Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Required Report - public distribution

Date: 9/12/2002

GAIN Report #GM2015

Germany

Fresh Deciduous Fruit

Annual

2002

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Report Highlights:
For CY 2002, German commercial apple production is estimated at 762,000 MT down 17 percent from CY 2001 due to adverse weather conditions during pollination. This is the lowest table apple harvest since 1995. Non-commercial production is estimated at 850,000 MT. Production of pears is forecast at 44,000 MT, down 6 percent, and production of concentrated apple juice (CAJ, 70.5 brix) at 75,000 MT up 19 percent.

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

Executive Summary

For CY 2002, German commercial apple production is estimated at 762,000 MT plus about 850,000 MT noncommercial production (private gardens and meadows). This is a drop of about 17 percent for market production against the already low crop of CY 2001, while noncommercial production increased by about 42 percent. Figures for noncommercial production are very rough estimates as no reliable data on area or tree numbers exists. Production of pears In CY 2002 is estimated at 44,000 MT (down 6 percent). Production of concentrated apple juice (CAJ) in MY 2002/2003 is estimated at 75,000 MT, up 20 percent as result of the larger non-commercial apple crop.

In CY 2001 German market apple production was a little lower than the forecast (936,000 MT) and amounted to 922,433 MT. Non commercial production is estimated at 600,000 MT. Total German production of pears was 46,823 MT. German production of CAJ (70.5 degrees brix) was 63,000 MT.

The United States is the largest single export market for German CAJ. In MY 2001/02, CAJ export to the U.S. amounted to 35,771 MT, compared to 25,562 MT in MY 2000/2001. The rise was facilitated by the German Mark-US$ exchange rate which favors German exports. In 2002/03 exports may decline due to the stronger Euro.

Traditionally, the German apple juice industry depends heavily on imports of apple juice concentrates of various densities. Major traditional suppliers are Poland, Italy, Turkey and the Czech Republic. Imports from China have increased drastically and pushed China from the number nine supplier in MY2000/01 to number three in MY 2001/02. Nevertheless, domestic production of must and cider apples in house gardens and from meadows are important to the German juice industry because of assured quality (acid content) and price.

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

Note: Noncommercial production includes apple and pear trees in house gardens and from meadows. Only a very small proportion of this production is used for fresh consumption; while the bulk is for processing into juice, sauce and spirits. Little information is available on area and trees in noncommercial production, and harvest numbers are only rough estimates. Nevertheless, particularly high or low noncommercial apple harvests may significantly influence overall apple balances, e.g., by substituting for apple imports and fresh table apple consumption or increasing processing in case of a bumper must apple crop. PSD's for pears only include *"Commercial Production"* since quantities of pears from *"Noncommercial Production"* that enter the market either in form of fresh or must pears are negligible. Most noncommercial production is consumed directly by households or on farms or distilled into spirits.

Section I: Situation and Outlook

Apples

Production

Germany is the third largest producer of apples in the EU, after Italy and France (see table 20). German apple production in CY 2002 is estimated at 762,000 MT for commercial production plus about 850,000 MT noncommercial production (private gardens and meadows). This is a drop of about 17 percent for market production against the already low crop of 922,433 MT in CY 2001, while noncommercial production increased by about 42 percent from about 600,000 MT in CY 2001.

The drop in market production is due to severe frost damage and bad weather conditions during blossom time, which resulted in poor pollination, especially of triploid varieties like Jonagold and Boskoop. Fruit quality of market fruit production is better than in CY 2001. There is substantially less hail damage than last year (only about 3.100 ha were affected so far compared to 7.300 ha in 2001) but scab is found both in commercial and noncommercial production. Russeting occurred in some "Gala" variety orchards . "Jonagold" apples occasionally show frost rings. The average fruit diameter is larger than in CY 2001, but diameter variation is higher than usual, which is a consequence of the long blossoming period (fruits from early blossoms have had more growing days than those from later blossoms).

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

Variety	1997	1998	1999	2000	2001	2002 /1	Change
Jonagold	137	188	198	210	143	136	-4.6
Elstar	98	116	149	156	137	127	-7.5
Jonagored	45	63	78	96	66	64	-3.6
Golden Delicious	69	80	73	77	66	62	-5.3
Gloster	88	99	86	81	70	51	-27.6
Idared	54	68	60	70	59	47	-20.6
Boskoop	76	91	96	86	58	46	-20.1
Gala	15	21	24	29	30	29	-2
Cox Orange	56	58	65	57	51	25	-50.8
Braeburn	4	7	8	17	16	14	-13.6
Other /2	122	186	199	251	227	161	-29
Total	764	977	1,036	1,131	922	762	-17.4

1/ Forecast.

