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Germany

Fresh Deciduous Fruit

Annual

2005

Approved by:
Richard Petges
U.S. Embassy, Berlin

Prepared by:
Sabine M Lieberz

Report Highlights:
For CY 2005, German commercial apple production is forecast at 915,000 MT, down 3 percent from the previous year. Non-commercial apple production is forecast at 500,000 MT, and commercial pear production at 58,000 MT. Production of concentrated apple juice (CAJ, 70.5 brix) is forecast at 59,000 MT in MY 2005/2006.

Includes PSD Changes: Yes
Includes Trade Matrix: Yes
Unscheduled Report
Berlin [GM1]
[GM]

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Production

Apple 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] 2005 was estimated at 915,000 MT[2] for commercial production, down 3 percent compared to the previous year. The crop for CY 2004 was revised upwards to 945,000 MT from the previous estimate of 860,000 MT, in line with official data from the German Federal Ministry of Consumer Protection, Food and Agriculture (BMVEL). The production potential is estimated at 1 million MT.

The quality of commercial fruit is better than in 2004, when about 13 percent of the total area had been affected by hail.

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

Country	2000	2001	2002	2003	2004 r	2005 f	Change in percent
Italy	2,206	2,172	2,171	2,152	2,035	2,145	5
France	2,260	1,938	1,966	1,728	1,708	1,778	4
Germany	1,131	922	763	818	945	915	- 3
Spain	683	806	646	704	553	671	21
Netherlands	500	475	370	405	435	380	- 13
Belgium	500	337	349	319	356	325	- 9
Portugal	206	240	295	280	284	288	1
Greece	288	194	244	165	282	265	- 6
UK	195	212	124	156	163	183	12
Austria[1)]	161	156	163	152	163	169	4
Denmark	31	29	25	25	26	26	0
Sub-total EU-15	**8,162**	**7,480**	**7,115**	**6,905**	**6,949**	**7,143**	**3**
Poland[2)]	2,000	2,484	2,168	2,428	2,522	2,200	- 13
Hungary	695	605	527	508	700	489	- 30
Lithuania[2)]	100	155	120	180	70	130	86
Czech Republic	195	141	164	152	164	121	- 26
Slovenia	59	38	42	62	60	57	- 5
Slovakia	27	27	27	34	31	29	- 6
Sub-total NMS	**3,077**	**3,451**	**3,048**	**3,369**	**3,547**	**3,026**	**- 15**
Total EU-25	**11,239**	**10,931**	**10,163**	**10,269**	**10,496**	**10,169**	**- 3**

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

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

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

Variety	2000	2001	2002	2003 r	2004 r	2005f	Change 05/04
Jonagold	210	148	149	152	169	151	-10.7 %
Elstar	156	139	119	126	178	162	-9.0 %
Jonagored	96	93	70	90	103	116	12.6 %
Golden Delicious	77	66	59	63	67	58	-13.4 %
Gloster	81	66	40	47	43	42	-2.3 %
Idared	70	59	49	52	61	46	-24.6 %
Boskoop	87	68	44	38	50	54	8.0 %
Cox Orange	57	54	24	30	29	28	-3.4 %
Gala	29	28	33	39	45	51	13.3 %
Braeburn	17	16	14	20	39	39	0.0 %
Other *	251	186	162	161	161	168	4.3 %
Total	1,131	922	763	818	945	915	-3.2 %

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

German authorities stopped issuing official figures for non-commercial production (private gardens and meadows) in 1992. However, industry estimates CY 2005 non-commercial production at approximately 500,000 MT, down 50 percent from approximately 1 million MT in CY 2004. Non-commercial production tends to alternate between good and poor crop years. The reason for this 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 practice, 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, 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.

Pear Production

While Germany is the fourth largest apple producer in the EU, for pears, Germany only ranks eighth. Commercial pear production in CY 2005 is estimated at 43,000 MT versus 61,000 MT in 2004, a reduction of 30 percent. These figures originate not from the German Federal Ministry of Consumer Protection, Food, and Agriculture (BMVEL) but from the German Central Market- and Price Reporting Agency (ZMP). According to industry sources, the official final numbers from BMVEL for the German pear production have been largely overestimating the actual crop ever since CY 2002. Therefore FAS/Berlin decided to go with the widely accepted ZMP figures instead.

