



Apples - Review of 2007/08 season

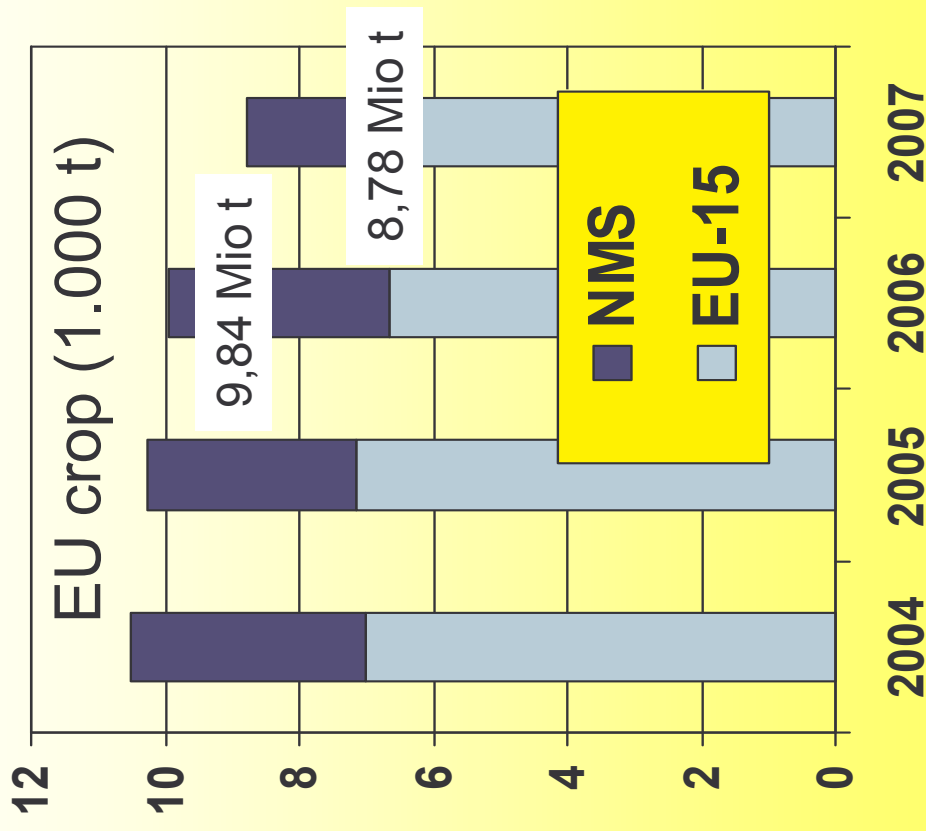
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Season 07/08 profits from extrem factors

Smallest crop since 1991
EU-15 Offer pressure in autumn
High prices for processing support the market for table-apples
Strong demand from East. Europe
Weaker crops at competition products
Weaker apples from southern hemisphere





Market end results for table-apples in EU-15

1.000 t	2004/05	2005/06	2006/07	2007/08f
Market production	6.944	7.093	6.672	7.168
+ Import EU ¹⁾	1.024	787	883	765
- Export EU ¹⁾	407	630	550	800
= Consumption ²⁾	7.557	7.250	7.005	7.133
Per capita (kg)	19,5	18,6	17,9	18,1

Note: 1) 1.8. - 31.7. - 2) Without market losses, incl. processing from table-apples

