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Germany

Fresh Deciduous Fruit

Annual

2000

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Report Highlights:
U.S. exports of table apples declined to 190 MT in MY1999/00 (July/June), and pear exports declined to 1,797 MT. Due to the strong dollar, exports may decline further in MY2000/01. The weak German Mark may favor German exports of concentrated apple juice (CAJ) to the United States in MY2000/01. Although the United States remained the single largest CAJ export market for Germany, exports declined to 16,840 MT in MY1999/00.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
Annual Report
Berlin [GM1], GM

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Executive Summary

German apple production is estimated at 2.428 million MT in CY2000 (928,000 MT commercial production and 1.5 million MT noncommercial production). Production of pears is estimated at 55,000 MT, and production of concentrated apple juice (CAJ) is estimated at 110,000 MT.

German apple production in CY1999 was 1.936 million MT, only slightly lower than the 1998 crop of 1.980 million MT. Total German production of pears in 1999 was 54,000 MT, similar to 55,000 MT in 1998. A mild winter and less hail damage in spring boosted blossoming considerably. German production of CAJ (70.5 degrees brix) was 98,560 MT in 1999, considerably up from 81,974 MT in 1998. The United States, despite a sharp decline in recent years, still remains the largest single export market for German CAJ, purchasing an estimated 16,840 MT in MY 1999/00 (July/June).

U.S. exports of apples and pears to Germany have a small window in January/February just before apples from Southern hemisphere countries enter the market. Quantities are small. Currently, U.S. exporters face an unfavorable exchange rate and high EU apple stocks.

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

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

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

Note: Under market conditions after unification in the former East Germany, most of the old apple orchards were not economical, and with the help of EU financial support, two uprooting programs were administered between CY1990 and 1992 and again in 1994 and 1995 in eastern Germany. These programs reduced the number of apple orchards and the number of hectares and trees in orchards considerably by 1995. At the same time, some replanting took place with new apple varieties at a higher plant density such that, in 1997, plant density in the east equaled plant density in the west. Due to replanting and new plantations, the number of hectares and trees has increased slightly since 1995.

Area in apple orchards in the former West Germany increased marginally as replanting and new planting roughly balanced uprooted areas. However, new orchards generally had a higher plant density so that the total number of trees increased. Due to these distinct developments in both parts of Germany, the area in apple production and the number of trees in Germany declined until 1995, after which they increased. Both parts now have similar plant densities, and it is expected that economic and structural adjustments arising from German unification have been finalized. Thus, further developments in response to market changes (uprooting or replanting) are likely to be the same regardless of whether it is an eastern or western location.

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

Note: U.S. dollar/German mark exchange rates have been as follows (according to *Handelsblatt*):

1991: $1 = DM 1.66;	1996: $1 = DM 1.50;	1995: $1 = DM 1.43;
1992: $1 = DM 1.52;	1997: $1 = DM 1.70;	Euro (i)/German mark: i 1 = DM 1.95583,
1993: $1 = DM 1.65;	1998: $1 = DM 1.76,	i /U.S. dollar: i 1 = $ 0.9012 (8/29/2000).
1994: $1 = DM 1.61;	1999: $1 = DM 1.66.	

Section I: Situation and Outlook

Apples

German apple production in CY2000 is an estimated 2,428,000 MT, of which noncommercial production is 1,500,000 MT and commercial production is 928,000 MT. (In 1999 total apple production amounted to 1,936,000 MT; noncommercial production was 900,000 MT; and commercial production was 1,036,000 MT.) A mild winter supported fruit settings and early growth. Conditions during blossoming were generally favorable. This generally favors apple growth especially in house gardens and on meadows. Additionally, bigger fruit sizes may boost noncommercial production and commercial production. Production in 2000 thus may surpass 1999 harvests significantly. However, hail damage may result in the conversion of table apples away from fresh to processing into apple juice.

Noncommercial production includes apples grown in house gardens and extensive production in meadows. Typically, noncommercial production is used for fresh consumption, must and spirit production, baking (cakes, tarts) or preserved foods (canned, dried, cooked). Approximately one-half of this production is grown in house gardens and is consumed by private households; one-third is comprised of must apples used in apple juice production; and the remainder is processed into spirits.

Domestic fresh consumption was 1.653 million MT in MY 1999/00 (July/June), and consumption for processing was 988,000 MT (all uses). Only 2,589 MT were sold into intervention. In MY 2000/01 fresh consumption is estimated at 1.855 million MT and processing at 1,200,000 MT due to the significantly higher noncommercial crop which may boost both fresh consumption and the production of apple juice. Intervention is estimated at 8,000 MT.

