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Germany

Poultry and Products

Annual

2000

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Report Highlights:
Production and consumption of poultry and eggs are likely to grow moderately in calendar years 2000 and 2001. Poultry meats face stiff competition from low-priced pork. Turkey is being replaced by low-priced pork in food products wherever possible. Consumption of eggs are stable at approximately 225 eggs per person.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
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Table of Contents

Executive Summary

This report contains PS&D's for calendar years 1999, 2000 and 2001 and trade matrices for 1999 and 2000. (Please refer to GM9050 for 1998 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 2000 and 2001. Poultry meats compete with pork and are often substituted for by inexpensive pork. In particular, 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 stable at 225 eggs per capita. Thus, production increases are only moderate. Prices remain firm at low levels.

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 upwords in mid-1999. Prices declined sharply after consumers quickly reduced 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 2000 and 2001 to 750,000 MT. Consumption is expected to increase to 1,250,000 MT. Upswings in production and consumption may be realized for all poultry meats.

The poultry market is influenced by the swine market. Pork is marketed at very attractive prices, substituting poultry meats in meat products where possible and on the fresh market. Therefore, consumption/use will only increase moderately. Turkey meat seems especially hard 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 most of consumption increases in poultry meats. Prices of poultry meats remain low.

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 saturated. Per-capita consumption seems to level off at 225 eggs. Therefore, production is expected to rise only moderately in 2000 and 2001, and imports are likely to decline in response to firm domestic competition and low market prices. There seems to be room left in the market for egg products. (Unfortunately, meaningful statistics on production and consumption of egg products are not available.) Prices of eggs remain low.

Germany imports about 35 million eggs mostly in the form of egg products from the United States. 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 1999, 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. Listed below are 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. New constructions of 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 at 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 don't need to be changed and can continue to operate. Second, newly constructed systems have to comply with the Court's decision. Unfortunately, there is 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 stop, which dampens 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 23 through 36).

Poultry

- Sales of frozen poultry still dominate: In Germany, 51 percent of poultry sales were purchased frozen in 1999. Fresh poultry gains market share. In western Germany fresh sales dominate. Eastern Germany is still a frozen market.

- Poultry parts gain importance: In 1999, 65 percent of poultry sales were in parts versus 62 percent in 1998.

- If frozen, then parts - if fresh, then parts: 52 percent of frozen sales are parts, 80 percent of fresh sales are in parts in 1999. There occurred a significant shift from whole to parts in purchases of frozen product in 1999.

- If fresh, then turkey: Turkey meats comprise 56 percent of fresh sales in 1999.

- Consumer markets dominate all other poultry outlets: In 1999, sales in consumer markets account for 39 percent of frozen broiler, 45 percent of fresh broiler, 36 percent of frozen turkey and 48 percent of fresh turkey. However, especially the discounter Aldi, a German grocery chain, significantly increased its sales of frozen product.

Eggs

- Fewer households buy fewer eggs: Whereas 94.4 percent of households bought eggs in 1995, only 89.9 percent of households bought eggs in 1999. Average egg purchases per household declined from 346 eggs to 331 eggs p.a. respectively.

- Consumers prefer size "M" eggs: In 1999, 61.9 percent of shell eggs sales were in grade "M", 35.9 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 1999, 45 percent of household purchases were in packages, and thereof 88 percent in packages of ten eggs and ten percent in packages of six eggs.

- Germans prefer brown eggs: In 1999, 60 percent of households purchased exclusively brown eggs, 26 percent exclusively white eggs, 11percent of households purchased mixed colors, and one percent eggs with artificial color. 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 48 percent of egg sales in 1999. They have less importance in the East.

- Egg sales with special label surged: Packaged eggs sold under special label (free range, cereal fed, bio) increased from 25.6 percent in 1997 of all packaged eggs to 31.2 percent in 1999 mainly due to the Germany wide sales of free range eggs in Aldi supermarket outlets.

The German Compound Feed Industry

The German Compound Feed Industry was comprised of 510 companies (companies with an annual production capacity of more than 250 MT) in CY1999. In marketing year MY1998/99 (July/June), the industry produced 19.04 million MT of mixed (compound) feed with a turnover of 7.8 billion DM (approximately US$3.9 billion). German farmers spent 9.3 billion DM (US$ 4.6) on animal feed. Consequently, the compound feed industry accounted for 84 percent of total commercial feed expenditures in Germany.

The compound feed industry in Germany is characterized by commercial production. Integrated production is small as only marginal quantities of compound feed are channeled into affiliated livestock operations. However, a significant quantity of feed is mixed on the farm, by farmers, to be used in their livestock operations (see Table 4). These, often larger, farm operations use their own harvested grain and purchase premixtures of minerals and additional feed and feed concentrates to mix their own feed formulations.

The industry is haunted by overcapacity at 15 to 20 percent. Consequently, the compound feed industry is constantly consolidating (see Table 8). Since MY1992/93, the total number of companies declined by 145 and average annual production per company rose from 29,889 MT to 37,333 MT or 25 percent. Bigger companies, although small in number, account for the bulk of production. For example, in MY1991/92 companies with an annual production of over 200,000 MT accounted for less than 30 percent of total production. In MY1998/99 this share rose to 36 percent. Small companies tend to specialize whereas big market players supply the full range of mixed feeds for major animal varieties.

Naturally, the upside of overcapacity is the industry's ability to quickly adjust to additional demand, e.g., the increase in hog numbers in 1999 was easily met by an increase in compound feed production (see Table 4).

Despite fewer feed producers, there is fierce competition within the industry for clients. Overcapacity is mainly due to lower livestock numbers (especially cattle and hog); more mixed feed on the farm, and slow adjustment by a traditionally small scale industry.

