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Germany

Fresh Deciduous Fruit

Update on Production Estimates

2003

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Report Highlights:

Production estimates for 2003 had to be revised downwards to 807,000 MT for apples and 49,000 MT for pears, due to the summer heat and drought. This is a reduction of 7 and 18 percent on previous estimates.

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

This report updates the August production estimates given in the Fresh Deciduous Fruit Annual (GM3029) and gives the trade data for the complete marketing year (July/June) that had not been available earlier. It also adjusts historic data for domestic fresh apple consumption and use for processing.

A revision of the production estimate became necessary as the effects of the unusual summer heat and drought could only be fully assessed after the submission of the annual report. The new production estimates for 2003 are 807,000 MT for apples and 49,000 MT for pears. This is a reduction of 7 and 18 percent, respectively, compared to the original estimate. The hot and dry weather that lasted until the middle of August, resulted in depressed fruit growth and an unusually early harvest, with fewer days for the fruit to grow than normal. Both effects led to smaller fruit size and consequently lower tonnage. However, for apples it is still a 6 percent increase compared to the very low production of 2002. Pear production is 24 percent below the 2002 harvest.

In previous reports "deliveries to processors" in the concentrated apple juice (CAJ) PSD was connected to the amount reported "for processing" in the fresh apples PSD, which therefore did not include apples that are processed into other products (apple sauce, etc.) These apples used to be included in "fresh domestic consumption".

With a change in the programming of the PSD tables it is now possible to report the two lines independent of each other. Thus the figure for "for processing" in the apples PSD has to be enlarged by the amount of apples used for processing into other products, while domestic fresh consumption has to be reduced by the same amount. To ensure comparability with historic data, a revised series is listed in table 2.

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

Country Commodity	Germany Fresh Apples					
	2001		2002		2003	
Market Year Begin	USDA Official [Ost Estimate [N]	Revised [N]	USDA Official [Ct Estimate [N]	Estimate [N]	USDA Official [Ct Estimate [N]	Forecast [N]
	07/2001		07/2002		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	867,000	807,000
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	1,467,000	1,407,000
TOTAL Imports	680,604	680,604	850,000	851,491	660,000	720,000
TOTAL SUPPLY	2,203,037	2,203,037	2,412,800	2,414,291	2,127,000	2,127,000
Domestic Fresh Consumption	1,591,892	1,452,892	1,702,781	1,580,567	1,571,990	1,410,000
Exports, Fresh Only	66,555	66,555	60,000	65,705	55,000	55,000
For Processing	544,000	683,000	650,000	768,000	500,000	662,000
Withdrawal From Market	590	590	19	19	10	0
TOTAL UTILIZATION	2,203,037	2,203,037	2,412,800	2,414,291	2,127,000	2,127,000

Table 2: Revised Historic Figures for "Domestic Fresh Consumption" and "For Processing"

Year	Old		Revised	
	Domestic Fresh Consumption (MT)	For Processing (MT)	Domestic Fresh Consumption (MT)	For Processing (MT)
1992	2,615,512	950,000	2,496,512	1,069,000
1993	1,627,747	750,000	1,616,747	761,000
1994	1,859,980	800,000	1,797,980	862,000
1995	1,544,973	750,000	1,517,973	777,000
1996	1,723,617	840,000	1,723,617	840,000
1997	1,441,008	830,000	1,441,008	830,000
1998	1,690,306	857,000	1,690,306	857,000
1999	1,815,149	838,000	1,660,149	993,000
2000	2,080,571	1,108,000	1,910,571	1,278,000

Table 3: Import Prices for Fresh Apples in U.S. \$ /MT

Prices Table

Country Germany

Commodity Fresh Apples

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	849.50	4%
Aug	686.62	892.21	30%
Sep	546.79		-100%
Oct	401.66		-100%
Nov	310.26		-100%
Dec	490.95		-100%

Table 4: German Imports of Fresh Apples (in MT)

Import Trade Matrix

Country	Germany	
Commodity	Fresh Apples	
Time Period	July/June	Units:
Imports for:	2001	2002
U.S.	107	U.S. 113
Others	Others	
ITALY	294,263	ITALY 345,126
NETHERLANDS	71,391	NETHERLANDS 109,908
NEW ZEALAND	68,481	FRANCE 77,264
FRANCE	60,959	BELGIUM 63,147
BELGIUM	38,877	NEW ZEALAND 59,870
ARGENTINA	30,020	CZECH REPUBLIC 48,246
SOUTH AFRICA	26,419	AUSTRIA 28,880
POLAND	22,665	ARGENTINA 27,963
CZECH REPUBLIC	15,986	BRAZIL 23,994
CHILE	14,584	CHILE 20,320
Total for Others	643,645	804,718
Others not Listed	36,853	46,663
Grand Total	680,605	851,494
Intra - EU	483,580	628,395
Extra - EU	197,025	223,099
sum	680,605	851,494