Imports in MY 1999/00 are estimated at 769,559 MT, a rise from MY 1998/99, triggered by the favorable European supply situation. For MY 2000/01 slightly lower imports of apples at 700,000 MT are expected due to the estimated higher domestic noncommercial crop. Germany exports only small quantities of apples annually.

Due to the favorable domestic supply, prospects for U.S. table apple exports to Germany are low. More importantly, domestic apple prices may not increase due to the strong harvest, and the exchange rate is unfavorable. Generally, the German market is just a small valve for U.S. table apple exports, mainly from December to February, between the end of EU-fresh apple supplies and the import of fresh table apples from southern hemisphere countries. Nevertheless, in MY 1998/99, U.S. exports of fresh table apples grew from 310 MT in the previous marketing year to 721 MT. In MY 1999/00, U.S. table apple exports dropped to a mere 190 MT.

EU-financed uprooting programs resulted in uprootings of approximately 8,000 ha of commercial apple orchards in 1997, including 1,000 ha in Germany. There were no uprooting programs for 1998 or 1999.

Pears

Germany is not a big pear producer, and pear production in 2000 is estimated at 55,000 MT. Final German pear production in 1999 was 54,000 MT including commercial production after 55,000 MT in 1998; no reliable data for noncommercial production of pears is available. Also, only small quantities of noncommercial pear production enter the pear market; most are consumed directly by households or on farms either fresh or processed. Therefore, Post doesn't enter any data for noncommercial pear crop.

Consumption of fresh table pears in MY 1999/00 (July/June) was 238,476 MT. Pear imports supplied roughly 80 percent of domestic consumption. Pears for processing, diverted from commercial production, amounted to 1,172 MT. Total imports of pears are expected to be 193,834 MT in MY 1999/2000, mainly originating from Italy.

With exports of 5,034 MT in MY1998/99 and 1,797 MT in MY1999/00, the United States ranks as a significant non-EU supplier of fresh table pears to Germany. Still, due to the high exchange rate, U.S. exports of pears may drop further in MY2000/01.

Exports of U.S. table pears in MY2000/01 may also decline due to a strong EU pear harvest which may reduce third country imports of pears. Generally, U.S. exports of table pears to the EU have an open window between December and January and decline in February when deliveries from the southern hemisphere enter the market.

Concentrated Apples Juice (CAJ)

The total volume of must apples pressed ("Eigenkelterung" or production from domestic and imported must or diverted table apples) into apple juice concentrate (70.5 degrees brix) in 1999 was 98,560 MT, versus 81,974 MT in 1998. For 2000 apple juice production is expected at 110,000 MT due to a bumper noncommercial apple crop of 1.5 million MT in 2000 and hail damage to commercial apples which may result in the additional conversion of approximately 100,000 MT of table apples for must production. Stocks of CAJ may thus increase from 220,384 MT in 1998 to 335,360 in 1999 to 319,821 MT in 2000.

German must apples - and to a small extent domestic table apples - form the basis of apple juice production in Germany, especially since German must apples provide the quality (acid content) and price required by the German apple juice processors. For 1998 and 1999, 657,000 MT and 838,000 MT of apples entered juice production. For 2000 this number may rise to approximately 950,000 MT of must apples processed into apple juice.

Traditionally, the German apple juice industry depends heavily on imports of apple juice concentrates of various densities. In MY 1998/99 (for which final numbers are available), German imports of apple juice concentrate totaled 249,177 MT. Poland is by far the most important supplier of concentrated apple juice (CAJ) to German processors and bottlers. Despite low supply and high export prices, in MY1998/99, Poland supplied 63,484 MT of CAJ of 70.5 brix to Germany. (This is significantly below the 112,411 MT of CAJ delivered to Germany in MY1998/99.) Poland is followed by Italy with 43,797 MT and Turkey with 31,496 MT. Imports and of apple juice are expected to decline for two reasons: First, domestic supply and stocks are high, and production of concentrated apple juice in Poland lacks the quantity, price and quality required by German processors. Second, there is stable supply of must apples in Germany and the EU. Exports may rise due to the German Mark-US$ exchange rate which especially favors German exports to the United States, the most important export market for German CAJ. In recent years, German exports of CAJ to the United States had declined significantly because of unfavorable exchange rates and high prices of German CAJ. This development may be reversed.

German trade statistics distinguish between apple juice concentrates below 1.33 density (representing approximately 60 percent of imports) and above 1.33 density. Poland mainly supplies CAJ of below 1.33 density, where it held an import market share of around 38 percent in CY1999. Other major suppliers of CAJ with a density below 1.33 are Switzerland and the Czech Republic, with an import market share of 19 and eighteen percent respectively. Significant EU suppliers were Austria and Italy, which together held a market share of around five percent in 1999.