2/ Includes Gravensteiner, James Grieve, Glockenapfel, Ingrid Marie

Source: ZMP - Der Markt Obst & Gemüse 8/2002 page 5.

Noncommercial production usually alternates between good and poor crops every other year. As CY 2001 was a "poor" year, the 42 percent increase is not as high as one would have expected under average conditions. Noncommercial production includes apples grown in house gardens and extensive production in meadows. Typically, noncommercial production is used for fresh consumption, must and spirit production, baking (cakes, tarts) or preserved foods (canned, dried, cooked). Approximately 50 percent of this production is grown in house gardens and is consumed by private households; 40 percent is comprised of must apples used in apple juice production; and the remaining 10 percent is processed into spirits. These percentages may vary depending on the price for must apples.

Consumption

Apples are by far the most popular fresh fruit in Germany, even before bananas. Per capita consumption of apples shows a large variation, depending on the non-commercial crop.

Table 2: Per Capita Consumption of Fresh Fruit in Germany

	1996/97	1997/98	1998/99	1999/00	2000/01
Apples (total)	30.5	27.2	31.7	33.6	39.5
Apples (market)	16.7	18.0	17.7	20.5	18.7
Bananas	13.6	11.2	10.3	10.8	11.9
Oranges	5.9	6.4	5.8	5.8	6.4
Easy Peelers (Clementines, tangerines etc.)	4.6	5.2	3.8	4.0	3.8
Grapes	4.2	3.8	3.8	4.2	3.6
Pears	2.5	2.3	2.7	2.8	2.3
Strawberries	2.3	2.4	2.5	2.7	2.3
other	27.3	23.0	26.2	30.2	30.0
Total Fresh Fruit	90.9	81.5	86.8	94.1	99.8

Source: ZMP

Domestic fresh consumption of commercial and non-commercial production combined was 1.6 million MT in MY 2001/02 (July/June). This figure includes 33,319 MT for processing purposes other than apple juice (e.g. apple sauce). Consumption for processing into apple juice was 536.000 MT. Intervention was down to 590 MT , a result of the lower CY 2001 harvest and the restrictive intervention rule of the EU Common Market Organization for fruit and vegetables. In MY 2002/03 fresh consumption is estimated at 1.619 million MT and processing is expected to rise to 650,000 MT due to the higher noncommercial crop. Intervention is estimated at 200 MT.

Table 3: Fresh Apples Purchased by EU Intervention Agency (in MT)								
Crop Year	1992/93	1996/97	1997/98	1998/99	1999/00	2000/01	2001/02	2002 onwards
Total EU	976,000	349,000	358,000	274,151	209,347	255,693	76,000	
Germany	46,300	3,914	1,846	7,912	2,589	11,549	590	
Maximum Intervention price Euro/100 kg		15.04	10.69	10.32	9.94	9.56	9.18	8.81
Maximum Intervention			50 pct	45 pct	40 pct	30 pct	20 pct	8.5 pct

Source: BLE Frankfurt, ZMP Bonn, EU regulation 2200/96 article 23.

Trade

In MY 2001/02, German imports of apples amounted to 680,604 MT, an increase of 6 percent from the 642,038 MT of MY 2000/01, due to the lower domestic crop. The largest supplier by far was Italy with 43 percent of the imports, followed by the Netherlands (10.4 percent), New Zealand (10 percent), France (9 percent), and Belgium (6 percent). In MY 2002/03, a rise of apple imports to 720,000 MT is expected due to the estimated lower domestic crop. Germany exports only small quantities of apples, mainly to other EU member states. Exports of table apples amounted to 66,555 MT in MY 2001/02 versus 72,721 MT in the previous MY. The drop was a result of the smaller crop in 2001.

U.S. table apple exports to Germany are marginal, therefore year to year changes do not reflect real trends but are the result of chances and coincidences. US apple exports to Germany amounted to 190 MT in MY 1999/00, 387 MT in MY 2000/01 and 107 MT in MY 2001/02.

Reasons for the low prospects of US apples in Germany are twofold: price and a difference in consumer prefernce. German consumers have a preference for striped (or two-colored) varieties with a sweet and sour taste versus single-colored "just sweet" varieties. Consequently varieties like "Elstar", "Jonagold" and "Braeburn" are much more popular in Germany than traditional US varieties like "Red Delicious" and "Golden Delicious". Germany is a price driven market and the strong U.S. dollar made U.S. apples less competitive than apples from other sources. With the stronger Euro, prospects for U.S. apple exports are expected to improve.

Marketing

Most recent data about the retail distribution of fresh fruit dates from CY 2000. The data shows that multiple retailers have increased their market share from 78.1 percent in 1995 to 82.3 percent in 2000 at the expense of market stalls and farm shops. Within the multiple retail sector, discounters (e.g. Aldi, Lidl) have gained importance.