The industry depends heavily on imports of pulses, soybean meal/soybeans, palm kernel meal, and corn gluten feed. It also imports significant quantities of fish meal, also from the United States. In addition to bulk commodities mainly soybeans, corn and corn gluten feed, the United States may provide premixtures and specialty products, such as vitamins and mineral concentrates or specialize in niche markets (e.g., pet food).

For this section refer to Tables 37 through 44.

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: U.S. dollar/German mark exchange rates have been as follows (according to *Handelsblatt*):

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 = $ 0.9388 (7/26/2000).

PSD's and Trade Matrices

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

		1999		2000		2001
	Old	New	Old	New	Old	New
Calendar Year Begin		01/1999		01/2000		01/2001
Inventory (Reference)	59	59	59	59	0	59
Slaughter (Reference)	381	385	381	385	0	385
Beginning Stocks	0	0	0	0	0	0
Production	740	748	760	750	0	750
Whole, Imports	210	213	210	215	0	215
Parts, Imports	440	443	440	440	0	440
Intra EC Imports	520	520	520	510	0	510
Other Imports	130	136	130	145	0	145
TOTAL Imports	650	656	650	655	0	655
TOTAL SUPPLY	1,390	1,404	1,410	1,405	0	1,405
Whole, Exports	50	53	50	55	0	55
Parts, Exports	100	102	105	100	0	100
Intra EC Exports	120	110	124	110	0	110
Other Exports	30	45	31	45	0	45
TOTAL Exports	150	155	155	155	0	155
Human Consumption	740	743	755	755	0	755
Other Use, Losses	500	506	500	495	0	495
Total Dom. Consumption	1,240	1,249	1,255	1,250	0	1,250
TOTAL Use	1,390	1,404	1,410	1,405	0	1,405
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	1,390	1,404	1,410	1,405	0	1,405
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0

Year	1998	1999	% Change			1998	1999	% Change
Jan	2,625	2,697	2.7%		Jul	2,661	2,387	-10.3%
Feb	2,532	2,453	-3.1%		Aug	2,578	2,341	-9.2%
Mar	2,466	2,654	7.6%		Sep	3,010	2,468	-18.0%
Apr	2,501	2,563	2.5%		Oct	2,786	2,461	-11.7%
May	2,622	2,203	-16.0%		Nov	2,837	2,314	-18.4%
Jun	2,459	2,439	-0.8%		Dec	3,062	2,534	-17.2%

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	1999			2000
U.S.	135		U.S.	400
Others			Others	
Netherlands	174,463		Netherlands	170,000
France	71,226		France	80,000
Hungary	50,076		Hungary	46,000
Poland	23,580		Italy	24,000
Thailand	17,633		Thailand	23,000
Italy	17,048		Great Britain	21,000
Denmark	15,694		Poland	20,000
Brazil	14,914		Denmark	19,000
Great Britain	12,849		Brazil	15,000
Belgium	7,087		Belgium/Lux	12,000
Total for Others	404,570		Total for Others	430,000
Others not listed	15,822		Others not listed	17,000
Grand Total	420,527		Grand Total	447,400

Exports for	1999			2000
U.S.	0		U.S.	0
Others			Others	
Netherlands	55,671		Netherlands	60,000
Russia	19,294		Great Britain	15,000
Great Britain	12,911		Russia	11,000
Austria	9,830		Austria	9,000
France	9,102		France	8,000
Hong Kong	5,912		Hong Kong	5,000
Denmark	3,895		Denmark	5,000
Switzerland	2,840		Belgium/Lux	4,000
Belgium	2,579		Switzerland	2,000
Bosnia-Hercegov	1,570		Spain	2,000
Total for Others	123,604		Total for Others	121,000
Others not listed	15,634		Others not listed	12,000
Grand Total	139,238		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)

		1999		2000		2001
	Old	New	Old	New	Old	New
Calendar Year Begin		01/1999		01/2000		01/2001
Inventory (Reference)	48	48	49	49	0	49
Slaughter (Reference)	296	296	300	300	0	300
Beginning Stocks	0	0	0	0	0	0
Production	385	384	395	395	0	395
Whole, Imports	120	123	120	120	0	120
Parts, Imports	245	248	245	245	0	245
Intra EC Imports	305	309	305	305	0	305
Other Imports	60	62	60	60	0	60
TOTAL Imports	365	371	365	365	0	365
TOTAL SUPPLY	750	755	760	760	0	760
Whole, Exports	20	25	20	20	0	20
Parts, Exports	70	75	70	70	0	70
Intra EC Exports	73	78	73	73	0	73
Other Exports	17	22	17	17	0	17
TOTAL Exports	90	100	90	90	0	90
Human Consumption	419	421	424	424	0	424
Other Use, Losses	241	234	246	246	0	246
Total Dom. Consumption	660	655	670	670	0	670
TOTAL Use	750	755	760	760	0	760
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	750	755	760	760	0	760
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0

Year	1998	1999	% Change			1998	1999	% Change
Jan	2,306	2,369	2.7%		Jul	2,524	2,124	-15.8%
Feb	2,311	2,210	-4.4%		Aug	2,360	2,015	-14.6%
Mar	2,287	2,364	3.4%		Sep	2,611	2,205	-15.5%
Apr	2,235	2,301	3.0%		Oct	2,422	2,176	-10.2%
May	2,419	1,953	-19.3%		Nov	2,321	1,898	-18.2%
Jun	2,223	2,158	-2.9%		Dec	1,749	2,224	27.2%

