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Competitor Report

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Germany

Fresh Deciduous Fruit Semi-Annual 2000

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Report Highlights:

Commercial production of apples was revised downwards for 1998 and 1999 due to a change in counting methods prior to harvest.

Production of Concentrated Apple Juice (CAJ) in MY1999/2000 (July/June) may suffer due to low production of must apples in Poland, Germany's main supplier. Meanwhile, German processors missed the chance to buy enought must and table apples from their own domestic supplies. As a result, German exports of CAJ to the United States will likely decline in MY1999/2000.

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

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Executive Summary

German apple production in 1998 was 1.95 million MT or 33 percent above the 1997 crop. Total German production of pears in 1998 was 55,000 MT, 54 percent higher than in 1997. A mild winter and less hail damage in spring boosted blossoming considerably. German production of concentrated apple juice (CAJ) (70.5 brix) was 67,025 MT in 1998, less than in 1997. The United States remains the largest single export market for German CAJ, purchasing an estimated 26,371 MT in MY 1997/98 (July/June).

German apple production in 1999 is estimated at 1.81 million MT, down from the 1998 level despite an increase in commercial production. This is due to a drop in non-commercial production by 200,000 MT. Pear production in 1999 is estimated at 49,000 MT. Production of CAJ in MY1999/2000 is estimated at 65,000 MT due to reduced purchases of apples from commercial production. Imports of CAJ are estimated at only 245,000 MT in response to lower availability of must apples and CAJ in Poland (for processing in Germany.) Consequently, reexports of processed CAJ to the United States are likely to decline in MY1999/2000.

Due to the high German apple and EU pear harvest, U.S. exports of apples and pears to Germany are estimated to decline. The lower apple harvest of Germany’s main EU suppliers is overcompensated by an increased German apple production. Other disadvantages for U.S. exporters are an unfavorable exchange rate and high EU apple stocks.

German production of CAJ for 1998 is expected at 67,025 MT. The United States remains the largest single export market for German CAJ. Exports to the United States totaled 46,683 MT in 1996/97. For MY 1997/98, exports dropped sharply to 26,317 MT due to overall low exports. For MY 1998/99, exports are expected to decline further to 21,447 MT.

Traditionally, the German apple juice industry depends heavily on imports of apple juice concentrates of various densities. Major suppliers are Poland, Italy, Turkey and Moldavia.

Note: Commercial production of apples in Germany had to be revised for 1998 and 1999 because of a change in official German production estimates. Apparently, production had been systematically over-estimated in 1998 and therefore also in 1999. Current PS&D data address this error.

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. In 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: Non-commercial production includes apple and pear trees in house gardens and in meadows. Part of this production is for fresh consumption; nevertheless, it is estimated that the bulk is for processing into juice, sauce and spirits. Information is scarce for area and trees in noncommercial production, and harvest numbers are 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"* as there is no reliable data available for *"Noncommercial Production."* Furthermore, only small quantities of pears from *"Noncommercial Production"* enter the market as either fresh or must pears for fresh consumption or processing. Most is consumed directly by households or on farms.

Note: In former East Germany, under market conditions after unification, most of the old apple orchards were not economical, and, with the help of EU financial support, two uprooting programs were administered between 1990 and 1992 and again in 1994 and 1995 in eastern Germany. These programs considerably reduced the number of apple orchards, hectares and trees (in orchards) 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 have increased slightly since 1995.

In former West Germany, area in apple orchards 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 western and eastern 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 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: In recent years the U.S. dollar/German mark exchange rate has been as follows:

1991: $1 = DM 1.66;	1996: $1 = DM 1.50;
1992: $1 = DM 1.52;	1997: $1 = DM 1.70;
1993: $1 = DM 1.65;	1998: $1 = DM 1.76,
1994: $1 = DM 1.61;	1999: $1 = DM 1.85. Estimate.
1995: $1 = DM 1.43;	

Further exchange rates are for: Euro (i)/German mark: i 1 = DM 1.95583,
i /U.S. dollar: i 1 = $ 1.0062 (12/01/1999),
U.S. dollar/ i : $ 1 = i 0.9936.

Section I: Situation and Outlook

Apples

German apple supply in 1998 amounted to 1,950,000 MT; noncommercial production was 1,100,000 MT; and commercial production was 850,000 MT.