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

	2000	2001	2002	2003	2004	2005	Change in percent
Italy	876	793	948	831	854	842	- 1
Spain	597	660	603	641	521	573	10
France	259	254	237	191	248	230	- 7
Belgium	180	89	173	176	231	212	- 8
Netherlands	195	70	180	170	225	200	- 11
Portugal	94	135	102	80	178	137	- 23
Greece	53	47	39	32	54	56	4
Germany	65	47	56	49	61	43	- 30
UK	34	33	35	35	34	27	- 21
Denmark	6	6	5	4	5	5	0
EU-15	**2,359**	**2,134**	**2,378**	**2,209**	**2,411**	**2,325**	**- 4**
Poland 1)	82	77	90	77	87	65	- 25
Czech Republic	3	2	2	2	2	2	- 9
NMS	**85**	**79**	**92**	**79**	**89**	**67**	**- 25**
EU-25	**2,444**	**2,213**	**2,470**	**2,288**	**2,500**	**2,392**	**- 4**

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

No reliable data for non-commercial pear production is available. Also, 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 91,520 MT in MY 2004/05, versus 78,100 MT the previous year. This increase of 17 percent can be attributed to the higher non-commercial apple crop of 1 million MT in CY 2004 compared to CY 2003. For MY 2005/06, CAJ production is estimated at 56,000 MT due to the lower non-commercial apple crop of 500,000 MT in CY 2005 (CY 2004: 1.0 million MT) and lower hail damage of the commercial crop. However, as prices for must apples are expected to be much higher than in the previous MY, a higher share of apples is expected to be delivered to processors. Therefore the reduction in CAJ production is expected to be more moderate than the reduction in the non-commercial crop.

German must apples, and to a small extent domestic table apples, form the basis of apple juice production in Germany, especially since German must apples provide the quality (acid content) required by the German apple juice processors. For MY 2005/06, the number of apples processed into apple juice is expected to amount to approximately 480,000 MT, compared to 779,000 MT in MY 2004/05, and 664,000 MT in 2003/04.

Consumption

Apples are by far the most popular fresh fruit in Germany, followed by bananas and oranges. Pears rank number 6 in popularity with German consumers.

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

	1997/98	1998/99	1999/00	2000/01	2001/02 r	2002/03 r
Apples (market)	18.0	17.7	20.6	19.1	17.5	17.6
Bananas	11.2	10.3	11.0	12.1	11.1	11.2
Oranges	6.4	5.8	6.1	7.0	6.0	6.5
Easy Peelers	5.2	3.8	4.1	4.2	3.6	4.2
Grapes	3.8	3.8	4.3	4.0	3.8	3.3
Pears	2.3	2.7	2.8	2.6	2.3	2.6
Strawberries	2.4	2.5	2.7	2.4	2.7	2.3
Lemons	1.5	1.5	1.6	1.6	1.7	1.6
Cherries	1.0	1.1	1.5	1.4	1.2	1.0
Plums	1.1	1.1	1.2	1.1	1.0	1.0
other	27.9	28.0	33.1	30.5	29.2	28.5
Total Fresh Fruit	62.8	60.6	68.4	66.9	62.6	62.2

Source: ZMP Bilanz Obst 2004, table 11

Apple Consumption

Domestic consumption of fresh apples from commercial and non-commercial production combined was 1.62 million MT in MY 2004/05 (July/June). Consumption for processing was 945,000 MT. 779,000 MT thereof were processed into apple juice, 100,000 MT into spirits, 54,000 into apple sauce and 12,000 into apple preserves. 287 MT were withdrawn from the market by means of EU intervention program. That is the highest use of intervention in Germany since 2001, but still well below the levels of the 1990s. In MY 2004/05, fresh consumption is estimated at 1.477 million MT and processing is expected to decrease to 600,000 MT due to the smaller non-commercial crop and better quality of the 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 possible excess table apples are therefore 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 2004/05 (July/June) adds up to 214,724 MT. About 75 percent of the pear supply in Germany originate from imports and only 25 percent from domestic production. Intervention of pears is traditionally marginal in Germany. Therefore the intervention of 349 MT of pears in MY 2004/05 was exceptionally high by German standards.

