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Report Highlights:

FAS/Berlin decreases the estimate for German pear production in MY 2006/07 (harvest 2006) from 61,000 to 51,000 MT. The production estimate is left unchanged for commercial apples at 955,000 MT, but increased from 950,000 to 1,065,000 MT for non-commercial production.

Includes PSD Changes: Yes
Includes Trade Matrix: No
Semi-Annual Report
Berlin [GM1]
[GM]

Executive Summary

This report contains changes to the PSD for apples and pears submitted in our last Fresh Deciduous Fruit annual report (GM6033). The trade tables are left unchanged for the full marketing year MY 2005/06. However, this report gives trade data for the first three months of MY 2006/07.

Official figures for German commercial apple and pear production for the 2006 harvest are expected to be released by the end of January 2007. Based on stock figures and industry information, FAS/Berlin is decreasing the estimate for pear production in MY 2006/07 (harvest Fall 2006) from 61,000 MT to 51,000 MT.

The report also contains revision of the CAJ PSD because of a systematic change in the calculation of ending stocks. The previously used method overestimated ending stock to a large extent.

Apples

The production estimate for commercial apple production is left unchanged. Based on industry information FAS/Berlin raises the estimate non-commercial production from 950,000 MT to 1,065,000 MT.

However, German official sources do not issue production estimates for non-commercial apple production, because the last tree census for non-commercial apple trees dates from the 1960s. Therefore, FAS/Berlin data for non-commercial apple production are very rough estimates. Non-commercial apple production includes apples from trees in meadows and house gardens and is mostly used for processing.

Stocks

At this time of the year, commercial stock figures provide a better picture about market prospects than harvest figures alone. As of December 1, 2006, stock levels at producer organizations were only marginally higher compared to the previous year. For details please see table 1. The low stock level in the eastern region is a result of a higher than usual damage by hail and scab¹.

¹ Scab is a plant disease that causes unattractive, brown and corky lesions on the fruits. It is induced by the fungus *venturia inaequalis*.

Table 1: Commercial Apple Stocks held by Producer Organizations on December 1, by Year, Variety and Region in MT

	2003/04	2004/05	2005/06r	2006/07p	Change in percent	
Total apples	291,347	327,455	325,408	325,812	+	0
Thereof						
Jonagored	42,345	47,884	59,569	62,677	+	5
Jonagold*	65,107	66,976	57,963	55,076	-	5
Elstar	39,885	65,418	53,011	59,742	+	13
Idared	34,305	32,453	29,126	27,140	-	7
Golden Delicious	29,297	27,225	21,628	18,429	-	15
Braeburn	10,322	14,786	15,721	17,023	+	8
Gala *	11,445	10,447	14,921	13,724	-	8
Gloster	21,938	16,490	13,349	13,605	+	2
Boskoop	9,445	13,314	11,763	13,259	+	13
Pinova	3,955	7,140	8,114	8,908	+	10
Holsteiner Cox	7,559	5,968	10,387	8,007	-	23
Red Prince	.	.	.	7,213	x	x
Cox Orange	4,224	4,724	5,562	4,063	-	27
Fuji	.	.	.	3,478	x	x
Shampion	3,690	4,441	5,307	2,738	-	48
Cameo	.	.	.	1,871	x	x
Topaz	.	.	.	1,036	x	x
Ingrid Marie	468	831	1,627	823	-	49
Other varieties	7,362	9,358	17,360	7,000		
By region:						
North	116,944	131,263	138,529	140,515	+	1
South	82,947	105,696	100,126	106,367	+	6
East	83,101	75,426	73,957	62,916	-	15
Center-West	8,355	15,070	12,796	16,014	+	25

R = revised

P = provisional

* = including similar varieties

Source: Central Market and Price Reporting Agency (ZMP)

Market Conditions/Prices

Price wise, the beginning of the MY 2006/07 exceeded the previous MY but did not live up to earlier expectations. This happened because apples with limited storage stability² put pressure on the market. Warm Fall weather in combination with a shortage of seasonal farm

² The major factors contributing to the limited storage life were the warm Fall weather

labor for harvesting had the effect that some apples were harvested overripe. However, prices improved after these apples disappeared from the market. Industry expects firm prices for the rest of the MY.

