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Germany

Fresh Deciduous Fruit

Annual

2006

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Report Highlights:
For CY 2006, German commercial apple production is forecast at 955,000 MT, up three percent from the previous year. Non-commercial apple production is forecast at 950,000 MT, and commercial pear production at 61,000 MT. Production of concentrated apple juice (CAJ, 70.5 brix) is forecast at 87,500 MT in MY 2006/07.

Includes PSD Changes: No
Includes Trade Matrix: No
Unscheduled Report
Berlin [GM1]
[GM]

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Production

Apple Production
Commercial Production

Germany is the fourth largest apple producer in the EU, after Poland, Italy and France. As of mid-July, German apple production for CY[1] 2006 was estimated at 955,000 MT[2] for commercial production, up 3 percent compared to the previous year. In the months of June and July, precipitation was lower than usual, which resulted in below average fruit diameters. In August, most of the country enjoyed more rainfall. It remains to be seen if the late favorable weather conditions would help the trees make up the delayed fruit diameter growth. If so, the crop could be a bit higher than estimated here. The crop for CY 2005 was revised downwards to 925,000 MT from the previous estimate of 960,000 MT. The production potential is estimated at 1 million MT.

These figures originate from the German Central Market- and Price Reporting Agency (ZMP). The German Federal Ministry of Agriculture, Food, and Consumer Protection (BMELV), also collects information about deciduous fruit production, however in recent years figures from BMELV and ZMP differed substantially, because of differences in data gathering. Industry sources believe that ZMP figures come closer to actual production. Therefore, FAS/Berlin decided to go with the widely accepted ZMP figures instead of the official BMELV data.

Table 1: Commercial Apple Production in the EU-15 and New Member States (NMS) by Country and Year in 1,000 MT

Country	2000	2002	2003	2004r	2005r	2006f	Change in percent
Italy	2,206	2,172	2,153	2,032	2,071	1,949	- 6
France	2,260	1,966	1,728	1,708	1,769	1,584	- 10
Germany	1,131	763	818	945	925	955	3
Spain	683	646	704	553	701	550	- 22
Netherlands	500	370	405	435	380	347	- 9
Belgium	500	349	319	356	317	339	7
Portugal	206	244	165	282	265	267	1
Greece	288	300	287	277	249	249	0
UK	195	124	156	163	192	178	- 7
Austria 1)	161	163	152	163	173	161	- 7
Denmark	31	25	25	26	26	27	4
Sub-total EU-15	**8,162**	**7,112**	**6,914**	**6,940**	**7,069**	**6,607**	- 7
Poland 2)	2,000	2,168	2,428	2,522	2,200	2,100	- 5
Hungary	695	527	550	668	487	455	- 7
Czech Republic	100	163	152	164	138	170	23
Lithuania 2)	195	82	97	34	97	130	34
Slovenia	59	42	62	60	58	50	- 14
Slovakia		27	34	31	36	43	19
Estonia		17	5	2	11	10	- 9
Other NMS	27	50	36	7	38	32	- 16
Sub-total NMS	**3,077**	**3,076**	**3,364**	**3,488**	**3,065**	**2,990**	- 2
Total EU-25	**11,239**	**10,198**	**10,278**	**10,428**	**10,134**	**9,597**	- 5

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[1] CY = Calendar year
[2] MT = Metric ton = 1000 kg

r = revised
f = Forecast
1 = Steiermark/Styria
2 = including non-commercial production
Source: German Central Market and Price Reporting Agency (ZMP), based on Eurofel-database and own calculations

Table 2: Commercial Apple Production in Germany by Variety and Year in 1,000 MT

Variety	2000	2002	2003	2004r	2005r	2006f	Change
Elstar	156	119	126	178	159	158	-1%
Jonagold	210	149	152	163	146	146	0%
Jonagored	96	70	90	100	123	135	10%
Golden Delicious	77	59	63	67	58	59	2%
Idared	70	49	52	61	51	54	6%
Gala	29	33	39	46	54	54	0%
Boskoop	87	44	38	51	52	52	0%
Braeburn	17	14	20	38	37	42	14%
Gloster	81	40	47	42	37	34	-8%
Cox Orange	57	24	30	28	26	26	0%
Other *	251	162	161	171	182	195	7%
Total	1,131	763	818	945	925	955	3%

r = Revised
f = Forecast.
* Includes Pinova, Topaz, Gravensteiner, James Grieve, Glockenapfel, Ingrid Marie
Source: German Central Market and Price Reporting Agency (ZMP)

Non-commercial Production

German authorities stopped issuing official figures for non-commercial production (private gardens and meadows) in 1992. However, industry estimates CY 2006 non-commercial production at approximately 950,000 MT, almost double the 480,000 MT in CY 2005. Non-commercial production tends to alternate between good and poor crop years. The reason is that during the fruit growing season, the trees are already developing the buds for next year's apple blossom and crop. In good years, the trees use most of the assimilates for fruit growth and have less available for bud development. Commercial orchards alternate or vary much less from year to year because good farming practices, such as thinning, are used to ensure a more even production.

