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Germany

Fresh Deciduous Fruit

Annual

2004

Approved by:
Karina Ramos
U.S. Embassy, Berlin

Prepared by:
Sabine M. Lieberz

Report Highlights:
For CY 2004, German commercial apple production is forecast at 842,000 MT up 14 percent from the previous year. Non-commercial apple production is forecast at 1.0 million MT, and commercial pear production at 58,000 MT. Production of concentrated apple juice (CAJ, 70.5 brix) is forecast at 99,600 MT in MY 2004/2005.

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

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Production

Apple Production

Germany is the third largest apple producer in the EU, after Italy and France. As of mid-July German apple production for CY[1] 2004 was estimated at 842,000 MT[2] for commercial production, up 3 percent compared to the previous year (818,000 MT). However, this is still well below the current production potential of about 1.0 million MT and 6 percent below the average for years 2000 through 2003. The crop for CY 2003 was revised downwards to 818,000 MT from the previous estimate of 860,000 MT. Apparently the effects of the drought were stronger than previously expected.

This once again small harvest of CY 2004 is partly a result of a poor quality of the apple blossoms in those areas that had suffered from drought in 2003 during bud development and partly due to frost damage in spring of 2004. Also low temperatures in May/June of 2004 during cell partition of the young fruits limited the fruit size.

Table 1: Commercial Apple Production in the EU-15 by Country and Year in 1,000 MT

Country	2000	2001	2002	2003 r	2004 f	% change
Italy	2,206	2,172	2,171	1,851	2,080	12.4
France	2,260	1,938	1,966	1,728	1,782	3.1
Germany	1,131	922	763	818	841	2.8
Spain	699	806	646	704	537	-23.7
Netherlands	500	475	370	405	435	7.4
Belgium	500	337	349	319	324	1.6
Greece	288	194	244	165	283	71.5
Portugal	206	240	295	280	260	-7.1
United Kingdom	195	212	124	156	160	2.6
Austria	161	156	163	152	147	-3.3
Denmark	31	29	25	25	26	4.0
TOTAL	8,162	7,480	7,115	6,603	6,875	4.0

r = revised
f = forecast

[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	2004f	Change
Jonagold	210	148	149	154	147	-4.5
Elstar	156	139	119	125	152	21.6
Jonagored	96	93	70	92	90	-2.2
Golden Delicious	77	66	59	59	55	-6.8
Gloster	81	66	40	48	47	-2.1
Idared	70	59	49	52	51	-1.9
Boskoop	87	68	44	38	47	23.7
Cox Orange	57	54	24	31	30	-3.2
Gala	29	28	33	36	34	-5.6
Braeburn	17	16	14	18	27	50.0
Other *	251	186	162	165	162	-1.8
Total	1,131	922	763	818	842	2.9

r = revised
f = Forecast.
* Includes Pinova, Topaz, Gravensteiner, James Grieve, Glockenapfel, Ingrid Marie
Source: ZMP Obst & Gemüse Marktinfo, 34/2004

German authorities stopped issuing official figures for non-commercial production (private gardens and meadows) in 1992. However, industry estimates CY 2004 non-commercial production at approximately 1.0 million MT, up 42 percent from approximately 700,000 MT in CY 2003.

Non-commercial production includes apples grown in house gardens and extensive production in meadows. Typically, non-commercial production is used for fresh consumption, must and spirit 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.

The fruit quality of commercial fruit is good. However, about 13 percent of the total area was affected by hail, this is about 30 percent more than in 2003. Non-commercial orchards were severely hit by apple aphids and scab.

Pear Production

While Germany is the third largest apple producer in the EU, for pears, Germany only ranks seventh. Commercial pear production in CY 2004 is estimated at 58,000 MT versus 49,000 MT in 2003. 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.

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 78,100 MT in MY[3] 2003/04, versus 75,300 MT the previous year. This increase of 20 percent can be attributed to the higher non-commercial apple crop of 800,000 MT in CY 2003 compared to CY 2002. For MY 2004/05, CAJ production is estimated at 99,600 MT due to the higher non-commercial apple crop of 1.0 million MT in CY 2004 and higher hail damage of the 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 2004/05, the number of must apples processed into apple juice is expected to amount to approximately 847,000 MT, compared to 664,000 MT in MY 2003/04, and 650,000 MT in 2002/03.