Intervention

The EU intervention price for apples is fixed at 8.81 Euro (US\$ 11.58³) per 100 kg⁴. Under the current market conditions the use of the intervention scheme is unattractive and hence unlikely to occur.

Pears

Based on stock numbers and sales data from producer organizations the commercial pear production in MY 2006/07 is revised from 61,000 to 51,000 MT. In MY 2005/06 pear production amounted to 53,000 MT. These figures originate not from the German Federal Ministry of Food, Agriculture, and Consumer Protection, (BMELV) but from the German Central Market- and Price Reporting Agency (ZMP). According to industry sources, the official final German pear production numbers from BMELV have been largely overestimated since CY 2002.

Commercial pear stocks amounted to about 2,585 MT on December 1, 2006, compared to 2,320 MT the year before, a increase of 11 percent.

Concentrated Apple Juice (CAJ)

Based on conversations with CAJ producers FAS Berlin changed the way to calculate CAJ ending stock figures to better reflect the actual situation. The previously used method overestimated ending stocks to a large extent.

Germany does not publish official CAJ stock figures. For lack of these FAS Berlin has in the past used December 31 stock estimates issued by the German Fruit Juice Industry Association (VdF). However, in Germany the majority of CAJ is produced between the middle of November and the end of November. Therefore, December 31 stock are generally much higher than June 30 stocks and should not be used as ending stocks.

³ Exchange rate as of Dec 15, 2006: 1 Euro = US\$ 1.3149, US\$ 1 = 0.7605 Euro

⁴ Annex V of EU regulation 2200/96

Part II: Statistical tables

Table 2 : PSD for fresh apples (in ha, 1000 trees, MT)

PSD Table

Country Commodity	Germany Apples, Fresh						(HA)(1000 TREES)(MT)			UOM
	2004	Revised	Post	2005	Estimate	Post	2006	Forecast	Post	
Market Year Begin	USDA Official	Post Estimate 07/2004	Estimate New 07/2004	USDA Official	Post Estimate 07/2005	Estimate New 07/2005	USDA Official	Post Estimate 07/2006	Estimate New 07/2006	MM/YY
Area Planted	31219	31219	31219	31219	31219	31219	31219	31219	31219	(HA)
Area Harvested	31219	31219	31219	31219	31219	31219	31219	31219	31219	(HA)
Bearing Trees	64182	64182	64182	64182	64182	64182	64182	64182	64182	(1000 T)
Non-Bearing Trees	0	0	0	0	0	0	0	0	0	(1000 T)
Total Trees	64182	64182	64182	64182	64182	64182	64182	64182	64182	(1000 T)
Commercial Production	945000	945000	945000	925000	925000	925000	955000	955000	955000	(MT)
Non-Comm. Production	1000000	1000000	1000000	480000	480000	480000	950000	950000	1065000	(MT)
Production	1945000	1945000	1945000	1405000	1405000	1405000	1905000	1905000	2020000	(MT)
Imports	708759	708759	708759	786653	786653	786653	710000	710000	710000	(MT)
Total Supply	2653759	2653759	2653759	2191653	2191653	2191653	2615000	2615000	2730000	(MT)
Fresh Dom. Consumption	1620247	1620247	1620247	1450269	1450269	1450269	1619000	1619000	1619000	(MT)
Exports, Fresh	88225	88225	88225	100384	100384	100384	100000	100000	100000	(MT)
For Processing	945000	945000	945000	641000	641000	641000	896000	896000	1011000	(MT)
Withdrawal From Market	287	287	287	0	0	0	0	0	0	(MT)
Total Distribution	2653759	2653759	2653759	2191653	2191653	2191653	2615000	2615000	2730000	(MT)

