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Germany: An Industry Rapid Analysis of Export Competition and Market Opportunities

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Germany: An Industry Rapid Analysis of Export Competition and Market Opportunities

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Foreword

EU is a major trading partner for Egypt, absorbing at least one-third of Egyptian processed food exports. As the EU expands to include additional countries, the new members will bring strong, additional competition for Egyptian food exports both in the EU-15 and in accession country markets.[1] Some accession countries will pose stronger export competition while others will open up their markets by adopting EU tariffs and reducing their protective tariffs.

This report was prepared for ALEB, a USAID-financed project designed to increase Egyptian exports of processed fruit and vegetable products. It focuses on Germany, a major market for accession country exports.

The report also focuses on selected commodity clusters reflecting ALEB Project priorities, including:

- Frozen and dehydrated fruits and vegetables
- Jams/Juices
- Spices/Herbs
- Table Olives/Olive Oil

The purpose of the report is to highlight key production, trade, and consumption trends, as well as tariff changes that may result, and to analyze ways these trends may impact Egyptian export opportunities to EU markets. Import potential for Germany was examined.

Meetings were held in Germany in early January 2004 with producers, exporters, food companies, importers, and government officials. Additional detail on the market, on EU regulations (see Appendix IV) and on persons and groups contacted are included in attachments.

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[1] Thirteen countries have applied to become new members of the EU, with ten of this group poised join the EU on May 1, 2004, including:

- Poland
- Hungary
- Czech Republic
- Estonia
- Cyprus
- Latvia
- Lithuania
- Slovak Republic
- Slovenia
- Malta

Two others expect to join by 2007:

- Romania
- Bulgaria

Turkey currently is not now negotiating for membership, but expects to do so following an EU review in 2004. Accession talks could begin in 2005.

I. Executive Summary

This report is based on extensive reviews of secondary materials and meetings in Germany during mid-January, 2004 to evaluate the impact of EU accession on export competition and import demand of frozen, dried and canned fruits and vegetables; spices and herbs; olives and olive oil; jams; and juices. The overall purpose of the study is to evaluate potential implications for Egyptian fruit and vegetable processors. The study also describes key trends and evaluates possible changes that may result from EU accession. Factors evaluated include production capacity and trends; trade trends including major markets and suppliers; tariff rates; and consumer market characteristics.

The study concludes that short-term production and trade impacts likely will be relatively small, and have been well-anticipated by most industry sectors although there are some major remaining questions of EU policy. For example, the price supports and payment regimes available to the new members likely will be very substantially different than those now offered in the EU-15—especially as the EU negotiates future trade policies in the Doha Round trade negotiations in an effort both to liberalize trade policies and to reduce budget exposure. The longer-term result expected by a number of study respondents is that EU agricultural policies could move substantially closer to the policies already existing in some of the accession states.

In recent years, Germany has increasingly relied on imports to Germany of all types of fruits and vegetables, a trend that is continuing and accelerating. A significant share of this growth is driven by food processors who are extending their sources. However, in the case of vegetables, retail and direct consumer markets are the main destination for supplies.

Note on the importance of quality

German importers and commercial representatives begin nearly every conversation concerning possible trade with Egypt with observations regarding non-price aspects of their markets. They believe that suppliers who anticipate market needs in terms of product quality and presentation have an enormous advantage, provided that they can meet the scheduling and market-capacity requirements. They include in their discussions assurances that competition on price is important, but perhaps less so than other product characteristics including basic quality, freshness and product presentation. In addition, there is a modest residue of concern that Egyptian product quality will not "measure up," based on some previous experience—perhaps a small but important handicap that Egyptian marketers face in a number of commercial German markets, based on the project team's recent discussions.

Key Observations

Developing direct access to consumer markets will be difficult, but could become increasingly attractive. Germany has a mature well-developed and efficient food distribution system with many consumer protections. At the same time, there is fierce competition between large grocery chains, which may provide Egyptian producers a market opportunity to supply product under a grocery store's name providing quality and volume requirements can meet EU standards.

In most cases, industrial markets likely will provide best access for Egyptian processors. To comply with the extensive, specific product registration and certifications requirements of consumer markets, supplying German processors semi-processed products may provide quicker access. This could take any of the following forms:

- Frozen strawberries for use in preserves or other food applications.
- Dried onions in flake or powdered form for highly processed foods.
- Bulk supplier of herbs and spices for grocery-store band name products.

Egyptian products have an uncertain quality image that will need to be improved if German markets are to be expanded. In addition, potential importers raised questions concerning production capacity and stability of supplies. While this is always an easy argument for buyers, it is an issue that the Egyptian growers and food processing industry will need to address constantly and effectively. Attempts to improve the image of Egyptian products to world-class quality and/or address the purity of agricultural products is important.

Germany is in the process of updating its regulations on pesticides, and pesticide residues are a concern for Egyptian products. Inquiries on the latest information and standards can be made to:

Federal Ministry of Consumer Protection, Food and Agriculture
Referat 313 – Rueckstaende U. Kontaminanten in Lebensmitteln
Rochusstr. 1
53123 Bonn, Germany
Tel: (49) 228 529-4659
Fax: (49) 228 529-4262
Website: www.verbraucherministerium.de

Logistical concerns regarding Egypt. As one trader put it, "Logistically, South America is closer to Europe than Egypt." Mention was made about the lack of refrigerator trucks in Egypt, and the capacity of the cold chain. This is important not only for finished products leaving the country, but also the travel time from the field to the processor. It also was expressed in term of the capacity of suppliers to guarantee the freshness of products, and to prevent loss of important quality characteristics.

Growing security concerns could mean an advantage for Egypt. One company representative mentioned last year while traveling in the Middle East, there was an explosion at his hotel he was staying. After the event, there were very serious discussions in the company regarding continuing business relationships in the region. Egypt may be able to capitalize on its security record and its capacity to make visiting business executives feel welcome and comfortable—a factor that could help stimulate favorable decisions concerning reliance on Egyptian products.

II. Background

Country Profile

2004 Economic Forecasts

Growth in Gross Domestic Product: 1.8%
Gross Domestic Product: 2543 Billion USD
Inflation: 0.5%
Population: 82.5 Million
Gross Domestic Product per Capita: 30,810 USD

Germany has the largest population and economy in Europe, and the fourth largest economy in the world. The Federal Statistics Office Destatis calculated that the German gross domestic product contracted by 0.1 percent in 2003. This is the first annual drop in GDP since the 1.1-percent decline in 1993. This is the third year of being the worst economic performance in the euro zone.

Increased government spending and an unemployment rate of over ten percent is prohibiting growth. Weaker household consumption, which fell by 0.2 percent in 2003, is stunting growth. An ever-larger population over 65 years of age is increasing pension costs for the economy. In 2004 an estimated 18% of German's population will be over 65, which is roughly a two percent increase from 1999. A large immigrant population and a greater role of women in the work force are helping contribute to the economy.

Most economic outlooks suggest the German economy is poised for moderate improvement. There is the prospect for changes to labor laws to give business more incentive to hire and some scaling back of pensions and public services. Expectations are for improvement in demand for Germany's main exports. The net effect of these changes should improve the German economy and promote expansion of the economy and increase disposable income.

Distribution Channels

The German retail market has shifted toward larger discount retail centers including food and retail merchandise. For the past couple years there have been intense price wars between the largest discounters vying for market share. Much of the competition is done with promotions on low cost private label products in order to attract consumers to their stores. In the process of these price wars, new discount store labels have been developed in order for higher-end retailers to take part in the growing sector. In 2000, the top five retailers made up 62.5% of national food and beverage sales. Forecasts are for the larger retailers to have as much as 75% of the market by the year 2010.

Over the last few years' convenience shops and sales outlets in high traffic areas has been on the rise. This includes more consumer products at gas station and kiosks on the street or at train stations with fast moving consumer goods including snacks and beverages. The growth in this retail segment is beginning to slow, and for the convenience consumers must be willing to pay anywhere from 30-70% higher for products offered at grocers. There are efforts to buck the trend of larger retailers and the German government is looking at ways of helping product the smaller retailers. Some of the methods investigated include land zoning for the construction of super and hypermarkets.

To bring Egyptian products to the German consumer market, contact will need to be made with a distributing company. Direct contact to the large retail outlets is a possibility, but they may lack the interest in dealing with administrative requirements of importing products. The Markant buying association is well respected and has a strong relationship with a number of retailers. Markant currently has about 100 members. They represent powerful private and co-operative enterprises in wholesaling and retailing with over 20,000 outlets in all distribution channels for food retailing. This corresponds to a selling area of about 7 million square meters altogether and a market share of about 20 % of total German food retailing sales. The distribution through Markant members covers the whole of Germany.