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 3: Per Capita Consumption of Commercially Grown Fresh Fruit in Germany

	MY 1997/98 (kg/person)	MY 1998/99 (kg/person)	MY 1999/00 (kg/person)	MY 2000/01 (kg/person)	MY 2001/02 (kg/person)	MY 2002/03 (kg/person)
Apples	18.0	17.7	20.6	19.1	17.4	17.1
Bananas	11.2	10.3	11.0	12.1	11.1	11.2
Oranges	6.4	5.8	6.1	7.0	5.8	6.4
Easy Peelers (Clementines, tangerines etc.)	5.2	3.8	4.1	4.2	3.5	4.0
Grapes	3.8	3.8	4.3	4.0	3.8	3.1
Pears	2.3	2.7	2.8	2.6	2.3	2.5
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	28.9	27.1
Total Fresh Fruit	62.8	60.6	68.4	66.9	62.0	60.2

Source: ZMP Bilanz Obst 2003 p. 27

[3] MY = Market year

Apple Consumption

Total domestic consumption of fresh apples from commercial and non-commercial production combined was 1.475 million MT in MY 2003/04 (July/June). This figure includes 70,000 MT for processing purposes other than apple juice (e.g. apple sauce). Consumption for processing into apple juice was 664,000 MT. As a consequence of the small CY 2002 harvest and the restrictive intervention rule of the EU Common Market Organization for fruit and vegetables, there was no intervention of apples in MY 2003/04. In MY 2004/05, fresh consumption is estimated at 1.575 million MT and processing is expected to increase to 887,000 MT due to the larger commercial and non-commercial crop. Intervention is estimated to be marginal.

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 2002/03 (July/June) adds up to 194,334 MT. About 77 percent of the pear supply in Germany originate from imports and only 23 percent from domestic production. Intervention of pears is traditionally marginal in Germany. In MY 2003/04 it amounted to 9.7 MT.

Pears for processing are used mainly for spirits and originate from commercial production. In MY 2003/04, this amounted to 3,236 MT compared to 1,900 MT in MY 2002/03. This large increase is a result of 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. As the 2004 summer is much cooler, for 2004/05 the amount of pears being processed is expected to fall back to normal levels of about 2000 MT.

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-15 and about 18 percent above per capita consumption in the United States (see table 3.) The increase of consumption in 2003 can be attributed to the extremely warm summer of 2003. As the summer was not as warm in 2004 a drop in per capita consumption of juices is expected for this year.

Apple juice enjoys the highest popularity among the juices, followed by orange juice and other citrus nectars (see table 4.)

Table 4: Per Capita Consumption of Fruit Juices/Nectars in European Countries and the USA (in liters)

	1997	1998	1999	2000	2001	2002r	2003p
Germany	41.2	41.0	40.5	40.6	40.5	40.4	42.0
Austria	34.5	36.1	37.4	37.8	35.6	32.0	31.0
Finland	25.1	25.1	25.5	26.1	35.0	32.0	31.7
Denmark	17.5	17.5	18.0	19.0	22.7	24.0	25.1
Netherlands	26.7	26.7	26.5	26.1	25.5	24.4	24.8
Spain	15.6	15.6	25.8	16.5	21.0	22.0	24.4
Sweden	20.6	20.6	21.0	21.5	23.0	23.7	23.8
Great Britain	19.5	19.5	20.2	19.0	20.5	21.3	22.8
France	18.0	18.1	18.6	20.5	21.8	21.7	22.5
Belgium/Lux.	20.8	20.8	20.5	20.5	19.9	19.7	20.2
Ireland	12.0	12.3	12.5	13.3	15.6	16.2	16.5
Greece	6.8	6.8	7.0	8.5	16.3	15.1	15.0
Italy	9.6	9.6	10.0	10.5	11.7	11.9	12.9
Portugal	6.5	6.5	6.8	7.1	10.8	11.1	11.1
TOTAL EU-15	**21.9**	**22.0**	**22.3**	**22.6**	**24.2**	**24.4**	**25.4**
Norway	18.6	23.8	24.5	25.5	31.4	33.3	33.5
Switzerland	30.0	30.0	30.0	30.0	27.7	29.1	29.1
United States	30.0	30.0	30.0	30.0	30.0	35.7	35.7

r = revised
p = provisional
Source: VdF, Association of the German Fruit Juice Industry, Annual Report 2003.