Source: ZMP / EUROSTAT - f = forecast

First positive balance of trade for the EU-15

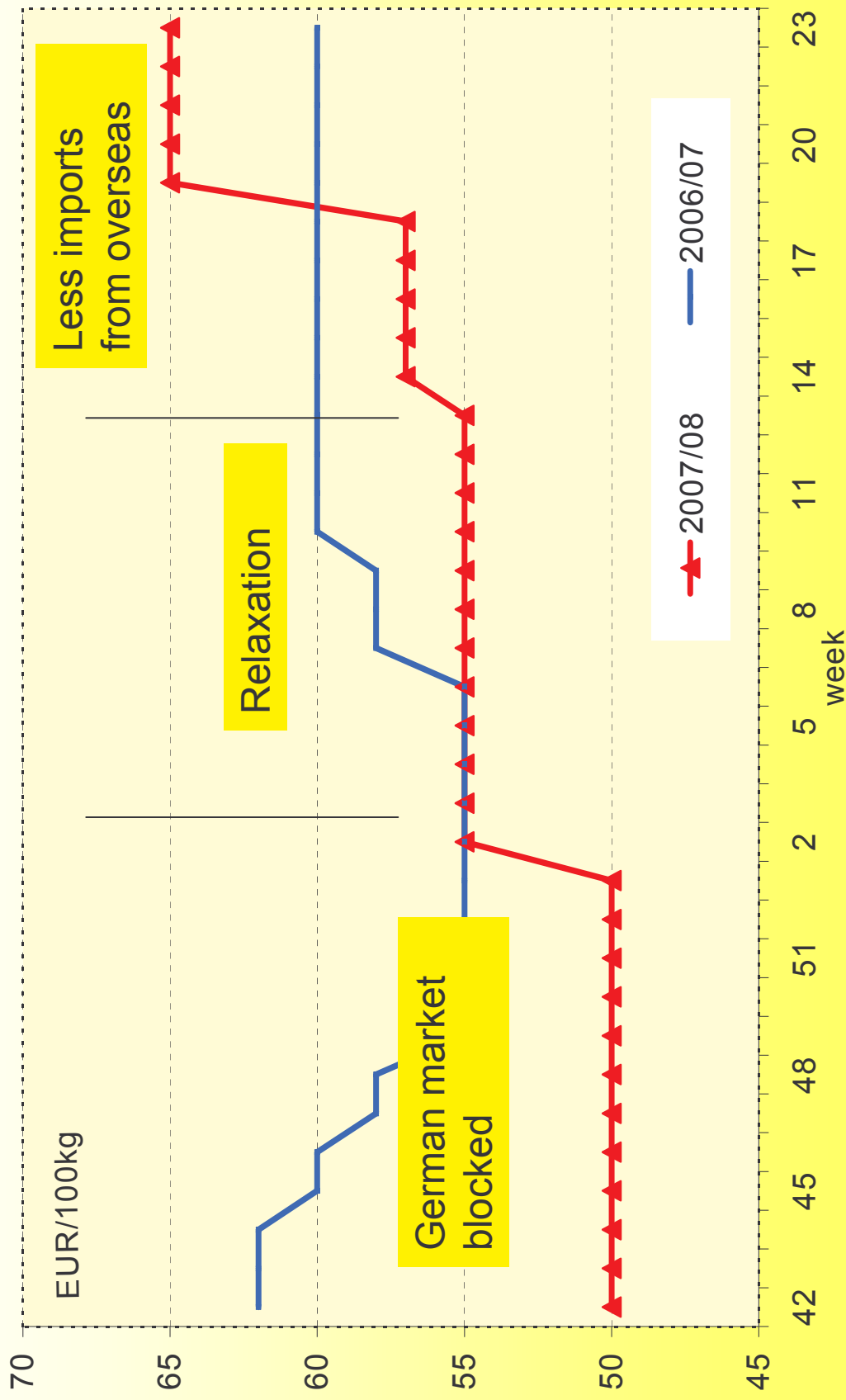


Apple consumption in Western Europe

		2007/08 vs. 06/07%	
Country	Period	Price	Volume
DE	Aug-Jun	+ 3,9	+ 1,6
AT	May-April	+ 7,8	+ 0,3
FR	Aug-July	- 0,4	+ 4,2
UK	52 w/e jun17	+ 0,8	+/-0
NL	52 w/e jun17	+ 2,4	+/-0
IT	Aug-March	+ 9,5	+ 1,9
ES	Aug-April	+ 7,3	+ 3,3
BE	Aug-March	+ 0,9	- 3,4