Italy was the largest supplier of CAJ above 1.33 density in 1999 with an import share of about 26 percent. Turkey, the second-largest supplier of this density, had an import share of around 20 percent for this density in 1999.

The United States remains the largest single export market for German CAJ. These deliveries are mainly reprocessed concentrates from eastern European countries or blends of such concentrates with domestic production. Exports to the United States totaled 26,317 MT in MY 1997/98 and 22,261 MT in MY1998/99 and are expected to decline to 16,840 MT in 1999/00 due to overall low exports, high German export prices and an unfavorable exchange rate which makes deliveries of German CAJ less price competitive with deliveries from the southern hemisphere countries. The United States imports almost exclusively sweet CAJ of above 1.33 density. Exports to the United States may rise due to favorable exchange rates.

Section II: Statistical Tables

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

		1998		1999		2000
	Old	New	Old	New	Old	New
Market Year Begin		07/1998		07/1999		07/2000
Area Planted	35,793	35,793	35,793	35,793	0	35,793
Area Harvested	35,793	35,793	35,793	35,793	0	35,793
Bearing Trees	58,412	58,412	58,412	58,412	0	58,412
Non-Bearing Trees	0	0	0	0	0	0
Total Trees	58,412	58,412	58,412	58,412	0	58,412
Commercial Production	850,000	880,000	910,000	1,036,000	0	928,000
Non-Comm. Production	1,100,000	1,100,000	900,000	900,000	0	1,500,000
TOTAL Production	1,950,000	1,980,000	1,810,000	1,936,000	0	2,428,000
TOTAL Imports	650,000	681,000	700,000	769,559	0	700,000
TOTAL SUPPLY	2,600,000	2,661,000	2,510,000	2,705,559	0	3,128,000
Domestic Fresh Consumption	1,734,758	1,730,285	1,655,000	1,653,418	0	1,855,000
Exports, Fresh Only	57,000	65,473	50,000	61,552	0	65,000
For Processing	800,000	857,000	800,000	988,000	0	1,200,000
Withdrawal From Market	8,242	8,242	5,000	2,589	0	8,000
TOTAL UTILIZATION	2,600,000	2,661,000	2,510,000	2,705,559	0	3,128,000

Note: Imports are adjusted upward by 40,000 MT each year from official statistics of the Federal Statistical Office based on information obtained from ZMP and own estimates to account for under reporting of official intra-EU trade data. Area planted and trees are only for commercial production for which figures are known.

Year	1998	1999	% Change			1998	1999	% Change
Jan	575	598	4.0%		Jul	746	676	-9.4%
Feb	523	623	19.1%		Aug	814	706	-13.3%
Mar	626	590	-5.8%		Sep	606	420	-30.7%
Apr	657	602	-8.4%		Oct	454	347	-23.6%
May	749	682	-8.9%		Nov	384	268	-30.2%
Jun	760	763	0.4%		Dec	485	300	-38.1%

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

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

Imports for	1998		1999
U.S.	767	U.S.	190
Others		Others	
Italy	270,000	Italy	250,000
Netherlands	107,000	Netherlands	190,000
France	70,000	France	115,000
New Zealand	58,558	Belgium	68,108
Czech Republic	32,827	New Zealand	48,585
South Africa	31,732	Argentina	20,213
Argentina	30,503	Czech Republic	15,631
Belgium/Lux	17,903	South Africa	15,033
Chile	19,161	Chile	13,475
Austria	10,785	Brazil	12,818
Total for Others	648,469	Total for Others	748,863
Others not listed	32,150	Others not listed	20,506
Grand Total	681,386	Grand Total	769,559

Exports for	1998		1999
U.S.	0	U.S.	0
Others		Others	
Denmark	10,722	Denmark	11,079
Netherlands	9,018	Finland	6,035
France	7,164	Netherlands	4,666
Finland	5,668	Russia	4,431
Sweden	5,420	Great Britain	4,117
Great Britain	4,677	France	4,017
Russia	3,966	Sweden	3,681
Belgium	3,606	Lithuania	2,956
Czech Republic	2,604	Belarus	2,922
Spain	1,635	Austria	2,856
Total for Others	54,480	Total for Others	46,760
Others not listed	10,994	Others not listed	14,792
Grand Total	65,474	Grand Total	61,552

Note: 1997 trade data cover July 1998 through June 1999.
1998 trade data cover July 1999 through June 2000.