Food Standards and Regulations

Regulations in Germany are for the most part harmonized with those for the EU. For Egyptian food stuffs to be imported to Germany there are a numerous requirements to meet consumer protection requirements. There are a number of changes that are expected in coming months as well, so it may be necessary to contact the Federal Office of Consumer Protection and Food Safety or BVL directly, or to follow their websites closely. The primary addresses for this information are:

Bundesamt fuer Verbraucherschutz und Lebensmittelsicherheit (BVL)
Rochusstrasse 65
53123 Bonn, Germany
Tel: 49 228-6198-0
Fax: 49 228-6198-120
Email: Poststelle@bvl.bund.de
Website: www.bvl.bund.de

Labeling

All imported food products for resale must be in compliance with the (LMKV – Food Labeling Ordinance of Dec. 1999). This is imported labelling decree has the following requirements:

- Name of product as commonly used in the trade
- List of ingredients and food additives
- Quantitative ingredient declaration (QUID)
- Alcohol content
- Uncoded minimum shelf-life date
- Storage conditions
- Metric units for all measurements
- Name and address of manufacturer, packer or importer in Germany/EU
- Coded lot identification
- Bar codes

The following list includes other special requirements that need to be taken into consideration when importing to Germany:

✓ Products must be free of pesticides and other contaminants. Phytosanitary certificates and import certificates on most agricultural products are a common requirement and need to be properly investigated.

✓ There are regulations regarding the type of packaging used for food products and food ingredients. These are very stringent, and must be followed very carefully. The specifications are available from the offices listed above, and from the cited website.

✓ Specific testing and test methodologies are required, and are described by the offices described above.

III. Commodity Summaries

Overview

This section focuses on Germany's fruit and vegetable market and processing sector (frozen, dehydrated and preserved/canning), canned table olives/olive oil, spices and jam/juice sectors as identified in the work plan for this study. It highlights key production, trade, and consumption trends and how these may impact Egyptian export opportunities to Germany. In addition, it reflects discussions and interviews in Germany in mid-January, 2004 held with producers, exporters, food companies, and government officials concerning potential markets and trade with Egypt.

Frozen fruits and vegetables

Industrial food processors are the main buyers and use the majority of imported frozen fruits, thus special attention was paid to needs expressed by these users. Meetings for the frozen vegetable markets were more focused on domestic consumer demand and retail distribution.

Market Analysis

Fruit. While fruit production in Germany appears is decline, this trend is thought to be the result of recent poor weather rather than a decline of investment in orchards. However, Europe's total fruit production has trended lower since 2000. With the shorter supplies, prices have trended higher, which has also recently caused reduction in demand. At the same time there are more fruit imports coming to Europe.

Frozen strawberries and sour cherries are Germany's main frozen imports. These products are not necessarily used in direct consumption; rather it is used in the food-processing sector. Many of these products are used in dairy products and specifically yogurts. In Germany today, the main destination for processed fruits and berries is the dairy sector according to contacts with the Association of fruit, vegetable and potato processors.

Table 1: German: Fruit Harvest and Yield per Tree

Type	Production (MT)			Yield Kg/Tree		
	2000	2001	2002	2000	2001	2002
Apples	1,130,802	922,433	762,800	19.4	15.8	11.9
Pears	65,162	46,823	76,139	27.9	20.0	28.2
Sweet Cherries	41,553	34,211	26,884	26.7	22.0	14.7
Sour Cherries	38,908	34,724	22,941	12.1	10.8	7.9
Black Plums	57,030	38,799	42,446	28.2	19.1	18.5
Red Plums	3,242	2,111	3,381	22.0	14.3	18.1
Apricots	313	142	238	13.6	6.2	7.9
Peaches	1,002	494	544	10.5	5.2	8.2
Walnuts	296	235	169	27.2	21.6	18.2
Tree Fruits	1,338,307	1,079,971	935,543	NA	NA	NA
Currants	NA	NA	NA	3.4	3.2	3.1
Gooseberries	NA	NA	NA	3.3	3.4	3.1
Raspberries	X	x	x	248.8	216.9	210.1
Strawberries	104,286	110,130	105,000 (f)	108.4	112.4	106.2

Source: Statistisches Bundesamt f – forecast.

Table 2: German: Frozen Fruit Imports
(MT)

	1998	1999	2000	2001	2002
Strawberries	76,162	72,050	74,334	91,592	98,246
Raspberries	36,108	38,037	37,888	39,917	46,387
Black Currants	12,657	15,559	13,871	15,004	11,774
Red Currants	9,980	9,393	10,124	10,154	8,554
Mulberries	10,976	8,012	9,844	10,753	13,996
Blueberries	25,879	19,278	20,412	20,898	23,068
Sweet Cherries	3,553	3,092	2,612	3,600	3,449
Sour Cherries	48,408	48,508	59,900	54,336	51,257
Other Fruit	64,188	59,480	61,288	62,239	65,882
Total	287,911	273,409	290,273	308,493	322,613

Source: Annual Review 2002 Merchandise Association of the Hamburg Exchange, September 2003.

Table 3: German: Frozen Fruit Imports By Origin (0811 90 95) (MT)

	1998	1999	2000	2001	2002
Greece	8,630	8,444	10,853	10,419	11,513
Netherlands	2,942	2,153	1,803	1,693	1,498
France	3,653	3,804	3,335	2,400	2,283
Belgium/Luxembourg	3,005	4,401	4,040	2,160	2,225
Italy	3,686	4,740	4,210	5,411	4,683
Finland	2,269	494	1,524	1,783	1,243
Spain	2,160	1,692	2,145	2,238	2,043
Other EU	1,494	1,618	2,365	1,894	2,373
EU Total	27,839	27,346	30,275	27,988	27,861
Poland	7,984	6,501	5,398	7,740	15,106
Turkey	2,308	2,335	1,858	2,151	1,798
Hungary	4,005	2,589	3,280	2,459	2,913
Bulgaria	1,309	1,873	2,398	1,795	1,033
Yugoslavia	5,478	6,039	6,455	8,501	4,404
White Russia	1,043	889	95	265	291
Czech Republic	1,877	2,234	1,751	2,192	1,272
Slovakia	541	798	530	442	396
Brazil	3,864	2,024	1,857	1,398	1,381
China	1,103	1,000	1,161	1,291	1,894
Other Countries	6,837	5,852	6,230	6,007	7,533
Total	64,188	59,480	61,288	62,239	65,882

* - Table includes: plums, apricots, peaches, apples, elderberries, haws, blackthorn, cranberry, and exotic fruit.

Source: Annual Review 2002 Merchandise Association of the Hamburg Exchange, September 2003.

Vegetables

While the German consumers are concerned about eating healthy, which includes more vegetables, they are consuming more frozen vegetables. There has been a steady rise in frozen vegetable production and imports in Germany. This trend is expected to continue. A number of contacts suggest that consumer's preference is moving way from canned vegetables toward frozen. The most dynamic growth in the frozen vegetable sub-sector is coming from processed products.

Table 4: Germany: Production of Frozen Vegetables and Food Preparations

		Quantity MT	Processors	Value 1,000 Euro
Unprocessed	1997	125,278	10	169,226
	1998	134,402	10	177,948
	1999	158,792	12	259,425
	2000	164,875	12	269,523
	2001	184,140	10	409,251
	2002	208,193	12	438,325
Processed	1997	65,080	13	182,260
	1998	68,072	14	180,112
	1999	68,045	12	142,127
	2000	70,820	11	137,328
	2001	114,797	8	154,113
	2002	148,436	14	186,750
Other Remaining Without Preparations	1997	8,282	4	17,939
	1998	5,763	3	13,756
	1999	17,341	5	14,657
	2000	20,240	5	13,040
	2001	NA	NA	NA
	2002	NA	NA	NA
Total	1997	203,432		366,807
	1998	208,237		371,816
	1999	238,178		416,210
	2000	255,935		419,891
	2001	298,937		563,364
	2002	256,629		625,075

Source: Statistisches Bundesamt

Germany is a net importer of frozen vegetables with the lion's share coming from its immediate neighbours. Poland's dynamic growth of exports to Germany should be noted. Most Germans interviewed didn't expect much change in the percentage each origin provided to the German market. Some suggested that France might continue gaining more, while others thought that Poland has a better chance to pick up more market share.

