



Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Scheduled Report - Public Distribution

“Competitor” Report

Date: September 10, 1998

GAIN Report #GM8065

Germany

Fresh Deciduous Fruit

Annual Report 1998

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Report Highlights:

Due to the high German apple and EU pear crops, U.S. exports of fresh apples and pears to Germany are estimated to decline in MY 1998/99. The United States remains the largest single export market for German concentrated apple juice (CAJ). For MY 1997/98 a sharp drop to 24,745 MT is estimated due to overall low exports. For MY 1998/99, exports are expected to rise due to higher exports of CAJ from stocks.

Includes PSD changes:
Includes Trade Matrix:

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EXECUTIVE SUMMARY

German apple production in 1998 is estimated at 2 million MT or 35 percent above the 1997 crop. Total German production of pears in 1998 is estimated at 37,000 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) is estimated at 74,000 MT in 1998, similar to 1997. The United States remains the largest single export market for German CAJ, purchasing an estimated 24,745 MT in MY 1997/98 (July/June).

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 74,000 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 a sharp drop to 24,745 MT is expected due to overall low exports. For MY 1998/99, exports are expected to rise due to higher exports of CAJ from stocks.

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: 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 on meadows. Part of this production is for fresh consumption; nevertheless, it is estimated that the bulk is for processing into juice, sauce and spirits. Few 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. For this reason, PSD's for pears only include "*Commercial Production*." This is because 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: 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 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.

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

1991: \$1 = DM 1.66;
1992: \$1 = DM 1.52;
1993: \$1 = DM 1.65;
1994: \$1 = DM 1.61;
1995: \$1 = DM 1.43;
1996: \$1 = DM 1.50;
1997: \$1 = DM 1.70;
1998: \$1 = DM 1.80 (estimate).

Further exchange rates are for: Ecu/German mark: Ecu 1 = DM 1.97292
Ecu/U.S. dollar: Ecu 1 = \$ 1.1082.

SECTION I: SITUATION AND OUTLOOK

APPLES

German apple supply in 1997 amounted to 2,346,063 MT, noncommercial production was 700,000 MT and commercial production was 765,000 MT.

German apple production in 1998 is an estimated 1,978,000 MT, noncommercial production 1,100,000 MT and commercial production 878,000 MT. A mild winter supported fruit settings and early growth. Additionally, bigger fruit sizes may boost noncommercial production 57 percent higher than in 1997, whereas commercial production may increase by 15 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 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 1.454 million MT in MY 1997/98 (July/June) and consumption for processing was 830,000 MT. Only 1,846 MT were sold into intervention. In MY 1998/99 fresh

consumption is estimated at 1.823 million MT and processing at 850,000 MT due to an increased crop in both commercial and noncommercial production.

Imports in MY 1997/98 are estimated at 881,063 MT. Higher imports of must apples compensate for a low noncommercial crop in Germany in 1997. For MY 1998/99 lower imports of apples at 750,000 MT are expected due to the estimated higher domestic commercial and 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 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.

EU-financed uprooting programs resulted in uprootings of approximately 8,000 ha of commercial apple orchards in 1997, including 1,000 ha in Germany. No further uprooting program is established for 1998.

PEARS

Final German pear production in 1997 decreased by 35 percent to 24,000 MT including commercial production; 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 1998 is estimated at 37,000 MT. Production increased by 54 percent compared to the low harvest of 1997 due to a mild winter.

Consumption of fresh table pears in MY 1998/99 is an estimated 246,000 MT. Pear imports supply roughly 90 percent of domestic consumption. Pears for processing, diverted from commercial production, are estimated to 1,000 MT.

Total imports of pears are expected to be 220,000 MT in MY 1998/99, mainly originating from Italy. With exports of 1,493 MT, 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 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 APPLE JUICE (CAJ)

The total volume of must apples pressed ("Eigenkelterung") into apple juice concentrate (70.5 brix) in 1997 is estimated at 73,872 MT, versus 68,630 MT in 1996. For 1998 it is expected around 74,000 MT.

Traditionally, the German apple juice industry depends heavily on imports of apple juice concentrates of various densities. In MY 1996/97 (for which final numbers are available), German imports of apple juice concentrate totaled 271,977 MT. Poland is by far the most important supplier of concentrated apple juice (CAJ) to German processors and bottlers. 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 52 percent in 1997. Other major suppliers of CAJ with a density below 1.33 are Moldavia and Switzerland, with an import market share of eight and six percent respectively. Significant EU suppliers are Italy and Spain, which together held a market share of around seven percent in 1997.

Turkey is the largest supplier of CAJ above 1.33 density with an import share of about 24-percent. Italy, the second-largest supplier of this density, had an import share of around 20 percent for this density in 1997.

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 31,394 MT in MY 1995/96 and increased to 46,683 MT in 1996/97. For MY 1997/98 experts expect a sharp drop to 24,745 MT, due to overall low exports and despite a favorable exchange rate which makes deliveries of German CAJ price competitive with deliveries from the southern hemisphere countries. The United States imports almost exclusively sweet CAJ of above 1.33 density. For MY 1998/99, exports are expected to rise due to higher exports of CAJ from stocks.