Non-commercial production includes apples grown in house gardens and production in meadows. Typically, non-commercial production is used for fresh consumption, must and spirits production, baking (cakes, tarts) or preserved foods (canned, dried, and cooked). Approximately 50 percent of this production is grown in house gardens and is consumed by private households; 40 percent is comprised of must apples used in apple juice production; and the remaining 10 percent is processed into spirits. These percentages may vary depending on the price for must apples. Higher must apple prices generally result in a higher proportion of fruit entering juice production, lower prices generally result in less fruit going into processing.

Fruit Quality

Hail damage and scab infections are reportedly higher than in 2005. As a result, the percentage of commercially grown apples being processed may increase in MY 2006/07.

Pear Production

While Germany is the fourth largest apple producer in the EU, for pears, Germany only ranks seventh. Commercial pear production in CY 2006 is estimated at 61,000 MT versus 53,000 MT in 2006, an increase of 15 percent.

Table 3: Commercial Pear Production in the EU-15 and Select New Member States (NMS) by Country and Year in 1,000 MT

	2002	2003	2004r	2005r	2006f	Change In Percent
Italy	948	820	838	879	879	0
Spain	603	641	521	608	537	- 12
France	173	176	231	229	259	13
Belgium	237	191	248	230	242	5
Netherlands	180	170	225	200	234	17
Portugal	125	90	188	130	150	15
Germany	56	49	61	53	61	15
Greece	39	32	54	56	45	- 20
UK	35	35	34	27	34	26
Denmark	5	4	5	5	6	20
EU-15	**2,401**	**2,208**	**2,405**	**2,417**	**2,447**	1
Poland 1)	90	77	87	65	55	- 15
Hungary	27	33	31	40	39	- 3
Czech Republic	2	2	2	2	3	50
NMS	**119**	**112**	**120**	**107**	**97**	- 9
EU-25	**2,520**	**2,320**	**2,525**	**2,524**	**2,544**	1

r = revised
f = Forecast
1 = including non-commercial production
Source: German Central Market and Price Reporting Agency (ZMP), based on Eurofel-database and ZMP calculations

No reliable data for non-commercial pear production is available. Only small quantities of non-commercial pear production enter the pear market, most are consumed directly by households or on farms either as fresh or processed fruit. Therefore, FAS/Berlin does not enter any data for the non-commercial pear crop into the PSD table.

The three most important pear varieties grown in Germany are Alexander Lucas, Williams Christ (Bartlett), and Conference.

Concentrated Apple Juice (CAJ) Production

The total volume of apple juice concentrate (70.5 degrees brix) pressed from domestic and imported must or diverted table apples amounted to 66,231 MT in MY 2005/06, versus

91,520 MT the previous year. This decrease of 28 percent is a result of the lower non-commercial apple crop of 480,000 MT in CY 2005 compared to 1 million MT in CY 2004. However, because of higher prices for processing apples the decrease in CAJ production was smaller than previously expected. According to the German Fruit Juice Industry Association (Verband der Deutschen Fruchtsaft-Industrie, VdF) net prices[3] for processing apples amounted to 102.2 Euro per MT at the beginning of MY 2005/06 and to 132.7 Euro per MT at the end of the season. This is 31 percent and 70 percent higher than the average price (78.1 Euro per MT) in MY 2004/05, respectively. As a result, a higher share of apples than expected was delivered to processors. For MY 2006/07, CAJ production is estimated at 87,465 MT as a result of the larger non-commercial apple crop.

German must apples, and to a small extent domestic table apples, form the basis of apple juice production in Germany. German must apples provide the quality (acid content) required by the German apple juice processors. For MY 2006/07, the number of apples processed into apple juice is expected to amount to approximately 744,000 MT, compared to 563,000 in MY 2005/06, and 779,000 MT in MY 2004/05.

Consumption

Apples are by far the most popular fresh fruit in Germany, followed by bananas and oranges. Pears rank number six in popularity with German consumers.