Table 5: Germany: Frozen Vegetable Imports By Origin (0710 80 95)
(MT)

	1998	1999	2000	2001	2002
Belgium/Luxembourg	79,095	78,047	75,927	94,801	74,109
Netherlands	18,260	11,126	13,118	13,842	13,324
Spain	13,216	12,598	18,147	22,367	16,403
France	8,818	8,888	7,984	11,160	10,314
Denmark	2,057	203	446	1,444	386
Austria	1,615	2,751	1,841	2,849	3,251
Portugal	1,066	855	872	782	304
Italy	1,037	1,130	625	1,307	903
Great Britain	650	1,475	1,565	1,226	493
Other EU	28	31	86	260	34
EU Total	125,842	117,104	120,611	150,038	119,521
Poland	41,612	65,377	71,400	105,344	91,899
Guatemala	7,718	6,167	4,248	1,668	859
South Africa	2,002	1,206	986	605	704
Hungary	4,967	7,134	5,501	7,880	8,997
Ecuador	6,941	10,229	8,633	11,117	11,177
Turkey	3,861	764	910	1,562	982
China	1,990	1,628	1,930	3,050	5,829
Other Countries	1,190	472	197	601	944
Total	196,123	210,081	214,416	281,865	240,912

* - Includes cauliflower, broccoli, kohlrabi, kale, and brussels sprouts.

Source: Annual Review 2002 Merchandise Association of the Hamburg Exchange, September 2003.

Market Opportunities

Frozen strawberries are expected to be a product with a strong chance of penetrating the German market. However, traders frequently mentioned past quality problems with Egyptian supplies—for example, one trader mentioned that the growers and processors do a good job of taking care of the product, which then can be prepared and frozen appropriately, but that he believes that problems frequently arise from lack of cold chain protections during transportation to the port. German processors generally expressed the belief that the lack of quality requirements in Egyptian domestic markets mean that some exporters may lack experience in producing and maintaining quality necessary to compete in German consumer markets.

However, study respondents expressed the belief that fresh vegetables markets may provide the best opportunity for Egyptian produce. They suggested that most participants in the vegetable trade are aware of the Egyptian green bean trade, and described the use of two German airstrips that allow Egyptian cargo plains to land. One trader said that from the time the beans are picked in Egypt it takes roughly thirty hours until they are in a warehouse in Germany, resulting in a product able find its way to the German market thanks to relatively inexpensive logistics. In addition, Egyptian producers can fill earlier markets than the new crop European supplies.

Respondents observed that competition for frozen product markets is intense, and depends significantly on price and product differentiation. However, there also is an opportunity for market timing advantages for new crop supplies that can be provided when stocks of European old crop are low.

Dehydrated fruits and vegetables

Market Analysis

Germany is a rapidly growing market for imported dried fruits and vegetables. It is also a very important logistical point for supplies destined to other European countries and a good share of product is re-exported to neighboring countries. The German market with its large immigrant population has the strong consumer base. Net imports of this product category have grown from 78,000 MT in 1998 to 87,000 MT in 2002. However, traders interviewed questioned how much more such products could be brought in to Germany, especially since some of the middle-eastern origin German immigrants are noticing their children's taste preferences are not geared toward these traditional products.

Trade data indicate a steady increase in dried onion imports in 2002, reflecting a shift of some of the major processing operations using blended ingredients out of Germany as they shifted closer to their source of dry production. The capacity and availably of Egyptian dry onions is well known, but the processing technology and the quality of the Egyptian product appears to be facing growing competition from Hungary. In certain food applications like soup, it is important that the onion retain it's shape. Companies interviewed mentioned that too often, the Egyptian product turn into mush in soups rather than holding their shape and appearance. Another important characteristic is a clean white color. Dried onions from two-year varieties are widely sought by the trade, but farmers prefer annual varieties and are shifting away from the more desirable (but costlier) varieties. The duty free quota is 5,000 tons of dried onions, with a duty of 9.3% on amounts above that level.

Table 6: Germany: Imports and Exports of Dried Vegetables (MT)

	1998	1999	2000	2001	2002
Imports					
Onions	15,000	15,796	15,948	17,781	22,022
Mushrooms	1,739	1,593	1,947	2,142	2,016
Sweet Corn	128	88	55	87	58
Tomatoes	2,469	3,675	3,802	3,893	4,587
Carrots	3,739	4,331	3,956	4,011	4,682
Other Vegetables	13,288	12,357	13,226	14,432	17,208
Exports					
Onions	3,342	3,698	3,596	3,377	3,873
Mushrooms	887	896	897	956	910
Sweet Corn	50	37	10	15	15
Tomatoes	162	195	227	392	525
Carrots	1,930	1,301	1,744	2,155	2,249
Other Vegetables	7,396	6,785	7,646	8,301	8,558

Source: Statistisches Bundesamt

Market Survey

The project team surveyed several German supermarket including a Medium-sized Kaiser's store, and two hypermarkets, Hit and Walmart. Packaging varied for these products from twist off plastic containers to cellophane bags for refilling. The placement of product was with the name brand display; often these dried products were toward the top or bottom, perhaps because the packages were larger than for other spices.

Table 7. Germany: Dried Vegetable Market Survey Average-January 2004

Product	**Shelf Space Allocation**	**Packaging Size Grams**	**Retail Price Euro**	**Retail Price $**	**Country of Origin**
Dried Veggi Mix	Varied by display	100	2.88	$3.89	not listed
Dried Onions	Varied by display	40	3.18	$4.30	not listed
Onion Powder	Varied by display	80	2.48	$3.35	not listed
Dry Onion Chunks	Varied by display	50	2.08	$2.81	not listed
Dry Diced Onions	Varied by display	30	0.98	$1.32	Germany
Garlic Granualets	Varied by display	80	2.48	$3.35	not listed

Market Opportunities

Healthy competition in Germany's dried fruits market is expected to hold these prices near current levels. The constraint Egyptian exports to Germany face is the strong and growing competition from Turkish producers in the market. German traders suggested that logistically Egypt is at a disadvantage as supplies move along shipping corridors with Turkish on the eastern side, or Moroccan / Spanish supplies on the western side.

The dried vegetable market, specifically dried onions, has seen supply sources shift to Hungary and China and Egypt not become a main player for these products—although a number of the commercial firms interviewed suggested that Egyptian suppliers could become more important in this market if they were able to improve their drying technology and onion variety.

Juices/Jams

According to the Association of the German Fruit Juice Industry's annual report for 2002 per capita consumption of fruit juice is the highest in Europe at 40.2 liter per year. This trend is declining slightly and has been since 1996, when conception was 41.2 liters a year, but is not expected to diminish the importance of these products or markets. The German economy has an enormous investment in the production, processing and distribution of juice and apple juice concentrates, an industry expected to continue to prosper even if growth is slow. And, Germany expects to continue to be a hub for the fruit concentrate export trade for the foreseeable future. While the rapidly growing production and processing base in China is seen as a threat to German and Polish production, the juice industries in Europe however don't foresee an immediate change in the strength of their position in the market for the near term.

Germany has switched from being a net importer to a net exporter of marmalade and jams. The production data confirms the fact that German consumers' favorite flavor for jam is strawberry, followed in many markets by plum butter. In general, German processors lack adequate internal supplies of these fruits and must supplement them with frozen supplies. Poland is the main source for strawberries, and Hungary is the main supplier of sour cherries and plums.

Table 8: Germany: Imports of Marmalade and Jam
(MT)

	1998	1999	2000	2001	2002
Marmalade					
Over 30% Sugar	1,438	1,422	1,361	1,443	1,337
13-30% Sugar	70	129	123	65	192
Other	1,771	491	29	14	8
Total	3,279	2,042	1,513	1,522	1,537
Jams - Over 30% Sugar					
Cherry	2,872	2,385	2,179	2,355	2,727
Strawberry	6,429	5,465	5,326	4,314	3,659
Raspberry	1,508	1,173	1,140	1,114	848
Other	13,661	12,345	12,958	13,212	10,865
Total	24,470	21,368	21,603	20,995	18,099
Jams 13-30% Sugar	9,405	11,850	13,658	13,281	12,383
Other Jams Up to 13% Sugar	5,470	2,418	2,844	4,981	3,833
Total	42,624	37,678	39,618	40,779	35,852

Source: Statistisches Bundesamt, Wiesbaden

Table 9: Germany: Exports of Marmalade and Jam
(MT)

	1998	1999	2000	2001	2002
Marmalade					
Over 30% Sugar	487	9,850	3,760	3,201	3,618
13-30% Sugar	24	15	50	26	19
Other	42	145	561	436	460
Total	553	10,010	4,371	3,363	4,097
Jams - Over 30% Sugar					
Cherry	1,665	1,588	2,561	2,760	3,076
Strawberry	6,800	6,937	10,191	9,889	10,110
Raspberry	2,099	2,296	3,219	2,927	2,287
Other	11,013	11,194	14,684	15,146	17,648
Total	21,577	22,015	30,655	30,722	33,121
Jams 13-30% Sugar	792	769	684	712	512
Other Jams Up to 13% Sugar	1,557	2,441	3,187	3,521	3,353
Total	24,479	35,235	38,897	38,318	41,083

Source: Statistisches Bundesamt, Wiesbaden

The traditional jam and preserves for consumer market is now in second place with regards to disappearance of fruit for processors. The main destination is the dairy sector.

