lux.	4,034	Denmark	4,000
Denmark	3,849	Russia	4,000
Estonia	1,515	Portugal	3,000
Austria	1,412	Uzbekistan	2,000
Bosnia-Herzeg.	1,137	Austria	1,500
Uzbekistan	1,009	Bosnia-Herzeg.	1,000
Total for Others	45,300	Total for Others	41,500
Others not listed	8,923	Others not listed	8,500
Grand Total	54,257	Grand Total	50,000

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

Table 7: PSD for Nonfat Milk Powder (in 1,000 MT) and average monthly Import Prices (in DM per MT)

		1997		1998		1999
	Old	New	Old	New	Old	New
Calendar Year Begin		01/1997		01/1998		01/1999
Beginning Stocks	10	10	5	5	5	20
Production	334	334	330	320	330	330
Intra EC Imports	37	37	40	40	40	40
Other Imports	27	27	30	30	30	30
TOTAL Imports	64	64	70	70	70	70
TOTAL SUPPLY	408	408	405	395	405	420
Intra EC Exports	244	244	240	230	240	240
Other Exports	47	47	50	50	50	50
TOTAL Exports	291	291	290	280	290	290
Human Dom. Consumption	22	22	20	20	20	20
Other Use, Losses	90	90	90	75	90	70
Total Dom. Consumption	112	112	110	95	110	90
TOTAL Use	403	403	400	375	400	380
Ending Stocks	5	5	5	20	5	40
TOTAL DISTRIBUTION	408	408	405	395	405	420
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

Year	1996	1997	% Change			1996	1997	% Change
Jan	3,330	2,896	-13.0%		Jul	1,623	2,245	38.3%
Feb	3,269	3,410	4.3%		Aug	2,972	2,298	-22.7%
Mar	3,343	2,632	-21.3%		Sep	2,992	2,402	-19.7%
Apr	3,633	3,595	-1.0%		Oct	2,700	2,462	-8.8%
May	3,521	1,954	-44.5%		Nov	2,977	3,361	12.9%
Jun	3,590	2,337	-34.9%		Dec	3,117	1,754	-43.7%

Exchange Rate: June 1998.

Date of Quote: US\$1=DM1.79.

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

Table 8: German Import and Export of Nonfat Milk Powder (in DM per MT)

Imports for	1997		1998
U.S.	0	U.S.	0
Others		Others	
Austria	17,835	Austria	20,000
Poland	13,888	Poland	15,000
Netherlands	6,659	Netherlands	10,000
France	4,482	France	5,000
Ukraine	4,132	Ukraine	5,000
Lithuania	3,319	Lithuania	2,000
Sweden	2,402	Sweden	2,000
Russia	1,904	Ireland	2,000
Estonia	1,864	Estonia	2,000
Belgium/Lux.	1,738	Belgium/Lux.	2,000
Total for Others	58,223	Total for Others	65,000
Others not listed	5,915	Others not listed	5,000
Grand Total	64,138	Grand Total	70,000

Exports for	1997		1998
U.S.	0	U.S.	0
Others		Others	
Netherlands	151,011	Netherlands	140,000
Italy	68,433	Italy	70,000
Mexico	22,534	Mexico	20,000
France	7,648	France	10,000
Spain	6,255	Spain	8,000
Belgium/Lux.	2,885	Belgium/Lux.	5,000
Malaysia	2,693	Denmark	5,000
Philippines	2,525	Chile	3,000
Denmark	2,326	Saudi Arabia	2,000
Great Britain	1,935	Austria	2,000
Total for Others	268,245	Total for Others	265,000
Others not listed	22,983	Others not listed	15,000
Grand Total	291,228	Grand Total	280,000

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

Table 9: PSD for Whole Milk Powder (in 1,000 MT) and average monthly Import Prices (in DM per MT)

	1997		1998		1999	
	Old	New	Old	New	Old	New
Calendar Year Begin		01/1997		01/1998		01/1999
Beginning Stocks	10	10	10	10	10	10
Production	210	210	215	215	215	215
Intra EC Imports	35	35	38	38	38	38
Other Imports	1	1	0	0	0	0
TOTAL Imports	36	36	38	38	38	38
TOTAL SUPPLY	256	256	263	263	263	263
Intra EC Exports	53	53	65	65	65	65
Other Exports	25	25	20	20	20	20
TOTAL Exports	78	78	85	85	85	85
Human Dom. Consumption	168	168	168	168	168	168
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	168	168	168	168	168	168
TOTAL Use	246	246	253	253	253	253
Ending Stocks	10	10	10	10	10	10
TOTAL DISTRIBUTION	256	256	263	263	263	263
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