Table 4: Per Capita Consumption of Commercially Grown Fresh Fruit in Germany in kg per person per year

	1998/99	1999/00	2000/01	2001/02 r	2002/03 r	2003/04p
Apples (market)	17.7	20.6	19.1	17.5	17.7	17.8
Bananas	10.3	11.0	12.1	11.1	11.1	11.0
Oranges	5.8	6.1	7.0	6.0	6.5	6.8
Easy Peelers	3.8	4.1	4.2	3.6	4.2	3.7
Grapes	3.8	4.3	4.0	3.8	3.4	3.6
Pears	2.7	2.8	2.6	2.3	2.6	2.4
Strawberries	2.5	2.7	2.4	2.7	2.3	2.2
Lemons	1.5	1.6	1.6	1.7	1.6	1.6
Cherries	1.1	1.5	1.4	1.2	1.0	1.2
Plums	1.1	1.2	1.1	1.0	1.0	1.1
Other	0.9	1.1	0.9	0.8	0.7	0.6
Total Fresh Fruit	27.1	32.0	29.6	28.3	28.0	29.2

Source: ZMP Bilanz Obst 2005, table 11
r = revised
p= preliminary

Apple Consumption

Domestic consumption of fresh apples from commercial and non-commercial production combined was 1.45 million MT in MY 2005/06 (July/June). Consumption for processing was 641,000 MT. 563,000 MT were processed into apple juice, 46,000 into apple sauce, 20,000

[3] Price excl. VAT

MT into spirits, and 12,000 MT into apple preserves. The EU intervention program was not used in MY 2005/06.

In MY 2006/07, fresh consumption is estimated at 1.619 million MT and processing is expected to increase to 896,000 MT due to the larger non-commercial crop. Intervention is estimated to be marginal as prices for must apples are expected to be above the maximum intervention price of 8.81 Euro per 100 kg and any surplus table apples are expected to enter processing rather than intervention.

Pear Consumption

Per capita consumption of table pears (without house gardens) varies between 2.2 and 2.8 kg in recent years. Consumption of fresh table pears in MY 2005/06 (July/June) totaled 220,022 MT. About 78 percent of the pear supply in Germany originate from imports and only 22 percent from domestic production. Intervention of pears is traditionally marginal in Germany and did not occur in MY 2005/06.

Pears for processing are used mainly for spirits and originate from commercial production. In MY 2005/06 this amounted to 1,220 MT compared to 2,270 MT in 2004/05. The drop can largely be attributed to the lower pear crop. For MY 2006/07, an increase in the use of pears for processing is expected in line with the higher domestic pear production.

CAJ Consumption

Fruit juices and fruit juice drinks are very popular in Germany. The per capita consumption of around 40 liters per year is the highest in the EU-25 and about 24 percent above per capita consumption in the United States (see table 5.) The large consumption increase in CY 2003 can be attributed to the extremely warm summer of 2003. In CY 2004 fruit juice consumption dropped back to average levels. In CY 2005, per capita consumption dropped below the 40 liter mark. High juice prices and growing popularity of competing soft drinks such as flavored water contributed to this drop.

Apple juice enjoys the highest popularity among the juices, followed by orange juice and other citrus nectars (see table 6.)

Table 5: Per Capita Consumption of Fruit Juices/Nectars in European Countries and the USA (in liters per year)

	2000	2001	2002	2003	2004
Germany	40.6	40.5	40.4	42.0	40.3
Finland	26.1	35.0	32.0	32.0	32.2
Austria	37.8	35.6	32.0	29.1	28.0
Denmark	19.0	22.7	24.0	24.9	24.8
Netherlands	26.1	25.5	24.4	24.8	24.7
Spain	16.5	21.0	22.0	24.4	25.3
Sweden	21.5	23.0	23.7	24.5	23.8
UK	19.0	20.5	21.3	22.8	23.2
France	20.5	21.8	21.7	22.4	21.7
Belgium/Lux.	20.5	19.9	19.7	20.2	20.8
Ireland	13.3	15.6	16.2	16.6	16.8
Greece	8.5	16.3	15.1	14.9	15.1
Italy	10.5	11.7	11.9	15.3	14.6
Portugal	7.1	10.8	11.1	11.1	11.4
TOTAL EU-15	22.6	24.2	24.4	25.7	25.3
Poland	16.2	16.9	19.2	20.3	20.7
Slovenia	19.1	17.8	17.7	18.2	18.5
Estonia	12.8	14.0	15.7	16.8	17.3
Latvia	12.0	12.7	14.4	14.1	15.1
Hungary	18.3	19.1	17.5	13.0	13.6
Czech Republic	10.7	10.8	11.2	11.7	12.1
Lithuania	8.1	8.4	8.6	9.4	11.3
Slovakia	10.9	10.1	10.8	8.4	8.6
Total NMS-8	14.8	15.2	16.5	16.4	16.9
Norway	25.5	31.4	33.3	32.2	33.3
Switzerland	30.0	27.7	29.1	29.1	30.7
United States	30.0	30.0	35.7	35.7	32.5

Source: VdF, Association of the German Fruit Juice Industry, Annual Report 2005. Data for 2005 is not yet available.

