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Germany

Fresh Deciduous Fruit

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> Report Highlights: The revised estimate for German commercial apple production in CY 2001 is 936,000 MT, down 17 percent compared to CY 2000. Production of pears is estimated at 45,551 MT (down 31 percent), and production of concentrated apple juice (CAJ) is estimated at 75,000 MT (down 39 percent). Imports and exports of fresh apples and pears from and to the United States are marginal. The United States is the largest single export market for German CAJ.

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

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Executive Summary

German apple production in CY 2001 is estimated at 1.532 million MT (932,000 MT commercial production and 600,000 MT noncommercial production). Compared to CY 2000 this is a drop of 41 percent in total crop production, with commercial production down 17 percent and noncommercial production down 60 percent. Production of pears is estimated at 45,551 MT (down 31 percent). Production of concentrated apple juice (CAJ) is estimated at 75,000 MT (down 39 percent).

For MY 2001/02 (July/June) domestic fresh consumption of apples is forecast to decline by 17 percent compared to MY 2000/01 to 1.723 million MT and processing is expected decline by 46 % to 600,000 MT due to a lower noncommercial crop and the high CAJ stocks of processors. Intervention is estimated at 2,000 MT.

Final figures for apple imports in MY 2000/01 are at 642,038 MT, a drop of 18 percent from the 787,692 MT of MY 1999/00, which is attributed to the favorable domestic supply situation. For MY 2001/02 a rise of imports of apples to 900,000 MT is expected due to the estimated lower domestic crop. Germany exports only small quantities of apples, 72,720 MT in MY 2000/01.

Prospects for U.S. table apple exports to Germany are limited. In MY 2000/01, U.S. table apple exports contributed less than 1 percent to Germany's total imports of apples. No increase is expected for MY 2001/02 as the U.S.\$-DM exchange rate is unfavorable for U.S. exports.

Germany is not a big pear producer, most of the demand is met by imports. In MY 2000/01 the United States was the number eight supplier of fresh table pears to Germany (2,103 MT). While the small German harvest generally favors imports, the high exchange rate for the U.S. \$ will obstruct further increases of U.S. pear exports to Germany.

The United States is 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 25,562 MT in MY 2000/01. Exports may rise due to the German Mark-US\$ exchange rate which favors German exports.

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

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

This report gives figures for commercial and noncommercial apple production. Commercial apple production includes apples grown by commercial orchards and destined for the fresh market. Nevertheless a small proportion of this crop may be used for processing because of inferior quality (e.g. hail damage).

Figures for CY 2001 commercial apple production are still preliminary. The original forecast of July was at 890,000 MT. While the Federal Office for Statistics adjusted this forecast in August downward to 832,157 MT (26 percent less than in CY 2000), the Central Market and Price Reporting Agency adjusted it upward to 936,000 MT (17 percent less than in CY 2000). The latter seems to be the more accurate for two reasons: 1.) Stocks held by German producer organizations on November 1, 2001 were only 14 percent less than the year before. 2.) From August through October 2001 producer organizations sold about the same volume to the fresh market as during that period the year before and sales to the processing industry were down about 15 %. A decline of production of 17 percent therefore seems more likely than one of 26 percent.

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. There is no official data available for non commercial production, because the last census for noncommercial trees was carried out in 1965, and no longer reflects the actual situation. For CY 2001 non commercial apple production is estimated at 600,000 MT down from 1,500,000 MT in CY 2000.

Total German apple production can therefore only be estimated too. In CY 2001 it is estimated at 1.560 million MT (960,000 MT commercial production and 600,000 MT noncommercial production), down 41 percent from CY 2000.

This sharp drop is largely due to a phenomenon called "alternance", which describes the fact a year of record production is followed by a year with a rather low crop, because during the blossom setting stage (July/August) for next year's crop the trees need all their strength to support the present year's fruit. This phenomenon especially appears in noncommercial production, as in commercial orchards thinning is used to prevent the trees from over exerting themselves.

Late blossoming and cold weather during June led to smaller fruit sizes except with triploid varieties such as Jonagold. Fruit quality is good, neither scab nor russeting is a problem this season. However, hail damage - especially in the Lake Constance area - may result in the conversion of table apples away from fresh to processing into apple juice.