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

Table 3: PSD for Fresh Pears (in MT) and German Import Prices for Fresh Pears (in US$ per MT)

		1998		1999		2000
	Old	New	Old	New	Old	New
Market Year Begin		07/1998		07/1999		07/2000
Area Planted	2,372	2,372	2,372	2,372	0	2,372
Area Harvested	2,372	2,372	2,372	2,372	0	2,372
Bearing Trees	2,342	2,342	2,342	2,342	0	2,342
Non-Bearing Trees	0	0	0	0	0	0
Total Trees	2,342	2,342	2,342	2,342	0	2,342
Commercial Production	55,000	55,000	49,000	54,000	0	55,000
Non-Comm. Production	0	0	0	0	0	0
TOTAL Production	55,000	55,000	49,000	54,000	0	55,000
TOTAL Imports	210,000	220,396	215,000	193,834	0	200,000
TOTAL SUPPLY	265,000	275,396	264,000	247,834	0	255,000
Domestic Fresh Consumption	255,649	265,238	255,000	238,476	0	245,790
Exports, Fresh Only	7,672	8,459	8,000	8,183	0	8,000
For Processing	1,679	1,679	1,000	1,172	0	1,200
Withdrawal From Market	0	20	0	3	0	10
TOTAL UTILIZATION	265,000	275,396	264,000	247,834	0	255,000

Note: Imports are adjusted upward by 35,000 MT each year from official statistics of the Federal Statistical Office based on information obtained from ZMP and own estimates to account for under reporting of official intra-EU trade data. Area planted and trees are only for commercial production for which figures are known.

Year	1998	1999	% Change			1998	1999	% Change
Jan	1,084	827	-23.7%		Jul	846	741	-12.4%
Feb	1,073	844	-21.3%		Aug	852	673	-21.0%
Mar	889	881	-0.9%		Sep	814	681	-16.3%
Apr	822	811	-1.3%		Oct	803	740	-7.8%
May	779	772	-0.9%		Nov	796	776	-2.5%
Jun	827	856	3.5%		Dec	825	826	0.1%

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

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

Imports for	1998		1999
U.S.	5,034	U.S.	1,797
Others		Others	
Italy	118,000	Italy	101,000
Argentina	30,992	Argentina	27,010
South Africa	19,092	Spain	22,413
Spain	12,075	France	12,314
France	11,675	South Africa	7,562
Chile	9,217	Chile	6,981
Netherlands	5,655	Belgium	6,542
Belgium/Lux.	5,606	Netherlands	5,976
Turkey	1,677	Turkey	1,189
Portugal	494	New Zealand	245
Total for Others	214,483	Total for Others	191,232
Others not listed	879	Others not listed	805
Grand Total	220,396	Grand Total	193,834

Exports for	1998		1999
U.S.	0	U.S.	0
Others		Others	
Denmark	1,798	Denmark	2,045
Netherlands	1,290	Netherlands	1,260
France	1,208	France	867
Sweden	692	Spain	862
Italy	620	Italy	740
Austria	517	Austria	712
Poland	496	Poland	660
Great Britain	486	Finland	180
Norway	316	Portugal	155
Portugal	308	Great Britain	129
Total for Others	7,731	Total for Others	7,610
Others not listed	728	Others not listed	573
Grand Total	8,459	Grand Total	8,183

Note: 1997 trade data cover July 1998 through June 1999.
1998 trade data cover July 1999 through June 2000.

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

Table 5: PSD for Concentrated Apple Juice (CAJ) (in MT) and German Import Prices for Concentrated Apple Juice (in US$ per MT)

		1998		1999		2000
	Old	New	Old	New	Old	New
Market Year Begin		07/1998		07/1999		07/2000
Deliv. To Processors	800,000	657,000	800,000	838,000	0	950,000
Beginning Stocks	115,000	115,000	100,114	220,384	0	335,360
Production	67,025	81,974	65,000	98,560	0	110,000
Imports	254,284	249,177	245,000	242,817	0	220,000
TOTAL SUPPLY	436,309	446,151	410,114	561,761	0	665,360
Exports	79,433	74,134	62,000	70,078	0	85,000
Domestic Consumption	256,762	151,633	260,539	156,323	0	260,539
Ending Stocks	100,114	220,384	87,575	335,360	0	319,821
TOTAL DISTRIBUTION	436,309	446,151	410,114	561,761	0	665,360

Note: All data are in 70.5 degrees brix.

