USDA Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Template Version 2.09

Required Report - public distribution

Date: 10/13/2004

GAIN Report Number: IT4028

Italy

Fresh Deciduous Fruit

Annual Report

2004

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Report Highlights:
Italian fresh apple production in 2004 is expected to increase by about 12% vis-à-vis the 2003 campaign, pear production is expected to grow by about 14%. The production of fresh table grapes is in line with previous years. Increasing competition in the European market and declining fruit consumption are creating some marketing concerns for Italian producers.

Includes PSD Changes: Yes
Includes Trade Matrix: Yes
Annual Report
Rome [IT1]
[IT]

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APPLE

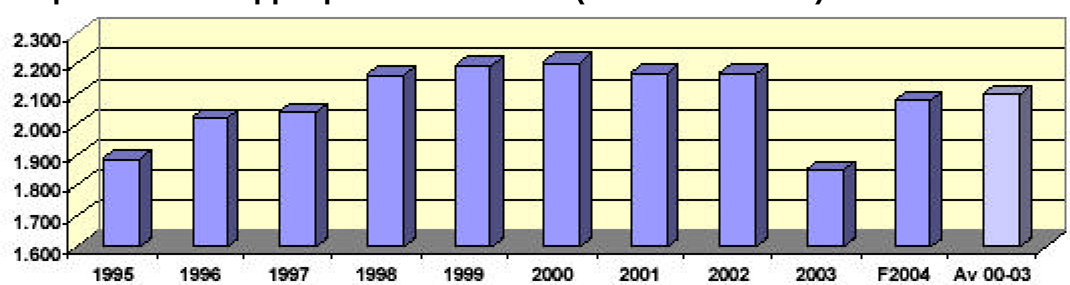
Production

Italian fresh apple production in 2004 is expected to increase by about 12% vis-à-vis the 2003 campaign. The European Association of Fresh Fruit Producers, Eurofel, confirmed Italian producers' forecast on the occasion of the Prognosfruit meeting in early August in Lubin, Poland. The marginal year-to-year increase is due to a return to normality after a very poor campaign in 2003, when adverse climatic conditions (frost during the blossoming period and drought in summer) resulted in low yields per hectare and les-than-average quality of the fruit.

According to the Prognosfruit forecast "blossoming of the main varieties in Italy was normal, weak for Red Delicious and Fuji. Weather conditions during and after blossoming were favorable. Fruit setting is normal for most varieties, weak fro Granny. Fuji is the only variety that has suffered heavy fruit fall". This was also reported by Agra Europe, July 16, 2004.

The long-term trend for Italian apple production shows a constant reduction of planted areas after a peak in 2000 and a shift toward high value added varieties. Plantations are increasingly concentrated in northern regions (and especially in Trentino-Alto Adige) were co-ops guarantee better market access thanks to their very well known brands and improved techniques (research on new varieties, phyto-sanitary information, availability of labor force for harvesting, etc). Plantations in other areas are decreasing as farmers are facing increasing competition with other EU and extra-EU producers. Northern producers are also favored by their proximity to the main export markets for Italian apples; Germany and other northern EU countries.

Graph 1. Italian apple production trend (mln metric tons)



Source. Eurofel 2004

Golden Delicious and Red Delicious are the most popular varieties but both have shown a decreasing in trend the last four years. They are being replaced with other new varieties such as Fiji, Gala and Pink Lady (Cripps Pink) that respond to customers' preferences.

Tab 1. Italian apple production by variety (mln metric tons)

Variety	2000	2001	2002	2003	2004
Annurca	89	86	79	40	60
Braeburn	31	44	58	57	85
Cripps Pink					36
Elstar	14	**14**	8	6	5
Fuji	26	34	42	52	62
Gala	178	176	210	186	237
Gloster	6	4	3	2	1
Golden D	1049	1088	1090	886	931
Granny Smith	113	90	110	95	94
Idared	13	16	12	11	10
Imperatore			134	145	99
Jonagold	63	64	46	44	39
Jonathan	3	2	2	1	1
Morgenduft	157	137			66
others A W	57	64	49	70	31
others S (apple)					
Ozark Gold					
Red Delicious	342	289	269	212	276
Renette	30	31	26	19	23
Stayman	34	34	32	25	24

Source. Eurofel 2004

EU enlargement

Post enlargement, Italy has lost its ranking as the main apple producer of the Union as Poland has now taken the lead. Italian apple producers fear that the enlargement of the European common market could result in a situation of over supply, as the increased supply is not balanced by a corresponding increase in the number of consumers. The table below summarizes the apple market situation before and after the accession of the 10 new member states.

