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Germany

Poultry Annual Report

1999

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Report Highlights:

Production and consumption of poultry and eggs are likely to grow only moderately in calendar years 1999 and 2000. Poultry meats face stiff competition from low-priced pork and especially turkey is being replaced by pork in food products wherever possible. Consumption of egg is stable at approximately 225 eggs per person.

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

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Executive Summary

This report contains PS&D's for calendar years 1998, 1998 and 2000 and trade matrices for 1998 and 1999. (Please refer to GM9049 for 1997 trade matrices.)

Conversion factors to convert product weights to slaughter weights are unchanged from 1996. (Please refer to Tables two though seven of GM7048 for conversion rates.)

Please note that poultry data are in ready-to-cook weight (RTC) for both PS&D's and trade matrices.

Production and consumption of poultry meats are likely to increase only moderately in 1999 and 2000. Poultry meats compete with pork and are often substituted for by inexpensive pork. Especially turkey meat is being replaced by pork in food products wherever possible. Prices remain weak as poultry producers and processors continue to utilize existing production capacities. Lower gains in consumption reduce market shares for imports.

Consumption of eggs seems to stabilize at 225 eggs per capita. Thus, production increases are only moderate. Prices remain firm at a low level.

Reduced exports of Belgium eggs, egg products and poultry meats after fears over dioxin contaminated food in this country briefly reduced supply in Germany and shifted prices up. Prices declined sharply after quick consumer reactions to reduce egg and poultry consumption. Traditionally low prices due to low consumption during the summer break prolonged the low price period. Prices are said to recover slightly but remain at a low level after the end of the summer break.

Section I: Production and Outlook

Poultry

Production of poultry meat may rise only moderately in calendar years 1999 and 2000 to 740,000 MT and 760,000 MT respectively. Consumption is expected to increase to 1,240,000 MT and 1,255,000 MT. Upswings in production and consumption may be realized throughout all poultry meats.

The poultry market is influenced by the swine market. Pork is marketed at very attractive prices, substituting for poultry meats in meat products where possible and on the fresh market. Therefore, consumption/use will only increase moderately. Turkey meat seems to be especially hit.

About 50 percent of poultry meat consumption is in broiler meat. Future upswings in broiler consumption may be lower than production increases, leaving less market for imports. Turkey meat accounted for the majority of consumption increases of poultry meats. Prices of poultry meats remain weak.

Germany imports poultry meat mainly from the Netherlands and France and exports to the Netherlands and Russia. Exports are small compared to imports.

Eggs

The egg sector is rather stagnant at saturation levels. Per-capita consumption seems to level off at 225 eggs. Therefore, production is expected to rise only moderately in 1999 and 2000, and imports are likely to decline in response to firm domestic competition and low market prices. There seems to be still some room in the market for egg products. (Unfortunately, meaningful statistics on production and consumption of egg products are not available.) Prices of eggs remain weak.

Germany imports about 35 million eggs mostly in the form of egg products from the United States, and this number is estimated to increase further. Germany imports eggs mainly from the Netherlands, Belgium and France and exports to the Netherlands, France and Switzerland. Exports are small compared to imports.

Dioxin

When information on dioxin contamination of Belgian food (especially eggs and poultry) surfaced in late May/early June, exports of Belgian product to Germany ceased and market prices for eggs and poultry soared briefly due to a shortfall in supply. However, Belgium is an insignificant supplier of poultry meat to the German market and - even though it is the second most important supplier of eggs, volumes are small. Thus, high prices were short-lived. Subsequently, a sharp drop in consumption in response to the dioxin scandal forced prices down permanently. Although prices recovered in late June, demand and prices weakened again in mid-July with the entry of Germany into its peak vacation time.

Prices are set to recover in mid-August with the end of the vacation period in Germany. The dioxin scandal may not have a lasting effect on production and consumption in Germany. Rather, the market is cooling off in general, showing only small increases in 1999 and 2000.

European legislation on rearing forms for laying hens

New European legislation administers changes in rearing forms for laying hens with more than 350 hens (except for breeding stock). The EU distinguishes in its regulation between three rearing forms. Below we list a few of the new requirements:

<u>1) Alternative rearing form</u>

Alternative rearing forms comprise various types of floor and free range management systems. Newly to be constructed laying units have to comply with requirements by January 1, 2002, existing laying units by January 1, 2007. Requirements comprise - among others - animal density (at most nine hens per square meter), bedding (at least 250 square centimeter per hen) and standards for perches as well as regarding feeding and watering systems.

<u>2) Traditional cage management form</u>

Traditional cage rearing forms consist of cages without nests, perches or scratch area. These systems will be banned by January 1, 2012. New systems may not be installed after January 1, 2003. For existing systems, the minimum available space per hen will be increased from 450 square cm to 550 square cm after January 1, 2003 the latest. This translates into four instead of five hens per cage in most present cage forms.

3) Enriched ("Hilton") cages

Enriched cages provide nests and perches or alternatively scratch areas. New requirements from January 1, 2002 for this type include minimum sizes (at least 750 square cm per hen including nest, at least 2,000 square cm total size), perches as well as bedding for picking and scratching.

In addition, all laying hen establishments will be registered and maintain a registration number to trace the origin of the eggs.

German High Court decision on cage management/animal welfare

The German Constitutional Court dismissed the German Laying Hen Ordinance for formal and factual reasons. Certain articles violate German animal welfare laws, in particular, the hen's right to sufficient rest and feeding space. Currently, a minimum of 10 cm of trough length and a minimum area of 450 square cm is required per hen in a cage. This compares unfavorably with the estimated average width of 14.5 cm per hen and the average size of 47.5 cm (length), 14.5 cm (width) and 38.0 cm (height) per hen. The ordinance thus requires only minimum cage sizes, which are insufficient to allow all hens to rest or feed at the same time. This, in the view of the high court, violates German animal welfare laws which allow limitations to restrict the species' appropriate movements as long as the animal can satisfy basic needs and doesn't suffer avoidable damage or pain.

There are two immediate consequences to the verdict. First, existing cage management systems need not be changed and can continue to operate. Second, newly constructed systems have to comply with the Court's decision. Unfortunately, there is at the moment no legal basis for new investments because the old legislation is null and void and no new legislation is in place yet. Consequently, no new investments are likely to take place for some time and maybe even construction under way will have to halt, slowing down innovation and profitability in the German egg production industry.

In the long run, there may also be consequences in conjunction with EU legislation of laying hen rearing.

Antibiotics

The following antibiotics may no longer be used in feed:

- As of July 1, 1999: Tylosinphosphate, spiramycin, virginiamycin and zinc bacitracin.
- As of September 1, 1999: Carbadox, olaquindox.
- As of September 30, 1999: Arpinocid, dinitolmid, and ipronidazol (due to expiration of approval).