The popularity of fruit based flavourings in ice cream, but mostly yoghurts. Some premium yoghurt products in Germany are made with as much as half fruit and half yoghurt. The popularity of this product in northern Europe is great as it can be consumed any time of the day, or just as a snack.

Market Survey

Shelf allocation varied greatly between stores. The Hypermarkets also had their own name brand product that was placed in the store more than one place. At the entrance there was space for the stores band of jams and juices. In the Hypermarkets there were two isles many of the store brand is sold by the case of tetra back one-liter boxes.

Table 10. Germany: Jam Market Survey Average-January 2004

Product	Shelf Space Allocation	Packaing Size Grams	Retail Price Euro	Retail Price $	Country of Origin
Strawberry	Top 2 Shelves	225	1.19	$1.61	Germany
Apricot	Top 2 Shelves	225	1.19	$1.61	Germany
Sour cherry	Top 2 Shelves	225	1.19	$1.61	Germany
Orange Marmalade	Top 2 Shelves	450	1.99	$2.69	Germany
Apricot & Plum	Top 2 Shelves	450	2.29	$3.09	Germany
Strawberry	Top 2 Shelves	370	1.69	$2.28	France
Cherry	Top 2 Shelves	370	1.69	$2.28	France
Red Current	Top 2 Shelves	370	1.69	$2.28	France
Rhubarb	Middle Shelf	250	1.79	$2.42	Germany
Black Cherry	Middle Shelf	250	1.79	$2.42	Germany
Black Current	Middle Shelf	250	1.79	$2.42	Germany
Peach	Middle Shelf	250	1.79	$2.42	Germany
Raspberry	Middle Shelf	250	1.79	$2.42	Germany
Black Currant, Cherry	Lower Middle	340	1.59	$2.15	Germany
Plum, Apricot, Orange	Lower Middle	340	1.59	$2.15	Germany
Bluberry, Strawberry	Bottom 2 Shelves	225	0.79	$1.07	Germany
Raspbery, Apricot	Bottom 2 Shelves	225	0.79	$1.07	Germany
Black Berry, Rhubarb	Bottom 2 Shelves	225	0.79	$1.07	Germany
Variety of flavors	Bottom 2 Shelves	450	1.69	$2.28	Germany

Table 11. Germany: Juice Market Survey Average-January 2004

Product	Shelf Space Allocation	Packaging Size Liters	Retail Price Euro	Retail Price $	Country of Origin
Orange Juice	Varied by display	1	0.95	$1.28	Germany
Apple Juice	Varied by display	1	0.95	$1.28	Germany
Grape Fruit Juice	Varied by display	1	0.96	$1.30	Germany
Mixed Fruit Juice	Varied by display	1	0.98	$1.32	Germany
Black Currant	Varied by display	1	1.26	$1.70	Germany

Market Opportunities

The strong demand for processed fruit applications for the dairy sector likely provides the best opportunity for Egypt. Aseptic preserves with lower sugar content in an industrial sized containers to the end user's speciation, provides the best opportunity. The German company that will further process this product likely will assist with the necessary product registration requirements.

Herbs and spices

The three main spice merchants in Germany are Fuchs, Ubena, and Ostmann Gewürze, and each study respondent took pains to emphasize their poor experience with imported products that did not meet customer standards. As one trader put it, "If buying on price, this usually meals that quality is lost in the trade," and several indicated that they had developed long ongoing relationships with suppliers, or they hold a stake in the production of spice products and are unlikely to switch to another supplier. In addition, there is a significant concern that Egyptian products will be unable to meet their requirements because of pesticide residues that show up when tested. A new list of prohibited pesticides is currently being considered.

Market Opportunities

The best opportunities with the widest potential margin appears to be to develop a co-packing supply agreement for a German firm's to supply under a super market chain's name brand. With this scenario, the grocery market will provide assistance with registration requirements, packaging materials and distribution in Germany. The other option is to develop a relationship with a large food processor requiring specific blends for specific processed food products.

Table Olives and Olive Oil

Well traveled Germans and large immigration populations have a strong appetite for table olives and olive oil. UN export data suggests that the main destination for Egyptian olives is the EU. At the mass-market consumer level, the main supplies are the member states of Spain, Italy and to a less existent Greece. These member states will likely continue to have the upper hand in consumer markets.

Market Survey

Shelf allocation was in close proximity to other canned or pickled products like peppers, marinated mushrooms and the like. Olive oil was usually in close proximity. Regarding olive oil selection, there were only a couple name brands offered. There was only once section of shelving less than what is allocated for table olives.

Table 12. Germany:Table Olives & Olive Oil Market Survey Average-January 2004

Product	Shelf Space Allocation	Packaing Size Grams	Retail Price Euro	Retail Price $	Country of Origin
Garlic olives	Upper Shelf	170	1.98	$2.68	Spain
Olive w/ Almond	Upper Shelf	140	1.58	$2.14	Spain
Green Olive Pitted	Upper Shelf	170	1.88	$2.54	Spain
Green Olive w/ seeds	Middle Shelf	200	1.58	$2.14	Spain
Olive w/ pepper	Middle Shelf	350	1.78	$2.41	Spain
Geeen Olives	Lower Shelf	930	2.78	$3.76	Spain
Green Olive (foil pouch)	Lower Shelf	500	1.58	$2.14	Spain
Black Olive (foil pouch)	Lower Shelf	500	1.68	$2.27	Spain
		In Liters			
Extra Virgin Olive Oil	Upper Shelf	0.5	4.29	$5.80	Italy
Extra Virgin Olive Oil	Upper Shelf	0.5	4.59	$6.20	Spain
Extra Virgin Olive Oil	Upper Shelf	0.5	4.89	$6.61	Italy
Extra Virgin Olive Oil	Middle Shelf	0.75	6.29	$8.50	Spain
Extra Virgin Olive Oil	Middle Shelf	0.5	3.86	$5.22	Italy
Extra Virgin Olive Oil	Middle Shelf	1	7.29	$9.85	Italy
Extra Virgin Olive Oil	Lower Shelf	1	6.89	$9.31	Italy
Extra Virgin Olive Oil	Lower Shelf	0.75	5.69	$7.69	Greece

Market Opportunities

To penetrate the consumer market for table olives may be a tall order. But, because it is the largest market and there are no local producers to contend with, there will be some segment of the market for Egyptian table olives and olive oil. There are two main tracks the co-packing agreement with a large grocery store chain. Alternatively there is name branding and product diversification, buy adding a twist by putting baby onions in the pitted olives or a clove of garlic rather than pimentos. With olive oil other herbs or spices could be added to enhance the flavor and differentiate from other products. This would be offered only as a premium product and the sales volume of such products would not be as large. The price would have to be high enough to offset the costs of satisfying all of Germany's certification and testing requirements for consumer food products.

IV. Summary & Conclusions

The study concludes that short-term production and trade impacts likely will be relatively small, and have been well-anticipated by most industry sectors although there are some major remaining questions of EU policy. For example, the price supports and payment regimes available to the new members likely will be very substantially different than those now offered in the EU-15—especially as the EU negotiates future trade policies in the Doha Round trade negotiations in an effort both to liberalize trade policies and to reduce budget exposure. The longer-term result expected by a number of study respondents is that EU agricultural policies could move substantially closer to the policies already existing in some of the accession states.

In recent years, Germany has increasingly relied on imports of all types of fruits and vegetables, a trend that is continuing and accelerating. A significant share of this growth is driven by food processors who are extending their sources. However, in the case of vegetables, retail and direct consumer markets are the main destination for supplies.

Note on the importance of quality

German importers and commercial representatives begin nearly every conversation concerning possible trade with Egypt with observations regarding non-price aspects of their markets. They believe that suppliers who anticipate market needs in terms of product quality and presentation have an enormous advantage, provided that they can meet the scheduling and market-capacity requirements. They include in their discussions assurances that competition on price is important, but perhaps less so than other product characteristics including basic quality, freshness and product presentation. In addition, there is a modest residue of concern that Egyptian product quality will not "measure up," based on some previous experience—perhaps a small but important handicap that Egyptian marketers face in a number of commercial German markets, based on the project team's recent discussions.

Key Observations

Developing direct access to consumer markets will be difficult, but could become increasingly attractive. Germany has a mature well-developed and efficient food distribution system with many consumer protections. At the same time, there is fierce competition between large grocery chains, which may provide Egyptian producers a market opportunity to supply product under a grocery store's name providing quality and volume requirements can meet EU standards.

In most cases, industrial markets likely will provide best access for Egyptian processors. To comply with the extensive, specific product registration and certifications requirements of consumer markets, supplying German processors semi-processed products may provide quicker access. This could take any of the following forms:

- Frozen strawberries for use in preserves or other food applications.
- Dried onions in flake or powdered form for highly processed foods.
- Bulk supplier of herbs and spices for grocery-store band name products.