Table 5: Per Capita Consumption of Select Juices and Fruit Drinks in Germany (in kg)

	1995	2000	2001	2002	2003	% change
Apple Juice	11.79	12.20	12.15	12.17	13.10	7.6
Orange Juice	9.83	9.53	9.52	9.52	9.66	1.5
Grape Juice	1.19	1.32	1.32	1.31	1.31	0.0
Grapefruit Juice	0.33	0.39	0.37	0.34	0.32	-5.9
Pear Juice	0.13	0.18	0.20	0.20	0.30	50.0
Vegetable Juice	0.86	0.96	0.97	0.97	0.97	0.0
Citrus Nectar	8.57	7.75	7.68	7.65	7.75	1.3
Other Juice/Nectar	8.02	8.31	8.31	8.27	8.62	4.2
Total	40.72	40.64	40.52	40.43	42.03	4.0

Source: VdF, Association of the German Fruit Juice Industry, Annual Report 2003.

Trade

Apple Trade

In MY 2003/04, German imports of apples amounted to 768,822 MT, a decrease of 10 percent from the record amount of 851,491 MT in MY 2002/03. The decline had been due to the extremely low domestic crop of CY 2002. 13 percent or 96,232 MT of the imported apples consisted of must apples for juice production. In MY 2004/05, a drop in apple imports to 700,000 MT is expected due to the estimated higher domestic apple crop.

The largest supplier by far was Italy with 43 percent of the imports, followed by the Netherlands (10 percent), France (9 percent), New Zealand (8 percent), and Belgium (6 percent). US apple exports to Germany are marginal and amounted to 249 and 113 MT in MY 2003/04 and 2002/03, respectively.

Germany exports only small quantities of apples, mainly to other EU-15 member states. Exports of apples amounted to 57,565 MT in MY 2002/03, almost the exact amount from the previous MY's level.

Pear Trade

Pear imports amounted to 163,108 MT in MY 2003/04, almost the exact amount as in the previous marketing year. Main suppliers were Italy with about 40 percent of the imports, followed by Argentina (about 17 percent), Spain (11 percent), and South Africa (10 percent). Pear imports contributed roughly 77 percent to the supply on the German market, while domestic production contributes 23 percent in MY 2003/04. The correspondent figures for 2002/03 were 72 and 28 percent. Pear imports are expected to drop by 5 percent in MY 2004/05, due to higher domestic production.

Imports from the United States are small and fluctuate a lot. They amounted to 4,372 MT in MY 2003/04 after 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 in MY 2003/04 at 14,528 MT compared to 13,724 MT in MY 2002/03. 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 with due caution.

Traditionally, the German apple juice industry depends heavily on imports of apple juice concentrates of various densities. In MY 2003/04, calculated German imports of CAJ at 70.5 brix were at 455,773 MT versus 409,355 MT in the previous MY. Imports of CAJ are expected to decrease in MY 2004/05 as the non-commercial crop is higher than in MY 2003/04. Also a larger percentage of commercial apples is expected to be used for juice production as a consequence of higher hail damage compared to the previous MY.

Sixty-eight percent of the German CAJ imports came from the top 5 suppliers, which were Poland, the Czech Republic, China, Turkey, and the Ukraine. Their individual market shares were 36, 10, 8, 7 and 7 percent in MY 2003/04. In 2002/03 the combined market share of the top five supplier amounted to 77 percent. The drop in MY 2003/04 is due to lower imports from Poland.