SECTION II: STATISTICAL TABLES

Table 1: PSD for Fresh Apples (in MT)

| PSD Table | | | | | | |
|------------------------|-----------|-----------|-----------|-----------|-----|-----------|
| Country: | Germany | | | | | |
| Commodity: | Apples | | | | | |
| | | 1996 | | 1997 | | 1998 |
| | Old | New | Old | New | Old | New |
| Market Year Begin | | 07/1996 | | 07/1997 | | 07/1998 |
| Area Planted | 35,646 | 35,646 | 35,793 | 35,793 | 0 | 35,793 |
| Area Harvested | 35,646 | 35,646 | 35,793 | 35,793 | 0 | 35,793 |
| Bearing Trees | 55,665 | 55,665 | 58,412 | 58,412 | 0 | 58,412 |
| Non-Bearing Trees | 0 | 0 | 0 | 0 | 0 | 0 |
| Total Trees | 55,665 | 55,665 | 58,412 | 58,412 | 0 | 58,412 |
| Commercial Production | 878,100 | 878,100 | 800,000 | 765,000 | 0 | 878,000 |
| Non-Comm. Production | 1,000,000 | 1,000,000 | 700,000 | 700,000 | 0 | 1,100,000 |
| TOTAL Production | 1,878,100 | 1,878,100 | 1,500,000 | 1,465,000 | 0 | 1,978,000 |
| TOTAL Imports | 737,906 | 737,906 | 850,000 | 881,063 | 0 | 750,000 |
| TOTAL SUPPLY | 2,616,006 | 2,616,006 | 2,350,000 | 2,346,063 | 0 | 2,728,000 |
| Domestic Fresh Consump | 1,783,617 | 1,723,617 | 1,595,000 | 1,454,217 | 0 | 1,823,000 |
| Exports, Fresh Only | 48,475 | 48,475 | 45,000 | 60,000 | 0 | 50,000 |
| For Processing | 780,000 | 840,000 | 710,000 | 830,000 | 0 | 850,000 |
| Withdrawal From Market | 3,914 | 3,914 | 0 | 1,846 | 0 | 5,000 |
| TOTAL UTILIZATION | 2,616,006 | 2,616,006 | 2,350,000 | 2,346,063 | 0 | 2,728,000 |

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 underreporting of official intra-EU trade data. Area planted and trees are only for commercial production for which figures are known.

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

Table 2: German Import Prices for Fresh Apples (in DM per MT)

| | | | |
|----------------------|-----------|-------|----------|
| Prices Table | | | |
| Country: | Germany | | |
| Commodity: | Apples | | |
| Year: | | | |
| | | | |
| Prices in (currency) | DM per MT | | |
| | | | |
| Year | 1996 | 1997 | % Change |
| Jan | 997 | 1,122 | 12.5% |
| Feb | 1,230 | 1,258 | 2.3% |
| Mar | 1,265 | 1,289 | 1.9% |
| Apr | 1,362 | 1,234 | -9.4% |
| May | 1,440 | 1,405 | -2.4% |
| Jun | 1,497 | 1,314 | -12.2% |
| Jul | 1,556 | 1,289 | -17.2% |
| Aug | 1,752 | 1,320 | -24.7% |
| Sep | 1,272 | 876 | -31.1% |
| Oct | 811 | 528 | -34.9% |
| Nov | 615 | 607 | -1.3% |
| Dec | 942 | 798 | -15.3% |

Exchange Rate: 1.71 (local currency/US\$).

Date of Quote: 03 September 1998.

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

Table 3: German Export of Fresh Apples (in MT)

| | | | |
|---------------------|---------|---------------|--------|
| Export Trade Matrix | | | |
| Country: | Germany | Units: MT | |
| Commodity: | Apples | | |
| Time period: | | | |
| Exports for | 1996 | | 1997 |
| U.S. | | U.S. | |
| Others | | Others | |
| Netherlands | 8,432 | Denmark | 10,015 |
| Denmark | 7,632 | Netherlands | 9,636 |
| Sweden | 5,328 | Belgium/Lux. | 8,176 |
| Russia | 4,624 | Finland | 6,280 |
| Belgium/Lux. | 3,814 | France | 4,912 |
| France | 3,680 | Sweden | 4,753 |
| Finland | 3,550 | Great Britain | 4,417 |
| Great Britain | 2,601 | Russia | 4,356 |
| Czech Republic | 1,990 | Italy | 1,655 |
| Austria | 1,779 | Austria | 1,369 |
| Total for Others | 43,430 | | 55,569 |
| Others not listed | 5,045 | | 4,431 |
| Grand Total | 48,475 | | 60,000 |

Note: 1996 trade data cover the time period July 1996 through June 1997.