Egg Labeling

In response to dioxin contaminated feed and food in Belgium and in an attempt to insulate the German egg industry from future external feed and food scandals, the German poultry and egg industry intends to introduce an identity label for each egg. Eggs under this labeling scheme would bear a capital letter "D" in an oval for "Deutschland" (Germany) and the individual farm or laying house number where the eggs were produced.

Eventually, this labeling scheme should allow traceability of all eggs in shell, control of origin and of quality of feed. To make it work, this idea is backed by Germany's Central Marketing Agency for Agricultural Products (CMA). The "Orgainvent" an independent company which already introduced a beef labeling scheme has the mandate to develop an operational labeling and control system. Checks will be performed by an independent agency.

Additionally, laying hen rearing forms may be identified on the egg package.

Marketing

The following market and consumption information results from a panel conducted by GfK for the CMA (Gesellschaft für Konsumforschung, Centrale Margetinggesellschaft der deutschen Agrarwirtschaft mbH). The panel covers only purchases of private German households. It excludes purchases of foreign households, HRI-consumption and consumption of egg and poultry products and thus comprises only 52 percent of the total egg market (exclusively shell eggs) and only 30 percent of the total poultry market. For tables please refer to the marketing section under the Statistical Tables section of this report (Tables).

Poultry

- Sales of frozen poultry still dominate: In Germany, 52 percent of poultry sales were in frozen. Fresh poultry gains market share. In western Germany fresh sales dominate. Eastern Germany is still a frozen market.

- Poultry parts gain importance: In 1998, 62 percent of poultry sales were in parts versus 60 percent in 1997.

- If frozen, then whole - if fresh, then parts: 53 percent of frozen sales are whole, 78 percent of fresh sales are in parts in 1998.

- If fresh, then turkey: Turkey meats comprise 57 percent of fresh sales in 1998.

- Consumer markets dominate all other poultry outlets: In 1998, sales in consumer markets account for 43 percent of frozen broiler, 41 percent of fresh broiler, 38 percent of frozen turkey and 49 percent of fresh turkey.

Eggs

- Fewer households buy fewer eggs: Whereas 94.4 percent of households bought eggs in 1995, only 89.1 percent of households bought eggs in 1998. Average egg purchases per household declined from 346 eggs to 331 eggs p.a. respectively.

- Consumers prefer size "M" eggs: In 1998, 63.1 percent of shell eggs sales were in grade "M", 33.1 percent in grade "L" and the remainder in grade "S" or "XL" (S=small, M=medium, L=large, XL=extra large). Consumption shifts further to grade "M".

- Consumers buy mostly unpackaged eggs: In 1998, 43 percent of household purchases were in packages, 88 percent in packages of ten eggs and ten percent in packages of six eggs.

- Germans prefer brown eggs: In 1998, 59 percent of households purchased exclusively brown eggs, 27 percent exclusively white eggs, 11percent of households purchased mixed colors, three percent didn't comment. Preference for brown eggs increased from 55 percent in 1995.

- Direct sales of eggs still dominate: Direct sales of eggs (Farmer/producer, home delivery, farmers' markets) accounted for 50 percent of egg sales in 1998. They have less importance in the East.

- Egg sales with special label remain stable: Eleven percent of packaged eggs bear a special label regarding the production method (free range, cereal fed, bio). Packaged eggs sold under special label increased from 25.6 percent of all packaged eggs to 25.9 percent.

Section II: Statistical Tables

The following section includes PSD's, price tables, trade matrices and additional tables.

Note: Prices in tables after PSD's are in US$ and indicate simple average monthly import prices for imported commodities recorded in the PSD's without discriminating between high-priced or low-priced products.

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 1.66.
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 = $ 1.0736 (8/11/1999).

PSD's and Trade Matrices

Table 1: Poultry PSD (in 1,000 MT, 1 million head) and Poultry Import Prices (in US$ per MT)

		1998		1999		2000
	Old	New	Old	New	Old	New
Calendar Year Begin		01/1998		01/1999		01/2000
Inventory (Reference)	56	56	59	59	0	59
Slaughter (Reference)	363	363	381	381	0	381
Beginning Stocks	0	0	0	0	0	0
Production	719	719	750	740	0	760
Whole, Imports	213	213	210	210	0	210
Parts, Imports	434	434	440	440	0	440
Intra EC Imports	517	517	520	520	0	520
Other Imports	130	130	130	130	0	130
TOTAL Imports	647	647	650	650	0	650
TOTAL SUPPLY	1,366	1,366	1,400	1,390	0	1,410
Whole, Exports	45	45	50	50	0	50
Parts, Exports	92	92	100	100	0	105
Intra EC Exports	110	110	120	120	0	124
Other Exports	27	27	30	30	0	31
TOTAL Exports	137	137	150	150	0	155
Human Consumption	731	731	745	740	0	755
Other Use, Losses	498	498	505	500	0	500
Total Dom. Consumption	1,229	1,229	1,250	1,240	0	1,255
TOTAL Use	1,366	1,366	1,400	1,390	0	1,410
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	1,366	1,366	1,400	1,390	0	1,410
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0

Year	1997	1998	% Change			1997	1998	% Change
Jan	3,052	2,625	-14.0%		Jul	2,707	2,661	-1.7%
Feb	2,692	2,532	-5.9%		Aug	2,553	2,578	1.0%
Mar	2,825	2,466	-12.7%		Sep	2,721	3,010	10.6%
Apr	2,774	2,501	-9.8%		Oct	2,868	2,786	-2.9%
May	2,801	2,622	-6.4%		Nov	2,891	2,837	-1.9%
Jun	2,682	2,459	-8.3%		Dec	2,737	3,062	11.9%

Note: Values are in $U.S. calculated from local currency import prices based on monthly exchange rates.

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

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

Imports for	1998			1999
U.S.	129		U.S.	400
Others			Others	
Netherlands	201,045		Netherlands	202,000
France	120,531		France	120,000
Hungary	45,982		Hungary	46,000
Italy	23,333		Italy	24,000
Thailand	22,528		Thailand	23,000
Great Britain	20,824		Great Britain	21,000
Poland	20,367		Poland	20,000
Denmark	19,043		Denmark	19,000
Brazil	14,966		Brazil	15,000
Belgium/Lux	11,898		Belgium/Lux	12,000
Total for Others	500,517		Total for Others	502,000
Others not listed	16,686		Others not listed	17,000
Grand Total	517,332		Grand Total	519,400

Exports for	1998			1999
U.S.	0		U.S.	0
Others			Others	
Netherlands	55,017		Netherlands	60,000
Great Britain	12,821		Great Britain	15,000
Russia	10,970		Russia	11,000
Austria	8,372		Austria	9,000
France	7,793		France	8,000
Hong Kong	4,818		Hong Kong	5,000
Denmark	4,537		Denmark	5,000
Belgium/Lux	3,549		Belgium/Lux	4,000
Switzerland	2,477		Switzerland	2,000
Spain	1,871		Spain	2,000
Total for Others	112,225		Total for Others	121,000
Others not listed	12,243		Others not listed	12,000
Grand Total	124,468		Grand Total	133,000