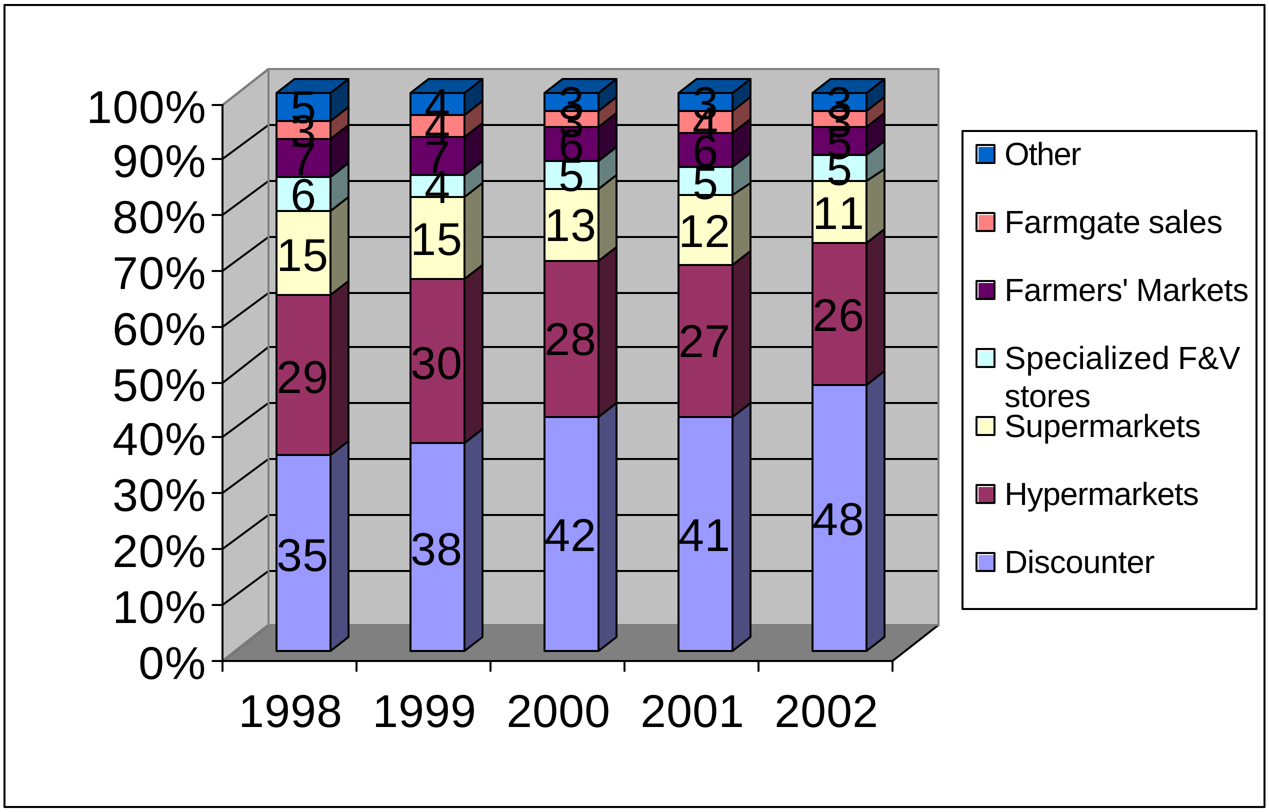
German CAJ exports consist mainly of reprocessed concentrates from eastern European countries or blends of such concentrates with domestic production. In MY 2003/04 they amounted to 132,102 MT (at 70.5 brix), less than 1 percent more than in the previous MY. In 2003/04 exports are expected to be stable.

The United States was replaced by the Netherlands as the largest single export market for German CAJ. Exports to the United States totaled 23,347 MT in MY 2003/04 versus 30,214 MT in MY 2002/03. This drop of 23 percent can be attributed to the strong Euro, which makes German exports less competitive compared to products from countries outside the Euro zone.

Marketing

The obvious trend among German consumers is a growing tendency to buy at no frill discount stores. From 1998 to 2002 discounters were able to increase their volume based market share from 35 to 48 percent at the expense of all other retail forms. This is a sign of the extreme price sensitivity of German consumers prevalent in almost all areas but especially developed when it comes to food. As a result discounters accounted for 48 percent of retail fruit sales in 2002 up from 35 percent in 1998.

Figure 1: Percent of fruit purchases by Retail Type and Year



Farmers' Markets	=	includes all markets with non-permanent sales booths
F&V	=	Fruits and Vegetables
Supermarkets	=	retail stores with less than 800 square meters or about 8,611 square feet
Hypermarkets	=	retail stores with more than 800 square meters
Discounter	=	no frill stores with a limited selection of items, also characterized by generally lower prices than at traditional supermarkets

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

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 (GAP) partly changes 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.