German apple production in 1999 is an estimated 1,810,000 MT; noncommercial production, 900,000 MT; and commercial production, 910,000 MT. A mild winter supported fruit settings and early growth. Conditions during blossoming were generally favorable. Additionally, bigger fruit sizes may boost noncommercial production and commercial production. Production in 1999 falls short of the 1998 results due to some rain damage during the later blossoming period in the Bodensee area, low temperatures in May/June and lack of rain in the Rhineland growing area, which mainly affected noncommercial production.

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 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 1.735 million MT in MY 1998/99 (July/June) and consumption for processing was 800,000 MT. Only 8,242 MT were sold into intervention. In MY 1999/2000 fresh consumption is estimated at 1.655 million MT and processing at 800,000 MT due to a lower crop in both commercial and noncommercial production.

Imports in MY 1998/99 are estimated at 650,000 MT, a decline from MY 1997/98 triggered by the favorable harvest in both noncommercial and commercial orchards. For MY 1999/2000 slightly higher imports of apples at 700,000 MT are expected due to the estimated lower domestic commercial and especially non-commercial crop. Germany exports only small quantities of apples annually.

Consequently, prospects for U.S. table apple exports to Germany are low. Also, domestic apple prices may not increase due to the strong harvest, and the exchange rate is unfavorable. Generally, the German market is a small niche 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.

EU-financed uprooting programs resulted in a decline of approximately 8,000 ha of commercial apple orchards in 1997, including 1,000 ha in Germany. No further uprooting program was established for 1998 or 1999.

Pears

Final German pear production in 1998 increased by 51 percent to 55,000 MT including commercial production after 37,000 MT in 1997; 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.

Germany is not a big pear producer, and pear production in 1999 is estimated at 49,000 MT. Production is likely to decline slightly compared to the good harvest of 1998 due to less favorable weather conditions.

Consumption of fresh table pears in MY 1998/99 was 255,649 MT. Pear imports supply roughly 90 percent of domestic consumption. Pears for processing, diverted from commercial production, amounted to 1,679 MT.

Total imports of pears are expected to be 215,000 MT in MY 99/2000, mainly from Italy.

With U.S. exports to Germany of 5,388 MT in MY1997/98 and 5,024 MT in MY1998/99, the United States ranks as a significant non-EU supplier of fresh table pears to Germany.

Exports of U.S. table pears in 1998/99 may decline slightly 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 with deliveries from the southern hemisphere.

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 1998 amounted to 67,025 MT. A production of 65,000 MT is expected for 1999. German processors missed the chance to buy sufficient table and must apples at early harvest when prices stayed low and may now not be able to buy much needed raw material because prices for apples for processing have skyrocketed.

German must apples and - to a small extent, domestic table apples - form the basis for apple juice production in Germany, especially since German must apples provide the quality (acid content) required by the German apple juice processors. For 1998 and 1999, approximately 800,000 MT of must apples may enter juice processing.

Traditionally, the German apple juice industry depends heavily on imports of apple juice concentrates of various densities. Poland is the main supplier of CAJ of below 1.33 density and much of this density is imported for processing and reexports. In 1999, production shortfalls of must apples in Poland may significantly reduce Germany’s import capacity. Consequently, German production of CAJ and its reexports to third countries, mainly the United States, may suffer in MY1999/2000.

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 48 percent in CY1998. Other major suppliers of CAJ with a density below 1.33 are Moldavia and Switzerland, with an import market share of eight and seven percent respectively. Significant EU suppliers are Italy and Spain, which together held a market share of around seven percent in 1998.

Italy was the largest supplier of CAJ above 1.33 density in 1998 with an import share of about 32 percent. Turkey, the second-largest supplier of this density, had an import share of 28 percent for this density.

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 are expected to decline to 21,447 MT in 1998/99 due to overall low export demand 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.