Tab 2. Consumers and apple production in enlarged EU

	Consumers (mln heads)	Apple production (mln tons)
EU-15	375	7
EU-25	450	10.4
Var %	+20%	+49%

Most of the labor force employed by the apple sector (especially for harvesting) comes from the new member states. Italian apple producers fear that EU enlargement could produce higher prices in the 10 acceding countries and therefore increase labor costs.

Trade

The potential situation of over-supply in the EU-25 could be party mitigated by reducing fruit plantations in France and Spain, as well as by an increase in demand of apples for processing. With the current competitive situation in the world apple market, however, it is reasonable to expect that an eventual over-supply of the EU-25 could depress world prices.

Italian imports, mainly in the off season, come from Chile to domestic production. These imports of counter-seasonal fruit keep a steady supply when the domestic apples are scarce. In 2003 however, Chinese apples appeared for the first time on Italian supermarket shelves in competition with the national product. It is not yet clear if this phenomenon is due to the very bad 2003 campaign or if it will become a long-term trend.

Exports in 2003 were down as a result of the low production in the campaign. In 2004 exports should revive as Italian production is expected to be back to normal. The long-term trend, however, seems to be a slow decline of Italian exports to northern EU countries as result of increased competition by other non-EU producers, mainly from southern hemisphere countries.

Germany is by far the main export market for Italian apples, followed by other northern European countries and Spain. According to the Italian Foreign Trade Commission, Italy is the main apple supplier for Germany with a market share of 47.8% in 2003. Italian apple exports to EU countries face increasing competition from the southern hemisphere. Main competitors include countries that are traditional apple exporters to the EU such as New Zealand and Chile, as well as newcomers such as Brazil, South Africa, Argentina and Australia.

Utilization

Domestic consumption of fresh apples in Italy is decreasing in line with consumption of all fruit and vegetable products. This trend became very evident after the introduction of the Euro in 2002 that caused an increase in retail prices (real or perceived) and reduced purchasing power of families. Furthermore, changes in lifestyle are favoring a shift in consumption habits away from fresh apples to processed fruit.

Apples, despite reduced consumption, are still the favorite fruit of Italian families. Annual per capita consumption is about 20 Kg. Apples alone account for about 19% of the volume of all fresh fruit consumed by Italian families, with a retail market value of about 1 billion Euros.

Processing does not only include production of apple juice, as Italian food industries are launching innovative apple products. One of the main apple producers is integrating its offer of fresh product with two lines of snacks to have more appeal on younger consumers. One is semi-dried apple slices, the other is an apple puree (refrigerated). Another small company has recently launched in the market a liquid sugar extracted from organic apples that claims to be much healthier than standard granulated white sugar.

There haven't been any withdrawals from the market by the EU in 2002 and 2003. It is hard to predict whether there will be withdrawals in 2004.

Marketing

Several marketing research projects demonstrated that brand recognition is a key factor for apple producers to succeed in the Italian market. The top 3-4 producers control a large share of the market through their own brands, but also produce for supermarkets' private labels. New varieties, such as Pink Lady, usually pay a price premium over the more popular varieties such as Golden and Red Delicious.

A consortium of co-ops of the Trentino region promoted the recognition by the EU of the geographic indication "mela della Valle di Non" (Non Valley apple). Apple producers of the area have now the option to certify and label their apples as Protected Designation of Origin (PDO). The EU will guarantee that certified apples have been produced in the area identified and according to pre-set standards. While it is not yet clear if market will pay a premium for

PDO certified apples, producers of two other areas have already applied for obtaining similar recognition.

According to a recent study (Mark Up, June 2004) there is little economic incentive for farmers to produce organic apples. Integrated pest management seems to be a viable alternative to orchards under conventional production. The research found that yields of organic plantations are about half of the conventional ones, with very little benefit in terms of quality of the fruit. The main reason for the low productivity seems to be the scarce development of pest management techniques. Organic apples are priced at retail level on average 10% higher than conventional apples.

The recent introduction by the EU of new classification standards for apples was strongly opposed by Italian producers. Its implementation was already postponed to 2005 and it is likely that Italians will call for further delays. The new standards would reduce by an average of 5 millimeters the minimum calibers of the different fruit categories. Italian apple producers fear that the new standard would lower the average quality of marketed products and would boost price competition.