Table 4: Retail Sales by Outlet Type						
	1995	1996	1997	1998	1999	2000
Discounter	32.4	33.6	33.8	35.2	37.2	41.3
Hypermarkets	28.8	30.1	31.2	28.7	29.4	27.6
Supermarkets	16.9	16.3	16.1	15.2	14.7	13.4
Total Multiple retailers	78.1	80	81.1	79.1	81.3	82.3
Markets Stalls	12.4	12	11.1	12	10.9	9.4
Farm Shops	3.7	3.2	3.1	3.4	3.5	3.3
Other	5.8	4.8	4.7	5.5	4.3	5

Source: ZMP based on GfK

In the past years parallel marketing of old and new harvest Jonagold apples resulted in price drops and marketing problems. The three leading Jonagold producing countries - Germany, Belgium, Netherlands - have agreed to stop marketing old season Jonagold apples at the latest on August 31 of each year, in order to prevent oversupplies in the fall.

In MY 2002/2003 the German Fruit Promotion Organization (Deutsche Obstwerbung e.V.) will spend 286,850 Euro on generic apple promotion (general promotion without reference to origin of the apples). 60 percent of the money is supplied by the German fruit industry, 40 percent is co-financed by the EU.

Also, apples and pears will likely benefit from the "5 a day" campaign that was started in Germany in 2000. The campaign encourages consumers to eat 5 portions of vegetable and fruit each day for the benefit of their health. The Federal Ministry of Consumer Protection, Food and Agriculture has taken patronage over the campaign. Among financial supporters of the campaign are the German Society for Nutrition, the German Cancer Society, the German fruit and vegetable industry, as well as processing and retail companies.

Pears

While Germany is the third largest producer of apples in the EU, for pears it only ranks at number 7. Commercial pear production in 2002 is estimated at 44,000 MT (down 6 percent). Final German pear production in 2001 was 46,823 MT compared to 65,162 MT in 2000; 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 does not enter any data for the noncommercial pear crop into the PSD table. The three most important pear varieties grown in Germany are *Alexander Lucas, Williams Christ (=Bartlett),* and *Conference*.

Per capita consumption of table pears (without house gardens) varies between 2.3 and 2.8 kg in recent years. Consumption of fresh table pears in MY 2001/02 (July/June) was 195,617 MT. Intervention of pears is traditionally marginal in Germany. In MY 2001/02 there was no pear intervention in Germany.

Table 5: Fresh Pears Purchased by EU Intervention Agency (in MT)							
Crop Year	1992/93	1996/97	1997/98	1998/99	1999/00	2000/01	2001/02
Total EU	21.419355	177000	86000	67444	88750	71668	36000
Germany	333	92	-	20	3	42	-

Source: BLE, Frankfurt; ZMP Bonn

Pears for processing, mainly for spirits, originating from commercial production, amounted to 1,262 MT in MY 2001/02 after 2,184 MT in MY 2000/01.

Total imports of pears amounted to 159,758 MT in MY 2001/02, a rise of 6 percent compared to the previous MY due to the lower domestic crop . Main suppliers were Italy with about 41 percent of the imports, followed by Argentina (about 16 percent), Spain and South Africa (about 13 percent each). Pear imports supplied roughly 80 percent of domestic consumption in MY 2001/02, while in MY2000/01 only 70 percent of domestic consumption was imported. Due to the low domestic crop, in MY 2001/02 pear imports are expected to rise to 170,000 MT (up 6 percent).

Imports from the United States almost doubled from 2,103 MT in MY 2000/01 to 4,133 MT in MY 2001/02. This makes the United States the number seven supplier of fresh table pears to Germany (number four for non-EU suppliers). Reasons for the increase are not entirely clear, however it is likely that the imports have benefitted from the weakening U.S dollar towards the end of the MY.

Exports of pears from Germany were slightly down in MY 2001/02 at 10,164 MT compared to 10,654 MT in MY 2000/01.

Concentrated Apple Juice (CAJ)

The total volume of apple juice concentrate (70.5 degrees brix) pressed from must apples ("Eigenkelterung" or production from domestic and imported must or diverted table apples) amounted to 63,000 MT in 2001, about half of the 122,199 MT of the previous year. The drop can be attributed to high beginning stocks and high must apple prices as consequence of the much smaller apple crop in 2001 compared to the bumper crop of 2000. For 2002, CAJ production is estimated at 75,000 MT due to the higher noncommercial apple crop of 850,000 MT in 2002.

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 2000 and 2001, 1.108 million MT and 536,000 MT respectively, of apples entered juice production. For 2002 this number is expected rise to approximately 650,000 MT of must apples processed into apple juice.

Fruit juices and fruit juice drinks are very popular in Germany. The per capita consumption of more than 40 liters per year is the highest in the EU and 30 percent above per capita consumption in the United States.