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

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

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

| | | | |
|---------------------|---------|----------------|---------|
| Import Trade Matrix | | | |
| Country: | Germany | Units: MT | |
| Commodity: | Apples | | |
| Time period: | | | |
| Imports for | 1996 | | 1997 |
| U.S. | 499 | U.S. | 343 |
| Others | | Others | |
| Italy | 276,569 | Italy | 313,393 |
| France | 108,655 | France | 137,828 |
| New Zealand | 79,937 | Netherlands | 106,704 |
| Netherlands | 79,016 | Poland | 57,165 |
| South Africa | 30,336 | Czech Republic | 54,959 |
| Poland | 29,513 | New Zealand | 52,051 |
| Argentina | 27,289 | Belgium/Lux. | 34,815 |
| Czech Republic | 21,367 | South Africa | 33,003 |
| Belgium/Lux. | 27,948 | Argentina | 29,357 |
| Chile | 20,261 | Austria | 23,340 |
| Total for Others | 700,891 | | 842,615 |
| Others not listed | 36,516 | | 38,105 |
| Grand Total | 737,906 | | 881,063 |

Note: 1996 trade data cover the time period July 1996 through June 1997.

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

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

Table 5: PSD for Fresh Pears (in MT)

| | | | | | | |
|------------------------|-------------|---------|---------|---------|-----|---------|
| PSD Table | | | | | | |
| Country: | Germany | | | | | |
| Commodity: | Fresh Pears | | | | | |
| | | 1996 | | 1997 | | 1998 |
| | Old | New | Old | New | Old | New |
| Market Year Begin | | 07/1996 | | 07/1997 | | 07/1998 |
| Area Planted | 2,399 | 2,399 | 2,372 | 2,372 | 0 | 2,372 |
| Area Harvested | 2,399 | 2,399 | 2,372 | 2,372 | 0 | 2,372 |
| Bearing Trees | 1,663 | 1,663 | 2,342 | 2,342 | 0 | 2,342 |
| Non-Bearing Trees | 0 | 0 | 0 | 0 | 0 | 0 |
| Total Trees | 1,663 | 1,663 | 2,342 | 2,342 | 0 | 2,342 |
| Commercial Production | 37,000 | 37,000 | 24,800 | 24,000 | 0 | 37,000 |
| Non-Comm. Production | 280,000 | 0 | 280,000 | 0 | 0 | 0 |
| TOTAL Production | 317,000 | 37,000 | 304,800 | 24,000 | 0 | 37,000 |
| TOTAL Imports | 206,347 | 218,347 | 195,000 | 210,000 | 0 | 220,000 |
| TOTAL SUPPLY | 523,347 | 255,347 | 499,800 | 234,000 | 0 | 257,000 |
| Domestic Fresh Consump | 270,000 | 247,188 | 249,800 | 223,000 | 0 | 246,000 |
| Exports, Fresh Only | 7,567 | 7,567 | 7,000 | 10,000 | 0 | 10,000 |
| For Processing | 245,780 | 500 | 243,000 | 1,000 | 0 | 1,000 |

| | | | | | | |
|------------------------|---------|---------|---------|---------|---|---------|
| Withdrawal From Market | 0 | 92 | 0 | 0 | 0 | 0 |
| TOTAL UTILIZATION | 523,347 | 255,347 | 499,800 | 234,000 | 0 | 257,000 |

Note: The two final rows (“Withdrawal From Market” and “TOTAL UTILIZATION”) are inserted manually

because the link to the “GAIN”-Lotus template did not insert these rows from Lotus.

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 underreporting of official intra-EU trade data. Area planted and trees are only for commercial production for which figures are known.

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

Table 6: German Import Prices for Fresh Pears (in DM per MT)

| | | | |
|----------------------|-----------|-------|----------|
| Prices Table | | | |
| Country: | Germany | | |
| Commodity: | Pears | | |
| Year: | | | |
| | | | |
| Prices in (currency) | DM per MT | | |
| | | | |
| Year | 1996 | 1997 | % Change |
| Jan | 1,531 | 1,325 | -13.5% |
| Feb | 1,488 | 1,337 | -10.1% |
| Mar | 1,464 | 1,453 | -0.8% |
| Apr | 1,443 | 1,381 | -4.3% |
| May | 1,269 | 1,428 | 12.5% |
| Jun | 1,537 | 1,399 | -9.0% |
| Jul | 1,615 | 1,189 | -26.4% |
| Aug | 1,182 | 1,191 | 0.8% |
| Sep | 1,077 | 1,305 | 21.2% |
| Oct | 1,076 | 1,593 | 48.0% |
| Nov | 1,251 | 1,667 | 33.3% |
| Dec | 1,240 | 1,793 | 44.6% |

Exchange Rate: 1.71 (local currency/US\$).

Date of Quote: 03 September 1998.