Table 6: Per Capita Consumption of Select Juices and Fruit Drinks in Germany (in kg per year)

	1995	2000	2002	2003	2004r	2005p	% Change
Apple Juice	11.79	12.20	12.17	13.10	12.88	12.36	-4.0%
Orange Juice	9.83	9.53	9.52	9.66	9.24	8.90	-3.7%
Grape Juice	1.19	1.32	1.31	1.31	1.31	1.29	-1.5%
Grapefruit Juice	0.33	0.39	0.34	0.32	0.32	0.36	12.5%
Pear Juice	0.13	0.18	0.20	0.30	0.30	0.25	-16.7%
Vegetable Juice	0.86	0.96	0.97	0.97	0.99	1.19	20.2%
Citrus Nectar	8.57	7.75	7.65	7.75	7.35	7.26	-1.2%
Other Juice/Nectar	8.02	8.31	8.27	8.62	8.26	8.18	-1.0%
Total	40.72	40.64	40.43	42.03	40.65	39.79	-2.1%

Source: VdF, Association of the German Fruit Juice Industry, Annual Report 2005.

Trade

Apple Trade

In MY 2005/06, German imports of apples amounted to 786,653 MT, an increase of 11 percent from the 708,759 MT in MY 2004/05. The increase was due to the smaller domestic crop of CY 2005. Sixteen percent or 122,772 MT of the imported apples consisted of must apples for juice production.

The largest supplier by far was Italy accounting for 40 percent of the German imports, followed by the Netherlands (13 percent), New Zealand (11 percent), France (10 percent), and Austria (5 percent). US apple exports to Germany are marginal and amounted to 331 and 61 MT in MY 2004/05 and 2005/06, respectively.

Germany exports only small quantities of apples, about 85 percent of which are destined to other EU-25 member states. Exports of apples amounted to 100,384 MT in MY 2005/06, an increase of about 14 percent compared to the previous season. This increase is due to the re-opening of the Russian market to German apples. Russia had closed its border for plant products from Germany from November 15, 2004, until May 15, 2005, due to findings of the pest “western flower thrips” (*frankliniella occidentalis*) on flower shipments and disputes about phytosanitary certificates. After the import ban was lifted German exports did not only rebound, but increased to the extent that Russia surpassed the Netherlands as the number one export market for German apples. In addition, the low stone fruit crop in Russia and the Ukraine aggravated the demand for apples in Russia.

Pear Trade

Pear imports amounted to 188,679 MT in MY 2005/06, an increase of 7 percent compared to MY 2004/05. The main suppliers to Germany were Italy accounting for 43 percent of Germany’s pear imports, followed by Argentina (15 percent), Spain (11 percent), and South Africa (10 percent).

Pear imports contributed roughly 78 percent to the supply on the German market, while domestic production contributes 22 percent in MY 2005/06. The correspondent figures for 2004/05 were 74 and 26 percent.

Imports from the United States are small and fluctuate widely. They amounted to 2,276 MT in MT 2005/06 and 3,091 MT in MY 2004/05. In MY 2005/06 the United States ranked as the number nine supplier of fresh table pears to Germany and number four as a non-EU supplier, after Argentina, South Africa, and Chile.

Pear exports from Germany were up 3 percent in MY 2005/06 at 20,636 MT. The majority of German pear exports consist of re-exports. Main destinations were other EU-15 countries.

CAJ Trade

Accurate trade figures are difficult to identify, since there is little ascertainable information about the strength (concentration) of imported/exported CAJ. Therefore the calculated figures for CAJ at 70.5 brix should be viewed as an estimate.

Traditionally, the German apple juice industry depends heavily on imports of apple juice concentrates of various densities. In MY 2005/06, calculated German imports of CAJ at 70.5 brix were 380,405 MT versus 378,876 MT in the previous MY.

Sixty-three percent of the German CAJ imports came from the top 3 suppliers, which were Poland, China, and Switzerland. Their individual market shares were 26, 21, and 16 percent in MY 2005/06. In 2004/05 the combined market share of the top three suppliers amounted to 61 percent. The most notable change is the increase of imports from China, which doubled its CAJ exports to Germany from MY 2004/05 to MY 2005/06 and improved its market share from 10 to 21 percent. The reason for this is the competitive price of Chinese CAJ.

German CAJ exports consist mainly of reprocessed concentrates from eastern European countries or blends of such concentrates with domestic production. In MY 2005/06 they amounted to 140,083 MT (at 70.5 brix), an increase of less than one percent compared to the previous MY.

The United States, traditionally the largest single export market for German CAJ, did not even make the top 10 list of German CAJ export destinations in MY 2005/06. Exports to the United States totaled 2,532 MT in MY 2005/06 versus 13,019 MT in MY 2004/05. It is unclear what caused this large drop.

Stocks

The latest available commercial stock figures refer to the situation at producers' organizations at the end of June. Stocks were approximately 70 percent below the previous season. Reportedly, stocks were sold out by the end of July.