Table 6: Per Capita Consumption of Fruit Juices/Nectars in European Countries and the USA (in liter)							
	1995	1996	1997	1998	1999	2000	2001*
Germany	40.7	41.2	41.2	41.0	40.5	40.6	40.3
Austria	31.4	33.0	34.5	36.1	37.4	37.8	35.6
Finland	23.6	25.1	25.1	25.1	25.5	26.1	35.0
Netherlands	24.4	26.0	26.7	26.7	26.5	26.1	25.5
Sweden	20.1	20.6	20.6	20.6	21.0	21.5	23.0
Denmark	18.5	16.9	17.5	17.5	18.0	19.0	22.7
France	16.5	18.0	18.0	18.1	18.6	20.5	21.8
Spain	15.4	15.6	15.6	15.6	25.8	16.5	21.0
Great Britain	19.6	19.1	19.5	19.5	20.2	19.0	20.5
Belgium/Lux	19.4	20.2	20.8	20.8	20.5	20.5	19.9
Greece	6.6	6.7	6.8	6.8	7.0	8.5	16.3
Ireland	10.4	11.7	12.0	12.3	12.5	13.3	15.6
Italy	9.0	9.5	9.6	9.6	10.0	10.5	11.7
Portugal	5.3	6.2	6.5	6.5	6.8	7.1	10.8
TOTAL EU-15	21.3	21.9	21.9	22.0	22.3	22.6	24.2
Norway	19.5	18.6	18.6	23.8	24.5	25.5	31.4
Switzerland	30.0	28.6	30.0	30.0	30.0	30.0	27.7
United States	30.0	30.0	30.0	30.0	30.0	30.0	30.0
* Estimates.							

Source: VdF, Association of the German Fruit Juice Industry, Annual Report 2001, page 43.

In CY 2001 per capita consumption of apple juice and apple juice drinks increased again and reached 21.17 kg.

Table 7: Per Capita Consumption of Apple Juice/Apple Fruit Drinks and Citrus juice/Citrus Fruit drinks in Germany (in kg)							
	1995	*1996*	*1997*	*1998*	*1999*	*2000*	*2001*
Applejuice/drink	*14.76*	*18.82*	*19.79*	*19.71*	*21.00*	*21.11*	*21.17*
Citrus juice/drink	*18.73*	*18.88*	*18.81*	*18.71*	*17.70*	*17.67*	*17.53*

Source: VdF, Association of the German Fruit Juice Industry, Annual Report, several issues, table 27.

Accurate trade figures are difficult to retrieve, as there is little ascertainable information about the strength of imported/exported CAJ. Therefore the recalculated figures for CAJ at 70.5 brix should be viewed with due caution.

Traditionally, the German apple juice industry depends heavily on imports of apple juice concentrates of various densities. In MY 2001/02, calculated German imports of CAJ at 70.5 brix were at 363,551 MT. Imports of CAJ are expected to decline in MY2002/03 as stocks are very high and the domestic must apple crop is forecast to be higher in 2002 than in 2001.

Until 12/31/2001 EU customs regulations, and hence German trade statistics, distinguished between apple juice concentrates below 1.33 density (representing approximately 51 percent of imports) and above 1.33 density. In CY 2001 Poland was the main supplier of CAJ of below 1.33 density, and held an import market share of around 52 percent. Other major suppliers of CAJ with a density below 1.33 are The Czech Republic (19 percent) and Hungary (7 percent). About 6 percent of the CAJ imports originated in EU countries, with Italy, Austria and the Benelux countries being the main EU supplier.

Poland was also the largest supplier of CAJ above 1.33 density in CY 2001 with an import share of about 32 percent. Italy, the second-largest supplier of this density, had an import share of around 17 percent for this density in CY 2000. Turkey ranked third with an import share of 16 percent.

Starting from 01/01/2002, for statistical purposes, tariff codes were changed. The tariff rates were not affected. Now there are three groups:

- apple juice below 20 brix, the majority under this code will be single strength fruit juice
- apple juice with more than 20 brix but not more than 67 brix, mostly half concentrate
- apple juice above 67 brix, CAJ

This change helps to get a better pictures of the concentration levels of imported/exported, CAJ, however, there is still a lot of guess work involved.

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 (at 70.5 brix) to the United States totaled 25,562 MT in MY 2000/01 and 35,771 MT in MY 2001/02. The rise was facilitated by the German Mark-US$ exchange rate which favors German exports. In 2002/03 exports may decline due to the stronger Euro.

Section II: Statistical Tables

Note: The PSD tables for apples and CAJ are connected. Therefore figures for "Processing" in the PSD for apples only include apples for juice production. Apples for other processing purposes (e.g. applesauce, canned apples, spirits, bakeries) are included in "Domestic consumption".