Year	1996	1997	% Change			1996	1997	% Change
Jan	4,543	4,674	2.9%		Jul	4,785	4,859	1.5%
Feb	3,987	4,867	22.1%		Aug	4,930	4,849	-1.6%
Mar	4,208	4,868	15.7%		Sep	4,974	4,823	-3.0%
Apr	4,828	5,039	4.4%		Oct	5,047	4,794	-5.0%
May	4,537	4,735	4.4%		Nov	4,594	4,998	8.8%
Jun	4,773	4,969	4.1%		Dec	4,946	4,889	-1.2%

Exchange Rate: June 1998.

Date of Quote: US\$1=DM1.79.

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

Table 10: German Import and Export of Whole Milk Powder (in MT)

Imports for	1997		1998
U.S.	0	U.S.	0
Others		Others	
France	14,126	France	10,000
Netherlands	9,774	Netherlands	10,000
Ireland	4,080	Ireland	8,000
Belgium/Lux.	3,324	Belgium/Lux.	4,000
Great Britain	1,453	Italy	3,000
Denmark	871	Great Britain	500
Italy	824	Poland	500
Poland	707	Austria	500
Austria	397	Sweden	100
Spain	305	Spain	100
Total for Others	35,861	Total for Others	36,700
Others not listed	429	Others not listed	1,300
Grand Total	36,290	Grand Total	38,000

Exports for	1997		1998
U.S.	2	U.S.	2
Others		Others	
Netherlands	29,658	Netherlands	30,000
Belgium/Lux.	11,424	Belgium/Lux.	10,000
Jordan	5,023	Jordan	7,000
Italy	4,124	Italy	5,000
Saudi Arabia	3,617	France	5,000
Russia	3,066	Israel	5,000
Switzerland	2,312	Switzerland	4,000
Israel	2,032	Russia	4,000
Greece	1,740	Algeria	3,000
Uzbekistan	1,593	Austria	3,000
Total for Others	64,589	Total for Others	76,000
Others not listed	13,193	Others not listed	8,998
Grand Total	77,784	Grand Total	85,000

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

Table 11: PSD for Casein (in 1,000 MT) and average monthly Import Prices (in DM per MT)

		1997		1998		1999
	Old	New	Old	New	Old	New
Calendar Year Begin		01/1997		01/1998		01/1999
Beginning Stocks	2	2	2	2	2	2
Production	11	11	11	11	11	11
Intra EC Imports	13	13	12	12	12	12
Other Imports	26	26	26	26	26	26
TOTAL Imports	39	39	38	38	38	38
TOTAL SUPPLY	52	52	51	51	51	51
Intra EC Exports	17	17	15	15	15	15
Other Exports	11	11	10	10	10	10
TOTAL Exports	28	28	25	25	25	25
Human Dom. Consumption	17	17	18	18	18	18
Other Use, Losses	5	5	6	6	6	6
Total Dom. Consumption	22	22	24	24	24	24
TOTAL Use	50	50	49	49	49	49
Ending Stocks	2	2	2	2	2	2
TOTAL DISTRIBUTION	52	52	51	51	51	51
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	2	2	3	3	3	3

Year	1996	1997	% Change			1996	1997	% Change
Jan	7,177	6,344	-11.6%		Jul	6,309	6,359	0.8%
Feb	7,179	6,140	-14.5%		Aug	6,143	6,621	7.8%
Mar	7,102	6,649	-6.4%		Sep	5,675	6,352	11.9%
Apr	7,091	6,104	-13.9%		Oct	5,527	6,477	17.2%
May	6,923	6,646	-4.0%		Nov	5,417	6,749	24.6%
Jun	6,841	6,613	-3.3%		Dec	5,854	6,530	11.5%

Exchange Rate: June 1998.

Date of Quote: US\$1=DM1.79.