Table 3 : German imports of apples for the first quarter of the MY, by year

IMPORT	July/Sep 2004			July/Sep 2005			July/Sep 2006		
	MT	1000-\$	\$/MT	MT	1000-\$	\$/MT	MT	1000-\$	\$/MT
U.S.	180	194	1080	0	0	0	0	0	0
ITALY	34,859	35,164	1,009	57,529	40,233	699	48,541	44,836	924
NEW ZEALAND	48,334	54,275	1,123	50,894	51,974	1,021	36,481	49,788	1,365
NETHERLANDS	22,246	12,970	583	25,493	8,117	318	18,235	14,270	783
CHILE	19,850	18,870	951	16,465	12,185	740	16,903	16,543	979
FRANCE	11,969	11,942	998	14,657	6,248	426	10,044	10,390	1,034
ARGENTINA	7,988	7,151	895	11,479	8,035	700	9,720	9,889	1,017
SOUTH AFRICA	19,016	21,266	1,118	5,113	4,335	848	7,098	8,151	1,148
AUSTRIA	1,860	1,714	921	6,470	2,964	458	5,387	4,636	861
BRAZIL	13,458	11,566	859	5,744	4,238	738	4,959	5,496	1,108
BELGIUM	8,246	8,134	986	5,359	2,464	460	3,513	3,330	948
SPAIN	1,258	1,127	896	314	259	826	3,194	1,518	475
CZECH REPUBLIC	4,048	429	106	914	122	134	1,982	297	150
GREECE	20	22	1,111	2,855	609	213	1,703	290	170
POLAND	4,192	789	188	2,509	439	175	976	164	168
CHINA	1,727	1,869	1,082	507	466	920	637	625	982
Other	1,082	552		1,165	604		334	216	
INTRA EU-15	80,458	71,072	883	112,677	60,894	540	90,623	79,277	875
NMS ⁵	8,697	1,313	151	3,570	585	164	3,170	501	158
EXTRA EU-25	111,178	115,649	1,040	91,221	81,813	897	75,914	90,661	1,194
WORLD	200,333	188,034	939	207,467	143,292	691	169,707	170,439	1,004

Note:

NMS = New Member States (Czech Republic, Cyprus, Estonia, Hungary, Latvia, Lithuania, Malta, Slovakia, Slovenia, Poland)

Source: German Federal Office of Statistics, Wiesbaden

⁵ NMS = New EU member states

Table 4: German exports of fresh apples for the first quarter of the MY, by year

EXPORT	July/Sep 2004			July/Sep 2005			July/Sep 2006		
	MT	1000-\$	\$/MT	MT	1000-\$	\$/MT	MT	1000-\$	\$/MT
NETHERLANDS	5,754	5,095	885	3,781	3,374	892	3,922	3,766	960
UNITED KINGDOM	2,615	4,058	1,552	3,225	3,946	1,223	2,451	4,182	1,706
FRANCE	3,149	3,680	1,168	3,391	3,608	1,064	2,060	3,157	1,533
RUSSIA	352	172	487	417	223	534	2,008	1,546	770
DENMARK	1,568	1,616	1,030	2,146	1,558	726	1,335	1,529	1,146
SPAIN	734	727	990	433	410	947	1,140	1,901	1,667
AUSTRIA	1,745	1,903	1,091	1,705	1,481	869	1,107	1,414	1,277
CZECH REPUBLIC	202	172	852	1,633	706	432	1,057	761	720
SWITZERLAND	411	338	822	371	209	563	968	770	796
BELGIUM	466	627	1,347	691	775	1,121	940	880	936
SWEDEN	1,302	1,545	1,187	1,201	1,216	1,013	868	1,048	1,207
ITALY	2,009	2,241	1,115	889	767	863	820	1,193	1,456
FINLAND	778	788	1,013	643	596	926	583	657	1,127
POLAND	167	147	881	234	141	600	451	477	1,057
OTHER	1,730	2,059		3,097	2,229		2,974	2,992	
INTRA EU-15	21,494	24,141	1,123	19,011	18,743	986	16,455	21,262	1,292
NMS	673	476	708	3,423	1,490	435	2,711	2,180	804
EXTRA EU-25	815	551	676	1,423	1,006	707	3,517	2,832	805
WORLD	22,982	25,168	1,095	23,857	21,239	890	22,684	26,273	1,158

Note:

NMS = New Member States (Czech Republic, Cyprus, Estonia, Hungary, Latvia, Lithuania, Malta, Slovakia, Slovenia, Poland)

Source: German Federal Office of Statistics, Wiesbaden

Table 5: PSD for fresh pears (in ha, trees, MT)