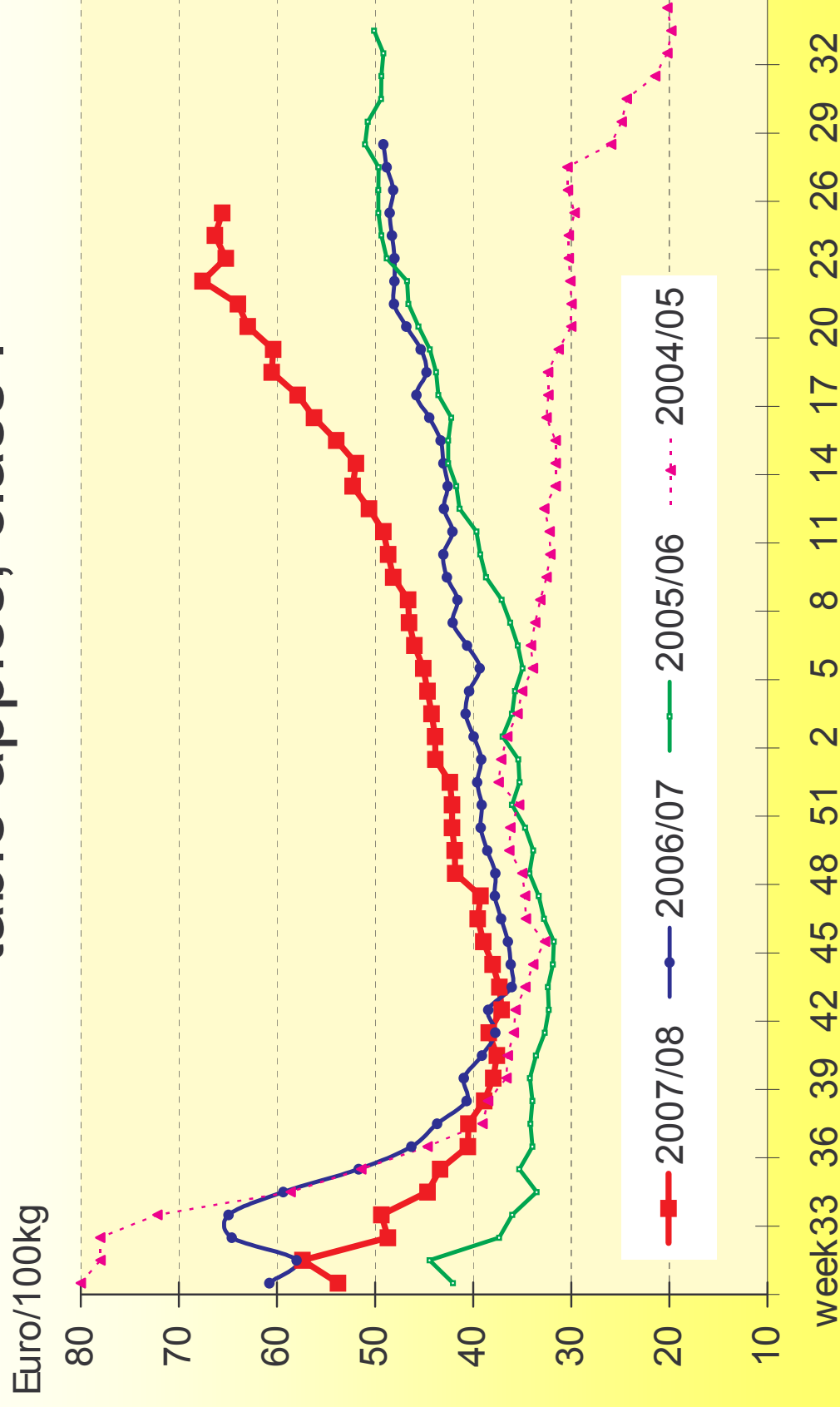


Steiermark: Gala 70mm+ (regional area-prices)





Sales prices P.O. Niederelbe/ Bodenseegebiet table apples, class I



Apple exports from the EU-15 to Eastern Europe in 2007/08 (Sept.-Feb.)