Table 7: Apple stocks in Germany on June 30 in MT by year and variety

Variety	2002/03	2003/04	2004/05	2005/06
Jonagored	705	714	13,025	2,771
Jonagold	3,045	1,130	12,594	4,260
Golden Delicious	404	75	3,419	1,270

Total	4,946	2,309	33,433	10,266

Source: German Central Market and Price Reporting Agency (ZMP)

Policy

In the past, support for the German fruit sector was limited to what is available for producer organizations under the EU common market organization for fruits and vegetables (regulation 2200/96). For details please refer to GAIN report GM3011.

While the 2003 reform of the EU common agricultural policy (CAP) made some fruits and vegetables eligible for direct payments under CAP, it did not change the program for permanent crops such as apples and pears.

As of September 1, 2005, EU member states are authorized to reduce the frequency of phytosanitary inspections on imports of U.S. apples to their territory from the previous level of 100 percent to any level between 15 and 100 percent. Germany has decided to keep the inspection rate at 100 percent.

Import tariffs

Germany is part of the EU and thus applies the harmonized EU import regulations. Apples and pears are subject to a special tariff system called "Entry Price System". In this system fruits and vegetables imported at or over an established entry price are charged an ad valorem duty only. Produce valued below the entry price are charged a tariff equivalent in addition to the ad valorem duty. The tariff equivalent is graduated for products valued between 92 and 100 percent of the entry price. The ad valorem duty and the full tariff equivalent are levied on imports valued at less than 92 percent of the entry price.

The tariff levels are published in EU regulation 1719/2005. For details please refer to:

http://europa.eu.int/eur-lex/lex/LexUriServ/site/en/oj/2005/l_286/l_28620051028en00010886.pdf

Apples and pears see pages 86/87 and 689 through 694,
CAJ see page 158.

Marketing

MY 2005/06 started badly because large amounts of apples from the previous season as well as from the Southern hemisphere put pressure on the market. Prospects for MY 2006/07 are much better since domestic apples from the previous season are sold out and imports from the southern hemisphere were lower than the year before. It is expected that this situation will lead to higher apples prices as well as higher imports. However, the expected higher apple prices could negatively affect fresh apple consumption.

Because of low world CAJ stocks, the market for must apples is also expected to be strong, despite the larger non-commercial apple crop.

For detailed information about the German fruit retail market please see our product brief on fruit (GM5002). This report includes information on market distribution of fruit sales by retail segment, labeling requirements, phytosanitary requirements and tariffs.

Trade fairs

In Germany, trade fairs play a key role in presenting new products to the trade or in finding additional buyers and importers. The major international trade fair for the fruit and vegetable trade is held each February in Berlin:

Fruit Logistica Berlin, Germany (Interval: yearly) Target Market: Germany/EU/Central & Eastern Europe Good venue for exhibiting fresh and dried fruit, nuts and related products	Next Fair: February 08-10, 2007	U.S. Pavilion Organizer: B*FOR International Tel: (540) 373-9935 Fax: (540) 372-1414 http://www.fruitlogistica.de

For organic products there is a special trade fair held annually in Nuremberg

Bio Fach Nuremberg, Germany (Interval: yearly) Target Market: Germany/Europe The leading European trade show for organic food and non-food products	Next Fair: February 15-18, 2007	U.S. Pavilion Organizer: B*FOR International Tel: (540) 373-9935 Fax: (540) 372-1411 http://www.biofach.de

Food safety

The number of food scandals that occurred in Europe in recent years involving various commodities - including fresh produce - have prompted the food industry to come up with various programs to ensure the safety of the traded food. For fruits and vegetables two main programs evolved in Germany - the Q+S and EUREPGAP. While Q+S is a three tier system that involves everyone who handles the produce from producers, to wholesalers, and the retail chains, EUREPGAP mainly focuses on the producer level and is often supplemented by the IFS (International Food Standard) on the wholesalers level. A major component of both systems is the extensive documentation requirement for all stages of the production process.

Both systems are open to international producers provided that they comply with the system and obtain a certification. Also a simultaneous certification for Q+S and EUREPGAP is possible at the producer level.

Some German retail chains have voiced their preference for one or the other systems: Spar favors Q+S, Metro focuses on EUREPGAP in conjunction with IFS, while Rewe and Tengelmann accept both systems.

The implementation of both systems is still in the beginning stages, therefore non certified produce is still accepted. However, U.S. exporters should monitor the issue closely.

For detailed information on both systems please view the following websites:
http://www.q-s.info/en
www.eurep.org

Related reports:

GM3011	3/17/2003	EU support for the fruit and vegetable sector in Germany
GM3025	8/15/2003	German Fruit Tree Census
GM5002	01/07/2005	Product Brief Fresh Fruits

Statistical Section:

Note: As the PSD tables apples and concentrated apple juice (CAJ) are connected, the figures for "Processing" in both PSDs include apples for juice production, as well as apples for other processing purposes (e.g. applesauce, canned apples, spirits, and bakeries).