Pears for processing are used mainly for spirits and originate from commercial production. In MY 2004/05, this amounted to 2,270 MT compared to 3,236 MT in MY 2003/04. However, when assessing this seemingly large drop one has to remember that processing was exceptionally high in MY 2003/04 due to the 2003 drought which resulted in a higher than usual proportion of pears not meeting the marketing standards for table pears. These were processed into juice or spirits instead. For MY 2005/06, a further reduction in the use of pears for processing is expected due to lower availability of pears.

CAJ Consumption

Fruit juices and fruit juice drinks are very popular in Germany. The per capita consumption of more than 40 liters per year is the highest in the EU-25 and about 18 percent above per capita consumption in the United States (see table 5.) The high increase of consumption in CY 2003 can be attributed to the extremely warm summer of 2003. In CY 2004 fruit juice consumption dropped back to average levels. For CY 2005 consumption is expected to remain stable.

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	2003r	2004p
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

r = revised
p = provisional
Source: VdF, Association of the German Fruit Juice Industry, Annual Report 2004.

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

	1995	2000	2001	2002	2003	2004	% Change
Apple Juice	11.79	12.20	12.15	12.17	13.10	12.78	-2.4%
Orange Juice	9.83	9.53	9.52	9.52	9.66	8.94	-7.4%
Grape Juice	1.19	1.32	1.32	1.31	1.31	1.31	0.0%
Grapefruit Juice	0.33	0.39	0.37	0.34	0.32	0.32	0.0%
Pear Juice	0.13	0.18	0.20	0.20	0.30	0.30	0.0%
Vegetable Juice	0.86	0.96	0.97	0.97	0.97	0.99	2.1%
Citrus Nectar	8.57	7.75	7.68	7.65	7.75	7.35	-5.2%
Other Juice/Nectar	8.02	8.31	8.31	8.27	8.62	8.26	-4.2%
Total	40.72	40.64	40.52	40.43	42.03	40.25	-4.2%

Source: VdF, Association of the German Fruit Juice Industry, Annual Report 2004.

Trade

Apple Trade

In MY 2004/05, German imports of apples amounted to 708,759 MT, a decrease of 8 percent from the 768,822 MT in MY 2003/04. The decline was due to the higher domestic crop of CY 2004. 9 percent or 65,331 MT of the imported apples consisted of must apples for juice production. In MY 2004/05, an increase in apple imports to 750,000 MT is expected due to the estimated lower domestic apple crop.

The largest supplier by far was Italy with 36 percent of the imports, followed by the Netherlands (13 percent), New Zealand (10 percent), France (8 percent), and Argentina (4.8 percent). US apple exports to Germany are marginal and amounted to 336 and 249 MT in MY 2004/05 and 2003/04, respectively.

Germany exports only small quantities of apples, about 85 percent of which are destined to other EU-15 member states. Exports of apples amounted to 88,225 MT in MY 2004/05, an increase of about 14 percent compared to the previous season. Russia had been number 6 in export destinations in MY 2003/04 but dropped to rank 16 in MY 2004/05 as 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.

Pear Trade

Pear imports amounted to 176,368 MT in MY 2004/05, an increase of 8 percent compared to MY 2003/04. The main suppliers were Italy with about 39 percent of the imports, followed by Argentina (about 18 percent), South Africa (14 percent), and Spain (8 percent). Pear imports contributed roughly 74 percent to the supply on the German market, while domestic production contributes 26 percent in MY 2004/05. The correspondent figures for 2003/04 were 77 and 23 percent. Pear imports are expected to drop by 4 percent in MY 2005/06, despite the lower domestic production, due to lower availability in Italy.