Year	1998	1999	% Change			1998	1999	% Change
Jan	853	757	-11.3%		Jul	729	627	-14.0%
Feb	816	740	-9.3%		Aug	723	752	4.0%
Mar	807	743	-7.9%		Sep	760	891	17.2%
Apr	833	664	-20.3%		Oct	741	1,091	47.2%
May	820	649	-20.9%		Nov	625	1,081	73.0%
Jun	722	606	-16.1%		Dec	708	995	40.5%

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

Table 6: German Import and Export of Concentrated Apple Juice (in MT, 70.5 brix)

Imports for	1998		1999
U.S.	134	U.S.	32
Others		Others	
Poland	63,484	Poland	58,465
Italy	43,797	Italy	33,001
Turkey	31,496	Turkey	24,059
Switzerland	19,251	China	18,847
Iran	14,652	Switzerland	17,377
Czech Republic	15,882	Czech Republic	15,950
Hungary	14,301	Austria	13,670
Austria	11,645	Hungary	12,823
Ukraine	11,615	Iran	12,358
Moldova	7,610	Spain	11,041
Total for Others	233,734	Total for Others	217,591
Others not listed	15,309	Others not listed	25,195
Grand Total	249,177	Grand Total	242,817

Exports for	1998		1999
U.S.	22,261	U.S.	16,840
Others		Others	
Netherlands	14,646	Netherlands	13,041
Great Britain	11,224	Great Britain	8,845
France	4,106	Belgium/Lux.	5,910
Denmark	3,177	Denmark	5,379
Belgium	2,816	France	3,117
Japan	2,613	Sweden	2,933
Austria	2,575	Finland	2,453
Sweden	1,906	Japan	2,356
Japan	1,789	Norway	2,199
Norway	1,533	Austria	1,874
Total for Others	46,386	Total for Others	48,106
Others not listed	5,487	Others not listed	5,131
Grand Total	74,134	Grand Total	70,078

Note: 1997 trade data cover July 1998 through June 1999.
1998 trade data cover July 1999 through June 2000.

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

Table 7: Commercial Production of Apples in Germany (in 1,000 MT)

Variety	1995	1996	1997	1998	1999	2000 1/
Cox Orange	43.9	49.9	57.0	54.0	65.0	55.0
Boskop	32.7	77.9	76.0	84.0	96.0	87.0
Ingrid Marie	15.9	12.8	9.8	n.a.	n.a.	n.a.
Golden Delicious	56.9	72.8	63.0	72.0	72.0	65.0
Idared	43.2	57.0	46.0	68.0	62.0	56.0
Gloster	54.4	129.0	90.0	91.0	86.0	73.0
Jonagold	99.4	154.4	141.0	183.0	198.0	185.0
Jonagored	20.7	45.9	44.0	55.0	78.0	72.0
Elstar	70.0	101.8	100.0	107.0	147.0	127.0
Gala	6.1	11.6	16.0	20.0	24.0	25.0
Other 2/	144.0	175.0	128.0	245.0	208.0	185.0
TOTAL	572.6	878.1	765.0	977.0	1,036.0	928.0

1/ Forecast.
2/ Includes Bräburn, Gravensteiner, James Grieve, Glockenapfel.

Source: ZMP - Der Markt 8/2000, Obst & Gemüse.

Table 8: EU Market Production of Apples by Country (in 1,000 MT)

Country	1992	1993	1994	1995	1996	1997	1998	1999	2000 1/
Italy	2,368	2,145	2,153	1,889	2,025	2,041	2,243	2,196	2,165
France	2,344	1,972	2,129	1,980	1,900	2,051	1,750	2,030	2,295
Germany	1,108	883	880	573	878	765	977	1,036	928
Spain	1,005	821	753	780	849	821	680	837	687
United Kingdom	388	360	316	254	248	152	194	256	184
Netherlands	640	670	600	595	490	470	507	575	510
Belgium	482	493	505	508	295	367	407	534	485
Greece	305	315	320	315	372	274	306	257	328
Portugal	275	222	167	175	215	250	125	227	175
Denmark	43	40	38	30	30	33	29	32	31
Ireland	9	8	9	9	8	8	8	8	8
Luxembourg	5	4	5	4	4	4	4	4	4
Austria	86	128	127	128	134	162	128	148	169
Sweden	27	20	20	18	19	20	18	19	19
TOTAL 2/	8.085	8,082	8,021	7,258	7,467	7,428	7,385	8,037	7,995

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

Source: ZMP Der Markt 8/2000 - Obst & Gemüse, based on Prognosfruit, FAS calculation.