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

Note: U.S. dollar/DM/Euro exchange rates have been as follows:

Euro (**i**)/German mark: **i** 1 = DM 1.95583,
i /U.S. dollar: **i** 1 = $ 0.9930 (*Handelsblatt* 9/06/2002) .

Table 8: PSD for Fresh Apples (in MT)

PSD Table						
Country	Germany					
Commodity	Fresh Apples				(HA)(1000 TREES)(MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		07/2000		07/2001		07/2002
Area Planted	35,793	35,793	35,793	36,124	0	36,124
Area Harvested	35,793	35,793	35,793	36,124	0	36,124
Bearing Trees	58,412	58,412	58,412	58,382	0	58,382
Non-Bearing Trees	0	0	0	0	0	0
Total Trees	58,412	58,412	58,412	58,382	0	58,382
Commercial Production	1,130,802	1,130,802	936,000	922,433	0	762,000
Non-Comm. Production	1,500,000	1,500,000	600,000	600,000	0	850,000
TOTAL Production	2,630,802	2,630,802	1,536,000	1,522,433	0	1,612,000
TOTAL Imports	642,038	642,038	854,000	680,604	0	720,000
TOTAL SUPPLY	3,272,840	3,272,840	2,390,000	2,203,037	0	2,332,000
Domestic Fresh Consump	2,080,571	2,080,571	1,723,000	1,599,892	0	1,618,800
Exports, Fresh Only	72,720	72,720	65,000	66,555	0	63,000
For Processing	1,108,000	1,108,000	600,000	536,000	0	650,000
Withdrawal From Market	11,549	11,549	2,000	590	0	200
TOTAL UTILIZATION	3,272,840	3,272,840	2,390,000	2,203,037	0	2,332,000

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

Table 9: Import Prices for Fresh Apples

Prices Table			
Country	Germany		
Commodity	Fresh Apples		
Prices in	US $	per uom	MT
Year	2000	2001	% Change
Jan	448.56	451.85	0.73%
Feb	380.40	522.13	37.26%
Mar	515.29	555.45	7.79%
Apr	525.02	595.85	13.49%
May	580.11	567.67	-2.14%
Jun	598.45	613.67	2.54%
Jul	603.19	669.38	10.97%
Aug	576.96	695.35	20.52%
Sep	429.14	641.73	49.54%
Oct	322.51	381.74	18.37%
Nov	243.06	374.58	54.11%
Dec	339.71	463.31	36.38%

Source: German Federal Office of Statistics, Wiesbaden

Table 10: German Imports of Fresh Apples (in MT)

Import Trade Matrix			
Country	Germany		
Commodity	Fresh Apples		
Time period	July/June	Units:	MT
Imports for:	2000		2001
U.S.	387	U.S.	107
Others		Others	
ITALY	273,838	ITALY	294,263
NETHERLANDS	88,431	NETHERLANDS	71,391
FRANCE	70,818	NEW ZEALAND	68,481
NEW ZEALAND	54,417	FRANCE	60,959
BELGIUM	35,196	BELGIUM	38,877
ARGENTINA	26,092	ARGENTINA	30,020
CZECH REPUBLIC	23,272	SOUTH AFRICA	26,419
AUSTRIA	18,405	POLAND	22,665
SOUTH AFRICA	14,309	CZECH REPUBLIC	15,986
BRAZIL	12,608	CHILE	14,584
Total for Others	617,386		643,645
Others not Listed	24,265		36,852
Grand Total	642,038		680,604
Intra-EU	491,487		483,579
Extra -EU	150,551		197,025

Note: 2000 trade data cover July 2000 through June 2001
2001 trade data cover July 2001 through June 2002.

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

Table 11: German Exports of Fresh Apples (in MT)

Export Trade Matrix			
Country	Germany		
Commodity	Fresh Apples		
Time period	July/June	Units:	MT
Exports for:	2000		2001
U.S.	0	U.S.	0
Others		Others	
NETHERLANDS	12,922	NETHERLANDS	13,179
DENMARK	10,998	DENMARK	10,654
FINLAND	7,551	FRANCE	7,199
AUSTRIA	5,081	AUSTRIA	5,887
FRANCE	4,848	RUSSIA	4,409
RUSSIA	4,435	FINLAND	3,854
BELGIUM	3,822	BELGIUM	3,724
SWEDEN	3,247	SWEDEN	3,265
LITHUANIA	3,170	ITALY	2,275
BELARUS	2,647	Czech Republic	1,548
Total for Others	58,721		55,994
Others not Listed	13,999		10,561
Grand Total	72,720		66,555
Intra-EU	55,408		54,294
Extra -EU	17,312		12,261

Note: 2000 trade data cover July 2000 through June 2001
2001 trade data cover July 2001 through June 2002.