Most contacts interviewed first voiced concerns regarding product quality. Secondly, they made overtures regarding the capacity and stability of supplies. While this is always an easy argument for buyers, it is an issue that the Egyptian growers and food processing industry should try to address. Attempts to increase the profile of Egyptian products as having world-class quality and/or address the purity of agricultural products is important.

Germany is in the process of updating is regulations on pesticides, which was mentioned as an issue with Egyptian products. Inquiries on the latest information should be made to the following:

Federal Ministry of Consumer Protection, Food and Agriculture
Referat 313 – Rueckstaende U. Kontaminanten in Lebensmitteln
Rochusstr. 1
53123 Bonn, Germany
Tel: (49) 228 529-4659
Fax: (49) 228 529-4262
Website: www.verbraucherministerium.de

Logistical concerns regarding Egypt. As one trader put it, "Logistically, South America is closer to Europe than Egypt." Mention was made about the lack of refrigerator trucks in Egypt, and the capacity of the cold chain. This is important not only for finished products leaving the country, but also the travel time from the field to the processor. It also was expressed in term of the capacity of suppliers to guarantee the freshness of products, and to prevent loss of important quality characteristics.

Growing security concerns could mean an advantage for Egypt. One company representative mentioned last year while traveling in the Middle East, there was an explosion at his hotel he was staying. After the event, there were very serious discussions in the company regarding continuing business relationships in the region. Egypt may be able to capitalize on its security record and its capacity to make visiting business executives feel welcome and comfortable—a factor that could help stimulate favorable decisions concerning reliance on Egyptian products.

V. APPENDICES

Appendix I – German Data

Table A1. Freight Rates from Main Egyptian Ports to Germany

Alexandria, Damietta and Port Said to Bremerhaven:

Dry	20'	40'dry
base	eur 330	483
handling fee (Egypt) :	egp 140	260
baf :	eur 48	96
import admin fee :	eur 15	15
b/l issuing fee :	egp 50	50
handling fee (Germany) :	eur 158.50	158.50

Refrigerated	20'	40'rfr
base :	usd1500	2400
handling fee :	egp 140	260
baf :	eur 48	96
import admin fee :	eur 15	15
b/l issuing fee :	egp 50	50
handling fee (Germany) :	eur 158.50	158.50

Table A2. Germany: Fruits for Consumer Markets

Country	1998	1999	2000	2001	2002
			1,000 MT		
Germany	1,218	1,330	1,443	1,190	970
France	2,977	3,733	3,717	3,368	3,450
Italy	9,941	11,051	10,970	10,759	11,020
Netherlands	694	759	744	590	570
Belgium	614	760	741	469	500
UK	312	351	294	323	250
Greece	2,472	3,302	3,129	2,604	2,600
Spain	9,682	10,708	10,213	10,767	10,300
Portugal	719	929	867	861	1,010
Austria	180	226	233	220	240
EU-15	28,925	33,281	32,493	31,286	31,050
Table Apples	7,441	8,406	8,255	7,566	7,220
Table Berries	2,394	2,339	2,365	2,141	2,240
Peaches/Nectarines	3,216	4,313	4,273	4,122	4,030
Apricots	411	633	552	502	600
Cherries	323	460	496	398	450
Plums	569	620	641	662	660
Strawberries	835	925	907	850	810
Kiwis	328	450	505	364	410
Oranges	5,110	6,143	5,844	5,875	5,780
Mandarins	2,344	2,855	2,566	2,496	2,670
Lemons	1,518	1,459	1,600	1,580	1,540
Grapes	2,188	2,197	2,206	2,246	2,230

Source: EUROSTAT-Datenbank, CRONOS, C.L.A.M., Eurofru, ZMP

Table A3. Germany: Fruit Production

Fruit	2000	2001	2002
		MT	
Strawberries	27,254	29,609	27,876
Raspberries	1,241	1,165	938
Blackberries	221	251	200
Red Currant	3,179	3,206	2,465
Black Currant	945	736	557
Gooseberries	747	557	696
Blueberries	x	239	186
Sweet Cherries	13,875	8,159	5,384
Sour Cherries	20,924	14,690	12,748
Black Plums	37,710	27,569	30,547
Greengage	50	50	25
Nancy Plums	2,304	2,269	2,495
Apricots	14	0.3	20
Peaches	132	36	105
Apples	583,867	293	450,428
Pears	17,527	12,706	13,398
Walnuts	99	78	40
Remaining Fruit	1,041	396	379
Total	711,132	658,010	549,488

Source: ZMP

Table A4. Germany: Fruit Prices per 100 KG

Fruit	2000	2001	2002
		Euros	
Strawberries	148.60	162.23	163.77
Raspberries	347.95	373.36	429.14
Blackberries	290.26	342.93	386.92
Red Currant	150.95	159.20	159.65
Black Currant	139.38	125.45	118.97
Gooseberries	201.99	222.10	204.11
Blueberries	NA	344.83	394.80
Sweet Cherries	118.11	160.76	170.38
Sour Cherries	88.93	54.13	60.02
Black Plums	43.51	69.44	58.68
Greengage	54.70	66.53	54.00
Nancy Plums	45.88	120.22	57.49
Apricots	90.00	195.72	120.04
Peaches	82.89	142.62	92.70
Apples	24.16	27.05	32.59
Pears	33.41	46.14	38.47
Walnuts	142.21	178.57	226.58
Remaining Fruit	144.73	73.55	71.79
Total	35.71	39.69	45.03

Source: ZMP

Table A5. Germany: Production of Canned Products

	Year	Amount (MT)	Number of Processors	Value (1,000 Euro)
Sweet Cherries	1998	4,218	10	6,919
	1999	7,303	11	10,066
	2000	6,393	9	8,783
	2001	4,560	7	6,919
	2002	3,600	7	5,985
Sour Cherries	1998	37,255	16	64,554
	1999	44,917	15	67,027
	2000	49,621	14	81,841
	2001	36,268	11	44,297
	2002	34,125	10	34,351
Plum Butter	1998	6,218	8	5,950
	1999	10,612	10	8,991
	2000	8,696	9	7,199
	2001	6,442	7	4,815
	2002	6,228	7	4,760
Apple Sauce	1998	43,833	10	17,398
	1999	50,669	9	19,129
	2000	53,085	10	20,094
	2001	46,192	8	18,033
	2002	58,837	8	22,474
Other Apple Processings	1998	7,408	4	6,567
	1999	5,719	4	4,970
	2000	4,583	4	3,484
	2001	6,069	4	4,819
	2002	x	2	x
Other Fruits	1998	42,150	30	72,990
	1999	56,695	30	84,422
	2000	80,570	31	120,147
	2001	94,057	25	140,621
	2002	91,475	27	140,552
Total	1998	141,082		174,378
	1999	175,915		194,605
	2000	202,948		241,549
	2001	193,588		219,505
	2002	194,265		208,122

Source: Statistisches Bundesamt, Wiesbaden

Table A6. Germany: Imports & Exports of Canned or Preserved Fruit

	1999		2000		2001		2002	
	Import	Export	Import	Export	Import	Export	Import	Export
	MT							
Sour Cherries with Sugar								
Over 1 kg	10,119	6,660	9,335	3,812	8,348	5,969	6,856	6,297
Under 1 kg	12,204	545	11,991	450	15,215	1,055	22,054	1,081
Steamed Sour Cherries								
Over 4.5 kg	269	53	156	27	692	67	1,465	137
Under 4.5 kg	1,587	209	2,283	53	1,511	254	1,854	68
Sweet Cherries with Sugar								
Over 1 kg	139	2,739	17	2,526	734	4,528	515	4,573
Under 1 kg	4,076	586	3,042	424	1,508	389	1,447	451
Steamed Sweet Cherries								
Over 4.5 kg	x	26	4	4	16	10	9	10
Under 4.5 kg	50	9	82	18	97	26	134	21
Strawberries with Sugar								
Over 1 kg	9,098	14,324	10,930	14,506	8,282	18,864	7,704	23,022
Under 1 kg	5,087	209	4,365	252	5,165	222	4,103	114
Steamed Strawberries								
Over 4.5 kg	1,167	1,691	2,283	1,451	2,204	1,471	2,434	1,980
Under 4.5 kg	259	29	179	4	45	12	27	1
Plums with Sugar								
Over 1 kg	1,030	2,081	907	1,620	738	2,244	694	3,146
Under 1 kg	1,370	200	1,531	228	712	271	2,147	342
Steamed Plums								
Over 4.5 kg	227	53	242	54	377	32	115	31
Under 4.5 kg	340	71	357	130	189	72	180	77
Applesauce								
Under 13% Sugar	9,613	77	7,776	63	5,491	56	5,587	131
13-30% Sugar	13,200	2,562	13,956	5,306	18,982	6,700	20,436	9,775

