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## Germany

### Fresh Deciduous Fruit

### Semi-Annual

### 2004

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**Report Highlights:**

FAS/Berlin raises the estimate for German commercial apple production in MY 2003/04 (harvest 2003) from 807,000 MT to 860,000 MT. The production estimate for pears is left unchanged at 49,000 MT.

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

## Executive Summary

This report contains changes to the PSD for apples and pears submitted in our last Fresh Deciduous Fruit report (GM3047 Update on Production Estimates). The trade tables are left unchanged.

Official figures for German commercial apple and pear production for the 2003 harvest are expected to be released around mid to end of January of 2004. Based on stock figures and industry information, FAS/Berlin raises the estimate for commercial apple production in MY 2003/04 (harvest 2003) from 807,000 MT to 860,000 MT. The production estimate for pears is left unchanged at 49,000 MT. For apples this is a 13 percent increase compared to the very low production of 763,000 MT in MY 2002/03. Pear production is 24 percent below the MY 2002/03 harvest.

## Apples

Based on stock figures and industry information, FAS/Berlin raises the estimate for commercial apple production in MY 2003/04 (harvest 2003) to 860,000 MT. This compares to our previous estimate of 807,000 MT and last year's production of 763,000 MT. It appears that the effects of the Summer drought turned out to be less severe than previously thought.

German official sources do not issue production estimates for non-commercial apple production, as the last tree census for non-commercial apple trees dates from the 1960s. Therefore, FAS/Berlin figures for non-commercial apple production are very rough estimates. Non-commercial apple production includes apples from trees in meadows and house gardens and is mostly used for processing. For MY 2003/2004, non-commercial apple production is estimated at about 600,000 MT, 25 percent below MY 2002/2003.

At this time of the year, commercial stock figures give a better picture about market prospects than harvest figures alone. As of December 1, 2003, producer organizations held 22 percent higher stocks than at the same time the previous year. However, stocks are still 4 percent below the long term average and 16 percent below the full harvest year of MY 2000/2001.

Stock developments vary considerably by region. Stocks are down 14 percent year-on-year in the South due to the extreme summer heat and drought. In contrast stocks are up 45 percent in the North, and 52 percent in the East. These regions were not hit as bad by the drought as the South, plus the previous seasons had delivered very poor crops there.

When looking at the stocks of the different varieties it has to be noted that the increase of stocks of the variety "*Gala*" and "*Braeburn*" reflect increased plantings of those varieties in the last couple of years, while the increase in "*Gloster*" is to be seen in comparison to the very low crop of the previous year.

The variation in shelf life appears to be larger than in average years, especially with varieties, which were harvested early, such as *Gala* and *Elstar*. Due to the heat during harvest, which resulted in higher sugar and lower acid content than usual in the fruits, the apples seem to ripen faster once they come out of the storage.

Table 1: PSD for Fresh Apples (in ha, 1000 trees, MT)

**PSD Table**

Country Commodity	Germany					
	Fresh Apples		(HA)(1000 TREES)(MT)			
Market Year Begin	2001 USDA Official [Old]	Revised Post Estimate [New] 07/2001	2002 USDA Official [Old]	Estimate Post Estimate [New] 07/2002	2003 USDA Official [Old]	Forecast Post Estimate [New] 07/2003
Area Planted	36,124	36,124	31,219	31,219	31,219	31,219
Area Harvested	36,124	36,124	31,219	31,219	31,219	31,219
Bearing Trees	58,382	58,382	64,182	64,182	64,182	64,182
Non-Bearing Trees	0	0	0	0	0	0
Total Trees	58,382	58,382	64,182	64,182	64,182	64,182
Commercial Production	922,433	922,433	762,800	762,800	807,000	860,000
Non-Comm. Production	600,000	600,000	800,000	800,000	600,000	600,000
TOTAL Production	1,522,433	1,522,433	1,562,800	1,562,800	1,407,000	1,460,000
TOTAL Imports	680,604	680,604	851,491	851,491	720,000	700,000
TOTAL SUPPLY	2,203,037	2,203,037	2,414,291	2,414,291	2,127,000	2,160,000
Domestic Fresh Consumption	1,452,892	1,452,892	1,580,567	1,580,567	1,410,000	1,443,000
Exports, Fresh Only	66,555	66,555	65,705	65,705	55,000	55,000
For Processing	683,000	683,000	768,000	768,000	662,000	662,000
Withdrawal From Market	590	590	19	19	0	0
TOTAL UTILIZATION	2,203,037	2,203,037	2,414,291	2,414,291	2,127,000	2,160,000