CONCENTRATED APPLE JUICE

Juice production has traditionally played a secondary role in Italian apple industry because of the scarce domestic demand for this product. Juice is generally produced from apples that have been damaged by hailstorms or that do not meet minimum EU marketing standards.

Since there are no official statistics available for the sector, PS&D figures were derived from PS&D data for fresh apples. Juice production in 2003 was down significantly from 2002 because of the scarce domestic supply of fresh apples in the campaign. Processed volumes are expected to be back to their previous levels, or even to show a slight increase following the launch of new products on the market.

Exports to Germany and other EU countries absorb about 80% of the domestic production. Exports to the United States dropped by about 70% from 15,000 in 2002 tons to 4,000 tons in 2003, mainly because of the reduced Italian supply.

Apple Juice consumption in Italy is very low, and mainly centered in northern regions. It is likely however that it could increase in the future as consumers are seeking healthy alternatives to soft drinks. The main Italian apple producers co-op signed an agreement last July 2004 with the main fruit processor of the country to jointly launch a line of beverages on the domestic market. The juices are apple beverages and other flavored drinks.

PSD FRESH APPLES

Commodity	Apples, Fresh					(HA)(1000 TREES)(M
	2002	Revised	2003	Estimate	2004	Forecast
	USDA Official [	Estimate [I	DA Official [	Estimate [	DA Official [	Estimate [I
Market Year Begin		07/2002		07/2003		07/2004
Area Planted	66000	64447	63000	61214	0	60983
Area Harvested	62000	60529	59000	56711	0	56855
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
Total Trees	0	0	0	0	0	0
Commercial Production	2170000	2170000	2050000	1851524	0	2080000
Non-Comm. Production	36000	36000	36000	26000	0	26000
TOTAL Production	2206000	2206000	2086000	1877524	0	2106000
TOTAL Imports	53618	53618	50937	77244	0	53000
TOTAL SUPPLY	2259618	2259618	2136937	1954768	0	2159000
Domestic Fresh Consump	1213941	1213941	1035206	1032000	0	1109000
Exports, Fresh Only	670677	670677	724331	622768	0	660000
For Processing	375000	375000	377400	300000	0	390000
Withdrawal From Market	0	0	0	0	0	0
TOTAL UTILIZATION	2259618	2259618	2136937	1954768	0	2159000

PSD APPLE JUICE

PSD Table

Country	Italy					
Commodity	Apple Juice, Concentrated			(MT)		
	2002	Revised	2003	Estimate	2004	Forecast
	USDA Official [	Estimate [I	DA Official [	Estimate [	DA Official [	Estimate [I
Market Year Begin		01/2002		01/2003		01/2004
Deliv. To Processors	375000	375000	377400	300000	0	385000
Beginning Stocks	10000	10000	10000	10000	10500	5500
Production	60000	60000	60750	48000	0	61000
Imports	40000	40000	42000	25000	0	35000
TOTAL SUPPLY	110000	110000	112750	83000	10500	101500
Exports	95000	95000	99750	70000	0	81000
Domestic Consumption	5000	5000	2500	7500	0	10000
Ending Stocks	10000	10000	10500	5500	0	10500
TOTAL DISTRIBUTION	110000	110000	112750	83000	0	101500

PEAR

Production
According to CSO (Center for Horticultural and Fruit Services) and to Prognosfruit, Italian pear production in 2004 will be up 14% in volume from last year's. In 2003 however, Pear production was below average due to high temperatures and drought during the summer season, that altered the ripening process and resulted in below average size of the fruits (See semiannual report). Comparing the 2004 forecast with a standard campaign, it should result about 10% higher than the average annual crop in the 1999-2003 period.
Size and calibers of the fruits are regular and in line with domestic market standards (the domestic market requires long-necked pears). Nevertheless, spots and other alterations of the skin could significantly lower the value of the 2004 production. They are the result of spring hailstorms in some of the key pear producing areas, and especially in Emilia Romagna (where about 70% of the Italian production is grown). Skin alterations may result in a downgrade, and therefore in a lower market price, especially for prime quality pears.

As already described in our previous report, the planted area is generally stable with minor reductions due to an increasing specialization of the farms, which are looking for higher yields per hectare. Abate Fétel is by far the most popular variety for fresh consumption with a continuing trend for growth in the last four years. Conference and Decana are also growing quickly.