Note: Trade data in PS&D's, trade matrices and text for CAJ are converted to 70.5 brix using a conversion factor of 0.158865 from 11.2 brix or single strength.

Table 8: PSD for Fresh Apples (in ha, 1000 trees, MT)

PSD Table

Country	**Germany**						
Commodity	**Apples, Fresh**			(HA)(1000 TREES)(MT)			
	2004	Revised	2005	Estimate	2006	Forecast	UOM
	USDA Official [	Estimate[N	A Official [	Estimate[N	A Official [	Estimate[New]	
Market Year Begin		07/2004		07/2005		07/2006	MM/YYYY
Area Planted	31219	31219	31219	31219	0	31219	(HA)
Area Harvested	31219	31219	31219	31219	0	31219	(HA)
Bearing Trees	64182	64182	64182	64182	0	64182	(1000 TRE
Non-Bearing Trees	0	0	0	0	0	0	(1000 TRE
Total Trees	64182	64182	64182	64182	0	64182	(1000 TRE
Commercial Production	945000	945000	960000	925000	0	955000	(MT)
Non-Comm. Production	1000000	1000000	450000	480000	0	950000	(MT)
TOTAL Production	1945000	1945000	1410000	1405000	0	1905000	(MT)
TOTAL Imports	708759	708759	740000	786653	0	710000	(MT)
TOTAL SUPPLY	2653759	2653759	2150000	2191653	0	2615000	(MT)
Domestic Fresh Consum	1620247	1624247	1462000	1450269	0	1619000	(MT)
Exports, Fresh Only	88225	88225	88000	100384	0	100000	(MT)
For Processing	945000	941000	600000	641000	0	896000	(MT)
Withdrawal From Market	287	287	0	0	0	0	(MT)
TOTAL UTILIZATION	2653759	2653759	2150000	2191653	0	2615000	(MT)

Note: figures for processing include processing for juice as well as for apple sauces and spirits

Table 9 : Import Prices for Fresh Apples in U.S. $ per MT

Prices Table

Country Germany

Commodity Apples, Fresh

Prices in US$ per uom MT

Year	2004	2005	% Change	2006	% Change
Jan	757	746	-1%	515	-31%
Feb	840	770	-8%	705	-8%
Mar	847	834	-2%	722	-13%
Apr	820	803	-2%	819	2%
May	859	770	-10%	952	24%
Jun	963	802	-17%	960	20%
Jul	990	792	-20%		
Aug	1008	753	-25%		
Sep	824	564	-32%		
Oct	586	365	-38%		
Nov	504	414	-18%		
Dec	672	551	-18%		

Exchange Rate Local Currency/US $

Date of Quote MM/DD/YYYY

Table 10: German Apple Imports by Country in MT

Import Trade Matrix

Country	Germany		
Commodity	Apples, Fresh		
Time Period	July/Jun	Units:	MT
Imports for:	2004		**2005**
U.S.	336	U.S.	61
Others		Others	
ITALY	258010	ITALY	317526
NETHERLANDS	93063	NETHERLANDS	102083
NEW ZEALAND	70424	NEW ZEALAND	83373
FRANCE	53638	FRANCE	74421
ARGENTINA	34159	AUSTRIA	37189
CHILE	32778	BELGIUM	36016
CZECH REPUBLIC	32778	ARGENTINA	33972
BELGIUM	32271	CHILE	30251
BRAZIL	28973	BRAZIL	14325
SOUTH AFRICA	23945	SOUTH AFRICA	10580
Total for Others	660039		739736
Others not Listed	48384		46856
Grand Total	708759		786653
INTRA EU-15	459986		582674
NMS	47564		24048
EXTRA EU-25	201209		179931

Note: 2004 trade data covers July 2004 through June 2005
2005 trade data covers July 2005 through June 2006
NMS = New Member States (Czech Republic, Cyprus, Estonia, Hungary, Latvia, Lithuania, Malta, Slovakia, Slovenia, Poland)

Table 11: German Apple Exports by Country in MT

Export Trade Matrix

Country Germany

Commodity Apples, Fresh

Time Period	July/June	Units:	MT
Exports for:	2004		**2005**
U.S.	0	U.S.	0
Others		Others	
NETHERLANDS	14936	RUSSIA	12838
DENMARK	11125	NETHERLANDS	11979
FRANCE	10214	DENMARK	11803
UNITED KINGDOM	7976	SWEDEN	9678
SWEDEN	6644	UNITED KINGDOM	9062
AUSTRIA	6131	FRANCE	9013
FINLAND	5515	AUSTRIA	4581
ITALY	4504	LITHUANIA	4113
LITHUANIA	2709	FINLAND	4022
SPAIN	2254	BELGIUM	3124
Total for Others	72008		80213
Others not Listed	16217		20171
Grand Total	88225		100384
INTRA EU-15	75100		71149
NMS	7499		13316
EXTRA EU-25	5526		15919