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

Table 12 : PSD for Fresh Pears (in MT)

PSD Table						
Country	Germany					
Commodity	Fresh Pears				(HA)(1000 TREES)(MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		07/2000		07/2001		07/2002
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	2,346	0	2,346
Non-Bearing Trees	0	0	0	0	0	0
Total Trees	2,342	2,342	2,342	2,346	0	2,346
Commercial Production	65,162	65,162	45,551	46,823	0	44,000
Non-Comm. Production	0	0	0	0	0	0
TOTAL Production	65,162	65,162	45,551	46,823	0	44,000
TOTAL Imports	150,754	150,754	170,000	159,758	0	161,000
TOTAL SUPPLY	215,916	215,916	215,551	206,581	0	205,000
Domestic Fresh Consump	203,036	203,036	206,000	195,155	0	195,250
Exports, Fresh Only	10,654	10,654	8,751	10,164	0	8,750
For Processing	2,184	2,184	800	1,262	0	1,000
Withdrawal From Market	42	42	0	0	0	0
TOTAL UTILIZATION	215916	215916	215551	206581	0	205000

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

Table 13: Import Prices for Fresh Pears

Prices Table			
Country	Germany		
Commodity	Fresh Pears		
Prices in	US $	per uom	MT
Year	2000	2001	% Change
Jan	884.68	764.05	-13.64%
Feb	869.61	764.98	-12.03%
Mar	839.40	778.85	-7.21%
Apr	747.11	726.75	-2.73%
May	747.11	660.03	-11.66%
Jun	748.69	631.44	-15.66%
Jul	786.21	702.21	-10.68%
Aug	638.98	611.56	-4.29%
Sep	610.80	640.41	4.85%
Oct	616.67	724.25	17.45%
Nov	632.73	728.48	15.13%
Dec	676.55	813.66	20.27%

Source: German Federal Office of Statistics, Wiesbaden

Table 14: German Imports of Fresh Pears (in MT)

Import Trade Matrix			
Country	Germany		
Commodity	Fresh Pears		
Time period	July/June	Units:	MT
Imports for:	2000		2001
U.S.	2,103	U.S.	4,133
Others		Others	
ITALY	70,168	ITALY	65,745
ARGENTINA	29,340	ARGENTINA	25,520
SPAIN	11,602	SPAIN	20,243
SOUTH AFRICA	8,069	SOUTH AFRICA	20,161
FRANCE	7,895	CHILE	8,455
BELGIUM	7,392	FRANCE	6,550
NETHERLANDS	6,074	BELGIUM	3,244
CHILE	6,064	NETHERLANDS	2,038
TURKEY	1,070	TURKEY	1,566
CHINA	276	CHINA	1,560
Total for Others	147,950		155,082
Others not Listed	701		543
Grand Total	150,754		159,758
Intra-EU	103210		97921
Extra -EU	47544		61837

Note: 2000 trade data cover July 2000 through June 2001
2001 trade data cover July 2001 through June 2002.

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

Table 15: German Exports of Fresh Pears (in MT)

Export Trade Matrix			
Country	Germany		
Commodity	Fresh Pears		
Time period	July/June	Units:	MT
Exports for:	2000		2001
U.S.	0	U.S.	0
Others		Others	
DENMARK	3,002	NETHERLANDS	2,039
FRANCE	1,753	FRANCE	1,801
ITALY	1,385	DENMARK	1,590
NETHERLANDS	1,175	ITALY	1,253
AUSTRIA	799	AUSTRIA	1,191
GREAT BRITAIN	475	GREAT BRITAIN	1,072
SWEDEN	463	GREECE	267
FINLAND	423	PORTUGAL	192
RUSSIA	250	SPAIN	170
PORTUGAL	192	IRELAND	142
Total for Others	9,917		9,717
Others not Listed	737		447
Grand Total	10,654		10,164
Intra-EU	10,132		9,840
Extra-EU	522		324

Note: 2000 trade data cover July 2000 through June 2001
2001 trade data cover July 2001 through June 2002.