Note: Values are in US$ 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	1999		2000
U.S.	26	U.S.	50
Others		Others	
Netherlands	143,167	Netherlands	145,000
Hungary	19,129	France	25,000
France	15,252	Thailand	20,000
Thailand	15,247	Hungary	15,000
Denmark	14,744	Denmark	17,000
Brazil	6,807	Belgium/Lux	10,000
Belgium	6,412	Brazil	9,000
Poland	5,142	Poland	4,000
Italy	2,813	Italy	3,000
Austria	2,340	Sweden	2,000
Total for Others	231,053	Total for Others	250,000
Others not listed	6,766	Others not listed	8,000
Grand Total	237,845	Grand Total	258,050

Exports for	1999		2000
U.S.	0	U.S.	0
Others		Others	
Netherlands	43,891	Netherlands	42,000
Russia	9,778	Russia	12,000
Great Britain	9,457	France	7,000
France	6,357	Great Britain	4,000
Austria	4,484	Austria	3,000
Hong Kong	3,970	Hong Kong	3,000
Switzerland	2,604	Denmark	3,000
Belgium	1,754	Switzerland	2,500
U.Arab Emirates	1,540	Belgium/Lux	2,200
Bosnia-Herceov	1,517	Arab Emirates	1,500
Total for Others	85,352	Total for Others	80,200
Others not listed	10,264	Others not listed	8,000
Grand Total	95,616	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)

		1999		2000		2001
	Old	New	Old	New	Old	New
Calendar Year Begin		01/1999		01/2000		01/2001
Inventory (Reference)	9	9	10	10	0	10
Slaughter (Reference)	29	29	30	30	0	30
Beginning Stocks	0	0	0	0	0	0
Production	265	271	270	272	0	272
Whole, Imports	25	25	25	25	0	25
Parts, Imports	155	154	155	155	0	155
Intra EC Imports	148	148	148	148	0	148
Other Imports	32	31	32	32	0	32
TOTAL Imports	180	179	180	180	0	180
TOTAL SUPPLY	445	450	450	452	0	452
Whole, Exports	0	0	0	0	0	0
Parts, Exports	40	40	41	40	0	40
Intra EC Exports	27	27	27	27	0	27
Other Exports	13	13	14	13	0	13
TOTAL Exports	40	40	41	40	0	40
Human Consumption	260	265	264	266	0	266
Other Use, Losses	145	145	145	146	0	146
Total Dom. Consumption	405	410	409	412	0	412
TOTAL Use	445	450	450	452	0	452
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	445	450	450	452	0	452
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0

Year	1998	1999	% Change			1998	1999	% Change
Jan	2,948	2,814	-4.5%		Jul	2,829	2,812	-0.6%
Feb	2,790	2,776	-0.5%		Aug	2,674	2,662	-0.4%
Mar	2,656	3,004	13.1%		Sep	3,188	2,769	-13.1%
Apr	2,889	2,813	-2.6%		Oct	2,888	2,453	-15.1%
May	2,914	2,593	-11.0%		Nov	2,821	2,373	-15.9%
Jun	2,788	2,836	1.7%		Dec	2,994	2,574	-14.0%

Note: Values are in US$ 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	1999			2000
U.S.	107		U.S.	100
Others			Others	
France	41,510		France	40,000
Netherlands	22,537		Netherlands	25,000
Italy	13,590		Italy	18,000
Hungary	10,838		Great Britain	14,500
Brazil	8,107		Hungary	9,000
Great Britain	6,094		Brazil	6,000
Poland	3,370		Israel	2,000
Israel	2,413		Ireland	1,000
Czech Republic	1,652		Belgium/Lux	1,000
Ireland	1,626		Poland	1,000
Total for Others	111,737		Total for Others	117,500
Others not listed	2,857		Others not listed	7,000
Grand Total	114,701		Grand Total	124,600

Exports for	1999			2000
U.S.	0		U.S.	0
Others			Others	
Russia	9,466		Russia	12,000
Netherlands	9,147		Netherlands	10,000
Austria	4,728		Austria	4,000
Great Britain	1,780		Denmark	1,200
Denmark	1,771		Belgium/Lux	1,000
France	731		Great Britain	1,000
Belgium	659		France	1,000
Spain	588		Poland	1,000
Finland	560		Hungary	600
Benin	493		Serbia/Mont.	500
Total for Others	29,923		Total for Others	32,300
Others not listed	3,093		Others not listed	3,000
Grand Total	33,016		Grand Total	35,300

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)

		1999		2000		2001
	Old	New	Old	New	Old	New
Calendar Year Begin		01/1999		01/2000		01/2001
Layers	50	50	50	50	0	50
Beginning Stocks	0	0	0	0	0	0
Production	14,200	14,341	14,250	14,350	0	14,350
Hatch Eggs, Imports	80	52	80	50	0	50
Shell Eggs, Imports	4,920	5,023	4,920	5,050	0	5,050
Other Imports	1,250	1,142	1,250	1,100	0	1,100
Intra EC Imports	6,250	6,217	6,100	6,300	0	6,300
TOTAL Imports	6,250	6,217	6,250	6,200	0	6,200
TOTAL SUPPLY	20,450	20,558	20,500	20,550	0	20,550
Hatch Eggs, Exports	50	81	50	80	0	80
Shell Eggs, Exports	900	1,058	900	1,000	0	1,000
Other Exports	400	378	400	400	0	400
Intra EC Exports	1,210	1,420	1,210	1,380	0	1,380
TOTAL Exports	1,350	1,517	1,350	1,480	0	1,480
Hatch Eggs,Consumption	550	542	550	550	0	550
Shell Eggs, Human	18,414	18,363	18,414	18,400	0	18,400
Shell Eggs,OT.Use/Loss	136	136	186	120	0	120
Other Dom. Consumption	0	0	0	0	0	0
Total Dom. Consumption	19,100	19,041	19,150	19,070	0	19,070
TOTAL Use	20,450	20,558	20,500	20,550	0	20,550
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	20,450	20,558	20,500	20,550	0	20,550
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0