Table 9: Market Production of Apples in the EU by Variety (in 1,000 MT)

Variety	1992	1993	1994	1995	1996	1997	1998	1999	2000 1/
Golden Delicious	3,232	2,684	2,995	2,785	2,803	2,962	2,698	2,950	2,842
Red Delicious	1,101	1,018	868	790	835	750	761	858	846
Granny Smith	418	401	407	395	440	423	377	385	425
Jonagold 2/	791	726	797	791	646	705	830	994	922
Morgenduft	290	229	219	179	200	229	202	158	153
CoxOrange	321	308	242	184	197	164	169	202	143
Boskop	255	173	210	120	134	140	151	197	171
Idared	153	141	143	126	140	125	137	138	135
Kanada Renette	123	93	146	132	112	84	109	106	116
Gloster	260	229	202	96	187	142	129	113	94
Elstar	314	335	363	336	334	314	354	426	387
Gala	110	128	185	208	349	412	454	561	635
Bramley	182	146	139	121	109	80	93	117	85
Braeburn	-	-	4	58	85	106	103	174	205
Fuji	-	-	0	17	22	34	36	56	69
Other	1,535	1,470	1,101	920	876	759	782	925	755
TOTAL 3/	9,085	8,081	8,021	7,258	7,467	7,428	7,385	8,360	7,983

1/ Forecast.
2/ Includes mutants.
3/ Discrepancies are due to rounding.

Source: ZMP Der Markt 8/2000 - Obst & Gemüse, based on Prognosfruit, FAS calculation.

Table 10: Fresh Apples Purchased by EU Intervention Agency (in MT)

Crop Year	1993/94	1994/95	1995/96	1996/97	1997/98	1998/99	1999/00
Total EU	976,000	638,000	208,000	349,000	358,000	274,151	211,756
Germany	46,300	26,400	300	3,914	1,846	7,912	2,589

Source: ZMP.

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

Country	1992	1993	1994	1995	1996	1997	1998	1999	2000
Italy	1,264	938	1,026	958	1,074	659	1,115	784	923
France	394	226	336	316	333	246	244	288	257
Germany	55	43	39	40	37	37	55	54	55
Spain	602	459	580	457	650	577	563	682	587
United Kingdom	25	44	26	36	40	25	25	18	26
Netherlands	115	170	140	165	135	145	140	135	180
Belgium	111	152	154	156	137	130	151	165	154
Greece	94	86	72	56	73	41	63	62	69
Portugal	97	87	91	87	120	165	15	140	160
Denmark	6	6	6	5	5	6	5	4	6
Sweden	--	1	2	2	2	1	1	2	2
TOTAL	2,762	2,213	2,471	2,277	2,606	2,032	2,377	2,334	2,419

1/ Forecast.

Source: ZMP Der Markt 8/2000 - Obst & Gemüse, based on Prognosfruit.

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

Variety	1992	1993	1994	1995	1996	1997	1998	1999	2000 1/
Conference	427	410	479	472	529	470	551	587	589
Williams	326	236	283	294	330	192	309	254	288
Abate Fetel	274	212	229	197	257	180	309	212	257
Rocha	-	-	-	70	102	140	10	100	140
Guyot	217	172	182	146	169	142	112	135	111
Doyenne de Comice	201	179	189	175	158	116	177	107	152
KaiserAlexander	141	97	91	103	89	41	88	51	55
Passa Crassana	134	76	83	76	75	45	58	45	47
Blanquilla	183	100	220	180	286	236	226	233	206
Coscia	170	95	104	65	89	76	80	116	105
Red Bartlett	41	39	36	50	43	19	44	29	36
Kristalli	35	40	35	16	32	24	26	25	28
Other	617	560	539	433	445	351	388	440	404
TOTAL	2,766	2,216	2,471	2,277	2,606	2,032	2,377	2,334	2,419

1/ Forecast.

Source: ZMP Der Markt 8/2000 - Obst & Gemüse, based on Prognosfruit.

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

Crop Year	1992/93	1993/94	1994/95	1995/96	1996/97	1997/98	1998/99	1999/00
Total EU	197,000	40,000	92,000	49,000	177,000	86,000	67,444	82,638
Germany	333	880	172	55	92	-	20	3

Source: ZMP.