Section II: Statistical Tables

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

		1997		1998		1999
	Old	New	Old	New	Old	New
Market Year Begin		07/1997		07/1998		07/1999
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	765,000	765,000	977,000	850,000	937,000	910,000
Non-Comm. Production	700,000	700,000	1,100,000	1,100,000	900,000	900,000
TOTAL Production	1,465,000	1,465,000	2,077,000	1,950,000	1,837,000	1,810,000
TOTAL Imports	867,358	867,358	650,000	650,000	700,000	700,000
TOTAL SUPPLY	2,332,358	2,332,358	2,727,000	2,600,000	2,537,000	2,510,000
Domestic Fresh Consumption	1,441,008	1,441,008	1,861,758	1,734,758	1,682,000	1,655,000
Exports, Fresh Only	59,504	59,504	57,000	57,000	50,000	50,000
For Processing	830,000	830,000	800,000	800,000	800,000	800,000
Withdrawal From Market	1,846	1,846	8,242	8,242	5,000	5,000
TOTAL UTILIZATION	2,332,358	2,332,358	2,727,000	2,600,000	2,537,000	2,510,000

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 post 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	1997	1998	% Change			1997	1998	% Change
Jan	700	575	-17.9%		Jul	719	746	3.8%
Feb	751	523	-30.4%		Aug	716	814	13.7%
Mar	760	626	-17.6%		Sep	489	606	23.9%
Apr	721	657	-8.9%		Oct	301	454	50.8%
May	825	749	-9.2%		Nov	350	384	9.7%
Jun	761	760	-0.1%		Dec	449	485	8.0%

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

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

Imports for	1997		1998
U.S.	310	U.S.	721
Others		Others	
Italy	307,906	Italy	250,000
France	132,372	Netherlands	100,000
Netherlands	110,896	France	70,000
Poland	60,282	New Zealand	44,005
Czech Republic	50,023	Czech Republic	32,827
New Zealand	48,092	South Africa	26,544
Belgium/Lux.	34,144	Argentina	24,303
South Africa	31,852	Belgium/Lux	17,903
Argentina	30,075	Chile	14,725
Austria	22,616	Austria	10,325
Total for Others	828,258	Total for Others	590,632
Others not listed	38,790	Others not listed	58,790
Grand Total	867,358	Grand Total	650,143

Exports for	1997		1998
U.S.	0	U.S.	0
Others		Others	
Denmark	9,840	Denmark	9,905
Netherlands	9,567	Netherlands	9,567
Belgium/Lux.	7,617	France	5,601
Finland	5,927	Sweden	5,344
France	4,787	Finland	4,833
Sweden	4,779	Great Britain	4,315
Great Britain	4,216	Belgium	3,239
Russia	4,210	Russia	2,874
Italy	2,176	Czech Republic	1,941
Austria	1,324	Spain	1,414
Total for Others	54,443	Total for Others	49,033
Others not listed	5,061	Others not listed	8,061
Grand Total	59,504	Grand Total	57,094

Note: 1997 trade data cover the time period July 1997 through June 1998.
1998 trade data cover the time period July 1998 through June 1999.

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

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

		1997		1998		1999
	Old	New	Old	New	Old	New
Market Year Begin		07/1997		07/1998		07/1999
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	37,000	37,000	45,000	55,000	0	49,000
Non-Comm. Production	0	0	0	0	0	0
TOTAL Production	37,000	37,000	45,000	55,000	0	49,000
TOTAL Imports	212,198	212,198	220,000	210,000	0	215,000
TOTAL SUPPLY	249,198	249,198	265,000	265,000	0	264,000
Domestic Fresh Consumption	238,348	237,574	254,000	255,649	0	255,000
Exports, Fresh Only	9,850	9,851	10,000	7,672	0	8,000
For Processing	1,000	1,753	1,000	1,679	0	1,000
Withdrawal From Market	0	20	0	0	0	0
TOTAL UTILIZATION	249,198	249,198	265,000	265,000	0	264,000

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 post 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	1997	1998	% Change			1997	1998	% Change
Jan	826	1,084	31.2%		Jul	663	846	27.6%
Feb	798	1,073	34.5%		Aug	647	852	31.7%
Mar	857	889	3.7%		Sep	729	814	11.7%
Apr	807	822	1.9%		Oct	907	803	-11.5%
May	839	779	-7.2%		Nov	962	796	-17.3%
Jun	810	827	2.1%		Dec	1,009	825	-18.2%