Source: Statistisches Bundesamt, Wiesbaden

Table A7. Germany: Imports of Sour Cherries with Sugar in Packaging under 1 KG

	Amount *100 kg*		Value *Euros*	
	2002	**2001**	**2002**	**2001**
France	11	175	4,000	62,889
Netherlands	36,300	27,531	4,114,000	4,024,000
Italy	456	568	160,000	196,336
Denmark	x	3	x	511
Belgium	2,544	374	476,000	96,634
Turkey	2,868	15,469	273,000	1,588,073
Poland	209	4,269	17,000	453,005
Hungary	175,449	99,972	13,129,000	9,366,867
Bulgaria	199	814	18,000	69,024
Moldova	x	89	x	5,624
Yugoslavia	763	141	76,000	15,339
South Africa	163	151	6,000	10,226
USA	1,581	2,593	192,000	379,379
Total	220,543	152,149	18,465,000	16,268,797

Source: Statistisches Bundesamt, Wiesbaden

Table A8. Germany: Strawberry Imports (0811 10 90)

	1998	1999	2000	2001	2002
			MT		
Spain	10,339	10,156	7,854	4,878	4,359
Netherlands	4,560	2,943	3,843	2,688	1,402
Belgium/Luxembourg	3,462	3,603	2,118	1,712	2,681
France	1,471	1,233	205	170	420
Italy	1,431	456	401	71	267
Austria	569	401	137	44	399
Denmark	x	x	x	1,606	4,489
Other EU	535	346	93	167	1,357
EU Total	22,367	19,138	14,651	11,336	15,374
Poland	40,994	40,414	52,779	72,136	69,737
Turkey	6,102	2,934	2,076	2,449	3,262
China	3,192	4,314	3,212	3,469	4,712
Yugoslavia	1,293	1,299	547	1,148	1,321
Bulgaria	433	350	77	243	585
Morocco	595	651	841	702	2,905
Mexico	644	945	70	x	x
Ecuador	44	597	x	x	x
Other Countries	498	1,408	81	109	350
Total	76,162	72,050	74,334	91,592	98,246

Table A9. Germany: Sweet Cherry Imports (0811 90 80)

	1998	1999	2000	2001	2002
			MT		
Belgium/Luxembourg	1,179	636	196	68	47
Greece	971	1,029	1,367	1,560	1,868
Netherlands	377	406	87	98	99
Frace	7	145	42	38	47
Other EU	186	44	117	216	231
EU Total	2,720	2,260	1,809	1,980	2,292
Turkey	674	523	464	1,169	674
Poland	49	x	30	22	138
Hungary	30	20	x	149	94
Other Countries	80	289	309	280	251
Total	3,553	3,092	2,612	3,600	3,449

Table A10. Germany: Imports of Sour Cherries (0811 90 75)

	1998	1999	2000	2001	2002
			MT		
Netherlands	2,243	1,904	2,186	1,251	1,457
Belgium/Luxembourg	1,958	1,090	987	912	479
Italy	3	16	99	x	25
Austria	96	82	165	130	91
Denmark	7	233	80	940	751
Greece	43	66	401	211	21
Great Britian	100	60	22	x	175
Other EU	27	125	28	83	170
EU Total	4,477	3,576	3,968	3,527	3,169
Poland	28,467	31,304	43,576	40,439	32,548
Yugoslavia	9,781	8,483	6,705	5,699	10,405
Turkey	968	1,467	561	593	490
Czech Republic	1,209	1,206	1,611	1,324	1,769
Hungary	902	509	719	869	1,758
Macedonia	837	958	754	637	500
USA	1,223	254	172	42	18
Other Countries	544	751	1,834	1,206	600
Total	**48,408**	**48,508**	**59,900**	**54,336**	**51,257**

Table A11. Germany: Origins of other Frozen Fruit Imports (0811 90 85)

	1998	1999	2000	2001	2002
			MT		
Greece	8,630	8,444	10,853	10,419	11,513
Netherlands	2,942	2,153	1,803	1,693	1,498
France	3,653	3,804	3,335	2,400	2,283
Belgium/Luxembourg	3,005	4,401	4,040	2,160	2,225
Italy	3,686	4,740	4,210	5,411	4,683
Finland	2,269	494	1,524	1,783	1,243
Spain	2,160	1,692	2,145	2,238	2,043
Other EU	1,494	1,618	2,365	1,894	2,373
EU Total	27,389	27,346	30,275	27,998	27,861
Poland	7,984	6,501	5,398	7,770	15,106
Turkey	2,308	2,335	1,858	2,151	1,798
Hungary	4,005	2,589	3,280	2,459	2,913
Bulgaria	1,309	1,873	2,398	1,795	1,033
Yugoslavia	5,478	6,039	6,455	8,501	4,404
	1,043	889	95	265	291
Czech Republic	1,877	2,234	1,751	2,192	1,272
Slovakia	541	798	530	442	396
Brazil	3,864	2,024	1,857	1,398	1,381
China	1,103	1,000	1,161	1,291	1,894
Other Countries	6,837	5,852	6,230	6,007	7,533
Total	64,188	59,480	61,288	62,239	65,882

Table A12. Germany: Imports of Canned Goods

	1998	1999	2000	2001	2002
			MT		
Asparagus	38,406	35,203	50,843	42,390	41,015
Peas	38,609	36,460	27,708	36,523	37,249
Green/Wax Beans	76,740	71,998	57,799	65,812	66,344
Artichokes	4,162	4,998	4,356	4,432	4,546
Sweet Corn	52,975	65,941	66,475	80,730	78,107
Capcium	2,735	2,676	3,653	2,398	2,599
Release Beans	37,304	39,547	38,746	45,942	43,531
Olives	22,259	16,382	23,979	36,169	23,711
Carrots	7,231	6,673	4,974	5,356	4,932
Vegetable Medley	86,905	88,862	72,132	81,176	88,379
Other Vegetables	72,094	57,923	68,647	73,628	67,133

Source: Statistisches Bundesamt

Table A13. Germany: Exports of Canned Goods

	1998	1999	2000	2001	2002
			MT		
Asparagus	4,996	5,330	7,080	8,269	8,710
Peas	1,030	966	710	600	392
Green/Wax Beans	1,777	2,437	2,255	3,879	5,576
Artichokes	414	621	515	420	564
Sweet Corn	5,741	9,057	9,754	9,800	7,265
Capcium	86	61	195	330	356
Release Beans	8,671	8,225	8,111	2,968	2,221
Olives	2,088	724	1,677	1,892	1,771
Carrots	157	137	146	195	101
Vegetable Medley	1,123	2,866	4,132	5,379	8,369
Other Vegetables	6,469	5,266	6,799	7,149	7,820

Source: Statistisches Bundesamt

Table A14. Germany: Imports of Frozen Vegetables

	1998	1999	2000	2001	2002
			MT		
Peas	29,954	28,576	27,435	41,268	32,621
Beans	31,699	32,158	30,863	34,409	32,063
Other Legumes	4,008	3,916	4,221	4,962	4,903
Spinach	23,946	18,258	16,454	21,495	22,348
Sweet Corn	10,863	12,085	11,637	13,233	13,116
Olives	147	138	97	125	148
Peppers	19,743	20,329	25,329	33,173	26,907
Mushrooms	19,469	19,025	20,683	23,461	24,939
Artichokes	150	192	145	184	180
Asparagus	5,548	7,085	6,421	9,819	7,990
Other Vegetables	184,665	204,681	200,150	281,856	240,912
Vegetable Medley	46,621	48,687	50,859	66,572	60,251

Source: Statistisches Bundesamt

Table A15. Germany: Exports of Frozen Vegetables

	1998	1999	2000	2001	2002
			MT		
Peas	4,426	3,104	4,625	4,570	6,144
Beans	5,434	2,324	2,599	5,244	4,576
Other Legumes	26	95	59	52	80
Spinach	7,201	7,878	3,012	2,860	2,406
Sweet Corn	3,422	2,451	2,689	2,373	3,892
Peppers	2,446	1,756	3,279	3,065	2,437
Mushrooms	1,441	995	1,221	2,928	1,795
Asparagus	423	353	380	782	1,220
Other Vegetables	21,046	28,050	23,838	40,578	40,942
Vegetable Medley	5,526	5,764	7,453	7,774	7,173

Source: Statistisches Bundesamt

Table A16. Germany: Imports of Deep Frozen Vegetables

	1998	1999	2000	2001	2002
			MT		
Peas	30,951	29,418	29,914	46,624	32,622
Beans	32,804	33,625	33,252	39,765	32,065
Spinach	25,329	18,987	17,713	25,040	22,347
Corn	10,985	12,165	12,312	14,289	13,116
Asparagus	5,930	7,166	6,512	9,917	7,991
Potatoes	8,336	7,299	5,035	7,085	4,896
Other Vegetables*	196,123	210,081	214,416	281,865	24,912

*Other Vegetables include cauliflower, broccoli, kohlrabi, kale and brussels sprouts.