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

Table 3: Broiler PSD (in 1,000 MT, 1 million head) and Broiler Import Prices (in US$ per MT)

		1998		1999		2000
	Old	New	Old	New	Old	New
Calendar Year Begin		01/1998		01/1999		01/2000
Inventory (Reference)	45	45	48	48	0	49
Slaughter (Reference)	282	282	296	296	0	300
Beginning Stocks	0	0	0	0	0	0
Production	370	370	385	385	0	395
Whole, Imports	119	119	120	120	0	120
Parts, Imports	243	243	245	245	0	245
Intra EC Imports	302	302	305	305	0	305
Other Imports	60	60	60	60	0	60
TOTAL Imports	362	362	365	365	0	365
TOTAL SUPPLY	732	732	750	750	0	760
Whole, Exports	20	20	20	20	0	20
Parts, Exports	71	71	70	70	0	70
Intra EC Exports	72	72	73	73	0	73
Other Exports	19	19	17	17	0	17
TOTAL Exports	91	91	90	90	0	90
Human Consumption	400	400	419	419	0	424
Other Use, Losses	241	241	241	241	0	246
Total Dom. Consumption	641	641	660	660	0	670
TOTAL Use	732	732	750	750	0	760
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	732	732	750	750	0	760
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0

Year	1997	1998	% Change			1997	1998	% Change
Jan	2,720	2,306	-15.2%		Jul	2,568	2,524	-1.7%
Feb	2,413	2,311	-4.2%		Aug	2,358	2,360	0.1%
Mar	2,627	2,287	-12.9%		Sep	2,572	2,611	1.5%
Apr	2,626	2,235	-14.9%		Oct	2,615	2,422	-7.4%
May	2,628	2,419	-8.0%		Nov	2,598	2,321	-10.7%
Jun	2,468	2,223	-9.9%		Dec	2,329	1,749	-24.9%

Note: Values are in $U.S. calculated from local currency import prices based on monthly exchange rates.

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

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

Imports for	1998			1999
U.S.	29		U.S.	50
Others			Others	
Netherlands	167,171		Netherlands	170,000
France	40,188		France	40,000
Thailand	21,043		Thailand	25,000
Hungary	17,230		Hungary	17,000
Denmark	16,677		Denmark	17,000
Belgium/Lux	10,619		Belgium/Lux	10,000
Brazil	9,004		Brazil	9,000
Poland	4,284		Poland	4,000
Italy	3,093		Italy	3,000
Sweden	2,017		Sweden	2,000
Total for Others	291,326		Total for Others	297,000
Others not listed	11,274		Others not listed	8,000
Grand Total	302,629		Grand Total	305,050

Exports for	1998			1999
U.S.	0		U.S.	0
Others			Others	
Netherlands	42,159		Netherlands	42,000
Great Britain	11,555		Great Britain	12,000
France	6,467		France	7,000
Russia	3,799		Russia	4,000
Austria	3,449		Austria	3,000
Hong Kong	3,318		Hong Kong	3,000
Denmark	2,542		Denmark	3,000
Switzerland	2,249		Switzerland	2,500
Belgium/Lux	2,241		Belgium/Lux	2,200
Arab Emirates	1,497		Arab Emirates	1,500
Total for Others	79,276		Total for Others	80,200
Others not listed	7,529		Others not listed	8,000
Grand Total	86,805		Grand Total	88,200

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

Table 5: Turkey PSD (in 1,000 MT, 1 million head) and Turkey Import Prices (in US$ per MT)

		1998		1999		2000
	Old	New	Old	New	Old	New
Calendar Year Begin		01/1998		01/1999		01/2000
Inventory (Reference)	8	8	9	9	0	10
Slaughter (Reference)	28	28	29	29	0	30
Beginning Stocks	0	0	0	0	0	0
Production	256	256	265	265	0	270
Whole, Imports	26	26	25	25	0	25
Parts, Imports	151	151	155	155	0	155
Intra EC Imports	147	147	148	148	0	148
Other Imports	30	30	32	32	0	32
TOTAL Imports	177	177	180	180	0	180
TOTAL SUPPLY	433	433	445	445	0	450
Whole, Exports	0	0	0	0	0	0
Parts, Exports	37	37	40	40	0	41
Intra EC Exports	25	25	27	27	0	27
Other Exports	12	12	13	13	0	14
TOTAL Exports	37	37	40	40	0	41
Human Consumption	250	250	260	260	0	264
Other Use, Losses	146	146	145	145	0	145
Total Dom. Consumption	396	396	405	405	0	409
TOTAL Use	433	433	445	445	0	450
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	433	433	445	445	0	450
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0

Year	1997	1998	% Change			1997	1998	% Change
Jan	3,586	2,948	-17.8%		Jul	2,868	2,829	-1.4%
Feb	3,206	2,790	-13.0%		Aug	2,781	2,674	-3.8%
Mar	3,152	2,656	-15.7%		Sep	2,757	3,188	15.6%
Apr	3,049	2,889	-5.2%		Oct	2,758	2,888	4.7%
May	3,123	2,914	-6.7%		Nov	2,802	2,821	0.7%
Jun	2,995	2,788	-6.9%		Dec	2,684	2,994	11.5%

Note: Values are in $U.S. calculated from local currency import prices based on monthly exchange rates.

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

Table 6: German Export and Import of Turkey (in MT)

Imports for	1998			1999
U.S.	91		U.S.	100
Others			Others	
France	61,815		France	62,000
Netherlands	24,778		Netherlands	25,000
Italy	18,139		Italy	18,000
Great Britain	14,652		Great Britain	14,500
Hungary	8,555		Hungary	9,000
Brazil	5,924		Brazil	6,000
Israel	2,216		Israel	2,000
Ireland	1,350		Ireland	1,000
Belgium/Lux	1,099		Belgium/Lux	1,000
Poland	930		Poland	1,000
Total for Others	139,458		Total for Others	139,500
Others not listed	6,794		Others not listed	7,000
Grand Total	146,343		Grand Total	146,600

Exports for	1998			1999
U.S.	0		U.S.	0
Others			Others	
Netherlands	11,164		Netherlands	11,000
Russia	7,119		Russia	7,000
Austria	4,067		Austria	4,000
Denmark	1,260		Denmark	1,200
Belgium/Lux	1,244		Belgium/Lux	1,000
Great Britain	995		Great Britain	1,000
France	910		France	1,000
Poland	863		Poland	1,000
Hungary	662		Hungary	600
Serbia/Mont.	530		Serbia/Mont.	500
Total for Others	28,814		Total for Others	28,300
Others not listed	1,361		Others not listed	3,000
Grand Total	30,175		Grand Total	31,300

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

Table 7: Egg PSD (in 1 million head, 1 million pieces) and Egg Import Prices (in US$ per MT)