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



Table 12: German Import and Export of Casein (in MT)

Imports for	1997		1998
U.S.	53	U.S.	100
Others		Others	
New Zealand	9,381	New Zealand	10,000
Ukraine	6,134	Ukraine	6,000
Russia	4,921	Netherlands	4,000
Netherlands	4,720	France	3,000
Ireland	2,808	India	2,000
Lithuania	1,994	Russia	2,000
France	1,624	Ireland	2,000
Denmark	1,618	Denmark	2,000
Latvia	1,604	Switzerland	2,000
Poland	1,056	Austria	2,000
Total for Others	35,860	Total for Others	35,000
Others not listed	2,818	Others not listed	3,000
Grand Total	38,731	Grand Total	38,100

Exports for	1997		1998
U.S.	2,258	U.S.	5,000
Others		Others	
France	3,093	Italy	3,000
Netherlands	2,757	Belgium/Lux.	3,000
Italy	2,695	France	3,000
Belgium/Lux.	2,257	Spain	2,000
Spain	2,196	Great Britain	2,000
Morocco	1,199	Netherlands	2,000
Japan	1,101	Austria	1,500
Poland	1,088	Morocco	1,000
Austria	1,035	Poland	1,000
Great Britain	863	Japan	1,000
Total for Others	18,284	Total for Others	19,500
Others not listed	7,858	Others not listed	500
Grand Total	28,400	Grand Total	25,000

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

Table 13: Number of Cows by State in Germany, December Census (in 1,000 head)

State/December of	1994	1995	1996	1997	% Change 96/97
<b>A. Western Germany 1/</b>					
Schleswig-Holstein	425.7	420.9	422.2	401.8	-4.8
Lower Saxony	863.3	872.6	860.8	827.3	-3.9
Northrhine-Westphalia	478.0	468.0	462.2	451.2	-2.4
Hesse	192.8	189.7	187.5	176.6	-5.8
Rhineland-Palatinate	150.9	148.5	148.5	142.0	-4.4
Saarland	17.7	17.0	17.3	16.5	-4.3
Baden-Wuerttemberg	503.3	498.5	490.3	465.7	-5.0
Bavaria	1,594.2	1,566.7	1,558.6	1,513.4	-2.9
SUBTOTAL	4,231.6	4,187.7	4,152.6	3,999.7	-3.7
<b>B. Eastern Germany 2/</b>					
Brandenburg	226.4	228.0	229.6	221.8	-3.4
Mecklenburg-Vorpommern	226.2	233.1	231.3	226.0	-2.3
Saxony	251.0	247.5	247.9	250.0	+0.9
Saxony-Anhalt	168.9	168.6	168.8	166.5	-1.3
Thuringia	168.7	164.0	164.1	161.7	-1.5
SUBTOTAL	1,041.7	1,041.7	1,041.5	1,025.9	-1.5
<b>C. Total Germany</b>	<b>5,273.3</b>	<b>5,229.4</b>	<b>5,194.7</b>	<b>5,026.2</b>	<b>-3.2</b>

1/ Includes Hamburg, Bremen and West Berlin.

2/ Includes East Berlin.

Source: BML, Daten-Analysen and ZMP Dairy Review '98.

Table 14: Cattle Inventory in Germany (in million head, 1,000 breeders)

December of	1994	1995	1996	1997	% Change 96/97
<b>Total cattle</b>	15.96	15.89	15.76	15.23	-3.4
western states	13.06	12.97	12.88	12.44	-3.4
eastern states	2.90	2.92	2.88	2.79	-3.1
<b>Milk cows</b>	5.27	5.23	5.19	5.03	-3.2
western states	4.23	4.19	4.15	4.00	-3.7
eastern states	1.04	1.04	1.04	1.03	-1.5
<b>Cows (beef breeds)</b>	0.52	0.57	0.59	0.61	+2.4
western states	0.36	0.37	0.39	0.39	+0.1
eastern states	0.17	0.20	0.21	0.22	+6.6
<b>Heifers over 1 year</b>	2.79	2.84	2.92	2.90	-0.7
western states	2.23	2.25	2.31	2.29	-1.1
eastern states	0.56	0.58	0.61	0.62	+0.9
<b>Calves under 6 months</b>	2.48	2.47	2.42	2.28	-5.8
western states	2.06	2.05	2.03	1.92	-5.4
eastern states	0.42	0.42	0.39	0.36	-7.9
Total milk cow breeders, west	200	187	178	-	-
Total milk cow breeders, east	9	8	8	-	-
AVG milk cows per farm, west	21	22	23	-	-
AVG milk cows per farm, east	113	123	128	-	-

Based on December cattle census.