Year	1998	1999	% Change			1998	1999	% Change
Jan	1,094	1,020	-6.8%		Jul	1,057	877	-17.0%
Feb	1,130	1,114	-1.4%		Aug	995	795	-20.1%
Mar	1,093	1,009	-7.7%		Sep	1,009	876	-13.2%
Apr	910	940	3.3%		Oct	1,173	943	-19.6%
May	1,020	815	-20.1%		Nov	1,112	983	-11.6%
Jun	977	943	-3.5%		Dec	1,087	1,045	-3.9%

Note: Values are in US$ 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	1999		2000
U.S.	35,000	U.S.	35,000
Others		Others	
Netherlands	5,090,000	Netherlands	5,124,000
Bel/Lux	600,000	Bel/Lux	550,000
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	6,165,000	Total for Others	6,149,000
Others not listed	17,000	Others not listed	16,000
Grand Total	6,217,000	Grand Total	6,200,000

Exports for	1999		2000
U.S.	0	U.S.	0
Others		Others	
Netherlands	480,000	Netherlands	480,000
France	350,000	France	275,000
Switzerland	200,000	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	1,495,000	Total for Others	1,440,000
Others not listed	22,000	Others not listed	40,000
Grand Total	1,517,000	Grand Total	1,480,000

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	1999
Broiler	7.1	6.9	6.7	7.0	7.1	7.3	7.8	8.0	8.0
Turkey	3.0	3.4	3.4	3.6	4.0	4.4	4.8	4.9	5.0
Other Poultry Meat	2.1	2.2	2.3	2.2	2.3	2.4	2.2	2.4	2.2
TOTAL	12.2	12.5	12.4	12.8	13.4	14.1	14.8	15.2	15.2

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	1.88	1.88	1.88	1.88	1.88	1.88	1.89
2000	1.92	1.94	1.97	2.00	2.03							

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	1.32	1.32	1.30	1.29	1.29	1.29	1.30
2000	1.29	1.30	1.31	1.31	1.32							

Source: Agrarwirtschaft, serveral issues.

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

	1993	1994	1995	1996	1997	1998	1999
January	17.70	17.38	16.75	16.61	17.06	16.44	15.21
February	17.69	17.35	16.75	16.58	16.95	16.56	15.18
March	17.69	17.18	16.64	16.58	16.79	16.48	14.75
April	17.49	17.33	16.58	16.34	16.80	16.25	15.21
May	17.53	17.22	16.81	16.50	16.69	16.41	14.76
June	17.47	17.26	16.79	16.69	16.74	16.17	14.75
July	17.59	17.14	16.62	16.92	16.54	16.23	14.89
August	17.44	17.88	16.61	16.99	16.59	16.04	14.80
September	17.37	17.86	16.52	17.06	16.63	16.13	14.82
October	17.39	17.87	16.60	17.00	16.63	16.02	14.97
November	17.44	17.06	16.58	16.91	16.52	15.99	15.25
December	17.40	17.87	16.63	16.75	16.36	15.77	15.22
Average	17.52	17.12	16.65	16.74	16.69	16.21	14.98

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	2.40	2.38	2.37	2.35	2.34	2.33	2.37
2000	2.38	2.39	2.39	2.41	2.43							

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
1999	2.56	2.47	2.42	2.31	2.27	2.27	2.27	2.27	2.27	2.27	2.27	2.29	2.33

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	3.85	3.85	3.80	3.78	3.73	3.65	3.65	3.64	3.57	3.53	3.57	3.59
2000	3.56	3.53	3.50	3.50	3.47							

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	1999
Feed Prices (Average) 2/	47.05	47.10	45.00	43.65	41.90	43.65	44.95	43.00	39.95
Broiler Meat/Feed Price Ratio 3/	3.39	3.32	3.37	3.42	3.36	3.31	3.35	3.27	3.21

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	1999
Total enterprises	1,478	1,453	1,409	1,361	1,317	1,316
Total number of laying hen places (1,000)	41,427	41,300	41,423	39,676	40,160	40,762
- Battery cage management enterprises	1,403	1,373	1,315	1,242	1,196	1,158
- % Share	94.9	94.5	93.3	91.3	90.8	88.0
- Number of laying hen places (1,000)	39,167	38,705	38,278	35,575	35,838	36,022
- % Share	94.5	93.7	92.4	89.7	89.2	88.4
- Aviary management enterprises	3	6	9	12	15	29
- % Share	0.2	0.4	0.6	0.9	1.1	2.2
- Number of laying hen places (1,000)	13	15	134	108	130	194
- % Share	N/A	N/A	0.3	0.3	0.3	0.5
- Floor management enterprises	136	138	147	166	161	188
- % Share	9.2	9.5	10.4	12.2	12.2	14.3
- Number of laying hen places (1,000)	1,827	1,905	2,120	2,512	2,514	2,482
- % Share	4.4	4.6	5.1	6.3	6.3	6.1
- Intensive range management enterprises	6	9	11	8	14	14
- % Share	0.4	0.6	0.8	0.6	1.1	1.1
- Number of laying hen places (1,000)	34	89	97	148	177	161
- % Share	0.1	0.2	0.2	0.4	0.4	0.4
- Free range management enterprises	46	65	80	97	105	129
- % Share	3.1	4.5	5.7	7.1	8.0	9.8
- Number of laying hen places (1,000)	384	586	794	1,333	1,500	1,903
- % Share	0.9	1.4	1.9	3.4	3.7	4.7