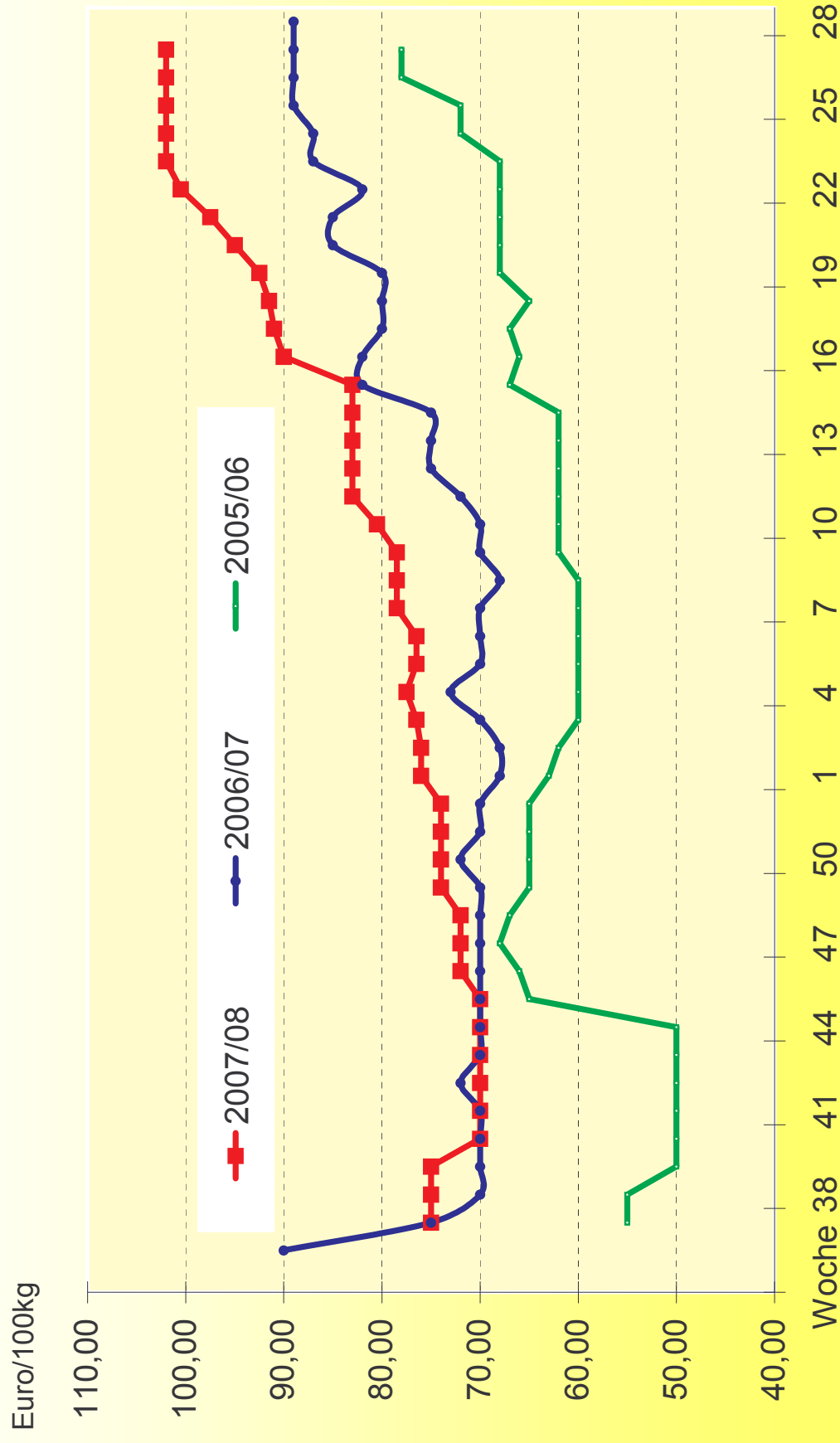
Russia: Apple imports October till March

(1000 t)	04/05	05/06	06/07	07/08	± %
World	409	429	537	544	+ 1
EU-15	59	117	110	151	+ 37
NMS	116	80	182	61	- 66
CIS	155	128	104	136	+ 31
other	79	104	141	196	+ 39