2001 : July 2001 through June 2002

2002 : July 2002 through June 2003

Table 5: German Exports of Fresh Apples (in MT)

Export Trade Matrix

Country	Germany		
Commodity	Fresh Apples		
Time Period	July/June	Units:	MT
Exports for:	2001		2002
U.S.	0	U.S.	0
Others		Others	
NETHERLANDS	13,179	NETHERLANDS	14,506
DENMARK	10,654	DENMARK	10,924
FRANCE	7,199	AUSTRIA	5,267
AUSTRIA	5,887	FRANCE	4,892
RUSSIA	4,409	RUSSIA	4,264
FINLAND	3,854	BELGIUM	3,628
BELGIUM	3,724	ITALY	3,357
SWEDEN	3,265	UNITED KINGDOM	2,582
ITALY	2,275	GREECE	2,150
CZECH REPUBLIC	1,548	FINLAND	2,121
Total for Others	55,994		53,691
Others not Listed	10,561		12,014
Grand Total	66,555		65,705
Intra - EU	54,294		53,614
Extra - EU	12,261		12,091
sum	66,555		65,705

2001 : July 2001 through June 2002

2002 : July 2002 through June 2003

Table 6: PSD for Fresh Pears (in ha, 1000 tress, MT)

PSD Table

Country Commodity	Germany Fresh Pears					
					(HA)(1000 TREES)(MT)	
Market Year Begin	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official [Ct	Estimate [N	DA Official [Ct	Estimate [N	DA Official [Ct	Estimate [N
	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	60,000	49,000
Non-Comm. Production	0	0	0	0	0	0
TOTAL Production	46,823	46,823	64,000	64,000	60,000	49,000
TOTAL Imports	159,758	159,758	165,000	165,000	158,000	158,000
TOTAL SUPPLY	206,581	206,581	229,000	229,000	218,000	207,000
Domestic Fresh Consumption	195,155	195,155	214,600	214,600	204,000	194,000
Exports, Fresh Only	10,164	10,164	12,500	12,500	12,000	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	229,000	218,000	207,000

Table 7: Import Prices for Fresh Pears

Prices Table

Country	Germany		
Commodity	Fresh Pears		
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	714.50	815.37	14%
Sep	725.33		-100%
Oct	769.73		-100%
Nov	806.45		-100%
Dec	825.76		-100%

Table 8: German Imports of Fresh Pears (in MT)

Import Trade Matrix

Country	Germany		
Commodity	Fresh Pears		
Time Period	Jul/Jun	Units:	MT
Imports for:	2001		2002
U.S.	4133	U.S.	2491
Others		Others	
ITALY	65,745	ITALY	67,916
ARGENTINA	25,520	ARGENTINA	27,572
SPAIN	20,243	SOUTH AFRICA	16,207
SOUTH AFRICA	20,161	SPAIN	12,600
CHILE	8,455	CHILE	10,148
FRANCE	6,550	BELGIUM	8,566
BELGIUM	3,244	FRANCE	8,293
NETHERLANDS	2,038	NETHERLANDS	6,102
TURKEY	1,566	PR CHINA	1,859
PR CHINA	1,560	BRAZIL	561
Total for Others	155082		159824
Others not Listed	545		1208
Grand Total	155627		161032
INTRA-EU-15	97,921		103,499
EXTRA EU-15	61,837		60,025
WORLD	159,758		163,523

2001 : July 2001 through June 2002

2002 : July 2002 through June 2003

Table 9: German Exports of Fresh Pears (in MT)