Imports from the United States are small and fluctuate widely. They amounted to 3,091 in MY 2004/05 after 4,372 MT in MY 2003/04, 2,490 MT in MY 2002/03, 4,132 MT in MY 2001/02 and 2,103 in MY 2000/01. In MY 2003/04 the United States ranked 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 39 percent in MY 2004/05 at 20,025 MT compared to 14,527 MT in MY 2003/04. 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 retrieve, 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 a guesstimate.

Traditionally, the German apple juice industry depends heavily on imports of apple juice concentrates of various densities. In MY 2004/05, calculated German imports of CAJ at 70.5 brix were at 378,876 MT versus 455,773 MT in the previous MY. The apparent drop was partly due to the higher non-commercial crop and the higher share of hail damage in the commercial crop. However, imports from Poland and some other new EU member states may have been underreported in MY 2004/05 due to changes in the reporting requirements[3] for imports from new EU member states as a result of EU enlargement. Imports of CAJ are expected to increase in MY 2005/06. Reportedly, the stocks of high acid CAJ are fairly low and the lower domestic non-commercial crop will not suffice to close the gap.

Seventy-eight percent of the German CAJ imports came from the top 5 suppliers, which were Poland, Switzerland, Hungary, China, and Austria. Their individual market shares were 33, 17, 12, 10 and 8 percent in MY 2004/05. In 2003/04 the combined market share of the top five supplier amounted to 68 percent. The most notable change is the increase of imports from Switzerland, which ranked 11th in MY 2003/04 with 11,979 MT and came second in MY 2004/05 with 64,315 MT.

German CAJ exports consist mainly of reprocessed concentrates from eastern European countries or blends of such concentrates with domestic production. In MY 2003/04 they amounted to 138,849 MT (at 70.5 brix), 5 percent more than in the previous MY. In 2005/06 exports are expected decrease due to lower production of CAJ.

The United States, traditionally the largest single export market for German CAJ, ranked number four in export destinations after the Netherlands, the U.K., and France in MY 2004/05. Exports to the United States totaled 13,019 MT in MY 2004/05 versus 23,347 MT in MY 2003/04. This drop of 44 percent can be attributed to the strong Euro, which makes German exports less competitive compared to products from countries outside the Euro zone. Also U.S. trade statistics[4] show a tremendous increase of U.S. CAJ imports from Brazil that could well have resulted in lower imports from Germany.

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[3] Importing companies have to report all trade with non-EU countries irrespective of volume or value of the trade. In contrast, trade with other EU member states only has to be reported if a company's trade exceeds the value of 300,000 Euro per year.
[4] http://www.fas.usda.gov/ustrade/

Stocks

While the previous harvest of apples and pears was usually sold out by the end of July in previous years, for apples it is expected to last well into the new season in MY 2005/06.

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

Variety	2002/03	2003/04	2004/05
Jonagored	705	714	13,025
Joangold	3,045	1,130	12,594
Golden Delicious	404	75	3,419
Total	4,946	2,309	33,433

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.

The 2003 reform of the EU common agricultural policy (CAP) partly changed this. With the decoupling of direct payments from production and the transition to uniform area payments, fruit and vegetable area becomes eligible for direct payments under CAP. However, this does not apply to 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.

Marketing

In MY 2004/05, market prospects for fresh table apples are very different from those for must or processing apples. The small non-commercial crop in combination with the low high-acid CAJ stocks will result in a stronger market for must apples. Average prices that were as low as 7.30 Euro per 100 kg in MY 2004/05 and 7.94 Euro per 100 kg in MY 2003/04, are expected to be in reach of 10.00 Euro per 100 kg in MY 2005/06.

For table apples the prospects are less favorable, especially at the beginning of this season, despite a lower projected commercial harvest in Germany and the other Northern EU countries. The reason for this are comparatively large quantities of last year's EU harvest as well as from the Southern hemisphere that are disturbing the market. Industry sources nicknamed this the "market of the 3 crops" meaning last year's European crop, this year's Southern hemisphere crop and the new European crop. However, the market is expected to improve, once the two old crops no longer disturb the market.