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

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

Imports for	1997		1998
U.S.	5,388	U.S.	5,024

Others		Others	
Italy	75,098	Italy	100,000
South Africa	26,804	Argentina	26,902
Argentina	25,802	South Africa	13,466
Spain	25,789	Spain	12,044
France	21,780	France	11,619
Netherlands	12,626	Chile	6,560
Chile	7,098	Netherlands	5,418
Belgium/Lux.	7,039	Belgium/Lux.	4,659
Turkey	2,079	Turkey	1,665
Portugal	494	Portugal	494
Total for Others	204,609	Total for Others	182,827
Others not listed	2,201	Others not listed	22,149
Grand Total	212,198	Grand Total	210,000

Exports for	1997		1998
U.S.	0	U.S.	0
Others		Others	
Russia	2,434	Denmark	1,701
Denmark	2,238	Netherlands	1,216
Sweden	1,134	France	1,164
Austria	1,107	Sweden	583
Netherlands	1,099	Great Britain	486
Poland	511	Austria	475
Italy	451	Italy	438
France	207	Poland	427
Belgium/Lux.	172	Norway	316
Great Britain	147	Spain	268
Total for Others	9,500	Total for Others	7,074
Others not listed	350	Others not listed	599
Grand Total	9,850	Grand Total	7,673

Note: 1997 trade data cover the time period July 1997 through June 1998.
1998 trade data cover the time period July 1998 through June 1999.

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

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

		1997		1998		1999
	Old	New	Old	New	Old	New
Market Year Begin		07/1997		07/1998		07/1999
Deliv. To Processors	830,000	830,000	800,000	800,000	800,000	800,000
Beginning Stocks	81,021	81,021	111,206	115,000	100,114	100,114
Production	73,872	73,903	74,000	67,025	70,000	65,000
Imports	291,199	294,347	265,000	254,284	260,000	245,000
TOTAL SUPPLY	446,092	449,271	450,206	436,309	430,114	410,114
Exports	85,152	85,122	100,000	79,433	82,000	62,000
Domestic Consumption	249,734	249,149	250,206	256,762	260,539	260,539
Ending Stocks	111,206	115,000	100,000	100,114	87,575	87,575
TOTAL DISTRIBUTION	446,092	449,271	450,206	436,309	430,114	410,114

Note: All data are in 70.5 degrees brix.

Year	1997	1998	% Change			1997	1998	% Change
Jan	1,075	853	-20.7%		Jul	935	729	-22.0%
Feb	1,019	816	-19.9%		Aug	861	723	-16.0%
Mar	1,019	807	-20.8%		Sep	996	760	-23.7%
Apr	1,002	833	-16.9%		Oct	1,009	741	-26.6%
May	1,003	820	-18.2%		Nov	965	625	-35.2%
Jun	983	722	-26.6%		Dec	840	708	-15.7%

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

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

Imports for	1997		1998
U.S.	18	U.S.	143
Others		Others	
Poland	112,411	Poland	71,489
Italy	40,559	Italy	47,660
Turkey	26,392	Turkey	39,716
Moldova	17,302	Switzerland	15,886
Ukraine	14,898	Czech Republic	12,709
Czech Republic	12,610	Hungary	7,943
Austria	12,605	Iran	6,355
Iran	10,167	Ukraine	6,355
Switzerland	9,827	Austria	6,355
Hungary	8,731	Moldova	6,355
Total for Others	265,502	Total for Others	220,822
Others not listed	28,827	Others not listed	33,362
Grand Total	294,347	Grand Total	254,327

Exports for	1997		1998
U.S.	26,317	U.S.	21,447
Others		Others	
Netherlands	14,928	Netherlands	14,298
Great Britain	12,396	Great Britain	11,121
Belgium/Lux	7,354	Belgium/Lux.	6,355
Denmark	4,740	Denmark	4,766
Japan	3,836	France	3,972
France	3,586	Sweden	3,177
Finland	2,815	Finland	3,177
Italy	2,046	Japan	2,383
Sweden	1,262	Norway	1,589
Russia	450	Austria	1,589
Total for Others	53,414	Total for Others	52,425
Others not listed	5,391	Others not listed	5,560
Grand Total	85,122	Grand Total	79,432

Note: 1997 trade data cover the time period July 1997 through June 1998.
1998 trade data cover the time period July 1998 through June 1999.