Export Trade Matrix

Country	Germany		
Commodity	Fresh Pears		
Time Period	July/June	Units:	
Exports for:	2001		2002
U.S.	0	U.S.	0
Others		Others	
NETHERLANDS	2,039	UNITED KINGDOM	2,335
FRANCE	1,801	DENMARK	2,124
DENMARK	1,590	NETHERLANDS	1,761
ITALY	1,253	AUSTRIA	1,387
AUSTRIA	1,191	ITALY	1,343
UNITED KINGDOM	1,072	FRANCE	1,219
GREECE	267	GREECE	925
PORTUGAL	192	RUSSIA	608
SPAIN	170	PORTUGAL	567
IRELAND	142	IRELAND	451
Total for Others	9717		12720
Others not Listed	447		1004
Grand Total	10164		13724
Intra - EU	9,840		12,825
Extra - EU	324		899
sum	10,164		13,724

2001 : July 2001 through June 2002

2002 : July 2002 through June 2003

Table 10: PSD for Concentrated Apple Juice at 70.5 brix (CAJ) in MT

PSD Table

Country	Germany					
	Commodity Concentrated Apple Juice (MT)					
Market Year Begin	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official [t	Estimate [t]	USDA Official [t	Estimate [t]	USDA Official [t	Estimate [t]
	07/2001		07/2002		07/2003	
Deliv. To Processors	544,000	544,000	650,000	650,000	500,000	535,000
Beginning Stocks	189,000	189,000	186,000	186,000	187,000	187,000
Production	63,000	63,000	75,300	75,300	58,500	62,500
Imports	363,551	363,551	414,000	409,342	420,000	420,000
TOTAL SUPPLY	615,551	615,551	675,300	670,642	665,500	669,500
Exports	118,867	118,867	130,000	130,823	115,000	119,000
Domestic Consumption	310,684	310,684	358,300	352,819	380,500	380,500
Ending Stocks	186,000	186,000	187,000	187,000	170,000	170,000
TOTAL DISTRIBUTION	615,551	615,551	675,300	670,642	665,500	669,500

To convert from single strength (11.2 brix) to 70.5 brix, figures were multiplied by 0.15887 or divided by 6.29464

Table 11: Import Prices for CAJ in U.S. \$ per MT

Prices Table

Country	Germany		
Commodity	Concentrated Apple Juice		
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	708.20	21%
Jul	592.79	652.78	10%
Aug	563.49	673.84	20%
Sep	615.63		-100%
Oct	651.02		-100%
Nov	673.16		-100%
Dec	632.19		-100%

Table 12 : German CAJ Imports in MT (converted to 70.5 brix)

Import Trade Matrix

Country	Germany	
Commodity	Concentrated Apple Juice	
Time Period	Jul/Jun	Units:
Imports for:	2001	2002
U.S.	309	U.S. 142
Others	Others	
POLAND	147,468	POLAND 176,077
CZECH REPUBLIC	30,877	CZECH REPUBLIC 44,051
ITALY	33,473	ITALY 30,246
PR CHINA	31,374	PR CHINA 31,333
AUSTRIA	21,746	HUNGARY 31,253
TURKEY	22,387	TURKEY 19,669
HUNGARY	17,707	AUSTRIA 17,046
IRAN	16,269	UKRAINE 16,786
UKRAINE	13,685	SWITZERLAND 10,306
SWITZERLAND	7,439	IRAN 8,907
Total for Others	342,425	385,674
Others not Listed	20,816	23,523
Grand Total	363,550	409,339
Intra - EU	62,541	54,200
Extra - EU	301,009	355,139
sum	363,550	409,339

2001 : July 2001 through June 2002

2002 : July 2002 through June 2003

Table 13: German CAJ Exports in MT (converted to 70.5 brix)

Export Trade Matrix

Country	Germany		
Commodity	Concentrated Apple Juice		
Time Period	July/June	Units:	MT
Exports for:	2001		2002
U.S.	35,771	U.S.	30,213
Others		Others	
NETHERLANDS	21,108	NETHERLANDS	24,442
FRANCE	7,294	UNITED KINGDOM	17,495
BELGIUM	7,358	FRANCE	8,224
UNITED KINGDOM	10,123	BELGIUM	7,775
AUSTRIA	6,673	DENMARK	7,526
DENMARK	6,066	AUSTRIA	8,278
ITALY	4,781	FINLAND	5,206
FINLAND	3,339	ITALY	3,452
GREECE	3,412	GREECE	3,534
NORWAY	3,074	SWEDEN	1,508
Total for Others	73,228		87,440
Others not Listed	9,869		13,194
Grand Total	118,868		130,847
Intra - EU	72,720		89,400
Extra - EU	46,148		41,447
sum	118,868		130,847

2001 : July 2001 through June 2002

2002 : July 2002 through June 2003