Note: 2004 trade data covers July 2004 through June 2005
2005 trade data covers July 2005 through June 2006
NMS = New Member States (Czech Republic, Cyprus, Estonia, Hungary, Latvia, Lithuania, Malta, Slovakia, Slovenia, Poland)

Table 12: PSD for Fresh Pears (in ha, 1000 trees, MT)

PSD Table

Country Germany

Commodity Pears, Fresh

(HA)(1000 TREES)(MT)

	2004	Revised	2005	Estimate	2006	Forecast	UOM
	USDA Official [	Estimate[N	USDA Official [	Estimate[N	USDA Official [	Estimate[New]	
Market Year Begin		07/2004		07/2005		07/2006	MM/YYYY
Area Planted	2090	2090	2090	2090	0	0	(HA)
Area Harvested	2090	2090	2090	2090	0	0	(HA)
Bearing Trees	2703	2703	2703	2703	0	0	(1000 TRE
Non-Bearing Trees	0	0	0	0	0	0	(1000 TRE
Total Trees	2703	2703	2703	2703	0	0	(1000 TRE
Commercial Production	61000	61000	43000	53000	0	61000	(MT)
Non-Comm. Production	0	0	0	0	0	0	(MT)
TOTAL Production	61000	61000	43000	53000	0	61000	(MT)
TOTAL Imports	176368	176368	170000	188878	0	182000	(MT)
TOTAL SUPPLY	237368	237368	213000	241878	0	243000	(MT)
Domestic Fresh Consump	214724	214724	194000	220022	0	220000	(MT)
Exports, Fresh Only	20025	20025	18000	20636	0	21000	(MT)
For Processing	2270	2270	1000	1220	0	2000	(MT)
Withdrawal From Market	349	349	0	0	0	0	(MT)
TOTAL UTILIZATION	237368	237368	213000	241878	0	243000	(MT)

Table 13 : Import Prices for Fresh Pears in U.S. $ per MT

Prices Table

Country Germany

Commoditi Pears, Fresh

Prices in US$ per uom MT

Year	2004	2005	% Change	2006	% Change
Jan	1233	1110	-10%	1173	6%
Feb	1183	1133	-4%	1062	-6%
Mar	1101	1135	3%	1001	-12%
Apr	927	891	-4%	1053	18%
May	966	935	-3%	1132	21%
Jun	917	1002	9%	1166	16%
Jul	1151	924	-20%		
Aug	979	770	-21%		
Sep	911	761	-16%		
Oct	941	850	-10%		
Nov	1051	949	-10%		
Dec	1173	1052	-10%		

Table 14: German Pear Imports by Country in MT

Import Trade Matrix

Country	Germany		
Commodity	Pears, Fresh		
Time Period	July/June	Units:	MT
Imports for:	2004		**2005**
U.S.	3091	U.S.	2276
Others		Others	
ITALY	68222	ITALY	81723
ARGENTINA	32028	ARGENTINA	28928
SOUTH AFRICA	24578	SPAIN	19952
SPAIN	14572	SOUTH AFRICA	19569
CHILE	9916	NETHERLANDS	12676
BELGIUM	7412	CHILE	9905
NETHERLANDS	7412	BELGIUM	6268
FRANCE	5520	FRANCE	4033
CHINA	2242	CHINA	1972
TURKEY	241	TURKEY	562
Total for Others	172143		185588
Others not Listed	1134		815
Grand Total	176368		188679
INTRA EU-15	103335		124979
NMS	156		95
EXTRA EU-25	72877		63605

Note: 2004 trade data covers July 2004 through June 2005
2005 trade data covers July 2005 through June 2006
NMS = New Member States (Czech Republic, Cyprus, Estonia, Hungary, Latvia, Lithuania, Malta, Slovakia, Slovenia, Poland)

Table 15: German Pear Exports by Country in MT

Export Trade Matrix

Country	Germany		
Commodity	Pears, Fresh		
Time Period	July/June	Units:	MT
Exports for:	2004		**2005**
U.S.	0	U.S.	0
Others		Others	
AUSTRIA	2694	NETHERLANDS	3295
NETHERLANDS	2471	AUSTRIA	2857
FRANCE	2364	DENMARK	2436
ITALY	2071	FRANCE	2167
DENMARK	1949	SWEDEN	1843
UNITED KINGDOM	1673	UNITED KINGDOM	1446
SWEDEN	1350	PORTUGAL	1115
PORTUGAL	968	ITALY	954
FINLAND	922	NORWAY	859
CZECH REPUBLIC	840	RUSSIA	803
Total for Others	17302		17775
Others not Listed	2723		2861
Grand Total	20025		20636
INTRA EU-15	17534		18047
NMS	1681		759
EXTRA EU-25	808		1830