Domestic fresh consumption for MY 2001/02 (July/June) is forecast at 1.723 million MT and processing is expected to decline to 600,000 MT due to a lower noncommercial crop and the well filled CAJ stocks of processors.

Intervention is estimated at 2,000 MT.

Final figures for imports in MY 2000/01 are at 642,038 MT, a drop of 18 percent from the 787,692 MT of MY 1999/00, due to the favorable domestic supply situation. For MY 2001/02 a rise of imports of apples to 900,000 MT is expected due to the estimated lower domestic crop. Germany exports only small quantities of apples, 72,720 MT in MY 2000/01.

Prospects for U.S. table apple exports to Germany are limited. In MY 2000/01, U.S. table apple exports amounted to 387 MT, this is less than 1 percent of Germany's total imports of 642,038 MT. First of all, German consumers have a preference for striped (or two-colored) varieties with a sweet and sour taste versus single-colored "just sweet" varieties. Consequently varieties like "Elstar", "Gala" and "Braeburn" are much more popular than varieties like "Golden Delicious" or "Red Delicious". Secondly, Germany is a price driven market. And although prices are expected to rise in MY2001/02, they still remain on a low level compared to other countries, and the U.S.\$-DM-exchange rate is unfavorable for U.S. exports.

Pears

Germany is not a big pear producer, and commercial pear production in 2001 is estimated at 45,551 MT (551 MT more than estimated in July) versus 65,162 MT in CY 2000, a drop of 30 percent. No reliable data for noncommercial production of pears is available. Also, only small quantities of noncommercial pear production enter the pear market; most are consumed directly by households or on farms either fresh or processed. Therefore, post doesn't enter any data for the noncommercial pear crop into the PSD table.

Consumption of fresh table pears in MY 2001/02 (July/June) is forecast at 206,000 MT, in MY 2000/01 it was at 203,039 MT. Total imports of pears are expected to rise by 11 percent to 170,000 MT in MY 2001/02 from 150,757 MT in MY 2000/01, because of the lower domestic crop. Most of the German domestic pear crop of CY 2001 will be sold by the end of the year 2001, which leaves the pear market almost entirely to imports for the first month of CY 2002.

In MY 2000/01 the United States exported 2,103 MT of pears to Germany which made them the number eight supplier of fresh table pears to Germany (number four for non-EU suppliers). While the low German harvest generally favors imports, the high exchange rate for the U.S. \$ will obstruct further increases of U.S. pear exports to Germany.

Exports of pears from Germany in MY 2001/02 are expected at 8,750 MT. In MY 2000/01 they were at 10,654 MT.

Concentrated Apples Juice (CAJ)

The total volume of must apples pressed ("Eigenkelterung" or production from domestic and imported must or diverted table apples) into apple juice concentrate (70.5 degrees brix) was at 122,199 MT in MY 2000/01 and is a reflection of

the record apple crop in 2000. For 2001 CAJ production is estimated at 75,000 MT due to high stocks of CAJ and a significantly lower noncommercial apple crop of only 600,000 MT in 2001. Although hail damage to commercial apples may result in the additional conversion of approximately 100,000 MT of table apples for must production, the total amount of domestic apples available for processing in MY 2001/02 is estimated at only 54 percent of last year's figure

German must apples - and to a small extent domestic table apples - form the basis of apple juice production in Germany, especially since German must apples provide the quality (acid content) and price required by the German apple juice processors. In MY 2000/01, 1.108 million MT of apples entered juice production. For MY 2001/02 this number is expected to drop to approximately 600,000 MT of must apples processed into apple juice.

Traditionally, the German apple juice industry depends heavily on imports of apple juice concentrates of various densities. In MY 2000/01, German imports of apple juice concentrate are estimated at 312,567 MT. Poland is by far the most important supplier of concentrated apple juice (CAJ) to German processors and bottlers. In MY 2000/01, Poland supplied 125,794 MT of CAJ of 70.5 brix to Germany. Poland was followed by Italy with 37,415 MT and Turkey with 32,286 MT. Imports of CAJ are expected to decline in MY 2001/02 as stocks are very high.