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

Table 16: PSD for Concentrated Apple Juice (CAJ) converted to 70.5 brix (in MT)

PSD Table						
Country	Germany					
Commodity	Concentrated Apple Juice				(MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		07/2000		07/2001		07/2002
Deliv. To Processors	1,108,000	1,108,000	600,000	536,000	0	650,000
Beginning Stocks	127,092	127,092	169,986	169,986	180,000	191,400
Production	122,199	122,199	75,000	63,000	0	75,000
Imports	312,567	312,567	300,000	363,551	0	330,000
TOTAL SUPPLY	561,858	561,858	544,986	596,537	180,000	596,400
Exports	86,484	86,484	90,000	124,269	0	128,000
Domestic Consumption	305,388	305,388	274,986	280,868	0	283,400
Ending Stocks	169,986	169,986	180,000	191,400	0	185,000
TOTAL DISTRIBUTION	561,858	561,858	544,986	596,537	0	596,400

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

Table 17: Import prices for CAJ

Prices Table			
Country	Germany		
Commodity	Concentrated Apple Juice		
Prices in	US $	per uom	MT
Year	2000	2001	% Change
Jan	953.51	632.32	-33.69%
Feb	975.13	594.18	-39.07%
Mar	887.36	587.81	-33.76%
Apr	916.90	595.89	-35.01%
May	848.87	536.19	-36.83%
Jun	830.42	520.63	-37.31%
Jul	840.80	585.22	-30.40%
Aug	826.71	502.11	-39.26%
Sep	738.30	572.64	-22.44%
Oct	613.76	621.48	1.26%
Nov	642.40	596.25	-7.18%
Dec	583.52	902.83	54.72%

Source: German Federal Office of Statistics, Wiesbaden

Table 18: German Imports of CAJ at 70.5 brix (in MT)

Import Trade Matrix			
Country	Germany		
Commodity	Concentrated Apple Juice		
Time period	July/June	Units:	MT
Imports for:	2000		2001
U.S.	69	U.S.	309
Others		Others	
POLAND	125,794	POLAND	147,468
ITALY	37,419	ITALY	33,473
TURKEY	32,286	CHINA	31,374
CZECH REPUBLIC	24,973	CZECH REPUBLIC	30,878
HUNGARY	16,964	TURKEY	22,387
SWITZERLAND	15,064	AUSTRIA	21,746
UKRAINE	14,101	HUNGARY	17,707
AUSTRIA	13,038	IRAN	16,269
CHINA	12,378	UKRAINE	13,685
IRAN	8,007	SWITZERLAND	7,439
Total for Others	300,024		342,426
Others not Listed	15,302		20,816
Grand Total	315,395		363,551
Intra-EU	55,458		62,542
Extra -EU	259,937		301,009

Note: 2000 trade data cover July 2000 through June 2001
2001 trade data cover July 2001 through June 2002.

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

Table 19: German Exports of CAJ at 70.5 brix (in MT)

Export Trade Matrix			
Country	Germany		
Commodity	Concentrated Apple Juice		
Time period	July/June	Units:	
Exports for:	2000		2001
U.S.	25,562	U.S.	35,771
Others		Others	
NETHERLANDS	12,875	NETHERLANDS	23,092
GREAT BRITAIN	12,051	GREAT BRITAIN	10,510
ITALY	5,632	FRANCE	7,976
BELGIUM	5,237	BELGIUM	7,923
DENMARK	5,128	AUSTRIA	7,626
FRANCE	4,562	DENMARK	6,221
FINLAND	3,381	ITALY	4,927
JAPAN	3,152	GREECE	3,428
GREECE	2,714	FINLAND	3,396
AUSTRIA	2,175	NORWAY	3,074
Total for Others	56,907		78,173
Others not Listed	6,350		10,325
Grand Total	88,819		124,269
Intra-EU	54,826		77,841
Extra -EU	33,993		46,409

Note: 2000 trade data cover July 2000 through June 2001
2001 trade data cover July 2001 through June 2002.

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

Table 20: EU Market Production of Apples by Country (in 1,000 MT)

Country	1992	1998	1999	2000	2001	2002 /1	Change
Italy	2,368	2,165	2,196	2,206	2,172	2,324	7.0
France	2,344	1,750	2,230	2,260	1,938	1,972	1.8
Germany	1,108	977	1,036	1,131	922	762	-17.4
Spain	1,005	680	837	699	820	687	-16.2
United Kingdom	388	217	256	195	212	145	-31.4
Netherlands	640	507	575	500	475	355	-25.3
Belgium	482	407	534	500	337	307	-8.8
Greece	305	356	257	288	194	240	23.8
Portugal	275	166	227	206	240	265	10.4
Denmark	43	29	32	31	29	23	-20.4
Austria	86	128	148	161	156	163	4.7
Sweden	27	18	19	23	23	20	-12.5
TOTAL / 2	9,071	7,400	8,347	8,200	7,517	7,263	-3.4

1/ Forecast.

2/ Discrepancies are due to rounding.

Source: ZMP - Der Markt - Obst & Gemüse 8/2002 page 2/ Prognosfruit Convention 2002, Trento, Italy.