Source: Agrarwirtschaft, BML-Daten-Analysen.

Table 15: Production of Fluid Milk Products in Germany (in 1,000 MT)

	1994	1995	1996	1997
<b>Total fluid milk</b>	5,436.7	5,603.0	5,608.4	5,503.4
thereof <b>whole milk</b>	3,340.8	3,477.2	3,451.8	3,327.1
- Pasteurized milk	1,903.3	1,995.0	1,923.6	1,800.1
- UHT milk	1,435.6	1,480.1	1,523.2	1,525.9
- Sterilized	1.9	2.1	5.0	1.2
thereof <b>partly skimmed milk</b>	1,985.5	2,021.4	2,050.0	2,080.1
- Pasteurized milk	264.4	257.2	243.9	255.6
- UHT milk	1,709.4	1,757.2	1,787.8	1,820.3
- Sterilized	11.7	7.0	18.2	4.3
thereof <b>skimmed milk</b>	110.4	104.4	106.6	96.2
- Pasteurized	3.1	3.7	3.4	1.5
- UHT milk	107.0	100.6	103.0	94.9
- Sterilized	0.5	0.0	0.4	-
<b>Buttermilk products</b>	218.8	197.9	193.4	218.7
<b>Sour milk and kefir</b>	149.0	150.9	151.5	153.4
<b>Yogurt products</b>	224.4	239.6	399.2	337.6
<b>Chocolate drinks</b>	192.4	196.6	191.8	191.8
<b>Other milk drinks</b>	97.4	90.6	118.1	148.0
<b>Other milk mix products</b>	485.1	513.6	534.9	531.3
<b>Other milk mix products from yogurt, kefir, sour milk</b>	897.3	934.2	877.0	1,081.4
<b>Cream incl. coffee cream</b>	509.2	523.2	545.3	548.8

Source: [BML Daten-Analysen](#).

Table 16: Milk Prices to Farmers (in DM per 100 Kilogram)

CY	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
A. Western Germany												
1997	54.0	53.8	53.5	53.5	53.3	54.7	54.5	55.3	56.4	57.6	58.5	57.5
1998	56.7	56.4	56.1	55.9	55.8	56.2	57.1	58.4	59.9	60.7		
B. Eastern Germany												
1997	52.9	53.1	53.1	53.3	53.6	53.9	54.2	54.7	55.3	56.4	57.0	57.4
1998	56.2	56.1	56.2	55.9	56.1	56.3	56.8	57.5	58.2	58.7		

Note: Average prices for milk with 3.7 percent fat and 3.4 percent protein excl. VAT, at the farm level.

Source: ZMP Marktbericht Milch, various issues. In recent years the U.S. dollar/DM exchange rate has been as follows:

1991: \$1 = DM 1.66; 1992: \$1 = DM 1.52; 1993: \$1 = DM 1.65; 1994: \$1 = DM 1.61;

1995: \$1 = DM 1.43; 1996: \$1 = DM 1.50; 1997: \$1 = DM 1.70; 1998: \$1 = DM 1.76.

Table 17: Cheese Production by Type and Variety (in 1,000 MT)

Type	1993	1994	1995	1996	1997 2/
Emmental	42.8	47.3	45.3	56.2	57.9
Chester (standard product)	51.7	48.2	47.3	48.6	53.4
Other hard cheeses 1/	86.6	84.3	82.3	88.9	71.9
<b>Total hard cheese</b>	181.1	179.8	174.9	193.7	183.2
Tilsit	26.0	25.3	26.6	27.4	31.5
Edam total	124.6	135.1	148.1	149.2	153.9
Of which 30% fat	39.2	36.7	36.3	34.5	30.2
Of which 40% fat	83.8	96.9	110.2	113.4	121.8
Gouda	91.2	87.0	84.8	109.9	148.3
Other Schnittkaese	88.2	105.9	105.5	128.4	121.7
<b>Total Sliced Cheese</b>	330.0	353.3	365.0	415.0	455.4
All Blue-Vein	5.4	5.6	6.2	7.0	7.4
Butter cheese	16.6	16.8	18.9	20.2	23.1