		1998		1999		2000
	Old	New	Old	New	Old	New
Calendar Year Begin		01/1998		01/1999		01/2000
Layers	50	50	50	50	0	50
Beginning Stocks	0	0	0	0	0	0
Production	14,164	14,164	14,200	14,200	0	14,250
Hatch Eggs, Imports	55	55	80	80	0	80
Shell Eggs, Imports	5,061	5,061	4,920	4,920	0	4,920
Other Imports	1,183	1,183	1,250	1,250	0	1,250
Intra EC Imports	6,250	6,250	6,100	6,250	0	6,100
TOTAL Imports	6,299	6,299	6,250	6,250	0	6,250
TOTAL SUPPLY	20,463	20,463	20,450	20,450	0	20,500
Hatch Eggs, Exports	74	74	50	50	0	50
Shell Eggs, Exports	924	924	900	900	0	900
Other Exports	372	372	400	400	0	400
Intra EC Exports	1,210	1,210	1,210	1,210	0	1,210
TOTAL Exports	1,370	1,370	1,350	1,350	0	1,350
Hatch Eggs,Consumption	541	541	550	550	0	550
Shell Eggs, Human	18,416	18,416	18,414	18,414	0	18,414
Shell Eggs,OT.Use/Loss	136	136	136	136	0	186
Other Dom. Consumption	0	0	0	0	0	0
Total Dom. Consumption	19,093	19,093	19,100	19,100	0	19,150
TOTAL Use	20,463	20,463	20,450	20,450	0	20,500
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	20,463	20,463	20,450	20,450	0	20,500
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0

Year	1997	1998	% Change			1997	1998	% Change
Jan	1,288	1,094	-15.1%		Jul	1,012	1,057	4.4%
Feb	1,442	1,130	-21.6%		Aug	1,046	995	-4.9%
Mar	1,367	1,093	-20.0%		Sep	1,152	1,009	-12.4%
Apr	1,307	910	-30.4%		Oct	1,043	1,173	12.5%
May	1,155	1,020	-11.7%		Nov	1,217	1,112	-8.6%
Jun	1,118	977	-12.6%		Dec	1,088	1,087	-0.1%

Note: Values are in $U.S. calculated from local currency import prices based on monthly exchange rates.

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

Table 8: German Export and Import of Eggs (in 1,000 eggs)

Imports for	1998			1999
U.S.	35,000		U.S.	35,000
Others			Others	
Netherlands	5,124,000		Netherlands	5,124,000
Bel/Lux	650,000		Bel/Lux	650,000
France	250,000		France	250,000
Austria	45,000		Austria	45,000
Denmark	40,000		Denmark	40,000
Finland	40,000		Finland	40,000
Great Britain	35,000		Great Britain	35,000
Israel	30,000		Israel	30,000
Canada	20,000		Canada	20,000
Italy	15,000		Italy	15,000
Total for Others	6,249,000		Total for Others	6,249,000
Others not listed	15,000		Others not listed	15,000
Grand Total	6,299,000		Grand Total	6,299,000

Exports for	1998			1999
U.S.	0		U.S.	0
Others			Others	
Netherlands	380,000		Netherlands	380,000
France	275,000		France	275,000
Switzerland	220,000		Switzerland	220,000
Hong Kong	120,000		Hong Kong	120,000
Italy	90,000		Italy	90,000
Austria	75,000		Austria	75,000
Bel/Lux	60,000		Bel/Lux	60,000
Denmark	50,000		Denmark	50,000
Great Britain	40,000		Great Britain	40,000
Bosnia-Hercegov	30,000		Bosnia-Hercegov	30,000
Total for Others	1,340,000		Total for Others	1,340,000
Others not listed	38,984		Others not listed	40,000
Grand Total	1,378,984		Grand Total	1,380,000

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

Additional Tables

Table 9: Per Capita Consumption of Poultry Meats (in kg/capita)

	1991	1992	1993	1994	1995	1996	1997	1998 1/
Broiler	7.1	6.9	6.7	7.0	7.1	7.3	7.7	7.8
Turkey	3.0	3.4	3.4	3.6	4.0	4.4	4.7	4.8
Other Poultry Meat	2.1	2.2	2.3	2.2	2.3	2.4	2.2	2.4
TOTAL	12.2	12.5	12.4	12.8	13.4	14.1	14.7	15.0

1/ Forecast.

Source: ZMP, Central Market and Price Reporting Agency, ZMP-Bilanz Eier, Gefluegel, several issues.

Table 10: Average Monthly Producer Prices for Live Turkeys - Heavy Toms, 18.5 kg (in DM/kg live weight)

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1996	2.05	2.05	2.05	2.05	2.05	2.10	2.14	2.16	2.19	2.21	2.33	2.33
1997	2.25	2.22	2.21	2.19	2.19	2.20	2.19	2.16	2.14	2.12	2.11	2.11
1998	2.11	2.11	2.11	2.11	2.08	2.06	2.03	2.03	1.99	1.97	1.97	1.97
1999	1.97	1.96	1.93	1.92	1.90							

Note: These figures represent contract prices at a base live weight of 18.5 kg.

Source: Agrarwirtschaft, several issues.

Table 11: Average Producer Prices for Broilers (in DM per kg live weight)

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1997	1.53	1.53	1.53	1.54	1.55	1.55	1.55	1.55	1.55	1.54	1.54	1.49
1998	1.49	1.48	1.47	1.47	1.46	1.45	1.44	1.43	1.42	1.40	1.39	1.35
1999	1.35	1.34	1.33	1.33	1.33							

Source: Agrarwirtschaft, serveral issues.

Table 12: Average Consumer Prices for Fresh Turkey Fillets (in DM/kg)

	1993	1994	1995	1996	1997	1998
January	17.70	17.38	16.75	16.61	17.06	16.44
February	17.69	17.35	16.75	16.58	16.95	16.56
March	17.69	17.18	16.64	16.58	16.79	16.48
April	17.49	17.33	16.58	16.34	16.80	16.25
May	17.53	17.22	16.81	16.50	16.69	16.41
June	17.47	17.26	16.79	16.69	16.74	16.17
July	17.59	17.14	16.62	16.92	16.54	16.23
August	17.44	17.88	16.61	16.99	16.59	16.04
September	17.37	17.86	16.52	17.06	16.63	16.13
October	17.39	17.87	16.60	17.00	16.63	16.02
November	17.44	17.06	16.58	16.91	16.52	15.99
December	17.40	17.87	16.63	16.75	16.36	15.77
Average	17.52	17.12	16.65	16.74	16.69	16.21

Source: ZMP, Central Market and Price Reporting Agency, ZMP-Bilanz Eier, Gefluegel, various issues.

Table 13: Broiler Prices free slaughter house (in DM per kg slaughter weight)

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1997	2.97	2.97	2.95	2.97	2.97	2.96	2.98	2.97	2.97	2.95	2.92	2.90
1998	2.90	2.90	2.90	2.87	2.85	2.84	2.85	2.85	2.83	2.83	2.81	2.75
1999	2.70	2.55	2.47	2.41	2.40							

Source: Agrarwirtschaft, several issues.