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				
	1995	**1996**	**1997**	**1998**	**1999**	**1995**	**1996**	**1997**	**1998**	**1999**
January	14.15	18.30	18.40	21.00	21.75	14.45	15.55	15.45	15.00	14.00
February	15.65	20.25	19.45	21.30	22.00	14.95	16.10	15.75	15.00	14.05
March	16.00	21.90	20.00	21.30	22.65	14.75	16.20	15.65	14.90	14.10
April	15.25	19.15	16.25	20.10	19.40	14.55	15.55	14.85	14.90	13.50
May	13.25	18.05	15.65	17.95	18.85	14.10	14.95	14.75	14.85	13.15
June	13.95	18.35	16.20	20.60	19.00	14.05	15.05	14.70	14.20	13.25
July	13.50	18.60	17.45	19.90	19.10	13.85	15.20	14.50	14.20	13.30
August	15.90	19.20	18.25	20.25	18.90	14.15	15.30	14.55	14.05	13.65
September	17.80	20.15	18.85	21.30	21.05	14.85	15.55	14.80	14.10	14.05
October	17.75	20.65	19.50	21.15	21.35	14.65	15.70	14.85	14.00	14.35
November	17.85	21.25	19.60	21.40	22.60	15.15	15.70	14.90	14.25	14.75
December	19.65	22.35	21.80	23.50	24.20	15.80	15.95	15.20	14.75	14.75
Jan-Dec	15.90	19.85	18.45	20.80	20.90	14.60	15.50	15.00	14.50	13.90

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	7.35	7.50	7.80	8.95	9.00	10.05	11.00
2000	10.95	12.45	14.15	12.20	10.60							

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	1.79	1.72	1.72	1.66	1.61	1.60	1.55	1.55	1.62	1.63	1.61	1.69
2000	1.71	1.76	1.86	1.91	1.81							

Source: Agrarwirtschaft, several issues.

Table 21: Trade in Egg Products (in MT)

	1993	1994	1995	1996	1997	1998	1999
Imports							
whole egg, dried	1,239	1,345	1,632	5,029	4,144	3,686	1,714
whole egg, liquid/frozen	20,021	19,137	20,143	15,175	20,117	19,067	16,769
egg yolk, liquid	3,975	5,418	6,517	7,966	11,619	11,523	11,174
egg yolk, frozen	762	684	721	493	641	578	401
egg yolk, dried	845	828	879	1,080	1,475	1,563	1,258
albumen, dried	1,607	1,906	1,790	1,510	1,166	1,509	1,511
albumen, liquid/frozen	3,209	2,782	1,973	1,500	1,168	1,837	942
Exports							
whole egg, dried	559	701	636	747	692	634	780
whole egg, liquid/frozen	3,547	6,556	6,085	5,788	9,836	9,016	8,896
egg yolk, liquid	1,750	870	929	1,392	2,422	1,529	1,305
egg yolk, frozen	605	323	181	89	22	68	168
egg yolk, dried	151	235	113	146	286	453	176
albumen, dried	2,090	1,762	1,502	1,597	1,358	1,335	1,206
albumen, liquid/frozen	2,399	3,915	3,998	4,214	4,517	3,090	4,513

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 1998 to 1999 by two 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	1999
Farmer/Producer	40	42	41	38	37
Home delivery	3	2	2	2	2
Farmers' Market	10	10	10	10	9
Aldi (largest discounter)	12	12	11	12	14
Other discounters (excl. Aldi)	12	11	11	12	12
Consumer Market	12	12	14	13	13
Supermarket/Food Retail	7	7	7	7	7
Others	4	4	4	7	7

Source: ZMP Bilanz Eier, Gefluegel, 2000.

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

Outlet	1995	1996	1997	1998	1999
Farmer/Producer	45	46	45	41	41
Home delivery	3	2	2	2	2
Farmers' Market	10	11	11	11	10
Aldi (largest discounter)	13	12	12	12	14
Other discounters (excl. Aldi)	9	9	8	9	9
Consumer Market	10	10	12	11	11
Supermarket/Food Retail	6	6	7	7	6
Others	4	4	4	7	7

Source: ZMP Bilanz Eier, Gefluegel, 2000.

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

Outlet	1995	1996	1997	1998	1999
Farmer/ Producer	18	23	24	23	25
Home Delivery	2	2	1	1	1
Farmers' market	8	8	8	7	7
Aldi Discounter	9	9	9	10	12
Discounters gen. (excl. Aldi)	24	21	22	24	23
Consumer Market	23	23	24	21	20
Supermarket/Food Retailers	12	10	10	9	9
Others	5	4	3	5	5

Source: ZMP Bilanz Eier, Gefluegel, 2000.

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

	Germany total			West Germany			East Germany		
	1997	1998	1999	1997	1998	1999	1997	1998	1999
Total share of packed eggs	41.4	43.0	44.7	35.8	37.0	39.9	64.2	65.6	64.6
- thereof with special label	25.6	25.9	31.2	26.6	28.6	34.3	23.3	20.1	23.8
- thereof free range	41.9	46.0	57.9	42.7	47.5	59.0	39.9	41.6	54.3
- thereof floor management	49.0	42.8	32.2	48.2	41.2	31.0	50.9	47.7	36.9
- thereof cereal eggs	9.1	8.5	5.0	9.1	8.5	4.8	9.2	8.6	5.6
- thereof biological	---	2.6	4.7	---	2.8	4.8	---	2.1	3.2

Source: ZMP Bilanz Eier, Gefluegel, 2000.