Tab 3. Italian pear production by variety (mln tons)

Variety	2000	2001	2002	2003	F2004
AbateF	242	225	281	261	313
Conference	133	132	150	118	155
Coscia- Ercollini	54	48	51	50	50
Doyenne	65	54	19	49	76
Guyot	6	5	5	4	4
Kaiser	51	50	59	63	56
Mad Red	30	28	33	27	31
Other Pears A W	68	65	51	55	52
Passacrassana	20	19	23	17	17
Santa Maria	15		14	16	19
William BC	193	168	195	169	177

Source. Prognosfruit - CSO, 2004

EU enlargement
The recent enlargement of the EU is not expected to have a huge impact on the European pear market. The only two producing countries among the ten new members are the Czech Republic (about 2,000 tons) and Poland (about 100,000 tons).

Trade
Pear imports were up by almost 15% in 2003 due to the reduced domestic production. They are expected to be back to their previous levels in 2004. As in the case of apples, Italian imports of pears are mostly counter-seasonal from countries of the southern hemisphere, especially from Argentina and Chile. Spain is still a major supplier despite the trend for decreasing pear production.

Northern European countries, and especially Germany and France, remain the main destination market for Italian pear exports. The volume of exports is expected to reflect the increase in production. Italy is the main pear supplier for Germany, covering a share of 41% (in volume) of the German imports in 2003.

Utilization
The forecast presented in this report includes a major adjustment in the "domestic fresh consumption" and "for processing" figures to better reflect reality and to take into account new statistical data that were made available. Please note that the adjustment introduced does not affect the volume utilized domestically, but only the split between fresh uses and processing.

Taking into consideration the adjustment, domestic fresh consumption shows a long-term trend for decrease in line with all the fruit and vegetable sector. Fresh consumption in 2003 was especially low because of the low quality and high retail prices of the domestic production.

Williams is the only pear variety grown in Italy for industrial processing. Its production was nearly stable in the last 4-5 years following a steady demand from food industries. In fact, the growing demand for juice production is balanced by a continuous decrease in canning.

Price
Italian pear producers fear that the expected production increase in 2004 could generate an excess of supply and depress market prices. All the major producers pear producers agreed a minimum price range, between 0.30 and 0.32 Euro/Kg, for prime quality Williams fruits with a caliber of 60 millimeters.

Marketing
Emilia-Romagna producers claim a continuing success for their EU-certified geographic indication "Pera dell'Emilia-Romagna", with sales growing by as much as 18% in 2003.

PSD FRESH PEARS

PSD Table

Country	**Italy**					
Commodity	**Pears, Fresh**				(HA)(1000 TREES)(M	
	2002	Revised	2003	Estimate	2004	Forecast
	USDA Official [	Estimate [	DA Official [	Estimate [	DA Official [	Estimate [I
Market Year Begin		07/2002		07/2003		07/2004
Area Planted	47000	47000	45630	44740	0	44689
Area Harvested	43000	43000	41605	40368	0	40264
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
Total Trees	0	0	0	0	0	0
Commercial Production	940760	940760	876807	831000	0	950000
Non-Comm. Production	45000	45000	41400	41400	0	42000
TOTAL Production	985760	985760	918207	872400	0	992000
TOTAL Imports	113827	113827	120656	131000	0	115000
TOTAL SUPPLY	1099587	1099587	1038863	1003400	0	1107000
Domestic Fresh Consump	856936	756936	819107	684700	0	737000
Exports, Fresh Only	137651	137651	119756	118700	0	140000
For Processing	105000	205000	100000	200000	0	230000
Withdrawal From Market	0	0	0	0	0	0
TOTAL UTILIZATION	1099587	1099587	1038863	1003400	0	1107000

FRESH TABLE GRAPES

Production

Italian table grape production for the campaign is expected slightly above previous years' average despite minor product losses after blossoming. Exceptional spring rains in the producing regions (Apulia and Sicily) resulted in a too high number of fruits per bunch that had to be thinned out mechanically, therefore increasing significantly production costs. The quality of grapes for the year is not very good as heavy rains affected the ripening and the sugar content of the fruits.

Planted area has steadily increased since the mid '90s thanks to the high profitability of the crop, however it is likely to decline in the next 3-4 years due to reducing producers' margins and increasing international competition.