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

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

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

Section II: Statistical Tables

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

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

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

1991: \$1 = DM 1.66;	1996: $\$1 = DM 1.50;$
1992: $\$1 = DM 1.52;$	1997: $\$1 = DM 1.70;$
1993: $\$1 = DM \ 1.65;$	1998: $\$1 = DM 1.76;$
1994: \$1 = DM 1.61;	1999: $\$1 = DM 1.66;$
1995: \$1 = DM 1.43;	2000: $\$1 = DM 2.12.$
Euro (i)/German mark:	$i \ 1 = DM \ 1.95583,$
U.S. dollar/ i :	US\$ 1 = i 1.12
US dollar/ DM:	US\$ 1 = DM 2.19 (Handelsblatt 12/10/2001, page 28).

Table 1: PSD table for Fresh Apples (in MT)

PSD Table						
Country	Germany					
Commodity	Fresh Apples				(HA)(1000 T	REES)(MT)
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin	07/1	.999	07/2	000	07/2	001
Area Planted	35,793	35,793	35,793	35,793	35,793	35,793
Area Harvested	35,793	35,793	35,793	35,793	35,793	35,793
Bearing Trees	58,412	58,412	58,412	58,412	58,412	58,412
Non-Bearing Trees	0	0	0	0	0	0
Total Trees	58,412	58,412	58,412	58,412	58,412	58,412
Commercial Production	1,036,000	1,036,000	1,130,802	1,130,802	890,000	936,000
Non-Comm. Production	900,000	900,000	1,500,000	1,500,000	600,000	600,000
TOTAL Production	1,936,000	1,936,000	2,630,802	2,630,802	1,490,000	1,536,000
TOTAL Imports	787,692	787,692	642,047	642,038	900,000	854,000
TOTAL SUPPLY	2,723,692	2,723,692	3,272,849	3,272,840	2,390,000	2,390,000
Domestic Fresh Consump	1,815,149	1,815,149	2,080,580	2,080,571	1,723,000	1,723,000
Exports, Fresh Only	67,954	67,954	72,720	72,720	65,000	65,000
For Processing	838,000	838,000	1,108,000	1,108,000	600,000	600,000
Withdrawal From Market	2,589	2,589	11,549	11,549	2,000	2,000
TOTAL UTILIZATION	2,723,692	2,723,692	3,272,849	3,272,840	2,390,000	2,390,000

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

	1998/99	1999/2000	2000/01	2001/02	Change in percent
Total Apples	383,500	385,000	392,500	336,700	-14
thereof					
Jonagold*	117,800	125,700	120,800	105,000	- 13
Elstar	47,300	62,300	60,200	54,100	-10
Idared	41,200	33,000	41,100	31,700	-23
Golden					
Delicious	33,100	35,900	31,800	29,100	-9
Gloster	44,900	31,800	30,900	26,800	-13
Boskoop	40,200	24,600	31,800	22,000	-31
Cox Orange	16,400	21,200	13,700	14,200	3
Gala	7,300	8,400	10,300	9,600	-7
Braeburn	6,400	7,500	8,500	9,100	7
* Jonagold and sim	nilar varieties				

Table 2: Stocks of Table Apples at German Producer Organizations (in MT) on November 1, 2001

Source: ZMP Marktkommentar, December 7, 2001

Prices Table			
Country	Germany		
Commodity	Fresh Apples		
Prices in	US\$	per uom	MT
Year	1999	2000	% Change
Jan	597.50		
Feb	622.95	380.40	-38.94%
Mar	590.35	515.29	-12.71%
Apr	601.87	525.02	-12.77%
May	681.87	580.11	-14.92%
Jun	762.55	598.45	-21.52%
Jul	676.20	603.19	-10.80%
Aug	705.74	576.96	-18.25%
Sep	419.92	429.14	2.20%
Oct	346.79	322.51	-7.00%
Nov	267.54	243.06	-9.15%
Dec	300.26	339.71	13.14%