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 02-06, 2006	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 16-19, 2006	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 3 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 not restricted to German producers but also open to international producers provided they comply with the system and obtain a certification. Also a combined certification for both Q+S and EUREPGAP at the same time is possible at the producer level.

Some German retail chains have voiced their preference for one or the other systems: Rewe, Spar and Wal-Mart Germany favor 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 in the future.

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, 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)

	2003	Revised	2004	Estimate	2005	Forecast	UOM
	USDA Official [	Estimate[DA	Official [	Estimate[DA	Official [	Estimate[New]	
Market Year Begin		07/2003		07/2004		07/2005	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	818000	818000	870000	945000	0	915000	(MT)
Non-Comm. Production	700000	700000	900000	1000000	0	500000	(MT)
TOTAL Production	1518000	1518000	1770000	1945000	0	1415000	(MT)
TOTAL Imports	768822	768822	770000	708759	0	750000	(MT)
TOTAL SUPPLY	2286822	2286822	2540000	2653759	0	2165000	(MT)
Domestic Fresh Consum	1475000	1475000	1594990	1620247	0	1477000	(MT)
Exports, Fresh Only	77622	77622	85000	88225	0	88000	(MT)
For Processing	734200	734200	860000	945000	0	600000	(MT)
Withdrawal From Market	0	0	10	287	0	0	(MT)
TOTAL UTILIZATION	2286822	2286822	2540000	2653759	0	2165000	(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 U.S.$ per uom MT

Year	2003	2004	% Change	2005	% Change
Jan	661.86	757.27	14%	746.32	-1%
Feb	731.98	839.66	15%	769.65	-8%
Mar	767.07	847.14	10%	833.62	-2%
Apr	759.68	819.95	8%	802.95	-2%
May	805.86	858.99	7%	769.72	-10%
Jun	910.31	963.21	6%	802.1	-17%
Jul	849.5	989.9	17%		
Aug	892.21	1007.7	13%		
Sep	644.46	823.68	28%		
Oct	493.75	586.01	19%		
Nov	515.66	503.95	-2%		
Dec	580.32	671.85	16%		

Table 10: German Apple Imports by Country in MT

Import Trade Matrix

Country	Germany		
Commodity	Apples, Fresh		
Time Period	July/June	Units:	MT
Imports for:	2003		**2004**
U.S.	249	U.S.	336
Others		Others	
ITALY	330184	ITALY	258010
NETHERLANDS	79189	NETHERLANDS	93063
FRANCE	69590	NEW ZEALAND	70424
NEW ZEALAND	62259	FRANCE	53638
BELGIUM	43280	ARGENTINA	34159
ARGENTINA	32349	CHILE	32778
BRAZIL	29346	CZECH REPUBLIC	32778
CZECH REPUBLIC	27541	BELGIUM	32271
AUSTRIA	24810	BRAZIL	28973
CHILE	22534	SOUTH AFRICA	23945
Total for Others	721082		660039
Others not Listed	47495		48384
Grand Total	768826		708759
INTRA EU-15	551,533		459,986
NMS	41,200		47,564
EXTRA EU-25	176,089		201,209

Note: 2003 trade data covers July 2003 through June 2004
2004 trade data covers July 2004 through June 2005
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

Commodit Apples, Fresh

Time Period	July/June	Units:	MT
Exports for:	2003		**2004**
U.S.	0	U.S.	0
Others		Others	
NETHERLAND:	18077	NETHERLAND	14936
DENMARK	11796	DENMARK	11125
FRANCE	6290	FRANCE	10214
FINLAND	6226	UNITED KINGI	7976
UNITED KINGI	4748	SWEDEN	6644
RUSSIA	4633	AUSTRIA	6131
SWEDEN	4180	FINLAND	5515
AUSTRIA	4062	ITALY	4504
ITALY	3270	LITHUANIA	2709
BELGIUM	2816	SPAIN	2254
Total for Others	66098		72008
Others not Liste	11524		16217
Grand Total	77622		88225
INTRA EU-15	66,178		75,100
NMS	3,023		7,499
EXTRA EU-25	8,404		5,526