Table 14: Production of Fruit Juices/ Nectars, Mineral Waters, Carbonated Fruit Juices (in 1,000 liter)

	1995	1996	1997	1998	1999
Fruit/Vegetable Juices	2,352,245	2,392,661	2,532,655	2,582,221	
- Citrus					1,060.4
- Pome Fruit					955.3
- Grape					88.3
- Other					506.1
Fruit/Vegetable Nectars	1,251,292	1,280,779	1,353,365	1,297,803	
- Citrus					315.5
- Other					664.7
Dietary Fruit Juices					240.7
Vegetable Juices					77.8
Vegetable Nectars					6.2
Natural Mineral Waters	8,645,440	8,393,229	8,728,584	8,737,724	7850.5
Table Water					276.5
Carbonated Fruit Juices	6,363,438	6,362,196	6,432,659	6,510,229	
Other Fruit Juices	647,959	714,651	811,223	915,499	
- without CO2					780.9
- with CO2					239.9
Limonades					
- Cola/Cola-mixtures					3,461.4
- with Fruit Juice					1,585.9
- Other					1,210.0
Dietary Products					249.1
Sodas					252.8
Total					19,821.5

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

Source: VDF, Association of the German Fruit Juice Industry, Annual Report 1999, page 24.

Table 15: Per Capita Consumption of Fruit Juices and Nectars 1990-98 (in liter)

	1991	1992	1993	1994	1995	1996	1997	1998	1999
Apple Juice	7.84	9.44	10.31	11.60	11.79	12.15	12.17	11.64	12.00
Orange Juice	8.02	9.81	9.77	8.97	9.83	10.25	10.17	10.03	9.51
Grape Juice	1.04	1.21	1.10	1.17	1.19	1.21	1.30	1.30	1.32
Grapefruit Juice	0.25	0.30	0.33	0.32	0.33	0.33	0.36	0.38	0.38
Pear Juice	0.07	0.08	0.12	0.16	0.13	0.15	0.17	0.17	0.18
Vegetable Juice	0.82	0.87	0.90	0.92	0.86	0.87	0.87	0.96	0.96
Citrus Nectar	12.51	11.17	10.47	9.45	8.57	8.30	8.28	8.30	7.85
Other Juice/Nectar	6.67	5.37	6.40	7.92	8.02	7.96	7.89	8.19	8.31
Total	39.61	37.22	39.40	40.51	40.72	41.22	41.21	40.97	40.51

Source: Fruit Juice Association, Bonn, Annual Report 1999, page 42.

Table 16: Per Capita Consumption of Beverages in Germany (in liter)

	1992	1993	1994	1995	1996	1997	1998	1999
Non-alcoholic	212.1	209.8	226.7	231.7	230.6	239.9	240.7	248.4
Fruit Juices/Nectars	38.3	39.4	40.5	40.7	41.1	41.2	41.0	40.5
Carbonated drinks	88.8	85.2	89.1	93.1	92.8	98.7	99.6	103.7
Mineral/ table waters	85.0	85.2	97.1	97.9	96.7	100.0	100.1	104.2
Alcoholic	179.0	167.8	170.8	168.3	162.5	161.9	157.9	158.4
Beer	144.2	135.9	139.1	137.7	131.7	131.2	127.5	127.5
Wine	19.5	17.5	18.0	17.4	18.2	18.2	18.1	18.5
Fruit wine	2.9	2.1	1.9	1.7	1.6	1.6	1.6	1.6
Sparkling wine	5.0	5.0	5.1	4.8	4.6	4.8	4.7	4.9
Spirits	7.4	7.3	6.7	6.5	6.3	6.1	6.0	5.9
Housedrinks 2/	291.0	286.6	278.8	273.5	278.0	266.4	271.9	277.5
TOTAL	679.2	664.2	676.3	673.5	671.1	668.0	670.5	684.3

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

Source: Fruit Juice Association Bonn, Annual Report 1999, page 10.

Table 17: Per Capita Consumption of Apple Juice and Apple Fruit Drinks in Germany (in kg)

	1991	1992	1993	1994	1995	1996	1997	1998	1999
Apple Juice	11.31	12.44	13.00	14.45	14.76	18.82	19.79	19.71	21.00

Source: Fruit Juice Association, Bonn, Annual Report, several issues.

Table 18: Per Capita Consumption of Fruit Juices/Nectars in European Countries and the USA (in liter)