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

Table 7: German Export of Fresh Pears (in MT)

| | | | |
|---------------------|---------|---------------|--------|
| Export Trade Matrix | | | |
| Country: | Germany | Units: MT | |
| Commodity: | Pears | | |
| Time period: | | | |
| Exports for | 1996 | | 1997 |
| U.S. | | U.S. | |
| Others | | Others | |
| Russia | 3,459 | Russia | 2,523 |
| Austria | 988 | Denmark | 2,347 |
| Poland | 814 | Sweden | 1,187 |
| Sweden | 498 | Austria | 1,153 |
| Netherlands | 449 | Netherlands | 1,100 |
| Italy | 401 | Poland | 461 |
| Denmark | 259 | Italy | 442 |
| Belarus | 161 | France | 216 |
| France | 93 | Belgium/Lux. | 176 |
| Great Britain | 93 | Great Britain | 134 |
| Total for Others | 7,215 | | 9,739 |
| Others not listed | 354 | | 261 |
| Grand Total | 7,569 | | 10,000 |

Note: 1996 trade data cover the time period July 1996 through June 1997.
1997 trade data cover the time period July 1997 through June 1998.

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

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

| | | | |
|---------------------|---------|--------------|---------|
| Import Trade Matrix | | | |
| Country: | Germany | Units: MT | |
| Commodity: | Pears | | |
| Time period: | | | |
| Imports for | 1996 | | 1997 |
| U.S. | 1,493 | U.S. | 6,699 |
| Others | | Others | |
| Italy | 104,499 | Italy | 66,096 |
| Argentina | 30,006 | South Africa | 31,827 |
| France | 20,853 | Argentina | 27,244 |
| South Africa | 20,624 | Spain | 24,951 |
| Spain | 15,296 | France | 22,498 |
| Chile | 10,667 | Netherlands | 12,626 |
| Netherlands | 7,763 | Chile | 7,248 |
| Belgium/Lux. | 3,867 | Belgium/Lux. | 6,280 |
| Turkey | 2,129 | Turkey | 2,629 |
| New Zealand | 424 | Portugal | 621 |
| Total for Others | 216,128 | | 202,020 |
| Others not listed | 726 | | 1,281 |
| Grand Total | 218,347 | | 210,000 |

Note: 1996 trade data cover the time period July 1996 through June 1997.

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

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

Table 9: PSD for Concentrated Apple Juice (CAJ) (in MT)

| | | | | | | |
|----------------------|---------|---------|---------|---------|-----|---------|
| PSD Table | | | | | | |
| Country: | Germany | | | | | |
| Commodity: | CAJ | | | | | |
| | | 1996 | | 1997 | | 1998 |
| | Old | New | Old | New | Old | New |
| Market Year Begin | | 07/1996 | | 07/1997 | | 07/1998 |
| Deliv. To Processors | 780,000 | 840,000 | 710,000 | 830,000 | 0 | 850,000 |
| Beginning Stocks | 91,347 | 91,347 | 81,021 | 81,021 | 0 | 111,206 |
| Production | 68,630 | 68,630 | 73,872 | 73,872 | 0 | 74,000 |
| Imports | 271,977 | 271,977 | 291,199 | 291,199 | 0 | 265,000 |
| TOTAL SUPPLY | 431,954 | 431,954 | 446,092 | 446,092 | 0 | 450,206 |
| Exports | 104,692 | 104,692 | 85,152 | 85,152 | 0 | 100,000 |
| Domestic Consumption | 246,241 | 246,241 | 249,734 | 249,734 | 0 | 250,206 |
| Ending Stocks | 81,021 | 81,021 | 111,206 | 111,206 | 0 | 100,000 |
| TOTAL DISTRIBUTION | 431,954 | 431,954 | 446,092 | 446,092 | 0 | 450,206 |

Note: All data are in 70.5 brix.

Source: Federal Office of Statistics, Fruit Juice Association Bonn, FAS/Bonn estimates.

Table 10: German Import Prices for Concentrated Apple Juice (in DM per MT)

| | | | |
|----------------------|-----------|-------|----------|
| Prices Table | | | |
| Country: | Germany | | |
| Commodity: | CAJ | | |
| Year: | | | |
| | | | |
| Prices in (currency) | DM per MT | | |
| | | | |
| Year | 1996 | 1997 | % Change |
| Jan | 997 | 1,122 | 12.5% |
| Feb | 1,230 | 1,258 | 2.3% |
| Mar | 1,265 | 1,289 | 1.9% |
| Apr | 1,362 | 1,234 | -9.4% |
| May | 1,440 | 1,405 | -2.4% |
| Jun | 1,497 | 1,314 | -12.2% |
| Jul | 1,556 | 1,289 | -17.2% |
| Aug | 1,752 | 1,320 | -24.7% |
| Sep | 1,272 | 876 | -31.1% |
| Oct | 811 | 528 | -34.9% |
| Nov | 615 | 607 | -1.3% |
| Dec | 942 | 798 | -15.3% |

Exchange Rate: 1.71 (local currency/US\$).

Date of Quote: 03 September 1998.