Italia and Vittoria are by far the most popular white varieties; Red Globe is the main red variety. Seedless cultivars are growing but do not represent yet more than 1% of the Italian production. Seedless grapes are almost exclusively produced for export (to Germany and the United Kingdom) as they do not meet the taste of domestic consumers.Thanks to the particular climatic conditions and to specific production techniques, the harvest season for table grapes can extend as far as late November for some of the varieties.

Utilization

Domestic consumption of table grapes has been declining in the last 3-4 campaigns in line with the consump tion of all fruit products. Lower-than-usual temperatures and high production of stone fruits in summer 2004 in most of the European countries further reduced the demand for fresh table grapes.

Prices

High supplies of average quality and stagnant demand on both the domestic and the European markets are resulting in low market prices.

Trade

Italy is by far the main table grapes producer and exporter in the European Union. However, increasing production is Spain is expected to boost competition in the European markets in the near future. The main destination markets are Germany, France, Poland and other North-European countries. Imports are limited to early production from Spain and counter seasonal production from Chile. Unlike other fruit products, only a small portion of the Italian table grapes is marketed through cooperatives and producers' associations. Most of the product is sold and exported directly by the producer or through specialized brokers.

PSD TABLE GRAPES

PSD Table

Country Italy

Commodity Grapes, Table, Fresh (HA)(MT)

	2002	Revised	2003	Estimate	2004	Forecast	UOM
	USDA Official [	Estimate [	DA Official [	Estimate [	DA Official [	Estimate [New]	
Market Year Begin		01/2003		01/2004		01/2005	MM/YYYY
Area Planted	73620	73620	72000	73345	0	74125	(HA)
Area Harvested	72449	72449	71000	72078	0	73000	(HA)
Commercial Production	1258000	1258000	1513423	1513423	0	1600000	(MT)
Non-Comm. Production	50000	50000	40000	40000	0	40000	(MT)
TOTAL Production	1308000	1308000	1553423	1553423	0	1640000	(MT)
TOTAL Imports	14291	14291	16577	16577	0	15000	(MT)
TOTAL SUPPLY	1322291	1322291	1570000	1570000	0	1655000	(MT)
Domestic Fresh Consum	680000	680000	685000	685000	0	750000	(MT)
Exports, Fresh Only	476877	476877	600000	600000	0	600000	(MT)
For Processing	165414	165414	285000	285000	0	305000	(MT)
Withdrawal From Market	0	0	0	0	0	0	(MT)
TOTAL UTILIZATION	1322291	1322291	1570000	1570000	0	1655000	(MT)

TRADE MATRIXES

FRESH APPLES EXPORTS

Export Trade Matrix

Country Italy

Commodit Apples, Fresh

Time Period	Year	Units:	MT
Exports for:	2002		**2003**
U.S.	0	U.S.	0
Others		Others	
Germany	364474	Germany	328993
Spain	37130	United Kingdon	34575
Greece	36421	Spain	45216
United Kingdom	29300	Greece	28779
France	24226	France	26437
Austria	18106	Austria	22397
Belgium	14806	Czeck rep.	18571
Sweden	14624	Sweden	16299
Norway	12126	Norway	15437
Denmark	12590	Denmark	12852
Total for Others	563803		549556
Others not Liste	106864		116934
Grand Total	670667		666490

FRESH APPLES IMPORTS

Import Trade Matrix

Country Italy

Commodit Apples, Fresh

Time Period	Year	Units:	MT
Imports for:	2002		**2003**
U.S.		U.S.	
Others		Others	
Chile	18965	Chile	21987
France	7088	Argentina	6148
Belgium	4165	France	7020
Argentina	3866	Germany	4768
Netherlands	3833	Brasil	3373
Brasil	3640	Spain	3018
Austria	3297	Belgium	2372
Spain	3088	Netherlands	1968
Germany	2788	China	1462
New Zeland	830	Austria	1406
Total for Others	51560		53522
Others not Liste	2058		1796
Grand Total	53618		55318

APPLES JUICE EXPORTS

Export Trade Matrix

Country Italy

Commodit Apple Juice, Concentrated

Time Period	Year	Units:	MT
Exports for:	2002		**2003**
U.S.	15848	U.S.	4352
Others		Others	
Germany	45707	Germany	50263
United Kingdom	7346	Austria	7376
Netherlands	5908	France	6435
France	5704	Netherlands	5403
Austria	3581	United Kingdom	4968
Greece	1873	Greece	1668
Canada	482	Canada	1087
Total for Others	70601		77200
Others not Listed	2728		2547
Grand Total	89177		84099