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

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

Variety	1995	1996	1997	1998	1999 1/
Cox Orange	43.9	49.9	57.0	54.0	57.0
Boskop	32.7	77.9	76.0	84.0	73.0
Ingrid Marie	15.9	12.8	9.8	n.a.	n.a.
Golden Delicious	56.9	72.8	63.0	72.0	70.0
Idared	43.2	57.0	46.0	68.0	65.0
Gloster	54.4	129.0	90.0	91.0	80.0
Jonagold	99.4	154.4	141.0	183.0	176.0
Jonagored	20.7	45.9	44.0	55.0	52.0
Elstar	70.0	101.8	100.0	107.0	115.0
Gala	6.1	11.6	16.0	20.0	20.0
Other 2/	144.0	175.0	128.0	245.0	230.0
TOTAL	572.6	878.1	765.0	977.0	937.0

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

Source: ZMP - Der Markt 8/99, Obst & Gemuese.

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

Country	1992	1993	1994	1995	1996	1997	1998	1999 1/
Italy	2,368	2,145	2,153	1,889	2,025	2,041	2,243	2,293

France	2,344	1,972	2,129	1,980	1,900	2,051	1,750	2,020
Germany	1,108	883	880	573	878	765	977	937
Spain	1,005	821	753	780	849	821	680	763
United Kingdom	388	360	316	254	248	152	194	209
Netherlands	640	670	600	595	490	470	507	575
Belgium	482	493	505	508	295	367	407	466
Greece	305	315	320	315	372	274	306	298
Portugal	275	222	167	175	215	250	125	250
Denmark	43	40	38	30	30	33	29	32
Ireland	9	8	9	9	8	8	8	8
Luxembourg	5	4	5	4	4	4	4	4
Austria	86	128	127	128	134	162	128	153
Sweden	27	20	20	18	19	20	18	19
TOTAL 2/	8.085	8,082	8,021	7,258	7,467	7,428	7,385	8,037

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

Source: ZMP Der Markt 8/99 - Obst & Gemuese, 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 1/**
Golden Delicious	3,232	2,684	2,995	2,785	2,803	2,962	2,698	2,886

Red Delicious	1,101	1,018	868	790	835	750	761	872
Granny Smith	418	401	407	395	440	423	377	382
Jonagold 2/	791	726	797	791	646	705	830	880
Morgenduft	290	229	219	179	200	229	202	177
CoxOrange	321	308	242	184	197	164	169	186
Boskop	255	173	210	120	134	140	151	185
Idared	153	141	143	126	140	125	137	135
Kanada Renette	123	93	146	132	112	84	109	112
Gloster	260	229	202	96	187	142	129	108
Elstar	314	335	363	336	334	314	354	393
Gala	110	128	185	208	349	412	454	575
Bramley	182	146	139	121	109	80	93	90
Braeburn	-	-	4	58	85	106	103	176
Fuji	-	-	0	17	22	34	36	54
Other	1,535	1,470	1,101	920	876	759	782	826
TOTAL 3/	9,085	8,081	8,021	7,258	7,467	7,428	7,385	8,037

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

Source: ZMP Der Markt 8/99 - Obst & Gemuese, 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**
Total EU	976,000	638,000	208,000	349,000	358,000	271,755
Germany	46,300	26,400	300	3,914	1,846	8,242

Source: ZMP.

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

Country	1992	1993	1994	1995	1996	1997	1998	1999 1/
Italy	1,264	938	1,026	958	1,074	659	1,115	797
France	394	226	336	316	333	246	244	248
Germany	55	43	39	40	37	37	55	49
Spain	602	459	580	457	650	577	563	575
United Kingdom	25	44	26	36	40	25	25	11
Netherlands	115	170	140	165	135	145	140	125
Belgium	111	152	154	156	137	130	151	151
Greece	94	86	72	56	73	41	63	65
Portugal	97	87	91	87	120	165	15	175
Denmark	6	6	6	5	5	6	5	4
Sweden	–	1	2	2	2	1	1	1
TOTAL	2,762	2,213	2,471	2,277	2,606	2,032	2,377	2,201

1/ Forecast.