Related Reports

GM3011	3/17/2003	EU support for the fruit and vegetable sector in Germany
GM3025	8/15/2003	German Fruit Tree Census

Statistical Section

Note: The PSD tables for apples and CAJ are connected. Therefore 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 6: PSD for Fresh Apples (in ha, 1000 trees, MT)

PSD Table

Country Germany

Commodity Apples, Fresh

(HA)(1000 TREES)(MT

	2002	Revised	2003	Estimate	2004	Forecast
	USDA Official [Ol	Estimate [N	DA Official [I	Estimate [I	DA Official [I	Estimate [N
Market Year Begin		07/2002		07/2003		07/2004
Area Planted	31,219	31,219	31,219	31,219	0	31,219
Area Harvested	31,219	31,219	31,219	31,219	0	31,219
Bearing Trees	64,182	64,182	64,182	64,182	0	64,182
Non-Bearing Trees	0	0	0	0	0	0
Total Trees	64,182	64,182	64,182	64,182	0	64,182
Commercial Production	762,800	762,800	860,000	818,000	0	842,000
Non-Comm. Production	800,000	800,000	600,000	700,000	0	1,000,000
TOTAL Production	1,562,800	1,562,800	1,460,000	1,518,000	0	1,842,000
TOTAL Imports	851,491	851,491	700,000	768,822	0	700,000
TOTAL SUPPLY	2,414,291	2,414,291	2,160,000	2,286,822	0	2,542,000
Domestic Fresh Consum	1,580,567	1,580,567	1,443,000	1,475,000	0	1,574,990
Exports, Fresh Only	65,705	65,705	55,000	77,622	0	80,000
For Processing	768,000	768,000	662,000	734,200	0	887,000
Withdrawal From Market	19	19	0	0	0	10
TOTAL UTILIZATION	2,414,291	2,414,291	2,160,000	2,286,822	0	2,542,000

Table 7 : 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	2002	2003	% Change
Jan	552.33	661.86	20%
Feb	532.19	731.98	38%
Mar	665.51	767.07	15%
Apr	644.76	759.68	18%
May	660.29	805.86	22%
Jun	775.27	910.31	17%
Jul	813.92	849.5	4%
Aug	686.62	892.21	30%
Sep	546.79	644.46	18%
Oct	401.66	493.75	23%
Nov	310.26	515.66	66%
Dec	490.95	580.32	18%

Table 8: German Apple Imports by Country in MT

Commodity	Apples, Fresh		
Time Period	Jul/Jun	Units:	MT
Imports for:	2002		**2003**
U.S.	113	U.S.	249
Others		Others	
ITALY	345,126	ITALY	330,184
NETHERLANDS	109,908	NETHERLANDS	79,189
FRANCE	77,264	FRANCE	69,590
BELGIUM	63,147	NEW ZEALAND	62,259
NEW ZEALAND	59,870	BELGIUM	43,280
CZECH REPUBLIC	48,246	ARGENTINA	32,349
AUSTRIA	28,880	BRAZIL	29,346
ARGENTINA	27,963	CZECH REPUBLIC	27,541
BRAZIL	23,994	AUSTRIA	24,810
CHILE	20,320	CHILE	22,534
Total for Others	804718		721082
Others not Listed	46660		47491
Grand Total	851491		768822
EU-15	628,392		551,533
NMS	66,862		41,200
Extra EU-25	156,236		176,089

Note: 2002 trade data covers July 2002 through June 2003
2003 trade data covers July 2003 through June 2004

Table 9: German Apple Exports by Country in MT

Country	Germany		
Commodity	Apples, Fresh		
Time Period	Jul/Jun	Units:	MT
Exports for:	2002		**2003**
U.S.	0	U.S.	0
Others		Others	
NETHERLANDS	14,506	NETHERLANDS	18,077
DENMARK	10,924	DENMARK	11,796
AUSTRIA	5,267	FRANCE	6,290
FRANCE	4,892	FINLAND	6,226
RUSSIA	4,264	UNITED KINGDOM	4,748
BELGIUM	3,628	RUSSIA	4,633
ITALY	3,357	SWEDEN	4,180
UNITED KINGDOM	2,582	AUSTRIA	4,062
GREECE	2,150	ITALY	3,270
FINLAND	2,121	BELGIUM	2,816
Total for Others	53691		66098
Others not Listed	12014		11524
Grand Total	65705		77622
EU-15	53,602		66,178
NMS	5,363		3,023
Extra EU-25	6,728		8,404