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

Table 11: German Export of Concentrated Apple Juice (in MT, 70.5 brix)

| | | | |
|---------------------|---------|---------------|--------|
| Export Trade Matrix | | | |
| Country: | Germany | Units: MT | |
| Commodity: | CAJ | | |
| Time period: | | | |
| Exports for | 1996 | | 1997 |
| U.S. | 46,683 | U.S. | 24,745 |
| Others | | Others | |
| Netherlands | 16,162 | Netherlands | 13,386 |
| Great Britain | 11,596 | Belgium/Lux. | 13,280 |
| Belgium/Lux. | 6,312 | Great Britain | 11,251 |
| Denmark | 5,486 | Denmark | 4,284 |
| Fance | 3,859 | Japan | 3,764 |
| Japan | 3,831 | France | 3,259 |
| Finland | 2,155 | Finland | 2,681 |
| Italy | 1,601 | Italy | 1,923 |
| Austria | 353 | Russia | 420 |
| Russia | 332 | Sweden | 1,198 |
| Total for Others | 51,687 | | 48,341 |
| Others not listed | 6,322 | | 4,961 |
| Grand Total | 104,692 | | 85,152 |

Note: 1996 trade data cover the time period July 1996 through June 1997.

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

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

Table 12: German Import of Concentrated Apple Juice (in MT, 70.5 brix)

| | | | |
|---------------------|---------|----------------|---------|
| Import Trade Matrix | | | |
| Country: | Germany | Units: MT | |
| Commodity: | CAJ | | |
| Time period: | | | |
| Imports for | 1996 | | 1997 |
| U.S. | 7 | U.S. | 18 |
| Others | | Others | |
| Poland | 89,357 | Poland | 116,589 |
| Italy | 35,350 | Italy | 46,792 |
| Turkey | 33,248 | Turkey | 35,891 |
| Iran | 17,639 | Moldavia | 25,031 |
| Moldavia | 16,552 | Czech Republic | 16,380 |
| Austria | 11,360 | Ukraine | 15,031 |
| Czech Republic | 9,581 | Austria | 10,861 |
| Switzerland | 9,484 | Switzerland | 8,532 |
| Russia | 9,158 | Hungary | 8,223 |
| Ukraine | 8,466 | Iran | 869 |
| Total for Others | 240,195 | | 259,230 |
| Others not listed | 31,775 | | 35,864 |
| Grand Total | 271,977 | | 291,199 |

Note: 1996 trade data cover the time period July 1996 through June 1997.
1997 trade data cover the time period July 1997 through June 1998.

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

Table 13: Commercial Production of Apples in Germany (in 1,000 MT)

| Variety 1/ | 1995 | 1996 | 1997 | 1998 |
|------------------|--------------|--------------|--------------|--------------|
| Cox Orange | 43.9 | 49.9 | 57.0 | 52.0 |
| Boskop | 32.7 | 77.9 | 76.0 | 95.0 |
| Ingrid Marie | 15.9 | 12.8 | 9.8 | n.a. |
| Golden Delicious | 56.9 | 72.8 | 63.0 | 61.0 |
| Idared | 43.2 | 57.0 | 46.0 | 56.0 |
| Gloster | 54.4 | 129.0 | 90.0 | 95.0 |
| Jonagold | 99.4 | 154.4 | 141.0 | 173.0 |
| Jonagored | 20.7 | 45.9 | 44.0 | 57.0 |
| Elstar | 70.0 | 101.8 | 100.0 | 108.0 |
| Gala | 6.1 | 11.6 | 16.0 | 20.0 |
| Other 2/ | 144.0 | 175.0 | 128.0 | 156.0 |
| TOTAL | 572.6 | 878.1 | 765.0 | 878.0 |

1/ Forecast.

2/ Includes Gravensteiner, James Grieve, Glockenapfel since 1996.

Source: ZMP - Der Markt 8/98, Obst & Gemuese, page 4.

Table 14: EU Market Production of Apples by Country (in 1,000 MT)

| Country | 1992 | 1993 | 1994 | 1995 | 1996 | 1997 | 1998 1/ |
|-----------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Italy | 2,368 | 2,145 | 2,153 | 1,889 | 2,025 | 2,014 | 2,064 |
| France | 2,344 | 1,972 | 2,129 | 1,980 | 1,900 | 2,051 | 1,836 |
| Germany | 1,108 | 883 | 880 | 573 | 878 | 765 | 878 |
| Spain | 1,005 | 821 | 753 | 780 | 849 | 821 | 707 |
| United Kingdom | 388 | 360 | 316 | 254 | 248 | 151 | 211 |
| Netherlands | 640 | 670 | 600 | 595 | 490 | 470 | 520 |
| Belgium | 482 | 493 | 505 | 508 | 295 | 369 | 407 |
| Greece | 305 | 315 | 320 | 315 | 372 | 274 | 294 |
| Portugal | 275 | 222 | 167 | 175 | 215 | 261 | 156 |
| Denmark | 43 | 40 | 38 | 30 | 30 | 33 | 28 |
| Ireland | 9 | 8 | 9 | 9 | 8 | 8 | 8 |
| Luxembourg | 5 | 4 | 5 | 4 | 4 | 4 | 4 |
| Austria | 86 | 128 | 127 | 128 | 134 | 162 | 157 |
| Sweden | 27 | 20 | 20 | 18 | 19 | 20 | 18 |
| TOTAL 2/ | 8,085 | 8,082 | 8,021 | 7,258 | 7,467 | 7,400 | 7,287 |

1/ Forecast.