Table 3: Import Prices for Fresh Apples (in US\$ per MT)

Source: Federal Office of Statistics, Wiesbaden

Table 4: German Import of Fresh Apples (in MT)

Import Trade Matrix			
Country	Germany		
Commodity	Fresh Apples		
Time period	Jul/Jun	Units:	
Imports for:	1999		2000
U.S.	193	U.S.	387
Others		Others	
Italy	254,926	Italy	273,838
Netherlands	185,241	Netherlands	88,431
France	106,623	France	70,818
Belgium	69,299	New Zealand	54,417
New Zealand	59,441	Belgium	35,196
Argentina	23,174	Argentina	26,092
Brazil	17,155	Czech Republic	23,272
South Africa	17,011	Austria	18,405
Czech Republic	15,631	South Africa	14,309
Chile	14,880	Brazil	12,608
Total for Others	763,381		617,386
Others not Listed	24,118		24,265
Grand Total	787,692		642,038

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

Table 5: German Export of fresh Apples (in MT)

Export Trade Matrix			
Country	Germany		
Commodity	Fresh Apples		
Time period	Jul/Jun	Units:	MT
Exports for:	1999		2000
U.S.	0	U.S.	0
Others		Others	
Denmark	11,761	Netherlands	12,922
Finland	6,141	Denmark	10,998
Netherlands	5,662	Finland	7,551
Russia	5,026	Austria	5,081
Great Britain	4,446	France	4,848
France	4,216	Russia	4,435
Sweden	4,055	Belgium	3,822
Lithuania	3,534	Sweden	3,247
Belarus	3,317	Lithuania	3,170
Belgium	3,267	Belarus	2,647
Total for Others	51,425		58,721
Others not Listed	16,528		13,999
Grand Total	67,953		72,720

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

Table 6: PSD for Fresh Pears (in MT)

PSD Table						
Country	Germany					
Commodity	Fresh Pears				(HA)(1000 T	REES)(MT)
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin	07/1	.999	07/2	000	07/2	2001
Area Planted	2,372	2,372	2,372	2,372	2,372	2,372
Area Harvested	2,372	2,372	2,372	2,372	2,372	2,372
Bearing Trees	2,342	2,342	2,342	2,342	2,342	2,342
Non-Bearing Trees	0	0	0	0	0	0
Total Trees	2,342	2,342	2,342	2,342	2,342	2,342
Commercial Production	54,042	54,042	65,162	65,162	45,000	45,551
Non-Comm. Production	0	0	0	0	0	0
TOTAL Production	54,042	54,042	65,162	65,162	45,000	45,551
TOTAL Imports	167,770	167,770	150,757	150,754	170,000	170,000
TOTAL SUPPLY	221,812	221,812	215,919	215,916	215,000	215,551
Domestic Fresh Consump	211,892	211,892	203,039	203,036	205,750	206,000
Exports, Fresh Only	8,754	8,754	10,654	10,654	8,500	8,751
For Processing	1,163	1,163	2,184	2,184	750	800
Withdrawal From Market	3	3	42	42	0	0
TOTAL UTILIZATION	221,812	221,812	215,919	215,916	215,000	215,551

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

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Table 7: German	Import Prices	for Fresh Pears	(in US\$ per MT)
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Prices Table			
Country	Germany		
Commodity	Fresh Pears		
Prices in	US\$	per uom	MT
Year	1999	2000	% Change
Jan	827.29	884.68	6.94%
Feb	843.66	869.61	3.08%
Mar	881.15	839.40	-4.74%
Apr	810.65	747.11	-7.84%
May	772.42	747.11	-3.28%
Jun	855.99	748.69	-12.54%
Jul	741.06	786.21	6.09%
Aug	672.77	638.98	-5.02%
Sep	681.00	610.80	-10.31%
Oct	740.40	616.67	-16.71%
Nov	775.63	632.73	-18.42%
Dec	825.67	676.55	-18.06%

Source: Federal Office of Statistics, Wiesbaden

Table 8: German Imports of Fresh Pears (in MT)