PSD Table

Country Commodity	Germany						(HA)(1000 TREES)(MT)			UOM
	2004	Revised	Post	2005	Estimate	Post	2006	Forecast	Post	
Market Year Begin	USDA Official	Post Estimate 07/2004	Estimate New 07/2004	USDA Official	Post Estimate 07/2005	Estimate New 07/2005	USDA Official	Post Estimate 07/2006	Estimate New 07/2006	MM/YY
Area Planted	2090	2090	2090	2090	2090	2090	0	0	2090	(HA)
Area Harvested	2090	2090	2090	2090	2090	2090	0	0	2090	(HA)
Bearing Trees	2703	2703	2703	2703	2703	2703	0	0	2703	(1000 T)
Non-Bearing Trees	0	0	0	0	0	0	0	0	0	(1000 T)
Total Trees	2703	2703	2703	2703	2703	2703	0	0	2703	(1000 T)
Commercial Production	61000	61000	61000	53000	53000	53000	61000	61000	51000	(MT)
Non-Comm. Production	0	0	0	0	0	0	0	0	0	(MT)
Production	61000	61000	61000	53000	53000	53000	61000	61000	51000	(MT)
Imports	176368	176368	176368	188878	188878	188878	182000	182000	190000	(MT)
Total Supply	237368	237368	237368	241878	241878	241878	243000	243000	241000	(MT)
Fresh Dom. Consumption	214724	214724	214724	220022	220022	220022	220000	220000	219000	(MT)
Exports, Fresh	20025	20025	20025	20636	20636	20636	21000	21000	20000	(MT)
For Processing	2270	2270	2270	1220	1220	1220	2000	2000	2000	(MT)
Withdrawal From Market	349	349	349	0	0	0	0	0	0	(MT)
Total Distribution	237368	237368	237368	241878	241878	241878	243000	243000	241000	(MT)

Table 6: German imports of fresh pears for the first quarter of the MY, by year

IMPORT	July/Sep 2004			July/Sep 2005			July/Sep 2006		
	MT	1000-\$	\$/MT	MT	1000-\$	\$/MT	MT	1000-\$	\$/MT
U.S.	506	706	1,396	21	10	459	2	3	1,067
SPAIN	8,185	6,768	827	7,763	4,682	603	10,160	10,134	997
ITALY	7,815	7,335	939	7,441	6,904	928	9,336	11,526	1,235
SOUTH AFRICA	11,686	14,722	1,260	4,920	5,093	1,035	4,999	6,719	1,344
NETHERLANDS	904	749	829	520	521	1,001	3,939	6,528	1,657
FRANCE	3,136	2,661	849	2,112	1,379	653	2,762	2,966	1,074
CHILE	2,874	2,568	894	3,223	2,489	772	2,632	3,109	1,181
ARGENTINA	2,724	2,732	1,003	4,584	3,745	817	2,619	3,105	1,186
BELGIUM	610	381	625	572	435	761	631	560	886
PR CHINA	105	86	818	39	39	1,010	117	130	1,108
TURKEY	140	174	1,248	159	153	967	103	134	1,306
Other	74	85		309	284		133	160	
INTRA EU-15	20,651	17,894	867	18,586	14,063	757	26,834	31,721	1,182
NMS	12	9	710	2	2	1,418	19	10	541
EXTRA EU-25	18,096	21,064	1,164	13,076	11,668	892	10,581	13,343	1,261
WORLD	38,759	38,967	1,005	31,663	25,734	813	37,433	45,074	1,204

Note:

NMS = New Member States (Czech Republic, Cyprus, Estonia, Hungary, Latvia, Lithuania, Malta, Slovakia, Slovenia, Poland)

Source: German Federal Office of Statistics, Wiesbaden

Table 7 : German exports of fresh pears for the first quarter of the MY, by year

EXPORT	July/Sep 2004			July/Sep 2005			July/Sep 2006		
	MT	1000-\$	\$/MT	MT	1000-\$	\$/MT	MT	1000-\$	\$/MT
AUSTRIA	436	519	1,189	586	613	1,048	692	850	1,229
NETHERLANDS	633	584	923	816	615	754	647	816	1,261
UNITED KINGDOM	325	433	1,332	357	331	926	470	1,008	2,145
FRANCE	255	351	1,380	493	499	1,012	369	494	1,340
DENMARK	269	258	959	201	171	852	333	411	1,234
SWEDEN	257	287	1,119	344	293	854	262	322	1,226
BELGIUM	71	134	1,890	162	113	697	242	387	1,603
ITALY	339	425	1,254	312	311	997	233	252	1,083
FINLAND	167	169	1,012	90	82	910	130	153	1,179
NORWAY	24	21	855	71	67	941	88	147	1,659
OTHER	402	400		1,100	757		194	216	
INTRA EU-15	3,051	3,467	1,137	4,176	3,602	863	3,435	4,792	1,395
NMS	101	88	876	237	156	661	62	56	899
EXTRA EU-25	49	35	719	121	97	801	167	216	1,290
WORLD	3,201	3,591	1,122	4,534	3,856	850	3,664	5,064	1,382