Table 2: Commercial Apple Stocks held by Producer Organizations on December 1 by Year, Variety and Region in MT

	1999/2000	2000/01	2001/02	2002/03*	2003/04	Change in percent
<b>Total Apples</b>	326,276	349,007	298,257	239,435	291,147	22
Thereof						
Jonagold**	11,656	114,062	96,052	81,805	107,452	31
Elstar	51,443	49,812	48,313	41,537	39,885	-4
Idared	31,646	40,236	30,087	29,147	34,305	18
Golden Delicious	33,799	29,763	25,988	29,058	29,297	1
Gloster	28,451	27,999	24,480	12,966	21,938	69
Gala	7,013	8,368	7,346	9,148	11,445	25
Braeburn	7,060	7,377	8,246	5,548	10,332	86
Other	155,208	71,390	57,745	30,226	36,493	21
<b>By region:</b>						
North	118,519	147,344	136,849	80,398	116,944	45
East	72,943	88,368	65,487	54,721	83,101	52
Center-West	19,891	12,165	13,218	8,030	8,355	4
South	114,923	101,130	82,703	96,286	82,747	-14

\* = revised

\*\* Jonagold and similar varieties

Source: Central Market and Price Reporting Agency (ZMP)

## Pears

Commercial pear production in MY 2003/04 is estimated at 49,000 MT compared to 64,000 MT in MY 2002/03.

Commercial pear stocks amounted to about 2,000 MT on December 1, 2003, compared to about 1,900 MT the year before.

**Table 3: PSD for Fresh Pears (in ha, 1000 trees, MT)**

## PSD Table

Country	Germany					
	Fresh Pears		(HA)(1000 TREES)(MT)			
Commodity	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin	07/2001		07/2002		07/2003	
Area Planted	2,372	2,372	2,090	2,090	2,090	2,090
Area Harvested	2,372	2,372	2,090	2,090	2,090	2,090
Bearing Trees	2,346	2,346	2,703	2,703	2,703	2,703
Non-Bearing Trees	0	0	0	0	0	0
Total Trees	2,346	2,346	2,703	2,703	2,703	2,703
Commercial Production	46,823	46,823	64,000	64,000	49,000	49,000
Non-Comm. Production	0	0	0	0	0	0
TOTAL Production	46,823	46,823	64,000	64,000	49,000	49,000
TOTAL Imports	159,758	159,758	165,000	163,523	158,000	158,000
TOTAL SUPPLY	206,581	206,581	229,000	227,523	207,000	207,000
Domestic Fresh Consumption	195,155	195,155	214,600	211,899	194,000	194,000
Exports, Fresh Only	10,164	10,164	12,500	13,724	11,000	11,000
For Processing	1,262	1,262	1,900	1,900	2,000	2,000
Withdrawal From Market	0	0	0	0	0	0
TOTAL UTILIZATION	206,581	206,581	229,000	227,523	207,000	207,000

Related reports:

Report Number	Date	Title
GM3011	3/17/2003	EU support for the fruit and vegetable sector in Germany
GM3024	8/13/2003	Prognosfruit 2003 – European Crop Forecast Convention
GM3025	8/15/2003	Fruit Tree Census
GM3029	8/27/2003	Fresh Fruit Annual
GM3047	11/14/2003	Fresh Deciduous Fruit – Update on Production Estimates