<b>Other semi-hard Sliced Cheese</b>	31.3	35.0	38.4	40.0	45.1
Total Camembert	32.4	32.0	31.7	31.5	33.1
Of which 30-45% fat	14.4	14.0	14.6	15.0	14.9
Of which 45-50% fat	9.3	9.3	7.7	6.6	9.2
Of which 50% fat and more	8.7	8.8	9.4	10.0	9.0
Brie	7.1	5.6	4.1	3.7	3.2
Romadur	2.0	1.9	1.9	1.9	1.9
Limburger	7.3	7.3	7.5	7.4	7.5
Muensterkaese	0.3	0.3	0.3	0.3	0.3
Other soft cheeses	49.4	50.7	57.6	63.6	75.9
Of which 40-45% fat	10.9	8.0	8.8	11.6	6.8
<b>Total soft cheese</b>	98.5	97.8	103.2	108.5	121.9
Soured milk cheese	29.1	28.3	28.9	28.8	28.4
Cooked cheese	5.7	5.6	5.6	5.6	5.4
<b>Total soured milk cheese and cooked cheese</b>	34.8	33.9	34.5	34.4	33.9
Cream & double-cream fresh cheese	4.3	5.0	4.9	5.9	6.9
Quark	348.8	352.6	354.3	346.8	340.3
Schichtkaese	10.1	10.3	9.5	8.8	8.2
Fresh cheese with fruit	132.6	164.2	192.0	211.7	219.5
Fresh cheese with herbs	62.8	61.2	66.3	54.9	59.9
Other fresh cheeses	102.0	105.9	109.6	110.4	116.6
<b>Total fresh cheese</b>	660.6	699.2	736.6	738.5	751.3
Of which less than 20% fat	302.8	304.6	306.4	304.9	304.5
Of which 20-40% fat	184.4	214.6	235.7	244.3	252.5
Of which 40-45% fat	94.0	97.3	103.8	97.6	96.6
Of which over 45% fat	79.3	83.6	90.7	91.3	97.7
<b>Total Cheeses</b>	1,336.3	1,399.0	1,452.6	1,527.4	1,590.8

1/ Other Chester and Emmental produced from pasteurized milk.

2/ Preliminary.

Source: ZMP-Dairy Review 1998.

Table 18: Cheese Prices at Dairy (in DM per Kilogram)

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<b>A. Gouda 1/</b>												
<b>1997</b>	6.00	6.00	6.09	6.10	6.10	6.10	5.83	5.77	6.05	6.21	6.26	6.26
<b>1998</b>	6.26	6.26	6.26	6.26	6.26	6.26	6.26	6.26	6.26	6.26	6.26	
<b>B. Emmentaler 2/</b>												
<b>1997</b>	8.09	8.03	7.98	7.96	7.88	7.84	7.91	7.95	7.99	7.96	7.94	7.90
<b>1998</b>	7.93	7.93	7.94	7.94	7.95	7.98	8.03	8.04	8.03	8.03	8.04	

1/ Price at Cologne market incl. Freight to warehouse of wholesaler, excl. VAT.

2/ Price at Kempten (Bavaria) at dairy, excl. VAT.

Source and contract terms: ZMP, Europamarkt Milch, Butter, Kaese, various issues.

Table 19: Per Capita Consumption of Cheese by Variety (in Kilogram)

	1991	1992	1993	1994	1995	1996	1997
<b>Hard Cheeses</b>	1.0	1.1	1.1	1.2	1.3	1.3	1.3
<b>Medium Hard Cheeses</b>	5.2	5.5	5.8	5.9	5.9	6.3	6.6
<b>Soft Cheeses</b>	1.6	1.6	1.7	1.8	1.9	1.9	2.2
<b>Boiled Cheeses</b>	0.4	0.4	0.4	0.4	0.4	0.4	0.4
<b>Cheese Spreads</b>	1.5	1.5	1.4	1.5	1.4	1.4	1.3
<b>Fresh Cheeses</b>	7.8	8.0	8.0	8.5	8.9	8.6	8.7
<b>- Curds</b>	4.5	4.5	4.4	4.5	4.5	4.4	4.2
<b>- Other</b>	3.2	3.2	3.6	3.9	4.4	4.3	4.5
<b>TOTAL</b>	17.5	18.3	18.5	19.3	19.8	20.1	20.3

1/ Preliminary.