Source: ZMP Der Markt 8/99 - Obst & Gemuese, 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 1/
Conference	427	410	479	472	529	470	551	544
Williams	326	236	283	294	330	192	309	221
Abate Fetel	274	212	229	197	257	180	309	221
Rocha	-	-	-	70	102	140	10	150
Guyot	217	172	182	146	169	142	112	116
Doyenne de Comice	201	179	189	175	158	116	177	120
KaiserAlexander	141	97	91	103	89	41	88	54
Passa Crassana	134	76	83	76	75	45	58	42
Blanquilla	183	100	220	180	286	236	226	224
Coscia	170	95	104	65	89	76	80	94
Red Bartlett	41	39	36	50	43	19	44	27
Kristalli	35	40	35	16	32	24	26	29
Other	617	560	539	433	445	351	388	362
TOTAL	2,766	2,216	2,471	2,277	2,606	2,032	2,377	2,201

1/ Forecast.

Source: ZMP Der Markt 8/99 - Obst & Gemuese, based on Prognosfruit.

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

Crop Year	1991/92	1992/93	1993/94	1994/95	1995/96	1996/97	1997/98	1998/99
Total EU	3,172	197,000	40,000	92,000	49,000	177,000	86,170	56,611
Germany	-	333	880	172	55	92	-	20

Source: ZMP.

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

	1995	1996	1997	1998	1997/98 % Change
Fruit/Vegetable Juices	2,352,245	2,392,661	2,532,655	2,582,221	+2.0
Fruit/Vegetable Nectares	1,251,292	1,280,779	1,353,365	1,297,803	- 4.1
MineralWaters	8,645,440	8,393,229	8,728,584	8,737,724	+0.1
Carbonated Fruit Juices	6,363,438	6,362,196	6,432,659	6,510,229	+1.2
Other Fruit Juices	647,959	714,651	811,223	915,499	+12.9
Beer	11,156,500	10,856,900	10,891,000	10,699,300	- 1.8
Total	30,416,874	30,000,416	31,052,486	30,742,776	- 0.997

Note: (Data are in 11.2 brix = single strength. To convert 11.2 brix into 70.5 brix, a conversion factor of 0.158865 was 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, in Germany)

	1991	1992	1993	1994	1995	1996	1997	1998
Apple Juice	7.84	9.44	10.31	11.60	11.79	12.15	12.17	11.71
Orange Juice	8.02	9.81	9.77	8.97	9.83	10.25	10.17	9.82
Grape Juice	1.04	1.21	1.10	1.17	1.19	1.21	1.30	1.30
Grapefruit Juice	0.25	0.30	0.33	0.32	0.33	0.33	0.36	0.37
Pear Juice	0.07	0.08	0.12	0.16	0.13	0.15	0.17	0.17
Vegetable Juice	0.82	0.87	0.90	0.92	0.86	0.87	0.87	0.96
Citrus Nectar	12.51	11.17	10.47	9.45	8.57	8.30	8.28	8.30
Other Juice/Nectar	6.67	5.37	6.40	7.92	8.02	7.96	7.89	8.19
Total	39.61	37.22	39.40	40.51	40.72	41.22	41.21	40.82

Note: New eastern German states included from 1991 onward.

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 1/
Non-alcoholic	212.1	209.8	226.7	231.7	230.6	239.9	240.5
Fruit Juices/Nectars	38.3	39.4	40.5	40.7	41.1	41.2	40.8
Carbonated drinks	88.8	85.2	89.1	93.1	92.8	98.7	99.6
Mineral/ table waters	85.0	85.2	97.1	97.9	96.7	100.0	100.1
Alcoholic	179.0	167.8	170.8	168.3	162.5	161.9	158.0
Beer	144.2	135.9	139.1	137.7	131.7	131.2	127.4
Wine	19.5	17.5	18.0	17.4	18.2	18.2	18.1
Fruit wine	2.9	2.1	1.9	1.7	1.6	1.6	1.6
Sparkling wine	5.0	5.0	5.1	4.8	4.6	4.8	4.9
Spirits	7.4	7.3	6.7	6.5	6.3	6.1	6.0
Housedrinks 2/	291.0	286.6	278.8	273.5	278.0	266.2	266.4
TOTAL	679.2	664.2	676.3	673.5	671.1	668.0	664.9

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
Apple Juice	11.31	12.44	13.00	14.45	14.76	18.82	19.79	19.71