Sales of specially labeled eggs differ noticeably from outlet to outlet (Table 27). Further increases are expected for Aldi on the expense of non labeled eggs, due to Aldi's Germany-wide coverage of labeled eggs. In 1999, Aldi's share of specially labeled eggs surged to 26 percent after the two companies (Aldi South and Aldi North/East) indroduced eggs from free range production on all of their outlets.

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

	1995	1996	1997	1998	1999
Supermarket/traditional retail	37	41	47	48	50
Consumer Market	29	30	34	34	33
Discounters (excl. Aldi)	18	20	24	22	26

Aldi (largest discounter)	5	5	4	10	26

Source: ZMP Bilanz Eier, Gefluegel, 2000.

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**	**1999**
West Germany	192	206	271	272	274
East Germany	68	73	87	91	86

Source: ZMP Bilanz Eier, Gefluegel, 2000.

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	1999	1997	1998	1999	1997	1998	1999
Fresh, parts	36	37	39	40	41	43	24	26	29
Fresh, whole	12	11	9	13	11	10	7	8	5
Frozen, parts	24	25	26	21	23	24	33	32	32
Frozen, whole	28	27	25	26	25	22	36	34	32

Source: ZMP Bilanz Eier, Gefluegel, 2000.

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**	**1999**	**1996**	**1997**	**1998**	**1999**
Parts	46	46	47	52	45	47	48	50
Whole	54	54	53	48	55	53	52	50

Source: ZMP Bilanz Eier, Gefluegel, 2000.

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	1999	1996	1997	1998	1999
Parts	71	75	78	80	69	76	77	82
Whole	29	25	22	18	31	24	23	15

Source: ZMP Bilanz Eier, Gefluegel, 2000.

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	1999
Turkey parts	48	58	58	57	56
Chicken parts	48	38	39	40	41
Others	4	4	3	3	3

Source: ZMP Bilanz Eier, Gefluegel, 2000.

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

	Broiler				Turkey			
	1996	1997	1998	1999	1996	1997	1998	1999
Traditional Retail	19	18	18	16	13	13	14	12
Consumer Market	44	46	43	39	45	42	38	36
Aldi (largest discounter)	7	8	11	19	12	11	13	16
Discounter (excl. Aldi)	20	20	20	19	15	19	21	23
Others	11	9	7	7	15	14	13	14

Source: ZMP Bilanz Eier, Gefluegel, 2000.

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

	Broiler				Turkey			
	1996	1997	1998	1999	1996	1997	1998	1999
Traditional Retail	17	18	19	19	16	18	18	17
Consumer Market	42	40	41	45	47	47	49	48
Farmers' Market	16	13	15	12	5	9	10	7
Gefluegelhof	6	9	6	4	10	6	6	8
Butcher's shop	4	6	6	--	3	5	6	--
Others 1/	15	14	13	20	19	14	11	20

1/ Includes butcher's shops since 1999.
Source: ZMP Bilanz Eier, Gefluegel, 2000.

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 (1999 panel)

		Quantities purchased in %		
Share of households in %		Total Poultry	Frozen poultry	Fresh poultry
	Age of household-running person			
23.8	Up to 34 years	15.9	15.8	16.0
27.8	35 - 49 years	33.2	32.9	33.4
25.4	50 - 64 years	31.0	31.2	30.9
23.0	65 years and older	19.9	20.1	19.7
	Net income per household			
17.1	Up to DM 1,999	10.3	11.3	9.2
23.6	DM 2,000 - 2,999	21.3	22.8	19.7
23.2	DM 3,000 - 3,999	26.1	27.1	25.2
36.1	DM 4,000 and more	42.4	38.9	46.0
	Size of household			
30.6	1 person hh.	13.6	12.3	15.6
32.6	2 person hh.	36.0	37.4	34.6
18.0	3 person hh.	22.8	22.5	23.0
18.9	4 person hh. and more	27.6	27.9	27.3
	Life cycle (1998)			
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.

Strategic Feed Industry Indicator Tables

Table 37: Gross Domestic Production of Meat, Milk and Eggs (in 1,000 MT, million eggs)

	1998	1999	2000	2001
	Final	Last	Current	Forecast
Marketing Year Begin	01/1998	01/1999	01/2000	01/2001
Beef/Veal	1,449	1,420	1,400	1,400
Pork	3,744	3,850	3,900	3,850
Poultry Meat	769	790	800	810
Broiler	422	430	435	440
Hens and Cocks	58	58	58	58
Ducks and Geese	42	42	42	42
Turkey	247	260	265	270
Sheep/Mutton/Goat Meat	44	44	44	44
Horse Meat	5	5	5	5
Variety Meats	329	330	330	330
Other Meat 1/	89	89	89	89
TOTAL MEAT	7,198	7,318	7,368	7,338
Egg	14,164	14,200	14,200	14,200
Milk	28,500	28,400	28,400	28,400

Source: ZMP, various "Bilanzen." FAS/Berlin estimate.