APPLE JUICE IMPORTS

Import Trade Matrix

Country Italy

Commodit Apple Juice, Concentrated

Time Period	Year	Units:	MT
Imports for:	2002		**2003**
U.S.		U.S.	
Others		Others	
Iran	10333	Germany	11615
Germany	9195	China	5079
China	8339	Austria	2352
Austria	2329	Turkey	1361
Poland	2160	Belgium	1073
Turkey	1810	Iran	504
Spain	905		
Hungary	615		
Total for Others	35686		21984
Others not Listed	2415		1533
Grand Total	38101		23517
	38101		23517

FRESH PEARS EXPORTS

Export Trade Matrix

Country	Italy		
Commodit	Pears, Fresh		
Time Period	Year	Units:	MT
Exports for:	2002		**2003**
U.S.	0	U.S.	0
Others		Others	
Germany	66041	Germany	55555
France	24782	France	27133
United Kingdom	11962	United Kingdom	10564
Austria	9240	Austria	5870
Sweden	3595	Greece	3882
Greece	3429	Sweden	2852
Finland	2718	Spain	1717
Switzerland	2710	Finland	1657
Hungary	1832	Switzerland	1807
Belgium	1619	Hungary	910
Total for Others	127928		111947
Others not Liste	15807		15179
Grand Total	143735		127126

FRESH PEARS IMPORTS

Import Trade Matrix

Country	Italy		
Commodit	Pears, Fresh		
Time Period	Year	Units:	MT
Imports for:	2002		**2003**
U.S.	0	U.S.	0
Others		Others	
Argentina	51624	Argentina	60339
Spain	39707	Spain	34638
Chile	9268	Chile	11371
France	4476	France	5249
Netherlands	3413	Netherlands	3241
Belgium	2584	Belgium	3345
Germany	1245	Germany	1125
Total for Others	112317		119308
Others not Liste	3548		3044
Grand Total	115865		122352

FRESH TABLE GRAPES EXPORTS

Commodit	Grapes, Table, Fresh		
Time Period	Year	Units:	MT
Exports for:	2002		**2003**
U.S.		U.S.	
Others		Others	
Germany	167271	Germany	162490
France	87131	France	92863
Poland	32717	Poland	46354
Belgium	25613	Belgium	29202
Switzerland	23882	Switzerland	22893
Netherlands	18046	Czeck Rep.	22011
United Kingdom	13938	Netherlands	19065
Czeck Rep.	14107	Denmark	10594
Austria	11492	Spain	10536
Denmark	10164	Norway	10513
Total for Others	404361		426521
Others not Liste	76198		86758
Grand Total	480559		513279

FRESH TABLE GRAPES IMPORTS

Import Trade Matrix

Country	Italy		
Commodit	Grapes, Table, Fresh		
Time Period	Year	Units:	MT
Imports for:	2002		**2003**
U.S.		U.S.	
Others		Others	
Spain	3643	Spain	4187
Chile	3547	Chile	3657
Belgium	1879	Netherlands	2205
Netherlands	1540	Belgium	1801
S. Africa	1080	France	1018
Total for Others	11689		12868
Others not Liste	2739		3738
Grand Total	14428		16606

PRICES
FRESH APPLES PRICES

Prices Table

Country Italy
Commodity Apples, Fresh
Prices in Euro per uom Kg

Year	2003	2004	% Change
Jan	0.55	0.7	27%
Feb	0.53	0.75	42%
Mar	0.55	0.91	65%
Apr	0.69	0.9	30%
May	0.82	0.96	17%
Jun	0.55	0.62	13%
Jul			
Aug	0.39		-100%
Sep	0.39		-100%
Oct	0.42		-100%
Nov	0.65		-100%
Dec	0.7		-100%

Exchange Rate	1.2168	Local Currency/US $
Date of Quote	9/1/2004	MM/DD/YYYY

FRESH TABLE GRAPES

Prices Table

Country Italy

Commodity Grapes, Table, Fresh

Prices in Euro per uom Kg

Year	2003	2004	% Change
Jan	0.34		-100%
Feb			
Mar			
Apr			
May			
Jun	1.46		-100%
Jul	0.84	0.74	-12%
Aug	0.53	0.5	-6%
Sep	0.4		-100%
Oct	0.39		-100%
Nov	0.42		-100%
Dec	0.51		-100%

Exchange Rate	1.2168	Local Currency/US $
Date of Quote	9/1/2004	MM/DD/YYYY