Table A17. Germany: Imports of Peas (0710 21)

	1998	1999	2000	2001	2002
			MT		
Belgium/Luxembourg	13,289	15,203	16,155	20,535	15,308
Great Britain	2,349	1,919	807	316	224
Sweden	3,282	3,070	4,023	3,354	4,119
Netherlands	1,338	956	1,076	2,095	2,861
Denmark	1,181	44	280	1,568	624
France	2,362	2,107	2,839	2,427	1,656
Other EU	208	362	460	958	723
EU Total	24,009	23,661	25,640	31,253	25,515
China	233	761	672	1,066	1,202
Hungary	3,241	3,764	2,668	6,388	2,852
Poland	3,175	979	854	5,486	1,423
Yugoslavia	NA	NA	NA	2,118	1,533
Other Countries	293	253	80	313	97
Total	**30,951**	**29,418**	**29,914**	**46,624**	**32,622**

Table A18. Germany: Production of Dry Vegetables (w/out Mushrooms and Onions)

	Tons	Number of processors	Value Euros
1st Quarter	2,617	9	8,588
2nd Quarter	2,586	10	8,329
3rd Quarter	2,415	9	8,221
4th Quarter	2,654	8	8,145
1997 Total	**10,273**	**11**	**32,771**
1st Quarter	2,687	9	8,327
2nd Quarter	2,344	8	8,091
3rd Quarter	2,204	8	7,537
4th Quarter	2,444	7	7,395
1998 Total	**9,874**	**9**	**31,350**
1st Quarter	2,306	8	8,107
2nd Quarter	2,497	10	7,403
3rd Quarter	3,033	9	11,237
4th Quarter	2,377	9	8,233
1999 Total	**10,213**	**11**	**32,796**
1st Quarter	2,345	9	8,204
2nd Quarter	2,465	9	8,826
3rd Quarter	2,373	10	7,557
4th Quarter	2,530	9	7,503
2000 Total	**9,712**	**10**	**32,090**
1st Quarter	3,124	10	9,368
2nd Quarter	2,566	11	8,604
3rd Quarter	2,738	10	7,865
4th Quarter	2,184	8	8,727
2001 Total	**10,622**	**11**	**34,565**
1st Quarter	2,736	11	8,453
2nd Quarter	3,245	12	9,332
3rd Quarter	3,163	11	8,868
4th Quarter	3,637	10	11,008
2002 Total	**12,781**	**11**	**37,661**

Table A19. Germany: Imports of Raisins (0806 20)

	1998	1999	2000	2001	2002
			MT		
Greece	7,284	8,990	6,415	5,372	4,477
Netherlands	180	147	695	1,498	1,003
Turkey	36,177	38,729	39,867	42,500	44,180
USA	9,207	4,979	5,618	6,579	6,686
Australia	2,992	1,454	2,038	1,394	1,718
South Africa	3,123	3,914	2,786	2,746	3,725
Iran	2,197	3,491	5,651	1,304	2,094
Chile	272	1,167	401	295	286
Belgium	NA	NA	NA	1,461	2,522
Other Countries	1,544	533	1,722	598	1,372
Total Imports	62,976	63,404	65,193	63,747	68,063
Re-Export	4,511	4,776	4,138	3,483	2,560
Net Imports	**58,465**	**58,628**	**61,055**	**60,264**	**65,503**

Table A20. Germany: Imports of Dried Apricots (081310)

	1998	1999	2000	2001	2002
			MT		
Italy	122	6	29	7	18
Spain	11	10	27	15	8
France	197	254	176	198	180
Turkey	5,679	5,556	6,080	7,886	6,979
Iran	741	595	550	292	453
South Africa	84	41	26	24	9
USA	17	NA	20	18	NA
Pakistan	1	1	5	3	2
China	17	NA	NA	NA	54
Other Countries	112	92	192	239	403
Total Imports	6,981	6,555	7,105	8,682	8,106
Re-Export	1,010	778	680	618	640
Net Imports	**5,971**	**5,777**	**6,425**	**8,064**	**7,466**

Table A21. Germany: Imports of Figs (0804 20 90)

	1998	1999	2000	2001	2002
			MT		
Greece	641	405	331	444	121
France	170	346	214	81	39
Spain	9	1	19	12	9
Turkey	8,721	9,916	8,478	7,858	8,116
Iran	NA	NA	NA	718	541
Other Countries	86	172	601	131	56
Total Imports	9,627	10,840	9,643	9,244	8,882
Re-Export	1,236	1,368	1,521	806	637
Net Imports	8,391	9,472	8,122	8,438	8,245

Table A22. Germany: Imports of Dates (0804 10)

	1998	1999	2000	2001	2002
			MT		
France	669	504	285	282	347
Tunisia	3,296	3,151	4,145	4,121	4,028
Iran	868	875	998	1,054	1,135
Pakistan	396	711	339	168	202
Israel	321	328	307	246	389
Turkey	172	191	162	204	362
USA	122	175	150	81	46
Algeria	178	181	53	142	178
Egypt	143	101	61	104	117
Other Countries	35	66	121	87	242
Total Imports	6,200	6,283	6,621	6,489	7,046
Re-Export	855	760	658	784	885
Net Imports	5,345	5,523	5,963	5,705	6,161

Table A23. Germany: Production of Marmalade, Jams, Jellies, Fruit Applications and Plum Butter 2002.

Marmalade, Fruit Applications, Jellies From Citrus Fruits (Commodity Number 253325.507)			
	Quantity (MT)	**Processors**	**Value (1,000 Euro)**
Quarter I	2,331	13	3,887
Quarter II	2,558	13	3,954
Quarter III	2,392	13	3,523
Quarter IV	2,460	13	3,765
Total	**9,741**		**15,129**
Jams, Jellies and Fruit Applications Without Apple or Plum Butter (Commodity Number 253325.507)			
Quarter I	57,926	26	94,113
Quarter II	59,981	26	94,933
Quarter III	55,707	28	86,776
Quarter IV	56,205	28	91,934
Total	**229,756**		**367,756**
Production of Plum Butter (Commodity Number 153322903)			
Quarter I	2,810	10	5,346
Quarter II	3,084	9	6,432
Quarter III	2,922	11	6,100
Quarter IV	3,058	11	6,296
Total 2002	11,847		24,174
Total 2001	11,425		21,324
Total 2000	12,590		26,409
Total 1999	14,395		26,809

Source: Statistisches Bundesamt, Wiesbaden

Table A24. Germany: Concentrated Apple Juice Balance Sheet Converted to 70.5 Brix

Marketing Year begins in July	2001	2002	2003 F
		MT	
Delivered to Processors	536,000	590,000	0
Beginning Stocks	191,400	190,000	187,000
Prodcution	63,000	69,000	58,500
Imports	363,551	400,000	420,000
TOTAL SUPPLY	617,951	659,000	665,500
Exports	118,000	140,000	115,000
Domestic Consumption	309,951	334,000	380,500
Ending Stocks	190,000	185,000	170,000
TOTAL DISTRIBUTION	617,951	659,000	665,500

Source: USDA Foreign Agricultural Service (F - Forecast)

Table A25. Germany: Total Spice Imports Amount, Value and % Change Previous Year

	Import Amount MT	% Change to Previous Year	Value in Euro (000)	% Change to Previous Year
1991	52,973	+9.7	103,556	+1.2
1992	52,491	-0.9	97,866	-5.5
1993	51,459	-2.0	96,325	-1.6
1994	51,594	+0.3	106,569	+10.6
1995	53,757	+4.2	112,157	+5.2
1996	54,463	+1.3	112,005	-0.1
1997	62,290	+14.4	162,098	-44.7
1998	56,017	-10.1	172,124	+6.2
1999	59,724	+6.6	190,421	+10.6
2000	60,340	+1.0	201,193	+5.7
2001	63,076	+4.5	181,075	-10.0
2002	66,443	+5.3	175,985	-2.8

Source: Amtliche Aussenhandelsstatistik 2002.