Note: 2004 trade data covers July 2004 through June 2005
2005 trade data covers July 2005 through June 2006
NMS = New Member States (Czech Republic, Cyprus, Estonia, Hungary, Latvia, Lithuania, Malta, Slovakia, Slovenia, Poland)

Table 16: PSD for CAJ (in MT)

PSD Table

Country Germany

Commodity Apple Juice, Concentrated (MT)

	2004	Revised	2005	Estimate	2006	Forecast	UOM
	USDA Official [	Estimate[NA	Official [	Estimate[NA	Official [	Estimate[New]	
Market Year Begin		07/2004		07/2005		07/2006	MM/YYYY
Deliv. To Processors	945000	941000	600000	641000	0	896000	(MT)
Beginning Stocks	186000	186000	120000	120000	130000	120000	(MT)
Production	91520	91520	56000	66231	0	87500	(MT)
Imports	378876	378876	480000	380405	0	380000	(MT)
TOTAL SUPPLY	656396	656396	656000	566636	130000	587500	(MT)
Exports	138849	138849	130000	140083	0	142000	(MT)
Domestic Consumption	397547	397547	396000	306553	0	325500	(MT)
Ending Stocks	120000	120000	130000	120000	0	120000	(MT)
TOTAL DISTRIBUTION	656396	656396	656000	566636	0	587500	(MT)

Note: figures for processing include processing for juice as well as for apple sauces and spirits

Table 17 : Import Prices for CAJ in U.S. $ per MT

Prices Table

Country Germany

Commodity Apple Juice, Concentrated

Prices in US$ per uom MT

Year	2004	2005	% Change	2006	% Change
Jan	858	774	-10%	982	27%
Feb	750	720	-4%	847	18%
Mar	789	801	2%	834	4%
Apr	769	710	-8%	914	29%
May	770	694	-10%	915	32%
Jun	764	697	-9%	975	40%
Jul	786	659	-16%		
Aug	801	750	-6%		
Sep	710	901	27%		
Oct	793	967	22%		
Nov	797	907	14%		
Dec	770	917	19%		

Table 18: German CAJ Imports by Country in MT

Import Trade Matrix

Country	Germany		
Commodity	Apple Juice, Concentrated		
Time Period	July/June	Units:	MT
Imports for:	2004		**2005**
U.S.	442	U.S.	48
Others		Others	
POLAND	123720	NETHERLANDS	98552
SWITZERLAND	64315	UNITED KINGDOM	79668
HUNGARY	43450	FRANCE	60754
PR CHINA	36848	DENMARK	30502
AUSTRIA	28716	BELGIUM	19356
ITALY	17465	AUSTRIA	24507
TURKEY	21684	POLAND	10461
NETHERLANDS	8550	ITALY	10970
UKRAINE	8421	FINLAND	7461
ROMANIA	6674	IRELAND	5952
Total for Others	359843		348183
Others not Listed	18591		32174
Grand Total	378876		380405
EU 15	56866		66586
NMS	171801		114976
Extra EU 25	150209		198842

Note: 2004 trade data covers July 2004 through June 2005
2005 trade data covers July 2005 through June 2006
NMS = New Member States (Czech Republic, Cyprus, Estonia, Hungary, Latvia, Lithuania, Malta, Slovakia, Slovenia, Poland)

Table 19: German CAJ Exports by Country in MT

Export Trade Matrix

Country	Germany		
Commodity	Apple Juice, Concentrated		
Time Period	July/June	Units:	MT
Exports for:	2004		**2005**
U.S.	13019	U.S.	2532
Others		Others	
NETHERLANDS	27433	NETHERLANDS	34802
UNITED KINGDOM	26889	UNITED KINGDOM	25419
FRANCE	12121	FRANCE	11384
AUSTRIA	15768	DENMARK	8361
DENMARK	7894	BELGIUM	5864
BELGIUM	6089	AUSTRIA	10664
ITALY	2679	POLAND	8337
FINLAND	3023	ITALY	2554
GREECE	3977	FINLAND	4770
SWEDEN	1213	IRELAND	2626
Total for Others	107086		114781
Others not Listed	18744		22770
Grand Total	138849		140083
EU 15	111071		114431
NMS	3015		10051
Extra EU 25	24762		15601

Note: 2004 trade data covers July 2004 through June 2005
2005 trade data covers July 2005 through June 2006
NMS = New Member States (Czech Republic, Cyprus, Estonia, Hungary, Latvia, Lithuania, Malta, Slovakia, Slovenia, Poland)