Note:

NMS = New Member States (Czech Republic, Cyprus, Estonia, Hungary, Latvia, Lithuania, Malta, Slovakia, Slovenia, Poland)

Source: German Federal Office of Statistics, Wiesbaden

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

PSD Table

Country Commodity	Germany Apple Juice, Concentrated									UOM
	2004	Revised	Post	2005	Estimate	Post	(MT) 2006	Forecast	Post	
	USDA Official	Post Estimate	Estimate New	USDA Official	Post Estimate	Estimate New	USDA Official	Post Estimate	Estimate New	
Market Year Begin		07/2004	07/2004		07/2005	07/2005		07/2006	07/2006	MM/YY
Deliv. To Processors	945000	945000	945000	641000	641000	641000	896000	896000	1011000	(MT)
Beginning Stocks	186000	186000	46000	120000	120000	50400	120000	120000	26000	(MT)
Production	91520	91520	91520	66231	66231	66231	87500	87500	100000	(MT)
Imports	378876	378876	378876	380405	380405	380405	380000	380000	370000	(MT)
Total Supply	656396	656396	516396	566636	566636	497036	587500	587500	496000	(MT)
Exports	138849	138849	138849	140083	140083	140083	142000	142000	135000	(MT)
Domestic Consumption	397547	397547	327147	306553	306553	330953	325500	325500	330000	(MT)
Ending Stocks	120000	120000	50400	120000	120000	26000	120000	120000	31000	(MT)
Total Distribution	656396	656396	516396	566636	566636	497036	587500	587500	496000	(MT)

German Imports of CAJ (70.5 brix) for the first quarter of the MY, by year

	July through September		
	2004	2005	2006
	MT	MT	MT
U.S.	0	35	0
POLAND	28,324	26,162	23,649
CHINA	2,366	24,851	14,220
SWITZERLAND	17,200	17,139	12,427
AUSTRIA	5,279	9,027	9,635
TURKEY	5,707	1,617	3,565
NETHERLANDS	1,869	2,476	2,688
HUNGARY	7,262	917	2,252
ITALY	3,602	5,681	1,830
UKRAINE	809	383	756
OTHER	6,960	6,344	2,835
INTRA EU- 15	11,004	20,475	15,297
NMS	36,187	27,752	26,709
EXTRA EU- 25	32,186	46,404	31,850
WORLD	79,377	94,631	73,856

German Exports of CAJ (70.5 brix) for the first quarter of the MY, by year

	July through September		
	2004	2005	2006
	MT	MT	MT
U.S.	4,700	1,353	483
NETHERLANDS	5,400	10,788	6,799
UNITED KINGDOM	8,375	7,452	5,133
DENMARK	2,334	2,338	2,378
FRANCE	2,749	4,172	1,881
BELGIUM	1,779	1,509	1,534
GREECE	1,105	900	1,308
AUSTRIA	2,746	976	1,091
NORWAY	483	827	1,035
FINLAND	310	2,184	533
IRELAND	143	847	497
ITALY	708	370	408
SWEDEN	400	306	264
OTHER	4,303	8,669	2,477
INTRA EU- 15	26,904	33,222	22,106
NMS	990	5,331	512
EXTRA EU- 25	7,641	4,138	3,203
WORLD	35,535	42,691	25,821

Related reports:

Report Number	Date	Title
GM3011	03/17/2003	EU support for the fruit and vegetable sector in Germany http://www.fas.usda.gov/gainfiles/200303/145884986.pdf
GM3025	08/15/2003	Fruit Tree Census http://www.fas.usda.gov/gainfiles/200308/145985777.pdf
GM5002	01/07/2005	Product Brief Fresh Fruits http://www.fas.usda.gov/gainfiles/200501/146118443.pdf
GM6033	09/07/2006	Fresh Deciduous Fruit Annual http://www.fas.usda.gov/gainfiles/200609/146218900.pdf