Note: Differences are due to rounding.

Source: ZMP Bilanz Milch 1998.

Table 20: Butter Wholesale Prices (in DM per Kilogram)

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<b>A. Cologne Market</b>												
<b>1997</b>	6.27	6.37	6.45	6.45	6.45	6.58	6.67	6.80	6.98	7.13	7.16	7.18
<b>1998</b>	7.14	7.05	6.94	6.92	6.85	6.86	6.95	7.04	7.11	7.11	6.94	
<b>B. Eastern Germany</b>												
<b>1997</b>	6.25	6.33	6.38	6.42	6.45	6.52	6.71	6.80	6.98	7.11	7.16	7.18
<b>1998</b>	7.10	6.89	6.80	6.80	6.72	6.79	6.91	6.98	6.98	6.93	6.73	

Price in bulk at dairy incl. freight to warehouse of wholesaler and excl. VAT.

Source: ZMP Europamarkt Milch, Butter, Kaese, various issues.

Table 21: Butter Production by Type (in 1,000 MT)

	<b>1994</b>	<b>1995</b>	<b>1996</b>	<b>1997 1/</b>	<b>% Change</b>
<b>Branded butter, sweet cream</b>	48.6	53.8	46.8	41.8	-10.8
<b>Branded butter, sour cream</b>	64.6	42.4	37.8	31.6	-16.3
<b>Branded butter, NINO produce</b>	279.3	321.7	326.9	296.4	-10.5
<b>Other butter 2/</b>	5.4	5.6	6.1	5.9	-4.0
<b>Butter for cooking 3/</b>	63.4	62.7	62.6	65.1	-28.0
<b>Total</b>	461.3	486.2	480.2	442.0	-13.2
<b>Other butter products 4/</b>	19.8	21.6	—	—	—

1/ Preliminary, FAS/Bonn estimate.

2/ Second grade and whey butter.

3/ Including butter oil made directly from cream.

4/ Mixed fats and other butter preparations usually made with butter.

Source: ZMP Bilanz Milch 1998.



Table 22: Manufacture of Milk Fat Products and Dairy Spreads (in 1,000 MT)

	Directly from cream		From butter		Total	
	1996	1997 1/	1996	1997 1/	1996	1997 1/
<b>Butter preparations</b>	0.4	0.3	8.2	8.8	8.6	9.1
<b>Spreads</b>	4.1	6.9	9.7	10.8	13.8	17.8
<b>Of which</b>						
<b>- 3/4-fat butter</b>	—	—	0.0	0.0	0.0	0.0
<b>- half-fat butter</b>	0.4	0.5	96.6	10.7	10.1	11.2
<b>- others</b>	3.7	6.5	0.1	0.1	3.7	6.6
<b>Milk fat products</b>	17.5	18.8	12.1	14.4	29.6	33.2
<b>Of which</b>						
<b>- butter concentrate</b>	16.4	18.8	12.0	14.3	28.3	33.1
<b>- butter fat/oil 96%</b>	1.2	—	0.1	0.1	1.3	0.1

1/ Preliminary.

Source: ZMP Bilanz Milch 1998.

Table 23: Butter Consumption (in MT, Kilogram per Capita)

	1993	1994	1995	1996	1997 1/	1998 2/	1999 2/
<b>Total (MT)</b>	556,600	560,000	583,100	594,100	578,300	567,000	567,000
<b>Per Capita (kg)</b>	6.8	6.9	7.1	7.3	7.0	7.0	7.0

1/ Preliminary.

2/ Estimate.

Source: ZMP Bilanz Milch 1998.

Table 24: Nonfat Dry Milk Factory Prices (in DM per Kilogram)

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<b>1997</b>	4.07	4.18	4.10	3.99	3.99	3.98	3.94	3.99	4.10	4.12	4.12	4.14
<b>1998</b>	4.04	3.96	3.95	3.93	3.91	3.91	3.91	3.94	3.87	3.74	3.74	

Spray, Food grade, excl. VAT.