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

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

	1991	1992	1993	1994	1995	1996	1997	1998 1/
Germany	37.2	38.3	39.4	40.4	40.7	41.2	41.2	40.8
France	8.5	10.0	11.0	15.0	16.5	18.0	18.0	18.1
Netherlands	22.5	22.3	22.1	24.0	24.4	26.0	26.7	26.7
Belgium/Lux.	15.0	16.0	16.5	18.0	19.4	20.2	20.8	20.8
Italy	7.6	7.9	8.0	9.0	9.0	9.5	9.6	9.6
Great Britain	18.9	18.5	18.5	18.6	19.6	19.1	19.5	19.5
Ireland	8.5	8.5	8.6	9.5	10.4	11.7	12.0	12.3
Denmark	19.5	19.1	18.8	18.7	18.5	16.9	17.5	17.5
Greece	5.0	5.7	5.8	6.0	6.6	6.7	6.8	6.8
Spain	12.6	13.6	14.0	15.0	15.4	15.6	15.6	15.6
Portugal	2.8	3.2	3.2	3.5	5.3	6.2	6.5	6.5
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
Sweden	19.5	20.4	20.5	20.5	20.1	20.6	20.6	20.6
Finland	15.2	15.7	16.2	21.0	23.6	25.1	25.1	25.1
TOTAL EU-15	--	--	--	--	21.3	21.9	21.9	22.0
Norway	14.0	14.6	15.0	16.0	19.5	18.6	18.6	23.8
Switzerland	34.1	34.3	33.5	33.5	30.0	28.6	30.0	30.0
United States	29.0	29.0	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 1996

Fruit juice producers	450
Employees	6,500
Turnover	DM 5.0 billion
Industrial production	4.2 billion liters
Per-capita consumption	41.1 liters
Fruit transformation	600,000 MT
Imports	DM 1.6 billion
Exports	DM 1.0 billion

Source: Verband der deutschen Fruchtsaft-Industrie Bonn.

Table 20: Structure of the German Fruit Juice Industry (1998, (97), in million DM)

Turnover in DM	Number of Companies 1/	%	Total turnover 1998 in million DM	%
up to 500,000	51 (52)	26.0	12	0.2
over 500,000 - 1 million	28 (24)	14.3	21	0.4
over 1 - 2 million	25 (31)	12.7	35	0.7
over 2 - 5 million	28 (27)	14.3	94	1.8
over 5 - 10 million	18 (18)	9.2	122	2.3
over 10 - 20 million	10 (9)	5.1	139	2.7
over 20 - 50 million	22 (22)	11.2	750	14.5
over 50 - 100 million	2 (5)	1.0	153	2.9
over 100 - 200 million	5 (5)	2.6	753	14.5
over 200 million	7 (6)	3.6	3,116	60.0
Total /2	196 (199)	100.0	5,193	100.0

1/ Members of the Association as per January 1, 1997 (1996); not included are the approx. 233 smaller members being organised in regional associations as well as about 20 “outsiders”.
2/ Industry’s total turnover in 1998 (domestic and abroad) approximately DM 5.0 billion (1995: about DM 4.9 billion).

Source: Fruit Juice Association Bonn, Annual Report 1999, page 5.

Table 21: Regional Distribution of Fruit Juice Producers

Association's area	Number of companies 1/				Turnover in Million DM			
	1995	1996	1997	1998	1995	1996	1997	1998
Baden-Wuerttemberg	32	34	34	33	561	598	660	557
Bavaria	20	19	21	21	218	223	187	191
Brandenburg/Berlin	16	16	14	13	38	42	50	56
Hesse	12	13	14	13	458	410	357	743
Mecklenburg-Western Pomerania	3	3	3	3	45		38	40
North (Hamburg, Bremen, Lower-Saxony, Schleswig-Holstein)	32	28	30	29	1,319	1,302	1,325	1,195
North-RhineWestphalia	28	28	29	29	1,164	1,250	1,298	1,385
Rhineland-Palatinate/Saarland	28	28	27	29	862	885	889	879
Saxony	16	16	15	14	57	55	72	73
Saxony-Anhalt	8	8	7	7	44	45	50	62
Thuringia	6	5	5	5	8	9	11	11
TOTAL 2/	201	198	199	196	4,774	4,862	4,936	5,193

1/ Members of the Association: stated as per January 1 each year - here not included affiliated companies.
2/ DM turnover old federal states 1996: 4,668 million.
1995: 4,582 million.
1994: 4,463 million.
1993: 4,380 million.

Source: Fruit Juice Association Bonn, Annual Report 1999, page 6.