Note: 2002 trade data covers July 2002 through June 2003
2003 trade data covers July 2003 through June 2004

Table 10: PSD for Fresh Pears (in ha, 1000 trees, MT)

PSD Table

Country Germany
Commodity Pears, Fresh (HA)(1000 TREES)(M

	2002	Revised	2003	Estimate	2004	Forecast
	USDA Official [	Estimate [U	DA Official [	Estimate [	DA Official [	Estimate [I
Market Year Begin		07/2002		07/2003		07/2004
Area Planted	2,090	2,090	2,090	2,090	0	2,090
Area Harvested	2,090	2,090	2,090	2,090	0	2,090
Bearing Trees	2,703	2,703	2,703	2,703	0	2,703
Non-Bearing Trees	0	0	0	0	0	0
Total Trees	2,703	2,703	2,703	2,703	0	2,703
Commercial Production	64,000	64,000	49,000	49,000	0	58,000
Non-Comm. Production	0	0	0	0	0	0
TOTAL Production	64,000	64,000	49,000	49,000	0	58,000
TOTAL Imports	163,523	163,523	158,000	163,108	0	155,000
TOTAL SUPPLY	227,523	227,523	207,000	212,108	0	213,000
Domestic Fresh Consump	211,899	211,899	194,000	194,334	0	197,300
Exports, Fresh Only	13,724	13,724	11,000	14,528	0	13,700
For Processing	1,900	1,900	2,000	3,236	0	2,000
Withdrawal From Market	0	0	0	10	0	0
TOTAL UTILIZATION	227,523	227,523	207,000	212,108	0	213,000

Table 11: 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	2002	2003	% Change
Jan	853.98	977.02	14%
Feb	862.87	986.43	14%
Mar	867.38	919.69	6%
Apr	791.45	826.68	4%
May	750.79	872.42	16%
Jun	765.65	942.08	23%
Jul	828.95	924.83	12%
Aug	714.5	815.37	14%
Sep	725.33	824.93	14%
Oct	769.73	907.39	18%
Nov	806.45	955.8	19%
Dec	825.76	1072.72	30%

Table 12: German Pear Imports by Country in MT

Import Trade Matrix

Country Germany

Commodity Pears, Fresh

Time Period	Jul/Jun	Units:	MT
Imports for:	2002		**2003**
U.S.	2,491	U.S.	4,372
Others		Others	
ITALY	67,916	ITALY	65,258
ARGENTINA	27,572	ARGENTINA	26,995
SOUTH AFRICA	16,207	SPAIN	18,662
SPAIN	12,600	SOUTH AFRICA	16,067
CHILE	10,148	CHILE	9,828
BELGIUM	8,566	NETHERLANDS	7,164
FRANCE	8,293	FRANCE	6,083
NETHERLANDS	6,102	BELGIUM	5,935
PR CHINA	1,859	PR CHINA	1,242
BRAZIL	561	AUSTRIA	551
Total for Others	159,824		157,785
Others not Listed	1,208		951
Grand Total	163,523		163,108
EU-15	103,499		103,668
NMS	115		170
Extra EU-25	59,909		59,271

Note: 2002 trade data covers July 2002 through June 2003
2003 trade data covers July 2003 through June 2004

Table 13: German Pears Exports by Country in MT

Export Trade Matrix

Country Germany

Commodity Pears, Fresh

Time Period	Jul/Jun	Units:	MT
Exports for:	2002		**2003**
U.S.	0	U.S.	0
Others		Others	
UNITED KINGDOM	2,335	NETHERLANDS	2,603
DENMARK	2,124	ITALY	1,927
NETHERLANDS	1,761	FRANCE	1,651
AUSTRIA	1,387	UNITED KINGDOM	1,490
ITALY	1,343	AUSTRIA	1,365
FRANCE	1,219	DENMARK	1,307
GREECE	925	SWEDEN	783
RUSSIA	608	PORTUGAL	722
PORTUGAL	567	GREECE	685
IRELAND	451	FINLAND	552
Total for Others	12,720		13,085
Others not Listed	1,004		1,443
Grand Total	13,724		14,528
EU-15	12824		13813
NMS	222		200
Extra EU-25	677		515