Table 14: Average Wholesale Prices for Broilers (All Grades 1/, in DM/kg)

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Ave
1997	2.84	2.78	2.78	2.80	2.81	2.81	2.82	2.81	2.81	2.81	2.79	2.78	2.80
1998	2.78	2.78	2.78	2.78	2.76	2.72	2.70	2.70	2.71	2.67	2.66	2.64	2.72

1/ Over 1,000 g, ready to cook, poly-packaged, frozen.

Source: ZMP, Central Market and Price Reporting Agency, ZMP-Bilanz Eier, Gefluegel, various issues.

Table 15: Average Consumer Prices for Frozen Broilers, Class A (in DM/kg)

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1997	4.07	4.06	4.08	4.04	4.09	4.07	4.04	4.04	4.02	4.06	4.08	4.09
1998	4.03	4.03	4.02	4.05	4.03	4.01	3.96	3.97	3.95	3.95	3.95	3.95
1999	3.89	3.89	3.84	3.82	3.77							

Source: Agrarwirtschaft, several issues.

Table 16: Average Broiler Feed Prices in the Weser-Ems Area 1/ (in DM/100 kg) and Broiler Meat-Feed Price Ratio

	1991	1992	1993	1994	1995	1996	1997	1998
Feed Prices (Average) 2/	47.05	47.10	45.00	43.65	41.90	43.65	44.95	43.00
Broiler Meat/Feed Price Ratio 3/	3.39	3.32	3.37	3.42	3.36	3.31	3.35	3.27

1/ Weser-Ems is the Major Broiler Production Area in Western Germany.
2/ Average bulk prices of more than 10 MT, and since May 1992 of more than 3 MT.
3/ Based on price notations in Western Germany and Weser-Ems Area Feed Costs.

Source: ZMP, Central Market and Price Reporting Agency, ZMP-Bilanz Eier, Gefluegel, various issues.

Table 17: Keeping of Laying Hens by Rearing Form

	1994	1995	1996	1997	1998
Total enterprises	1,478	1,453	1,409	1,361	1,316
Total number of laying hen places (1,000)	41,427	41,300	41,423	39,676	40,152
- Battery cage management enterprises	1,403	1,373	1,315	1,242	1,195
- % Share	94.9	94.5	93.3	91.3	90.8
- Number of laying hen places (1,000)	39,167	38,705	38,278	35,575	35,835
- % Share	94.5	93.7	92.4	89.7	89.2
- Aviary management enterprises	3	6	9	12	15
- % Share	0.2	0.4	0.6	0.9	1.1
- Number of laying hen places (1,000)	13	15	134	108	130
- % Share	N/A	N/A	0.3	0.3	0.3
- Floor management enterprises	136	138	147	166	160
- % Share	9.2	9.5	10.4	12.2	12.2
- Number of laying hen places (1,000)	1,827	1,905	2,120	2,512	2,510
- % Share	4.4	4.6	5.1	6.3	6.3
- Intensive range management enterprises	6	9	11	8	14
- % Share	0.4	0.6	0.8	0.6	1.1
- Number of laying hen places (1,000)	34	89	97	148	177
- % Share	0.1	0.2	0.2	0.4	0.4
- Free range management enterprises	46	65	80	97	105
- % Share	3.1	4.5	5.7	7.1	8.0
- Number of laying hen places (1,000)	384	586	794	1,333	1,500
- % Share	0.9	1.4	1.9	3.4	3.7

Note: Double counting possible.

Source: ZMP Bilanz Eier, Gefluegel, various issues.

Table 18: Producer Prices for White Eggs, Weight Class 3 or M (in DM/100 eggs)

	NORTHERN GERMANY					EASTERN GERMANY				
	1994	1995	1996	1997	1998	1994	1995	1996	1997	1998
January	16.40	14.15	18.30	18.40	21.00	15.45	14.45	15.55	15.45	15.00
February	17.60	15.65	20.25	19.45	21.30	15.70	14.95	16.10	15.75	15.00
March	18.80	16.00	21.90	20.00	21.30	16.00	14.75	16.20	15.65	14.90
April	15.90	15.25	19.15	16.25	20.10	15.20	14.55	15.55	14.85	14.90
May	15.60	13.25	18.05	15.65	17.95	14.70	14.10	14.95	14.75	14.85
June	15.25	13.95	18.35	16.20	20.60	14.60	14.05	15.05	14.70	14.20
July	14.95	13.50	18.60	17.45	19.90	14.45	13.85	15.20	14.50	14.20
August	16.10	15.90	19.20	18.25	20.25	14.85	14.15	15.30	14.55	14.05
September	16.80	17.80	20.15	18.85	21.30	15.15	14.85	15.55	14.80	14.10
October	16.40	17.75	20.65	19.50	21.15	14.95	14.65	15.70	14.85	14.00
November	17.15	17.85	21.25	19.60	21.40	15.05	15.15	15.70	14.90	14.25
December	16.90	19.65	22.35	21.80	23.50	14.85	15.80	15.95	15.20	14.75
Jan-Dec	16.50	15.90	19.85	18.45	20.80	15.10	14.60	15.50	15.00	14.50

Note: Since 1997 according to new weight class M.

Source: ZMP, Central Market and Price Reporting Agency, ZMP-Bilanz Eier, Gefluegel, various issues.

Table 19: Egg Prices free Packaging/Collecting Station, Cologne Market, Class M (in DM/100 pieces)

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1997						8.70	9.80	9.90	10.40	10.55	11.15	11.95
1998	11.20	11.10	10.50	9.00	7.80	8.30	8.55	8.40	9.25	9.20	9.60	10.95
1999	9.50	9.80	10.00	8.05	7.55							

Note: DM 1 = Pfennig 100.

Source: Agrarwirtschaft, several issues.

Table 20: Egg Consumer Prices, Class M (in DM per 10 egg package)

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1997	2.33	2.20	2.20	2.07	1.93	1.88	1.84	1.88	1.88	1.91	1.90	1.98
1998	1.98	1.96	1.93	1.81	1.71	1.65	1.70	1.68	1.70	1.69	1.68	1.76
1999	1.73	1.66	1.66	1.60	1.54							

Source: Agrarwirtschaft, several issues.

Table 21: Trade in Egg Products (in MT)

	1993	1994	1995	1996	1997	1998
Imports						
whole egg, dried	1,239	1,345	1,632	5,029	4,144	3,596
whole egg, liquid/frozen	20,021	19,137	20,143	15,175	20,117	16,401
egg yolk, liquid	3,975	5,418	6,517	7,966	11,619	8,612
egg yolk, frozen	762	684	721	493	641	525
egg yolk, dried	845	828	879	1,080	1,475	1515
albumen, dried	1,607	1,906	1,790	1,510	1,166	1,435
albumen, liquid/frozen	3,209	2,782	1,973	1,500	1,168	1,730
Exports						
whole egg, dried	559	701	636	747	692	598
whole egg, liquid/frozen	3,547	6,556	6,085	5,788	9,836	8,382
egg yolk, liquid	1,750	870	929	1,392	2,422	1,337
egg yolk, frozen	605	323	181	89	22	68
egg yolk, dried	151	235	113	146	286	451
albumen, dried	2,090	1,762	1,502	1,597	1,358	1,327
albumen, liquid/frozen	2,399	3,915	3,998	4,214	4,517	3,083

Source: ZMP Bilanz Eier, Gefluegel, various issues.