Table 38: Animal Numbers (in 1,000 head, beginning stocks of marketing year)

Year	1998	1999	2000	2001
	Final	Last	Current	Forecast
Marketing Year Begin	01/1998	01/1999	01/2000	01/2001
CATTLE	15,227	14,942	14,488	14,160
Calves until six months of age	2,275	2,190	2,153	2,150
Calves until one year of age	2,622	2,562	2,469	2,450
Heifers for Breeding	1,904	2,905	2,775	2,700
Other and Slaughter Animals	2,792	1,812	1,769	1,720
Suckler Cows	608	640	678	690
Dairy Cows	5,026	4,833	4,644	4,450
HOGS	24,795	26,294	25,793	25,450
Piglets	6,149	6,574	6,471	6,400

Young pigs below 50 kg	6,599	6,910	6,620	6,550
Slaughter pigs above 50 kg	9,363	10,083	10,051	10,000
Sows and Boars	2,684	2,727	2,651	2,500
SHEEP AND GOAT	2,302	2,310	2,310	2,310
Up to one year of age	560	560	560	560
Above one year of age	1,742	1,750	1,750	1,750
POULTRY	104,900	106,300	107,550	108,300
Laying Hens	50,500	50,200	50,200	50,200
Broiler	44,000	45,000	45,700	46,100
Turkey	7,500	8,000	8,400	8,700
Ducks and Geese	2,900	3,100	3,250	3,300
Horses	670	680	690	700
Dogs	5,200	5,200	5,200	5,200
Cats	6,300	6,500	6,500	6,500
Birds	5,100	5,100	5,100	5,100
Fish Aquariums	3,200	3,200	3,200	3,200
Small animals	4,100	4,600	4,600	4,600
Inland Fisheries (in MT)	52,000	52,000	52,000	52,000

1/ Small Animals.
Source: ZMP, various "Bilanzen." German Association of Pet Food. FAS/Berlin estimate.
Statistisches Jahrbuch, Jahresbericht Deutsche Fischwirtschaft.

Table 39: Total Feed Supply (in 1,000 MT)

	1998	1999	2000	2001
	Final	Last	Current	Forecast
Marketing Year Begin	07/1997	07/1998	07/1999	07/2000
Area used for feed production (in ha)	10,495	10,495	10,495	10,495
Grain	21,934	21,934	21,934	21,934
Pulses	647	647	647	647
Oilseeds	55	55	55	55
Maniok	69	69	69	69
Dry Green Feed	450	450	450	450
Bran	1,645	1,645	1,645	1,645
Oilcakes and oilmeals	6,023	6,315	5,715	5,765
thereof Soybean Meal	3,444	3,650	3,150	3,200
Palmkernel Meal	596	500	500	500
Rapeseed Meal	1,406	1,650	1,550	1,550
Corn Germ Meal	48	50	50	50
Sunflower Meal	443	385	385	385
Other Meals	86	80	80	80
Sugar Beet Chips	1,468	1,468	1,468	1,468
Corngluten Feed	1,324	1,324	1,324	1,324
Vegetable Oils and Fats	48	48	48	48
By-Products from brewing and distilling	1,922	1,922	1,922	1,922
Other by-products from processing	1,495	1,495	1,495	1,495
Pasture and Meadows	42,802	42,802	42,802	42,802
Corn for Silage	56,844	56,844	56,844	56,844
Other fodder crops and by-products	16,853	16,853	16,853	16,853
Animal Feed	5,379	5,379	5,379	5,379
thereof Animal, Meat and Bone Meal	368	368	368	368
Fish Meal	102	102	102	102
Milk of all type	1,567	1,567	1,567	1,567
NFDM and Whey Powder	178	178	178	178
Whey	2,996	2,996	2,996	2,996
Animal Fats	168	168	168	168
TOTAL FEED	158,958	159,250	158,650	158,700
thereof COMPOUND FEED	18,559	19,030	18,810	18,239

Source: BML, Statistischer Monatsbericht 12/1999. FAS/Berlin estimate.

Table 40: Compound Feed Production and Use (in 1,000 MT)

	1998	1999	2000	2001
	Final	Last	Current	Forecast
Marketing Year Begin	07/1997	07/1998	07/1999	07/2000
Grain	6,309	6,500	6,400	6,200
Pulses	398	400	400	370
Bran	1,538	1,500	1,500	1,400
Oilcakes and oilmeals	4,533	4,830	4,710	4,629
Maniok	69	70	70	70
Citrus and Fruit Pellets	534	600	600	540
Corngluten Feed	1,324	1,500	1,400	1,300
Sugar Beet Chips	1,100	1,100	1,100	1,100
Fish, animal and bone meal	461	460	460	460
Mineral Feed	870	880	880	880
Nonfat Dry Milk Powder	93	90	90	90
Other	1,330	1,100	1,200	1,200
Compound Feed Production	18,559	19,030	18,810	18,239
Compound Feed Capacity	22,300	21,900	21,800	21,600
Prod. by integrated producers	0	0	0	0
Prod. by commercial producers	18,559	19,030	18,810	18,239
For				
Horses	276	280	285	289
Cattle	7,420	7,000	7,000	7,000
Hogs	6,408	7,300	7,075	6,500
Poultry	4,198	4,200	4,200	4,200
Other Animals	257	250	250	250
Compound Feed Used	18,559	19,030	18,810	18,239
Compound Feed (KGE)	16,555	17,000	16,600	16,300
Grain/Feed Concentr. (KGE)	16,258	16,500	16,000	16,000
Other Feed (KGE)	32,742	32,000	32,000	32,000
Total Feed (KGE)	65,555	65,500	64,600	64,300

Source: BML, Statistischer Monatsbericht 12/1999. FAS/Berlin estimate.