Import Trade Matrix			
Country	Germany		
Commodity	Fresh Pears		
Time period	Jul/Jun	Units:	MT
Imports for:	1999		2000
U.S.	1797	U.S.	2103
Others		Others	
Italy	66,736	Italy	70,168
Argentina	31,193	Argentina	29,340
Spain	22,433	Spain	11,602
France	12,324	South Africa	8,069
Chile	9,102	France	7,895
South Africa	8,909	Belgium	7,392
Belgium	6,781	Netherlands	6,074
Netherlands	6,125	Chile	6,064
Turkey	1,191	Turkey	1,070
New Zealand	331	China	276
Total for Others	165,125		147,950
Others not Listed	848		701
Grand Total	167,770		150,754

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

Table 9: German Export of Fresh Pears (in MT)

Export Trade Matrix			
Country	Germany		
Commodity	Fresh Pears		
Time period	Jul/Jun	Units:	
Exports for:	1999		2000
U.S.	0	U.S.	0
Others		Others	
Denmark	2,098	Denmark	3,002
Netherlands	1,340	France	1,753
France	898	Italy	1,385
Spain	897	Netherlands	1,175
Italy	772	Austria	799
Austria	754	Great Britain	475
Poland	698	Sweden	463
Portugal	240	Finland	423
Great Britain	222	Russia	250
Finland	180	Portugal	192
Total for Others	8,099		9,917
Others not Listed	655		737
Grand Total	8,754		10,654

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

PSD Table						
Country	Germany					
Commodity	Concentrated Apple Juice			(MT)		
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin	07/1999		07/2000		07/2001	
Deliv. To Processors	838,000	838,000	1,108,000	1,108,000	600,000	600000
Beginning Stocks	128,903	107,631	171,294	127,092	171,294	169986
Production	98,560	98,560	140,000	122,199	0	75000
Imports	279,690	266,658	200,000	312,567	0	300000
TOTAL SUPPLY	507,153	472,849	511,294	561,858	171,294	544986
Exports	79,536	76,048	85,000	86,484	0	90000
Domestic Consumption	256,323	269,709	255,000	305,388	0	274986
Ending Stocks	171,294	127,092	171,294	169,986	0	180000
TOTAL DISTRIBUTION	507,153	472,849	511,294	561,858	0	544986

Table 10: PSD for Concentrated Apple Juice (CAJ) at 70.5 degrees brix (in MT)

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

Table 11 : Average German Import Price for Concentrated Apple Juice of various strength in US\$ per MT

Prices Table			
Country	Germany		
Commodity	Concentrated Apple Juice		
Prices in	US\$	per uom	MT
Year	1999	2000	% Change
Jan	756.75	953.18	25.96%
Feb	740.03	974.25	31.65%
Mar	742.56	887.14	19.47%
Apr	664.17	916.92	38.06%
May	649.09	848.01	30.65%
Jun	605.59	830.22	37.09%
Jul	626.86	840.80	34.13%
Aug	752.15	825.91	9.81%
Sep	891.46	737.62	-17.26%
Oct	1,091.19	613.72	-43.76%
Nov	1,080.69	642.40	-40.56%
Dec	994.67	581.65	-41.52%

Source: Federal Office of Statistics, Wiesbaden

Table 12: German Import of Concentrated Apple Juice (CAJ) (in MT)

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

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

Table 13: German Export of Concentrated Apple Juice (CAJ) (in MT)

Export Trade Matrix			
Country	Germany		
Commodity	Concentrated Apple Juice		
Time period	Jul/Jun	Units:	MT
Exports for:	1999		2000
U.S.	18,741	U.S.	25,652
Others		Others	
Denmark	11,761	Netherlands	12,546
Finland	6,141	Denmark	12,051
Netherlands	5,662	Finland	5,632
Russia	5,026	Austria	5,128
Great Britain	4,446	France	5,048
France	4,216	Russia	3,563
Sweden	4,055	Belgium	3,381
Lithuania	3,534	Sweden	3,152
Belarus	3,317	Great Britain	2,714
Belgium	3,267	Lithuania	2,146
Total for Others	51,425		55,361
Others not Listed	5,485		6,334
Grand Total	75,651		87,347

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