Table 21: Market Production of Apples in the EU by Variety (in 1,000 MT)

Variety	1992	1998	1999	2000	2001	2002 /1	Change
Golden Delicious	3,232	2,698	2,950	2,542	2,546	2,712	6.5
Red Delicious	1,101	761	858	729	692	726	5.0
Gala	110	454	561	621	650	750	15.4
Jonagold 2	791	714	842	797	596	543	-8.8
Elstar	314	359	428	403	391	359	-8.2
Granny Smith	418	369	385	401	327	352	7.7
Braeburn	-	100	174	201	203	234	15.4
Cox Orange	321	182	202	145	162	98	-39.3
Boskop	255	159	196	174	131	86	-34.9
Jonagored	-	116	151	169	146	118	-19.3
Morgenduft	290	187	158	129	113	138	22.0
Idared	153	135	137	145	119	113	-5.6
Kanada Renette	123	110	106	105	86	104	21.8
Gloster	260	136	113	104	86	73	-15.3
Fuji	-	30	56.232	65	65	83	28.7
Pink Lady	-	5	15	26	45	58	29.5
Other	1,535	896	1,028	1,451	1,160	727	-37.3
TOTAL	9,085	7,410	8,360	8,208	7,517	7,274	-3.2
1/ Forecast.							
2/ Includes mutants except Jonagored.							

Source: ZMP Der Markt - Obst & Gemüse 8/2001 page 3, based on Prognosfruit Convention 2002, Trento, Italy, FAS calculation.

Table 22: EU Market Production of Pears by Country (in 1,000 MT)							
Country	1992	1998	1999	2000	2001	2002 /1	Change
Italy	1,264	1,115	784	876	793	858	8.2
Spain	602	563	682	595	661	600	-9.2
France	394	244	288	259	254	236	-7.1
Netherlands	115	140	135	195	70	175	150.0
Belgium	111	151	165	180	89	145	64.0
Portugal	97	15	140	94	135	113	-16.3
Germany	55	55	54	65	47	44	-6.0
United Kingdom	25	25	18	34	33	34	3.3
Greece	94	63	62	53	47	34	-26.5
Denmark	6	5	4	6	6	5	-9.1
Sweden		1	2	2	1	2	25.5
TOTAL	2,762	2,377	2,334	2,359	2,136	2,247	5.2
1/ Forecast							

Source: ZMP Der Markt - Obst & Gemüse 8/2002 page 12, based on Eurofel,CSO

Table 23: EU Market Production of Pears by Variety (in 1,000 MT)							
Variety	1992	1998	1999	2000	2001	2002 /1	Change
Conference	427	551	587	570	495	589	19.0
Williams Christ (=Bartlett)	326	309	254	286	269	263	-2.2
Abate Fetel	274	309	212	242	255	255	0.0
Rocha	-	10	100	?	130	110	-15.4
Guyot	217	112	135	107	76	111	46.1
Doyenne de Comice	201	177	107	131	68	125	83.8
Kaiser Alexander	141	88	51	51	50	47	-6.0
Passa Crassana	134	58	45	24	23	21	-8.7
Blanquilla	183	226	233	218	240	192	-20.0
Coscia	170	80	116	107	99	95	-4.0
Red Bartlett	41	44	29	30	28	32	14.3
Kristalli	35	26	25	28	17	13	-23.5
Other	617	388	440	565	386	394	2.1
TOTAL	2,766	2,377	2,334	2,359	2,136	2,247	5.2
1/ Forecast.							

Source: ZMP Der Markt - Obst & Gemüse 8/2002 page 13, based on CSO, Eurofel.

Table 24: Structure of the German Fruit Juice Industry (01.01.2002, (2001), in million Euro)

Turnover in DM	Number of Companies /1	%	Total turnover 2000 in million DM	%	Euro
up to 500,000	59 (53)	28.6	6	0.2	6,100,885
over 500,000 - 1 million	27 (25)	13.1	10	0.3	9,873,069
over 1 - 2 million	22 (26)	10.7	16	0.5	16,018,637
over 2 - 5 million	29 (29)	14.1	50	1.6	50,165,092
over 5 - 10 million	19 (20)	9.2	67	2.2	67,496,180
over 10 - 20 million	10 (10)	4.9	67	2.2	67,090,608
over 20 - 50 million	20 (22)	9.7	334	10.8	333,764,587
over 50 - 100 million	8 (5)	3.9	249	8.1	248,950,600
over 100 - 200 million	5 (6)	2.4	383	12.4	382,721,633
over 200 million	7 (7)	3.4	1903	61.7	1,903,085,353
Total /2	206 (203)	100	3085	100	3,085,266,644

1/ Members of the Association as per January 1, 2002 (2002); not included are the approx. 243 smaller members being organized in regional associations as well as about 16 "outsiders."

2/ Industry's total turnover in 2001 (domestic and abroad) was approximately Euro 3.2 billion (2000: about Euro 3.0 billion).

Source: VdF, Association of the German Fruit Juice Industry, Annual Report 2001, page 5.