Table 41: Feed Use by Animal Type (in kg Grain/Energy Units per animal)

	1998	1999	2000	2001
	Final	Last	Current	Forecast
Marketing Year Begin	07/1997	07/1998	07/1999	07/2000
CATTLE	2,737	2,737	2,737	2,737
thereof compound feed	406	406	406	406
Grain	417	417	417	417
Pulses	22	22	22	22
Feed Concentrate	439	439	439	439
Root Crops	58	58	58	58
Hay and green fodder	1,760	1,760	1,760	1,760
Straw	10	10	10	10
Milk of all type	31	31	31	31
HOGS	670	670	670	670
thereof compound feed	233	233	233	233
Grain	509	509	509	509
Pulses	11	11	11	11
Feed Concentrate	128	128	128	128
Root Crops	10	10	10	10
Hay and green fodder	0	0	0	0
Milk of all type	12	12	12	12
POULTRY	44	44	44	44
thereof compound feed	37	37	37	37
Grain	29	29	29	29
Pulses	0	0	0	0
Feed Concentrate	15	15	15	15
SHEEP AND GOATS	337	337	337	337
thereof compound feed	62	62	62	62
Grain	67	67	67	67
Pulses	1	1	1	1
Feed Concentrate	28	28	28	28
Root Crops	5	5	5	5
Hay and green fodder	225	225	225	225
Straw	10	10	10	10
Milk of all type	1	1	1	1

HORSES	1,742	1,742	1,742	1,742
thereof compound feed	323	323	323	323
Grain	290	290	290	290
Feed Concentrate	248	248	248	248
Root Crops	46	46	46	46
Hay and green fodder	1,124	1,124	1,124	1,124
Straw	31	31	31	31
Milk of all type	3	3	3	3

Note: Figures are converted into metric kg Grain/Energy Units from metric weights.

Source: BML, Statistischer Monatsbericht 12/1999. FAS/Berlin estimate.

Table 42: Net Imports of Animal Feed (in 1,000 MT)

	1998	1999	2000	2001
	Final	Last	Current	Forecast
Marketing Year Begin	07/1997	07/1998	07/1999	0/2000
Wheat	265	250	270	280
Ray	0	0	0	0
Barley	265	250	260	265
Hafer	4	5	4	4
Corn	38	40	43	44
Other Grains	29	30	25	25
Feed Rice	2	2	2	2
TOTAL GRAINS	603	577	604	620
Peas	91	90	90	90
Beans	5	5	5	5
Other Pulses	32	30	30	30
TOTAL PULSES	128	125	125	125
Oilseeds	18	25	25	25
Maniok	69	70	75	75
Dry Green Feed	133	150	150	150

Bran	180	200	180	180
Sugar Beet Chips	(126)	(120)	(120)	(120)
Corn Gluten Feed	1,143	1,200	1,100	1,100
Molasses	125	130	130	130
Citrus and Fruit Pellets	534	600	600	500
Vegetable Oils and Fats	27	30	30	30
By-Products from brewing and distilling	450	450	450	450
Potato Pulp	2	2	2	2
FEED FROM PLANT PROCESSING	2,335	2,492	2,372	2,272
Soybean Meal	3,444	3,600	3,700	3,300
Palm Kernel Meal	596	610	610	590
Rapeseed Meal	(19)	(25)	(25)	(25)
Sunflower Meal	401	400	350	350
Other oilmeals and cakes	96	100	110	90
TOTAL OILMEALS AND CAKES	4,518	4,685	4,745	4,305
Animal Meal	(282)	(290)	(290)	(290)
Fish Meal	85	110	95	85
Nonfat Dry Milk Powder	40	40	40	40
Whey Powder	20	20	20	20
Animal Fats	0	0	0	0
ANIMAL FEEDS	(137)	(120)	(135)	(145)
TOTAL NET FEED IMPORTS	7,667	8,004	7,961	7,427

Note: Comprises net trade (imports minus exports). A prarenthesis means that exports exceeded imports.
Source: BML, Statistischer Monatsbericht 12/1999. FAS/Berlin estimate.

Table 43: Tariff Rates for Selected Animal Feed (in Percent or Euro per 100 kg net)

CN Code	Product Description	Bound Rate	Other
		in	Import
		Percent	Tax/Fee*
0505.90	Feather Meal	free	16
1501.00	Pig and Poultry Fat:		
1501.00.19.001	Pig Fat - edible	$17.20	16
1501.00.19.009	Pig Fat - inedible	$17.20	16
1501.00.90.001	Poultry Fat - edible	11.5	7
1501.00.90.009	Poultry Fat - inedible	11.5	7
1502.00.90.000	Fats of bovine, sheep and goats	3.2	16

1511	Palm Oil and it's fractions, not chemically modified:		
1511.10	Crude oil:		
1511.10.10	Crude oil for technical or industrial use	free	16
1511.10.90	Other crude oils	3.8	16
1511.90	Refined oils:		
1511.90.11	Refined oils, solid fractions, <= 1kg	12.8	16
1511.90.19	Refined oils, solid fractions, > 1kg	12.8	16
1511.90.91	Refined oils, other, for tech./ind.l use	5.1	16
1511.90.99	Refined oils, other, not for tech./ind. use	9.0	16
1518.00	Anml/Veg. Fats and Oils:		
1518.00.10	Linoxyn	7.7	16
1518.00.31	Fixed veg. oils, fluid, mixed, for techn./ind. use, crude	3.2	16
1518.00.39	Fixed veg. oils, fluid, mixed, for techn./ind. use, refined	5.1	16
1518.00.91	Animal and vegetable fats and oil and their fraction, treated	7.7	16
1518.00.95	Other: Inedible mixtures or prep. animal	2.0	16
1518.00.99	Other: Edible mixtures or prep. animal	7.7	16
2301.10	Meat and Bone Meal	free	7
2301.20	Fish Meal	free	7

* Value Added Tax.

Source: Official Journal of the European Communities, L278, German Customs Offices.

Table 44: Compound Feed Producers (in 1,000, 250 MT to over 300,000 MT annual production)

1,000MT	0.25-5	5-10	10-50	50-100	100-200	200-300	>300	Total
1996/97	235	62	139	48	32	17	8	541
1997/98	225	70	126	49	36	14	6	526
1998/99	212	68	123	54	30	15	8	510

Source: Fachverband der Futtermittelindustrie, Mischfutter-Tabellarium, 2000, table 15.

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