Table A26. Germany: Spice Imports in MT

	1999	2000	2001	2002	% Change
		MT			
Pepper	19,374	17,742	19,786	20,516	3.7
Paprika	10,004	9,570	11,585	11,243	-3.0
Cinnamon	1,883	1,433	1,423	1,428	0.4
Clove	470	399	443	479	8.1
Nutmeg	2,317	2,146	1,885	1,382	-26.7
Mace	468	397	420	587	39.9
Cardamom	323	355	308	427	38.6
Coriander	2,867	3,524	2,981	3,603	20.9
Caraway	2,676	3,223	2,831	2,774	-2.0
Ginger	2,110	2,399	2,301	2,623	14.0
Other	17,232	19,152	19,115	21,383	11.9
Total	**59,724**	**60,339**	**63,076**	**66,443**	**5.3**

Source: Amtiliche Aussenhandelsstatistik 2002.

Table A27. Germany: Spice Imports in Euros (000).

	1999	2000	2001	2002	% Change
		(000) Euros			
Pepper	95,276	87,384	52,905	40,890	-22.7
Paprika	20,854	22,019	27,570	25,230	-8.5
Cinnamon	3,221	2,478	23,303	2,370	2.9
Clove	953	1,644	3,194	2,996	-6.2
Nutmeg	10,757	15,428	12,012	8,870	-26.2
Mace	4,021	3,820	2,679	3,617	35.0
Cardamom	1,718	2,693	3,365	3,302	1.9
Coriander	1,617	1,618	1,946	2,313	18.9
Caraway	2,399	3,642	3,709	3,729	0.5
Ginger	3,663	4,476	4,532	4,442	-2.0
Other	45,942	55,991	66,860	78,226	17.0
Total	190,421	201,193	181,075	175,985	-2.8

Source: Amtiliche Aussenhandelsstatistik 2002.

Table A28. Germany: Spice Imports, Expert & Domestic Consumption

	Import Amount *MT*	Expert Amount *MT*	Domestic Consumption *MT*
1991	52,973	13,807	39,166
1992	52,491	11,209	41,282
1993	51,459	10,311	41,148
1994	51,594	11,362	40,232
1995	53,757	12,429	41,328
1996	54,463	13,704	40,759
1997	62,290	16,814	45,475
1998	56,017	16,380	39,637
1999	59,724	16,347	43,377
2000	60,340	16,417	43,923
2001	63,076	17,472	45,604
2002	66,443	18,121	48,323

Source: Amtliche Aussenhandelsstatistik 2002.

Table A29. Germany: Selected Spice Percentage of Origin and Value in Euros

Origin of German Imports		
Country	**%**	**Value in Euro**
Pepper (0904 11 00)		
Indonesia	28.9	5,929
Brazil	28.3	5,806
Netherlands	6.5	1,334
India	4.5	923
Vietnam	24.4	5,006
Other origin	7.4	1,518
Paprika (0904 20 90)		
China	10.1	2,548
Brazil	43.9	11,076
Spain	14.9	3,759
Hungary	12.7	3,204
Israel	5.7	1,438
Other origin	12.7	3,204
Coriander (0909 20 00)		
Hungary	8.3	192
Egypt	18.2	421
Bulgaria	34.2	791
Romania	7.6	176
Netherlands	5.5	127
Ukraine	9.4	217
Other origin	16.8	389
Nutmeg (0908 10 00)		
Netherlands	6.1	541
Grenada	56.7	5,029
Indonesia	31.5	2,794
India	1.3	115
Other origin	4.4	390
Caraway (0909 40 00)		
Poland	39.6	1,477
Netherlands	14.5	541
Finland	7.9	295
Spain	4.8	179
Syria	5.1	190
Czech Rep.	5.3	198
Other origin	22.8	850
Cinnamon (0906 10 00)		
Brazil	57.8	825
Indonesia	5.1	73
Sri Lanka	13.4	191
Vietnam	6.2	88
Madagascar	1.7	24
Brazil	12.8	183
Other origin	3	43

Source: Amtliche Aussenhandelsstatistik 2002.

Appendix II. Trip Meeting Contacts

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Spice companies

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Friedrich-Hagemann-Str.56
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http://www.gewuerze.de/

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Telefax Export: +49 (0) 54 29 / 22 00
http://www.fuchs-gewuerze.de/

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Verbraucher Service
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Telefax: (0 54 21) 3 09-20 320
http://www.ubena.de/

Reichold Feinkost GmbH
August-Horch-Straße 4-8
Diez
65582
Tel: 06432/955-0
Fax: 06432/955-111
http://www.matithor.de/

McCormick (U.K.) Plc
Global Food Ingredients - Europe
Thame Road
Haddenham
Buckinghamshire
HP17 8LB
England
Telephone: 44-1844 292-930
Fax: 44-1844 294-397
http://www.mccormick.com/
http://www.ducros.fr/index-en.htm

Appendix III. Sources

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Kölla The Fruit Company, Company Folder.

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Appendix IV. EU Websites

The project team traveled to Brussels on January 12, 2004 to meet with European Commission representatives to obtain EU agricultural trade policy information, which could be used in conjunction with this report regarding export competition and market opportunities for Egypt.

The purpose of this appendix is to provide Egyptian exporters with websites obtained from travel to Brussels, which include regularly updated EU regulations and tariffs. The European Commission develops and operates several databases in conjunction with Member States' Customs and Taxation Services. The databases are part of the information systems of Taxation and Customs Union and can be found at:

http://europa.eu.int/comm/taxation_customs/databases/database.htm

Some of the more useful electronic databases are:

- TARIC – Integrated Community Tariff
- QUOTA – Tariff Quotas and Ceilings
- BTI – Binding Tariff Information
- TRANSIT – Transit Customs Offices

Descriptions of the websites are as follows:

TARIC

One of the more useful databases is TARIC, the Integrated Tariff of the Community. This database contains a nomenclature in all 11 official languages with about 15,000 tariff lines. It shows all third country and preferential duty rates actually applicable as well as all commercial policy measures. For example, the database can be used by Egyptian exporters to obtain tariff information for products it exports to the EU as well as for products exported by competitor countries.

The TARIC comprises the Community legislation as published in the Official Journal of the European Union. It constitutes an instrument for practical use and information, but does not have a legal status in itself. The TARIC serves as a direct basis for the preparation of Member States working tariffs. Another field for the application of TARIC codes is in automated customs clearance. The use of the TARIC codes is obligatory in customs and statistical declarations in trade with third countries.

The database can be found at:

http://europa.eu.int/comm/taxation_customs/dds/cgi-bin/tarchap?Lang=EN

The TARIC query screen allows you to:

- Browse the TARIC publication at any simulation date in the past
- Ask the description context of a specific TARIC code (10 digits)
  - Can enter 6 digits, which are common for most countries, to obtain codes and descriptions for products up to 10 digits.
- Ask the duty rates for a specific TARIC code (10 digits) for one country or all countries
  - In case of import into the EU enter the country of origin of goods (such as Egypt) or leave the field empty to display the community tariff for all possible origins.
  - In case of exports from the EU enter the country of destination of the goods, or leave the field empty to display the community legislation for all possible destinations.
- Ask the restriction for a specific TARIC code (10 digits) for one country or all countries

Quota

For a number of products, a reduction of the customs duty payable is allowed for limited quantities of imports. This limitation takes the form of tariff quotas or of tariff ceilings. Tariff quotas may apply to imports of a specified origin, normally within the framework of preferential tariff arrangements, or to imports of all origins. Recourse to tariff ceilings is normally confined to preferential tariff arrangements.

As the EU is a customs union, tariff quotas and ceilings are managed centrally by the Commission. Taxation and Customs Union DG performs this management in the Commission's name, except in the case of tariff quotas managed by import license, in which case the management is normally the responsibility of Agriculture DG.

The database for tariff quotas and ceilings on the EUROPA web site displays the balances of each tariff quota and ceiling applicable in the present year and in the past year. It also indicates certain other important information, such as the date when a particular tariff quota or ceiling is reached. This information is subject to constant change as a result of the daily operations, which take place. The information on the EUROPA web site is taken on the evening of each working day and is therefore correct at that time. It remains on the web site until the evening of the following working day.

This website can be found at:

http://europa.eu.int/comm/taxation_customs/dds/en/qotcau.htm

BTI

The main objectives of Binding Tariff Information are:

- Providing appropriate legal guarantees to traders
- Ensuring the uniform and correct application of the customs and statistical nomenclature in the whole Community
- Allowing the duty-rates to be established at importation, as well as the application of any other legal provisions which depend on the classification
- Allowing the use of import/export certificates or of advance-fixing certificates under the Common Agricultural Policy, or the calculation of export-refunds, etc.

This website can be found at:

http://europa.eu.int/comm/taxation_customs/databases/bti_en.htm

http://europa.eu.int/comm/taxation_customs/dds/en/ebticau.htm

TRANSIT

The Transit Customs Office List (COL) Home page comprises the list of authorized customs offices for Community/common transit operations. The information on this site is based on the data provided by the competent authorities.

This website can be found at:

http://europa.eu.int/comm/taxation_customs/dds/en/csrdhome.htm

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