2/ Discrepancies are due to rounding.

Source: ZMP Der Markt 8/98 - Obst & Gemuese, page 3 based on Prognosfruit.

Table 15: Market Production of Apples in the EU by Variety (in 1,000 MT)

| Variety | 1992 | 1993 | 1994 | 1995 | 1996 | 1997 | 1998 1/ |
|-------------------------|-------|-------|-------|-------|-------|-------|---------|
| Golden Delicious | 3,232 | 2,684 | 2,995 | 2,785 | 2,803 | 2,953 | 2,701 |
| Red Delicious | 1,101 | 1,018 | 868 | 790 | 835 | 741 | 678 |
| Granny Smith | 418 | 401 | 407 | 395 | 440 | 423 | 396 |
| Jonagold 2/ | 791 | 726 | 797 | 791 | 646 | 705 | 815 |
| Morgenduft | 290 | 229 | 219 | 179 | 200 | 229 | 179 |
| CoxOrange | 321 | 308 | 242 | 184 | 197 | 165 | 183 |
| Boskop | 255 | 173 | 210 | 120 | 134 | 137 | 166 |
| Idared | 153 | 141 | 143 | 126 | 140 | 125 | 130 |
| Kanada Renette | 123 | 93 | 146 | 132 | 112 | 84 | 108 |
| Gloster | 260 | 229 | 202 | 96 | 187 | 143 | 140 |
| Elstar | 314 | 335 | 363 | 336 | 334 | 315 | 365 |
| Gala | 110 | 128 | 185 | 208 | 349 | 412 | 445 |
| Bramley | 182 | 146 | 139 | 121 | 109 | 80 | 100 |
| Other | 1,535 | 1,470 | 1,101 | 920 | 876 | 749 | 754 |
| TOTAL 3/ | 9,085 | 8,081 | 8,021 | 7,258 | 7,467 | 7,400 | 7,286 |

1/ Forecast.

2/ Includes Mutants.

3/ Discrepancies are due to rounding.

Source: ZMP Der Markt 8/98 - Obst & Gemuese, page 4 based on Prognosfruit.

Table 16: Fresh Apples Purchased by EU Intervention Agency (in MT)

| Crop Year | 1993/94 | 1994/95 | 1995/96 | 1996/97 | 1997/98 |
|-----------------|---------|---------|---------|---------|---------|
| Total EU | 976,000 | 638,000 | 208,000 | 349,000 | 279,792 |
| Germany | 46,300 | 26,400 | 300 | 3,914 | 1,846 |

Source: ZMP.

Table 17: Market Production of Pears in the EU (in 1,000 MT)

| Country | 1992 | 1993 | 1994 | 1995 | 1996 | 1997 | 1998 1/ |
|----------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Italy | 1,264 | 938 | 1,026 | 958 | 1,074 | 659 | 1,165 |
| France | 394 | 226 | 336 | 316 | 333 | 246 | 258 |
| Germany | 55 | 43 | 39 | 40 | 37 | 25 | 36 |
| Spain | 602 | 459 | 580 | 457 | 650 | 587 | 556 |
| United Kingdom | 25 | 44 | 26 | 36 | 40 | 25 | 26 |
| Netherlands | 115 | 170 | 140 | 165 | 135 | 145 | 130 |
| Belgium | 111 | 152 | 154 | 156 | 137 | 130 | 138 |
| Greece | 94 | 86 | 72 | 56 | 73 | 41 | 49 |
| Portugal | 97 | 87 | 91 | 87 | 120 | 164 | 24 |
| Denmark | 6 | 6 | 6 | 5 | 5 | 6 | 3 |
| Sweden | -- | 1 | 2 | 2 | 2 | 1 | 1 |
| TOTAL | 2,762 | 2,213 | 2,471 | 2,277 | 2,606 | 2,028 | 2,386 |

1/ Forecast.

Source: ZMP Der Markt 8/98 - Obst & Gemuese, page 7 based on Prognosfruit.