Note: 2002 trade data covers July 2002 through June 2003
2003 trade data covers July 2003 through June 2004

Table 14: PSD for Concentrated Apple Juice (CAJ) in MT

PSD Table

Country Germany

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		07/2002		07/2003		07/2004
Deliv. To Processors	768,000	768,000	662,000	734,200	0	887,000
Beginning Stocks	186,000	186,000	187,000	187,000	170,000	186,000
Production	75,300	75,300	62,500	78,100	0	99,600
Imports	409,342	409,342	420,000	455,773	0	410,000
TOTAL SUPPLY	670,642	670,642	669,500	720,873	170,000	695,600
Exports	130,823	130,823	119,000	132,102	0	130,000
Domestic Consumption	352,819	352,819	380,500	402,771	0	379,600
Ending Stocks	187,000	187,000	170,000	186,000	0	186,000
TOTAL DISTRIBUTION	670,642	670,642	669,500	720,873	0	695,600

Table 15: CAJ Import Prices in U.S.$ per MT

Prices Table

Country Germany

Commodity Apple Juice, Concentrated

Prices in U.S.$ per uom MT

Year	2002	2003	% Change
Jan	630.51	574.33	-9%
Feb	549.51	664.85	21%
Mar	585.11	647.72	11%
Apr	499.36	654.19	31%
May	585.86	646.48	10%
Jun	582.95	708.2	21%
Jul	592.79	652.78	10%
Aug	563.49	673.84	20%
Sep	615.63	665.75	8%
Oct	651.02	868.53	33%
Nov	673.16	858.17	27%
Dec	632.19	857.35	36%

Table 16: German CAJ Imports by Country in MT

Import Trade Matrix

Commodity	Apple Juice, Concentrated		
Time Period	Jul/Jun	Units:	MT
Imports for:	2002		**2003**
U.S.	142	U.S.	175
Others		Others	
POLAND	176,084	POLAND	164,936
CZECH REPUBLIC	44,052	CZECH REPUBLIC	43,797
PR CHINA	31,334	PR CHINA	36,663
HUNGARY	31,254	TURKEY	32,749
ITALY	30,247	UKRAINE	29,758
TURKEY	19,670	ITALY	28,038
AUSTRIA	17,046	AUSTRIA	22,038
UKRAINE	16,787	MOLDOVA	16,525
SWITZERLAND	10,306	HUNGARY	16,296
IRAN	8,908	IRAN	13,823
Total for Others	385,688		404,623
Others not Listed	23,667		51,150
Grand Total	409,497		455,948
EU-15	54,204		68,122
NMS	256,145		232,179
Extra EU-25	99,005		155,471

Note: 2002 trade data covers July 2002 through June 2003
2003 trade data covers July 2003 through June 2004

Table 17: German CAJ Export by Country in MT

Export Trade Matrix

Country	Germany		
Commodity	Apple Juice, Concentrated		
Time Period	Jul/Jun	Units:	MT
Exports for:	2002		**2003**
U.S.	30,214	U.S.	23,347
Others		Others	
NETHERLANDS	24,443	NETHERLANDS	29,118
UNITED KINGDOM	17,495	UNITED KINGDOM	20,381
FRANCE	8,225	FRANCE	8,965
BELGIUM	7,775	BELGIUM	5,626
DENMARK	7,526	DENMARK	7,780
AUSTRIA	8,278	AUSTRIA	9,503
FINLAND	5,206	ITALY	3,969
ITALY	3,452	SPAIN	2,724
GREECE	3,534	GREECE	3,378
SWEDEN	1,508	SWEDEN	1,424
Total for Others	87,442		92,868
Others not Listed	13,194		15,887
Grand Total	130,850		132,102
EU-15	89,379		97,587
NMS	758		1,616
Extra EU-25	40,690		32,894

Note: 2002 trade data covers July 2002 through June 2003
2003 trade data covers July 2003 through June 2004