Note: 2003 trade data covers July 2003 through June 2004
2004 trade data covers July 2004 through June 2005
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)

	2003	Revised	2004	Estimate	2005	Forecast	UOM
	USDA Official [	Estimate[N	DA Official [	Estimate[N	DA Official [	Estimate[New]	
Market Year Begin		07/2003		07/2004		07/2005	MM/YYYY
Area Planted	2090	2090	2090	2090	0	2090	(HA)
Area Harvested	2090	2090	2090	2090	0	2090	(HA)
Bearing Trees	2703	2703	2703	2703	0	2703	(1000 TRE
Non-Bearing Trees	0	0	0	0	0	0	(1000 TRE
Total Trees	2703	2703	2703	2703	0	2703	(1000 TRE
Commercial Production	49000	49000	58000	61000	0	43000	(MT)
Non-Comm. Production	0	0	0	0	0	0	(MT)
TOTAL Production	49000	49000	58000	61000	0	43000	(MT)
TOTAL Imports	163108	163108	160000	176368	0	170000	(MT)
TOTAL SUPPLY	212108	212108	218000	237368	0	213000	(MT)
Domestic Fresh Consump	194334	194334	201500	214724	0	194000	(MT)
Exports, Fresh Only	14528	14528	14500	20025	0	18000	(MT)
For Processing	3236	3236	2000	2270	0	1000	(MT)
Withdrawal From Market	10	10	0	349	0	0	(MT)
TOTAL UTILIZATION	212108	212108	218000	237368	0	213000	(MT)

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

Prices Table

Country Germany

Commodity Pears, Fresh

Prices in U.S.$ per uom MT

Year	2003	2004	% Change	2005	% Change
Jan	977.02	1233.45	26%	1110.16	-10%
Feb	986.43	1183.48	20%	1132.54	-4%
Mar	919.69	1101.05	20%	1135.43	3%
Apr	826.68	926.58	12%	891.35	-4%
May	872.42	965.54	11%	934.73	-3%
Jun	942.08	916.62	-3%	1002.23	9%
Jul	924.83	1150.64	24%		
Aug	815.37	978.99	20%		
Sep	824.93	910.97	10%		
Oct	907.39	941.27	4%		
Nov	955.8	1050.66	10%		
Dec	1072.72	1172.54	9%		

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:	2003		**2004**
U.S.	4372	U.S.	3091
Others		Others	
ITALY	65258	ITALY	68222
ARGENTINA	26995	ARGENTINA	32028
SPAIN	18662	SOUTH AFRICA	24578
SOUTH AFRICA	16067	SPAIN	14572
CHILE	9828	CHILE	9916
NETHERLANDS	7164	BELGIUM	7412
FRANCE	6083	NETHERLANDS	7412
BELGIUM	5935	FRANCE	5520
PR CHINA	1242	PR CHINA	2242
AUSTRIA	551	TURKEY	241
Total for Others	157785		172143
Others not Listed	951		1135
Grand Total	163108		176369
INTRA EU-15	103,668		103,335
NMS	170		156
EXTRA EU-25	59,271		72,877

Note: 2003 trade data covers July 2003 through June 2004
2004 trade data covers July 2004 through June 2005
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:	2003		**2004**
U.S.	0	U.S.	0
Others		Others	
NETHERLANDS	2603	AUSTRIA	2694
ITALY	1927	NETHERLANDS	2471
FRANCE	1651	FRANCE	2364
UNITED KINGDOM	1490	ITALY	2071
AUSTRIA	1365	DENMARK	1949
DENMARK	1307	UNITED KINGDOM	1673
SWEDEN	783	SWEDEN	1350
PORTUGAL	722	PORTUGAL	968
GREECE	685	FINLAND	922
FINLAND	552	CZECH REPUBLIC	840
Total for Others	13085		17302
Others not Listed	1443		2724
Grand Total	14528		20026
INTRA EU-15	13,813		17,534
NMS	200		1,681
EXTRA EU-25	515		808