Tariffs

Table 22: EU Tariff Value for Poultry Meat and Products (in Euro per 100 kg/net)

CN Code	Description	07/98 - 06/99	07/99 - 06/2000	07/2000
0207;1110	**Chickens** 83% chickens	31.1 i *	28.7 i *	26.2 i *
0207;1130+1210	70% chickens w/o heads + feet	35.5 i *	32.7 i *	29.9 i *
0207;1190+1290	65% chickens w/o offal	38.6 i *	35.6 i *	32.5 i *
0207;1310+1410	Boneless cuts	121.6 i *	112.0 i *	102.4 i *
0207;1320+1420	Halves or quarters	42.5 i *	39.2 i *	35.8 i *
0207;1330+1430	Whole wings	32.0 i *	29.4 i *	26.9 i *
0207;1340+1440	Backs, necks, rumps, wing tips	22.2 i *	20.5 i *	18.7 i *
0207;1350+1450	Breasts and cuts thereof	71.5 i *	65.8 i *	60.2 i *
0207;1360+1460	Legs and cuts thereof	55.0 i *	50.7 i *	46.3 i *
0207;1370+1470	Other cuts with bone in	119.7 i *	110.3 i *	100.8 i *
0207;1391+1491	Livers	7.6 %	7.0 %	6.4 %
0207;1399+1499	Other offal	22.2 i	20.5 i	18.7 i
0207;2670+2770	**Turkeys** Other legs and cuts thereof	54.6 i *	50.3 i *	46.0 i *
0207;2490+2590	73% turkeys w/o offal	44.3 i *	40.8 i *	37.3 i *
0207;2610+2710	Boneless cuts	101 i *	93.1 i *	85.1 i *
0207;2620+2720	Halves or quarters	48.7 i *	44.9 i *	41.0 i *
0207;2630+2730	Whole wings	32.0 i *	29.4 i *	26.9 i *
0207;2640+2740	Backs, necks, rumps, wing tips	22.2 i *	20.5 i *	18.7 i *
0207;2650+2750	Breasts and cuts thereof	80.6 i *	74.3 i *	67.9 i *
0207;2660+2760	Drumsticks and cuts thereof	30.3 i *	27.9 i *	25.5 i *
0207;2410+2510	80% turkeys w/o heads + feed	40.4 i *	37.2 i *	34.0 i *
0207;2680+2780	Other cuts with bone in	98.6 i *	90.8 i *	83.0 i *
0207;2691+2791	Livers	7.6 %	7.0 %	6.4 %
0207;2699+2799	Other offal	22.2 i	20.5 i	18.7 i
0207;3211	**Ducks, geese, guinea fowls** 85% ducks halves or quarters	45.1 i	41.6 i	38.0 i

0207;3215+3311	70% ducks w/o heads + feet	54.9 i	50.5 i	46.2 i
0207;3219+3319	63% ducks w/o offal	60.9 i	56.1 i	51.3 i
0207;3259+3359	75% geese w/o heads + feet	57.1 i	52.6 i	48.1 i
0207;3251+3351	82% geese	53.6 i	49.3 i	45.1 i
0207;3290+3390	Meat of guinea fowls	58.5 i	53.9 i	49.3 i
0207;3410+3490+3681+3685	Fatty livers	1 %	0.5 %	Free
0207;3511+3611	Boneless cuts of geese	131.2 i	120.9 i	110.5 i
0207;3515+3615	Boneless cuts of ducks/guinea fowls	152.4 i	140.3 i	128.3 i
0207;3521+3621	Duck halves or quarters	67.0 i	61.7 i	56.4 i
0207;3523+3623	Geese halves or quarters	62.8 i	57.9 i	52.9 i
0207;3525+3625	Halves or quarters of guinea fowls	64.4 i	59.3 i	54.2 i
0207;3531+3631	Whole wings	32.0 i	29.4 i	26.9 i
0207;3541+3641	Backs, necks, rumps, wing tips	22.2 i	20.5 i	18.7 i
0207;3551+3651	Geese breasts and cuts thereof	102.7 i	94.6 i	86.5 i
0207;3553+3653	Duck breasts and cuts thereof	137.2 i	126.3 i	115.5 i
0207;3561+3661	Geese legs and cuts thereof	82.8 i	76.2 i	69.7 i
0207;3563+3663	Legs of ducks or guinea fowls	55.0 i	50.7 i	46.3 i
0207;3571+3671	Goose or duck paletots	78.4 i	72.2 i	66.0 i
0207;3579+3679	Other cuts with bone in	146.3 i	134.8 i	123.2 i
0207;3591+3689	Livers other than fatty	7.6 %	7.0 %	6.4 %
0207;3599+3690	Other offal	22.2 i	20.5 i	18.7 i
0209;0090	Poultry fat	49.3 i	45.4 i	41.5 i
0210;9071	Fatty geese/duck livers, salted/in brine	1 %	0.5 %	Free
0210;9079	Other preserved poultry liver	7.6 %	7.0 %	6.4 %
1602;2011+2019	Prepared goose/duck liver	12.1 %	11.2 %	10.2 %
1602;3111:3190	Prepared turkey meat/offal	11.3 %	9.9 %	8.5 %
1602;3211+3921	Uncooked chicken meat/offal	103 i	94.8 i	86.7 i
1602;3219:3290+3929:3980	Prepared cooked chicken meat/offal	12.9 %	11.9 %	10.9 %

* Note: WTO tariff quota as per Annex 7.

Source: Official Journal of the European Communities, L 292, Volume 41, 30 October 1998. Schedule LXXX - European Communities. FAS/Berlin calculation.

Marketing

Off-farm sales are - even though at a declining tendency - on average the most important form of outlet in Germany. Farmers' Markets also hold a high and stable market share. Purchases at Aldi markets, Germany's largest discounter, as well as other discounters increased from 1997 to 1998 by one percent.

The importance of outlets differs significantly between East and West. In western Germany, off farm sales dominate whereas discounters and Consumer Markets hold the highest market share in eastern Germany - with increasing tendency.

Table 23: Egg purchases by form of outlet (Germany, in %)

Outlet	1995	1996	1997	1998
Farmer/Producer	40	42	41	38
Home delivery	3	2	2	2
Farmers' Market	10	10	10	10
Aldi (largest discounter)	12	12	11	12
Other discounters (excl. Aldi)	12	11	11	12
Consumer Market	12	12	14	13
Supermarket/Food Retail	7	7	7	7
Others	4	4	4	7

Source: ZMP Bilanz Eier, Gefluegel, 1999.