Table 18: Market Production of Pears in the EU by Variety (in 1,000 MT)

| Variety | 1992 | 1993 | 1994 | 1995 | 1996 | 1997 | 1998 1/ |
|--------------------------|-------|-------|-------|-------|-------|-------|---------|
| Conference | 427 | 410 | 479 | 472 | 529 | 470 | 552 |
| Williams | 326 | 236 | 283 | 294 | 330 | 191 | 324 |
| Abate Fetel | 274 | 212 | 229 | 197 | 257 | 180 | 292 |
| Guyot | 217 | 172 | 182 | 146 | 169 | 142 | 133 |
| Doyenne de Comice | 201 | 179 | 189 | 175 | 158 | 116 | 171 |
| KaiserAlexander | 141 | 97 | 91 | 103 | 89 | 41 | 99 |
| Passa Crassana | 134 | 76 | 83 | 76 | 75 | 45 | 59 |
| Blanquilla | 183 | 100 | 220 | 180 | 286 | 236 | 231 |
| Coscia | 170 | 95 | 104 | 65 | 89 | 86 | 83 |
| Red Bartlett | 41 | 39 | 36 | 50 | 43 | 19 | 43 |
| Kristalli | 35 | 40 | 35 | 16 | 32 | 24 | 23 |
| Other | 617 | 560 | 539 | 503 | 547 | 478 | 378 |
| TOTAL | 2,766 | 2,216 | 2,471 | 2,277 | 2,606 | 2,028 | 2,386 |

1/ Forecast.

Source: ZMP Der Markt 8/98 - Obst & Gemuese, page 7 based on Prognosfruit.

Table 19: 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 |
|-----------------|---------|---------|---------|---------|---------|---------|---------|
| Total EU | 3,172 | 197,000 | 40,000 | 92,000 | 49,000 | 177,000 | 84,209 |
| Germany | - | 333 | 880 | 172 | 55 | 92 | - |

Source: ZMP.

Table 20: Production of Fruit Juices, Fruit Nectars, Mineral Waters,
Carbonated Fruit Juices and Beer (in 1,000 l)

| | 1995 | 1996 | 1997 | 1996/97 % Change |
|---------------------------------|------------|------------|------------|---------------------|
| Fruit/Vegetable Juices | 2,352,245 | 2,392,661 | 2,573,956 | +7.6 |
| Fruit/Vegetable Nectares | 1,251,292 | 1,280,779 | 1,371,013 | +7.0 |
| Mineral Waters | 8,645,440 | 8,393,229 | 8,695,410 | +7.4 |
| Carbonated Fruit Juices | 6,363,438 | 6,362,196 | 6,388,850 | +0.4 |
| Other Fruit Juices | 647,959 | 714,651 | 806,493 | +12.9 |
| Beer | 11,156,500 | 10,856,900 | 10,860,000 | 0 |
| Total | 30,416,874 | 30,000,416 | 30,695,722 | +2.3 |

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 1998, page 24.

Table 21: Per Capita Consumption of Fruit Juices and Nectars 1990-96 (in liter)

| | 1991 | 1992 | 1993 | 1994 | 1995 | 1996 | 1997 |
|---------------------------|-------|-------|-------|-------|-------|-------|-------|
| Apple Juice | 7.84 | 9.44 | 10.31 | 11.60 | 11.79 | 12.15 | 12.79 |
| Orange Juice | 8.02 | 9.81 | 9.77 | 8.97 | 9.83 | 10.25 | 10.36 |
| Grape Juice | 1.04 | 1.21 | 1.10 | 1.17 | 1.19 | 1.21 | 1.21 |
| Grapefruit Juice | 0.25 | 0.30 | 0.33 | 0.32 | 0.33 | 0.33 | 0.35 |
| Pear Juice | 0.07 | 0.08 | 0.12 | 0.16 | 0.13 | 0.15 | 0.17 |
| Vegetable Juice | 0.82 | 0.87 | 0.90 | 0.92 | 0.86 | 0.87 | 0.87 |
| Citrus Nectar | 12.51 | 11.17 | 10.47 | 9.45 | 8.57 | 8.30 | 8.26 |
| Other Juice/Nectar | 6.67 | 5.37 | 6.40 | 7.92 | 8.02 | 7.96 | 7.37 |
| Total | 39.61 | 37.22 | 39.40 | 40.51 | 40.72 | 41.22 | 41.38 |

Note: New eastern German states included from 1991 onward.

Source: Fruit Juice Association, Bonn, Annual Report 1998, page 42.

Table 22: Per Capita Consumption of Beverages in Germany (in liter)

| | 1992 | 1993 | 1994 | 1995 | 1996 | 1997 1/ |
|------------------------------|-------|-------|-------|-------|-------|---------|
| Non-alcoholic | 212.1 | 209.8 | 226.7 | 231.7 | 230.7 | 238.7 |
| Fruit Juices/Nectars | 38.3 | 39.4 | 40.5 | 40.7 | 41.2 | 41.4 |
| Carbonated drinks | 88.8 | 85.2 | 89.1 | 93.1 | 92.8 | 95.6 |
| Mineral/ table waters | 85.0 | 85.2 | 97.1 | 97.9 | 96.7 | 101.7 |
| Alcoholic | 179.0 | 167.8 | 170.8 | 168.3 | 162.5 | 161.8 |
| Beer | 144.2 | 135.9 | 139.1 | 137.7 | 131.7 | 131.1 |
| Wine | 19.5 | 17.5 | 18.0 | 17.4 | 18.2 | 18.2 |
| Fruit wine | 2.9 | 2.1 | 1.9 | 1.7 | 1.7 | 1.6 |
| Sparkling wine | 5.0 | 5.0 | 5.1 | 4.8 | 4.6 | 4.8 |
| Spirits | 7.4 | 7.3 | 6.7 | 6.5 | 6.3 | 6.1 |
| Housedrinks 2/ | 291.0 | 286.6 | 278.8 | 273.5 | 275.5 | 266.2 |
| TOTAL | 679.2 | 664.2 | 676.3 | 673.5 | 668.7 | 666.7 |

1/ Preliminary.