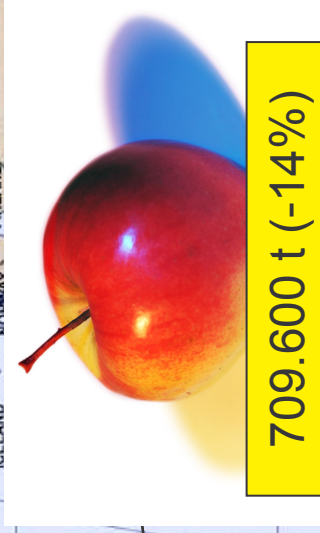
120.000 t less apples imported from NMS



Golden Delicious, prix d'expédition av.SE/SW/Loire (layer 75-80mm)



EU-Import-Licences till
30.KW 2008 (% vs. '07)



USA

18.280 t (-10 %)

709.600 t (-14%)

China

23.900 t (-29%)

Brazil

95.990 t (-5%)

Chile

198.950 t (-3%)

South Africa

136.105 t (+2%)

New Zealand

135.800 t (-30%)

Argentina

76.500 t (-30%)

Apple exports to EU-25



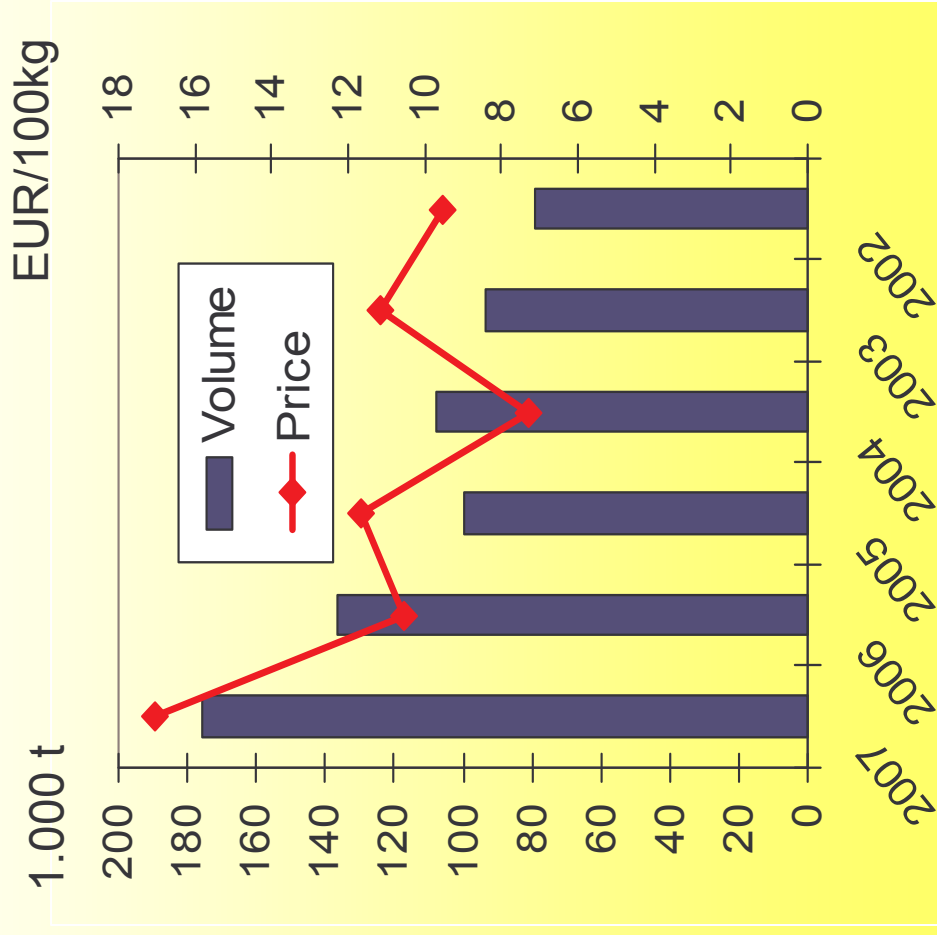
Germany – Producer organizations Sails und prices for processing

August – December 2007
175.000 t ('06 136.000 t)
17,06 EUR ('06 10,52 EUR)