Table 24: Egg purchases by form of outlet (Western Germany, in %)

Outlet	1995	1996	1997	1998
Farmer/Producer	45	46	45	41
Home delivery	3	2	2	2
Farmers' Market	10	11	11	11
Aldi (largest discounter)	13	12	12	12
Other discounters (excl. Aldi)	9	9	8	9
Consumer Market	10	10	12	11
Supermarket/Food Retail	6	6	7	7

Others	4	4	4	7

Source: ZMP Bilanz Eier, Gefluegel, 1999.

Table 25: Egg purchases by form of outlet (Eastern Germany, in %)

Outlet	1995	1996	1997	1998
Farmer/ Producer	18	23	24	23
Home Delivery	2	2	1	1
Farmers' market	8	8	8	7
Aldi Discounter	9	9	9	10
Discounters gen. (excl. Aldi)	24	21	22	24
Consumer Market	23	23	24	21
Supermarket/Food Retailers	12	10	10	9
Others	5	4	3	5

Source: ZMP Bilanz Eier, Gefluegel, 1999.

Table 26: Sales of packaged eggs under special label (Germany, in %)

	Germany total		West Germany		East Germany	
	1997	**1998**	**1997**	**1998**	**1997**	**1998**
Total share of packed eggs	41.4	43.0	35.8	37.0	64.2	65.6
- thereof with special label	25.6	25.9	26.6	28.6	23.3	20.1
- thereof free range	41.9	46.0	42.7	47.5	39.9	41.6
- thereof floor management	49.0	42.8	48.2	41.2	50.9	47.7
- thereof cereal eggs	9.1	8.5	9.1	8.5	9.2	8.6
- thereof biological	---	2.6	---	2.8	---	2.1

Source: ZMP Bilanz Eier, Gefluegel, 1999.

Sales of specially labeled eggs differ noticeably from outlet to outlet (Table 27). Further increases are expected for Aldi on the expense of others, mainly discounters, due to Aldi's Germany-wide coverage of labeled eggs.

Table 27: Sales of packaged eggs under special label by outlet (Germany, in %)

	1995	**1996**	**1997**	**1998**
Supermarket/traditional retail	37	41	47	48
Consumer Market	29	30	34	34
Discounters (excl. Aldi)	18	20	24	22

Aldi (largest discounter)	5	5	4	10

Source: ZMP Bilanz Eier, Gefluegel, 1999.

The CMA/GfK panel covers only expenditures by German households. Purchases by foreign households, HRI expenditures and consumption of poultry products are not included. Consequently, only 30 percent of the domestic poultry market is covered.

Table 28: Household purchases of poultry (West and East Germany, in 1,000 MT)

	1995	**1996**	**1997**	**1998**
West Germany	192	206	271	272
East Germany	68	73	87	91

Source: ZMP Bilanz Eier, Gefluegel, 1999.

In West Germany, fresh parts take the first place among poultry purchases of households. Whole poultry is less important. In the East, the focus is more on frozen parts and whole (Table 29).

Table 29: Household purchases of poultry (Germany total, West and East Germany, in %)

	Germany total		**West Germany**		**East Germany**	
	1997	1998	1997	1998	1997	1998
Fresh, parts	36	37	40	41	24	26
Fresh, whole	12	11	13	11	7	8
Frozen, parts	24	25	21	23	33	32
Frozen, whole	28	27	26	25	36	34

Source: ZMP Bilanz Eier, Gefluegel, 1999.

With frozen poultry, in the East and the West, whole poultry dominated slightly. Parts increases slowly. Apparently, the consumers tend to buy directly more fresh products.

Table 30: Household purchases of frozen poultry (West and East Germany, in %)

	West Germany			**East Germany**		
	1996	**1997**	**1998**	**1996**	**1997**	**1998**
Parts	46	46	47	45	47	48
Whole	54	54	53	55	53	52

Source: ZMP Bilanz Eier, Gefluegel, 1999.

Among fresh poultry, parts clearly dominate with a further trend towards parts. The difference between East and West Germany is fairly small (Table 31).

Table 31: Household purchases of fresh poultry (West and East Germany, in %)

	West Germany			East Germany		
	1996	**1997**	**1998**	**1996**	**1997**	**1998**
Parts	71	75	78	69	76	77
Whole	29	25	22	31	24	23

Source: ZMP Bilanz Eier, Gefluegel, 1999.

Turkey parts dominate sales of fresh poultry parts, but also chicken parts remained at a high level. Fresh parts of other poultry species play a small role for households (Table 32).

Table 32: Household purchases of fresh poultry parts (Germany total, in %)

	1995	1996	1997	1998
Turkey parts	48	58	58	57
Chicken parts	48	38	39	40
Others	4	4	3	3

Source: ZMP Bilanz Eier, Gefluegel, 1999.

Table 33: Household purchases of frozen broiler and turkey meat by major outlet (Germany total, frozen, in %)

	Broiler			Turkey		
	1996	**1997**	**1998**	**1996**	**1997**	**1998**
Traditional Retail	19	18	18	13	13	14
Consumer Market	44	46	43	45	42	38
Aldi (largest discounter)	7	8	11	12	11	13
Discounter (excl. Aldi)	20	20	20	15	19	21
Others	11	9	7	15	14	13

Source: ZMP Bilanz Eier, Gefluegel, 1999.

Table 34: Household purchases of fresh broiler and turkey meat by major outlet (Germany total, fresh, in %)

	Broiler			Turkey		
	1996	1997	1998	1996	1997	1998
Traditional Retail	17	18	19	16	18	18
Consumer Market	42	40	41	47	47	49
Farmers' Market	16	13	15	5	9	10
Gefluegelhof	6	9	6	10	6	6
Butcher's shop	4	6	6	3	5	6
Others	15	14	13	19	14	11

Source: ZMP Bilanz Eier, Gefluegel, 1999.

Table 35: Household purchases of fresh broiler and turkey meat by major outlet (Germany total, fresh, in %)

West Germany

	1996	1997	1998
Producer/Farmer	4	6	4
Farmers, Market	6	6	7
Supermarket/trad. Retail	17	17	19
Consumer Market	45	45	44
Discounters (excl. Aldi)	10	9	9
Aldi (largest discounter)	5	4	5
Others	14	14	12

Source: ZMP Bilanz Eier, Gefluegel, 1999.

East Germany

	1996	1997	1998
Supermarket/trad. Retail	18	16	18
Consumer Market	43	43	44
Discounters (excl. Aldi)	22	22	22
Aldi (largest discounter)	4	4	4

Others	13	15	12

Source: ZMP Bilanz Eier, Gefluegel, 1999.