2/ Milk, coffee, tea, coffee substitutes.

Source: Fruit Juice Association Bonn, Annual Report 1998, page 10.

Table 23: Per Capita Consumption of Apple Juice and Apple Fruit Drinks in Germany (in kg)

| | 1991 | 1992 | 1993 | 1994 | 1995 | 1996 | 1997 |
|--------------------|-------|-------|-------|-------|-------|-------|-------|
| Apple Juice | 11.31 | 12.44 | 13.00 | 14.45 | 14.76 | 18.82 | 19.79 |

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

Table 24: 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 1/ |
|----------------------|------|------|------|------|------|------|---------|
| Germany | 37.2 | 38.3 | 39.4 | 40.4 | 40.7 | 41.2 | 41.4 |
| France | 8.5 | 10.0 | 11.0 | 15.0 | 16.5 | 18.0 | 18.0 |
| Netherlands | 22.5 | 22.3 | 22.1 | 24.0 | 24.4 | 26.0 | 26.7 |
| Belgium/Lux. | 15.0 | 16.0 | 16.5 | 18.0 | 19.4 | 20.2 | 20.8 |
| Italy | 7.6 | 7.9 | 8.0 | 9.0 | 9.0 | 9.5 | 9.6 |
| Great Britain | 18.9 | 18.5 | 18.5 | 18.6 | 19.6 | 19.1 | 19.5 |
| Ireland | 8.5 | 8.5 | 8.6 | 9.5 | 10.4 | 11.7 | 12.0 |
| Denmark | 19.5 | 19.1 | 18.8 | 18.7 | 18.5 | 16.9 | 17.5 |
| Greece | 5.0 | 5.7 | 5.8 | 6.0 | 6.6 | 6.7 | 6.8 |
| Spain | 12.6 | 13.6 | 14.0 | 15.0 | 15.4 | 15.6 | 15.6 |
| Portugal | 2.8 | 3.2 | 3.2 | 3.5 | 5.3 | 6.2 | 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 | 34.3 |
| Sweden | 19.5 | 20.4 | 20.5 | 20.5 | 20.1 | 20.6 | 20.6 |
| Finland | 15.2 | 15.7 | 16.2 | 21.0 | 23.6 | 25.1 | 25.1 |
| TOTAL EU-15 | -- | -- | -- | -- | 21.3 | 21.9 | 22.1 |
| Norway | 14.0 | 14.6 | 15.0 | 16.0 | 19.5 | 18.6 | 18.6 |
| Switzerland | 34.1 | 34.3 | 33.5 | 33.5 | 30.0 | 28.6 | 30.0 |
| United States | 29.0 | 29.0 | 30.0 | 30.0 | 30.0 | 30.0 | 30.0 |

1/ Estimates.

Source: Fruit Juice Association Bonn, Annual Report 1998, page 43.

Table 25: 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 26: Structure of the German Fruit Juice Industry

| Turnover in DM | Number of Companies 1/ | % | Total turnover 1997 in million DM | % |
|---------------------------------|-------------------------------|----------|--|----------|
| up to 500,000 | 52 (47) | 26.1 | 12 | 0.3 |
| over 500,000 - 1 million | 24 (24) | 12.1 | 18 | 0.4 |
| over 1 - 2 million | 31 (33) | 15.6 | 45 | 0.9 |
| over 2 - 5 million | 27 (29) | 13.6 | 94 | 1.9 |
| over 5 - 10 million | 18 (18) | 9.0 | 126 | 2.5 |
| over 10 - 20 million | 9 (9) | 4.5 | 135 | 2.7 |
| over 20 - 50 million | 22 (22) | 11.1 | 695 | 14.1 |
| over 50 - 100 million | 5 (5) | 2.5 | 330 | 6.7 |
| over 100 - 200 million | 5 (4) | 2.5 | 782 | 15.8 |
| over 200 million | 6 (7) | 3.0 | 2,698 | 54.7 |
| Total /2 | 199 (198) | 100 | 4,936 | 100 |

1/ Members of the Association as per January 1, 1997 (1996); not included are the approx. 212 smaller members being organised in regional associations as well as about 30 “outsiders”.

2/ Industry’s total turnover in 1996 (at home and abroad) approximately DM 5.0 billion (1995: about DM 4.9 billion).

Source: Fruit Juice Association Bonn, Annual Report 1998, page 5.

Table 27: Regional Distribution of Fruit Juice Producers

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

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 1998, page 6.