	1991	1992	1993	1994	1995	1996	1997	1998	1999 1/
Germany	37.2	38.3	39.4	40.4	40.7	41.2	41.2	41.0	40.5
France	8.5	10.0	11.0	15.0	16.5	18.0	18.0	18.1	18.6
Netherlands	22.5	22.3	22.1	24.0	24.4	26.0	26.7	26.7	26.5
Belgium/Lux.	15.0	16.0	16.5	18.0	19.4	20.2	20.8	20.8	20.5
Italy	7.6	7.9	8.0	9.0	9.0	9.5	9.6	9.6	10.0
Great Britain	18.9	18.5	18.5	18.6	19.6	19.1	19.5	19.5	20.2
Ireland	8.5	8.5	8.6	9.5	10.4	11.7	12.0	12.3	12.5
Denmark	19.5	19.1	18.8	18.7	18.5	16.9	17.5	17.5	18.0
Greece	5.0	5.7	5.8	6.0	6.6	6.7	6.8	6.8	7.0
Spain	12.6	13.6	14.0	15.0	15.4	15.6	15.6	15.6	25.8
Portugal	2.8	3.2	3.2	3.5	5.3	6.2	6.5	6.5	6.8
TOTAL EU-12	17.9	18.6	19.0	19.9	--	--	--	--	--
Austria	28.5	28.6	29.5	30.5	31.4	33.0	34.5	36.1	37.4
Sweden	19.5	20.4	20.5	20.5	20.1	20.6	20.6	20.6	21.0
Finland	15.2	15.7	16.2	21.0	23.6	25.1	25.1	25.1	25.5
TOTAL EU-15	--	--	--	--	21.3	21.9	21.9	22.0	22.3
Norway	14.0	14.6	15.0	16.0	19.5	18.6	18.6	23.8	24.5
Switzerland	34.1	34.3	33.5	33.5	30.0	28.6	30.0	30.0	30.0
United States	29.0	29.0	30.0	30.0	30.0	30.0	30.0	30.0	30.0

1/ Estimates.
Source: Fruit Juice Association Bonn, Annual Report 1999, page 43.

Table 19: German Fruit Juice Industry in Figures, Financial Year 1999

Fruit juice producers	450
Employees	7,000
Turnover	DM 5.8 billion
Industrial production of juices, nectars, etc.	4.6 billion liters
Per-capita consumption	40.5 liters
Fruit processing	600,000 MT
Imports	DM 1.5 billion
Exports	DM 1.05 billion

Source: Verband der deutschen Fruchtsaft-Industrie Bonn, Daten und Fakten zur deutschen Fruchtsaft-Industrie 1999.

Table 20: Structure of the German Fruit Juice Industry (1999, (98), in million DM)

Turnover in DM	Number of Companies 1/	%	Total turnover 1999 in million DM	%
up to 500,000	51 (51)	25.1	11	0.2
over 500,000 - 1 million	29 (28)	14.3	20	0.4
over 1 - 2 million	24 (25)	11.8	31	0.5
over 2 - 5 million	33 (28)	16.3	110	1.9
over 5 - 10 million	18 (18)	8.9	127	2.2
over 10 - 20 million	8 (10)	3.9	117	2.0
over 20 - 50 million	25 (22)	12.3	822	14.5
over 50 - 100 million	2 (2)	1.0	128	2.3
over 100 - 200 million	6 (5)	3.0	870	15.3
over 200 million	7 (7)	3.4	3,453	60.7
Total /2	203 (196)	100.0	5,689	100.0

1/ Members of the Association as per January 1, 2000 (1999); not included are the approx. 228 smaller members being organized in regional associations as well as about 17 “outsiders.”
2/ Industry’s total turnover in 1999 (domestic and abroad) was approximately DM 5.8 billion (1998: about DM 5.3 billion).

Source: Verband der deutschen Fruchtsaft-Industrie Bonn, Daten und Fakten zur deutschen Fruchtsaft-Industrie 1999.

Table 21: Regional Distribution of Fruit Juice Producers

Association's area	Number of companies 1/					Turnover in Million DM				
	1995	1996	1997	1998	1999	1995	1996	1997	1998	1999
Baden-Wuerttemberg	32	34	34	33	34	561	598	660	557	591
Bavaria	20	19	21	21	20	218	223	187	191	152
Brandenburg/Berlin	16	16	14	13	12	38	42	50	56	61
Hesse	12	13	14	13	11	458	410	357	743	822
Mecklenburg-Western Pomerania	3	3	3	3	3	45	40	38	40	38
North (Hamburg, Bremen, Lower-Saxony, Schleswig-Holstein)	32	28	30	29	31	1,319	1,302	1,325	1,195	1,477
North-RhineWestphalia	28	28	29	29	32	1,164	1,250	1,298	1,385	1,477
Rhineland-Palatinate/Saarland	28	28	27	29	32	862	885	889	879	917
Saxony	16	16	15	14	16	57	55	72	73	79
Saxony-Anhalt	8	8	7	7	7	44	45	50	62	64
Thuringia	6	5	5	5	5	8	9	11	11	11
TOTAL	201	198	199	196	203	4,774	4,862	4,936	5,193	5,689

1/ Members of the Association: stated as per January 1 each year - here not included affiliated companies.

Source: Verband der deutschen Fruchtsaft-Industrie Bonn, Daten und Fakten zur deutschen Fruchtsaft-Industrie 1999.