Table 36: Socio-economic criteria of households in Germany (panel)

		Quantities purchased in %		
Share of households in %		Total Poultry	Frozen poultry	Fresh poultry
	Age of household-running person			
23.0	Up to 34 years	15.6	14.8	16.5
29.4	35 - 49 years	31.5	32.8	30.0
26.4	50 - 64 years	32.4	32.0	32.7
21.2	65 years and older	20.6	20.4	20.8
	Net income per household			
16.3	Up to DM 1,999	11.4	12.6	10.1
24.2	DM 2,000 - 2,999	22.0	23.3	20.5
25.7	DM 3,000 - 3,999	26.7	26.8	26.5
33.8	DM 4,000 and more	39.9	37.3	42.9
	Size of household			
29.4	1 person hh.	13.5	12.5	14.6
31.9	2 person hh.	35.7	35.3	36.2
18.2	3 person hh.	23.6	24.4	22.8
20.5	4 person hh. and more	27.1	27.9	26.4
	Life cycle			
14.9	Young singles	2.7	2.5	3.0
14.6	Older singles	10.8	10.0	11.6
23.2	Young household without child	27.7	28.8	26.5
8.9	Young household with child	9.5	8.8	10.3
8.9	Older household with child	12.0	12.3	11.7
29.6	Older household without child	37.3	37.7	36.9

Source: ZMP Bilanz Eier, Gefluegel, 1999.

Section III: Addresses and Useful Contacts

The Poultry and Egg Export Council is a cooperator of the U.S. poultry and egg industry and provides marketing assistance for U.S. exporters of poultry meat, eggs and products throughout Europe:

USA Poultry & Egg Export Council
79A High Street, Wimbledon Village
London SW19 5EG
Director Europe: Ms. Maire Burnett

Tel: (44-181) 946 4904
Fax: (44-181) 946 4187
E-mail: MaireBurnett@btinernet.com

The Agricultural Trade Office (ATO), which is located in the U.S. Consulate-General in Hamburg, has primary responsibility for coordinating FAS marketing activities in Germany. Facilitating trade contacts between U.S. agricultural suppliers and German importers represents a major ATO marketing function. The ATO can also supply U.S. exporters with basic market information. The ATO can be contacted as follows:

U.S. Agricultural Trade Office (ATO)
Alsterufer 28
20354 Hamburg
Director: Mr. Jeff Jones

Tel: (49-40) 414 607 0
Fax: (49-40) 414 607 20
www.usembassy.de/atohamburg
E-mail: atohamburg@fas.usda.gov

The Foreign Agricultural Service (FAS), USDA, which is located in the U.S. Embassy in Berlin, oversees all USDA activities in Germany and can provide market information and advice regarding German food law. The FAS Bonn office can be contacted as follows:

Foreign Agricultural Service
American Embassy
Clayallee 170
14195 Berlin
Agricultural Minister-Counselor: Mr. Peter O. Kurz

Tel: (49-30) 8305 1150
Fax: (49-30) 843 11935
www.usembassy.de/embassy/fas
E-mail: agbonn@fas.usda.gov

The AgExport Services Division in Washington, D.C. offers detailed information on export services provided by FAS:

AgExport Services Division
Mail Stop 1052
U.S. Department of Agriculture
Washington, DC 20250-1052
Tel: (202) 720 7103
Fax: (202) 690 4374

The Federal Association of Egg, Game and Poultry Wholesale and Trade assists members in market and legal affairs. It publishes sales offers in its information to members:

Bundesverband des Eier, Wild- und
Geflügel-Groß- und Außenhandels e.V.
Hochkreuzallee 72
53175 Bonn
Manager: Mr.Caspar von der Crone
Tel: (49-228) 95960 0
Fax: (49-228) 95960 50
Internet: www.bv-ewg.org
E-mail: info@bv-ewg.org

The Central Association of the German Poultry Industry is the main lobby group for poultry producers in Germany:

Zentralverband der Deutschen Geflügelwirtschaft e.V.
(ZDG)
Hinter Hoben 149
53129 Bonn
Manager: Dr. Siegfried Hart
Tel: (49-228) 5300 241
Fax: (49-228) 5300 277

The Federal Association of the Feed Industry and the Federal Association of the Mixed Feed Industry may be contacted for information on feed formulas and other feed industry related questions:

Fachverband der Futtermittelindustrie e.V.
Beueler Bahnhofsplatz 18
53225 Bonn
Manager: Dr. Hubert Grote
Tel: (49-228) 97568 0
Fax: (49-228) 97568 68

Bundesverband der Mischfutterhersteller e.V.
Kaiserplatz 15
53113 Bonn
Manager: Mr. Peter Radewahn
Tel: (49-228) 911 970
Fax: (49-228) 220 539

The Federal Association of the German Food Retail Trade provides useful information on the structure and development of the German Food Retail:

Bundesverband des Deutschen Lebensmittel-
Einzelhandels e.V.
Ulrich-von-Hassell-Str. 64
53123 Bonn
Manager: Mr. Gerd Haerig

Tel: (49-228) 91920 0
Fax: (49-228) 91920 10

The Central Marketing Agency for German Agriculture is the official promotion board for German agriculture and food products, both in Germany and abroad. It is financed by check-off programs and sponsored activities (e.g., sales and promotional materials). Some of its activities and materials, e.g., seminars and reports, may be of interest to U.S. exporters in gaining insight into current market trends.

CMA - Centrale Marketinggesellschaft der
deutschen Agrarwirtschaft mbH
Koblenzer Str. 148
53177 Bonn

Tel: (49-228) 847 0
Fax: (49-228) 847 202

The Central Market and Price Information Agency releases an annual publication providing detailed statistical information on the German livestock and poultry sectors as well as relevant EU and world data. The publication is in German, costs approximately $100 and may be ordered from the following address:

Zentrale Markt- und Preisberichtstelle für
Erzeugnisse der Land-, Forst- und
Ernährungswirtschaft GmbH (ZMP)
Rochusstr. 2
53123 Bonn

Tel: (49-228) 9777 0
Fax: (49-228) 9777 300
www.dainet.de/zmp/zmp.htm
E-mail: zmp@compuserve.com

For tariff classification and information on the import treatment of poultry meat and preparations, traders should contact the German Office of Customs Classification (Oberfinanzdirektion Zolltechnische Pruefungs- und Lehranstalt) in Hamburg:

Oberfinanzdirektion
Zolltechnische Prüfungs- und Lehranstalt
Baumacker 3
22523 Hamburg, Germany

Tel: (49-40) 37060
Fax: (49-40) 37062547

For tariff classification and information on the import treatment of products based on flour which contain poultry meat, traders should contact the German Office of Customs Classification (Oberfinanzdirektion Zolltechnische Pruefungs- und Lehranstalt) in Munich:

Oberfinanzdirektion
Zolltechnische Pruefungs- und Lehranstalt
Landsburger Strasse 122
80339 Muenchen, Germany

Tel: (49-89) 510 901
Fax: (49-89) 510 92379
or 510 92339