Note: 2003 trade data covers July 2003 through June 2004
2004 trade data covers July 2004 through June 2005
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)

	2003	Revised	2004	Estimate	2005	Forecast	UOM
	USDA Official [	Estimate[NA	Official [t	Estimate[NA	Official [	Estimate[New]	
Market Year Begin		07/2003		07/2004		07/2005	MM/YYYY
Deliv. To Processors	734200	734200	860000	945000	0	600000	(MT)
Beginning Stocks	187000	187000	186000	186000	186000	120000	(MT)
Production	78100	78100	99600	91520	0	56000	(MT)
Imports	455773	455773	410000	378876	0	480000	(MT)
TOTAL SUPPLY	720873	720873	695600	656396	186000	656000	(MT)
Exports	132102	132102	130000	138849	0	130000	(MT)
Domestic Consumption	402771	402771	379600	397547	0	396000	(MT)
Ending Stocks	186000	186000	186000	120000	0	130000	(MT)
TOTAL DISTRIBUTION	720873	720873	695600	656396	0	656000	(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 U.S.$ per uom MT

Year	2003	2004	% Change	2005	% Change
Jan	574.33	857.97	49%	773.81	-10%
Feb	664.85	749.70	13%	719.80	-4%
Mar	647.72	788.62	22%	800.88	2%
Apr	654.19	769.45	18%	709.92	-8%
May	646.48	770.40	19%	693.64	-10%
Jun	708.20	764.10	8%	697.35	-9%
Jul	652.78	786.29	20%		
Aug	673.84	801.02	19%		
Sep	665.75	709.85	7%		
Oct	868.53	793.28	-9%		
Nov	858.17	797.35	-7%		
Dec	857.35	770.01	-10%		

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:	2003		**2004**
U.S.	175	U.S.	442
Others		Others	
POLAND	164,936	POLAND	123,720
CZECH REPUBLIC	43,797	SWITZERLAND	64,315
CHINA	36,663	HUNGARY	43,450
TURKEY	32,749	CHINA	36,848
UKRAINE	29,758	AUSTRIA	28,716
ITALY	28,038	TURKEY	21,684
AUSTRIA	22,038	ITALY	17,465
MOLDOVA	16,525	NETHERLANDS	8,550
HUNGARY	16,296	UKRAINE	8,421
IRAN	13,823	ROMANIA	6,674
Total for Others	404,623		359,843
Others not Listed	50,975		18,754
Grand Total	455,773		379,039
INTRA EU-15	68,122		56,866
NMS	232,179		171,801
EXTRA EU-25	155,471		150,209

Note: 2003 trade data covers July 2003 through June 2004
2004 trade data covers July 2004 through June 2005
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:	2003		**2004**
U.S.	23,347	U.S.	13,019
Others		Others	
NETHERLANDS	29,118	NETHERLANDS	27,433
UNITED KINGDOM	20,381	UNITED KINGDOM	26,889
AUSTRIA	9,503	AUSTRIA	15,768
FRANCE	8,965	FRANCE	12,121
DENMARK	7,780	DENMARK	7,894
BELGIUM	5,626	BELGIUM	6,089
ITALY	3,969	GREECE	3,977
GREECE	3,378	FINLAND	3,023
SPAIN	2,724	ITALY	2,679
SWEDEN	1,424	SWEDEN	1,213
Total for Others	92,868		107,086
Others not Listed	15,887		18,744
Grand Total	132,102		138,849
INTRA EU-15	97,587		111,071
NMS	1,616		3,015
EXTRA EU-25	32,894		24,762

Note: 2003 trade data covers July 2003 through June 2004
2004 trade data covers July 2004 through June 2005
NMS = New Member States (Czech Republic, Cyprus, Estonia, Hungary, Latvia, Lithuania, Malta, Slovakia, Slovenia, Poland)