Source & Contract Terms: ZMP, Europamarkt Dauermilch, various issues.

Table 25: Whole Milk Factory Prices (in DM per Kilogram)

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1997	5.09	5.11	5.12	5.12	5.10	5.06	5.03	5.07	5.16	5.22	5.29	5.33
1998	5.28	5.16	5.13	5.08	5.07	5.11	5.10	5.08	5.06	5.04	5.03	

Spray, 26 percent fat, excl. VAT.

Source: ZMP, Europamarkt Dauermilch, various issues.

Table 26: Casein (Food Grade) Factory Prices (in DM per Kilogram)

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1997	7.80	7.90	7.90	7.90	7.75	7.75	7.80	7.95	8.00	8.00	8.00	8.00
1998	8.00	8.00	8.00	7.75	7.75	7.65	7.65	7.65	7.60	7.55	7.55	

Source: ZMP, Europamarkt Dauermilch, various issues.

Table 27: EU Tariff Rates for Cheese (in i per 100 kg/net weight)

CN Code	Description	7/98-6/99	7/99-6/2000	7/2000
0406;1020	Fresh cheese # 40% fat	219.9 *	202.6 *	185.2 *
0406;1080	Fresh cheese >40% fat	262.7 *	241.9 *	221.2 *
0406;2010+9019	Glarus herb cheese	9.1 %	8.4 %	7.7 %
0406;2090	Grated/powdered cheese	223.5 *	205.8 *	188.2 *
0406;3010	Processed cheese # 56% fat dry matter	172.1 *	158.5 *	144.9 *
0406;3031	Processed cheese # 36% fat by weight, # 48% fat dry matter	165.2 *	152.1 *	139.1 *
0406;3039	Processed cheese # 36% fat by weight, >48% fat dry matter	172.1 *	158.5 *	144.9 *
0406;3090	Processed cheese > 36% fat by weight	255.3 *	235.2 *	215.0 *
0406;4010-4090	Blue-veined cheese	167.3 *	154.1 *	140.9 *
0406;9001	Cheese for processing	198.4 *	182.8 *	167.1 *
0406;9002	Whole cheeses with a free-at-frontier value of 401.85 - 430.62 ECU	20.83	19.19	17.54

<b>0406;9003</b>	Whole cheeses with a free-at-frontier value of > 430.62 ECU	7.81	7.20	6.58
<b>0406;9004</b>	Vacuum-packed pieces \$ 1 - 4.9 kg net, free-at-frontier value 430.62 - 459.39 ECU	20.83	19.19	17.54
<b>0406;9005-9006</b>	Other vacuum-packed pieces	7.81	7.20	6.58
<b>0406;9013-9018</b>	Emmentaler, Gruyere, Sbrinz, Bergkaese, Appenzell, fromage fribourgeois, Vacherin Mont d'Or, Tete de Moine	203.9 *	187.8 *	171.7 *
<b>0406;9019</b>	Glarus herb cheese	9.1	8.4	7.7
<b>0406;9021</b>	Cheddar	198.4 *	182.8 *	167.1 *
<b>0406;9023-9050</b>	Edam, Tilsit, Butterkaese, Kashkaval, Feta, Kefalo-Tyri, Finlandia, Jarlsberg, sheep's cheese	179.3 *	165.2 *	151.0 *
<b>0406;9061-9069</b>	Cheese # 47% water content	223.5 *	205.8 *	188.2 *
<b>0406;9073-9088</b>	Cheese 47 - 72% water content	179.3 *	165.2 *	151.0 *
<b>0406;9093</b>	Cheese > 72% water content	219.9 *	202.6 *	185.2 *
<b>0406;9099</b>	Other cheese	262.7 *	241.9 *	221.2 *

\* Limited quantities at reduced tariff rates are available (WTO tariff quota). See Annex 7 of Official Journal of the European Communities. Tariff quotas vary according to commodities and are available on a first come first serve basis.

Source: Official Journal of the European Communities, L 292, Volume 41, 30 October 1998. Schedule LXXX - European Communities. FAS/Bonn calculation.