German export and import

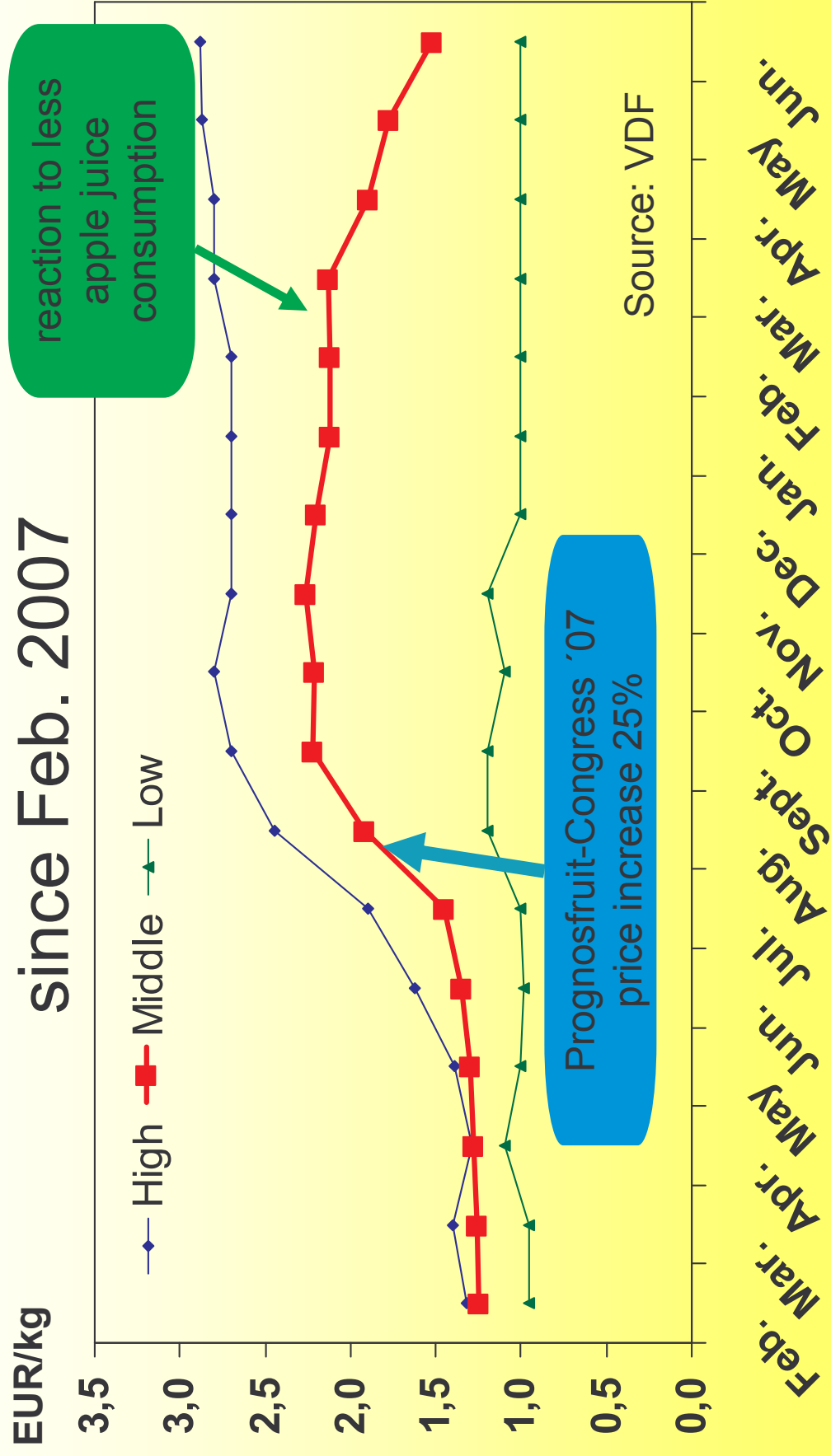
	2007	2006
Exp.	25.800 t	3.800 t
Imp.	71.200 t	115.500 t

VDF- Production apple-juice
2007 = 525 Mio. litre
2006 = 556 Mio. litre





Germany - price development for apple juice concentrate since Feb. 2007





Conclusion:

It was the most successful season for the countries of the EU-15 in years !

Thanks a lot for your attention