Production and marketing of German apples

Hamburg, 4th August 2016

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Overview

1. Introduction of BVEO and BOG
   - Export market development
   - PR campaign „Germany – My Garden."

2. Apple Production in Germany

3. Marketing channels

1. Introduction of BVEO and BOG

Who are we?

BVEO

Germany's union of fruit and vegetable producer organizations is a confederation of 40 members (among them 32 producer organizations) of the German fruit and vegetable industry.

Pome-Producers/Distributers:

BOG

BOG is the professional representation of German fruit and vegetable producers.

Board of trustees:

1. Introduction of BVEO and BOG

Tasks of the organizations in pome sector

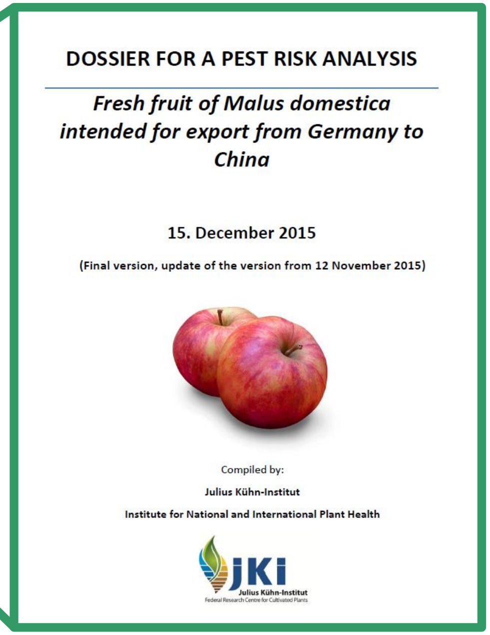
- **Member** of national and international committees, e.g. copa cogeca
- **Comments** at national and international level:
  - common market organization (CMO)
  - marketing standards
  - crop protection
  - etc.
- **Export market development** of third countries for plant products
- **PR campaign** „Germany – My Garden.“

Export market development

Sensitisation of political decision-makers

Coordination between business, government institutions and politics

Parl. State Secretary Bleser passes dossier in China



DOSSIER FOR A PEST RISK ANALYSIS

Fresh fruit of Malus domestica intended for export from Germany to China

15. December 2015

(Final version, update of the version from 12 November 2015)

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1. Introduction of BVEO and BOG

PR campaign „Germany - My Garden.“

Billboard campaign in answer to Russian import ban

Apple cabinett with Chancellor Merkel

German Apple Week: Green Week

2. Apple Production in Germany

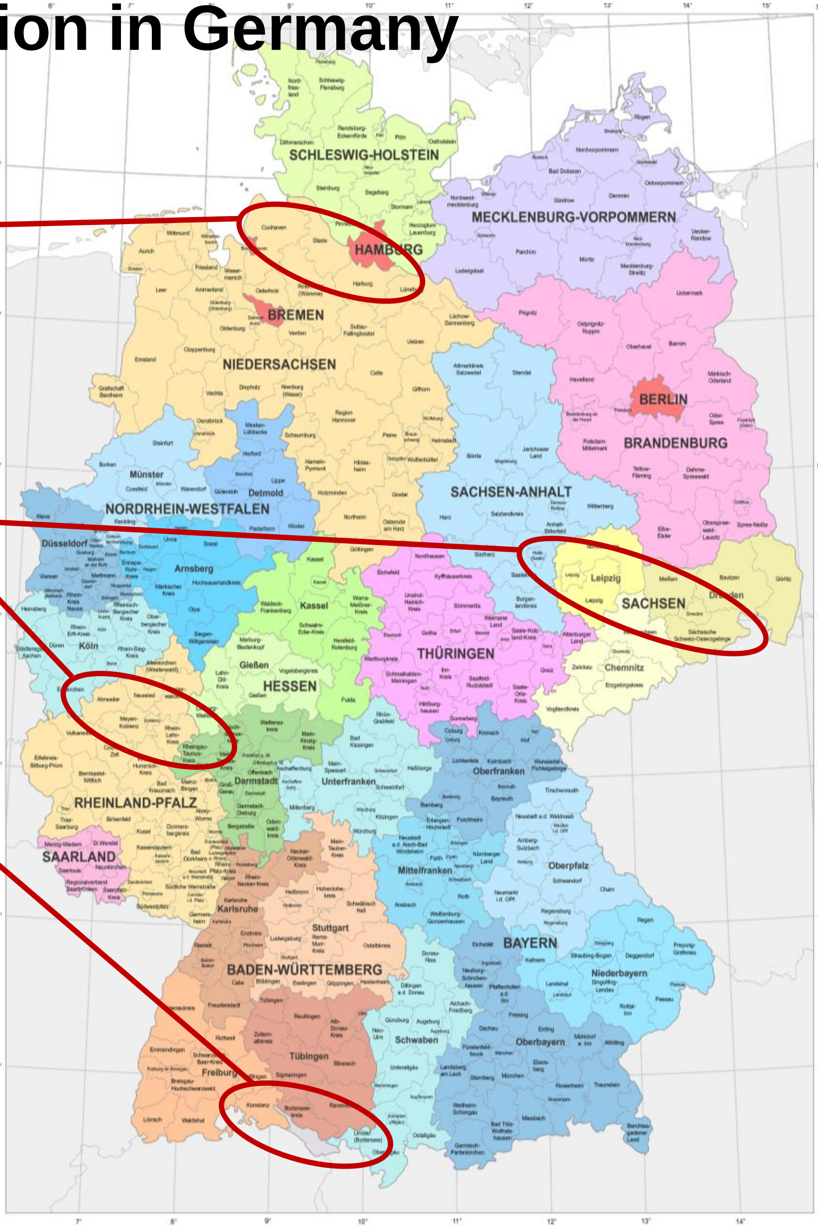
Main production areas:

„Saxony"
50 companies
2,500 ha
Harvest 2015: 102,000 t
100 – 200 m altitude

„Altes Land"
650 companies
8,900 ha
Harvest 2015: 310,000 t
-10 bis +10 m altitude

„Rhineland"
200 companies
1,500 ha
Harvest 2015: 53,000 t
50 – 200 m altitude

„Lake Constance "
1,600 companies
7,000 ha
Harvest 2015: 221,000 t
400 – 600 m altitude



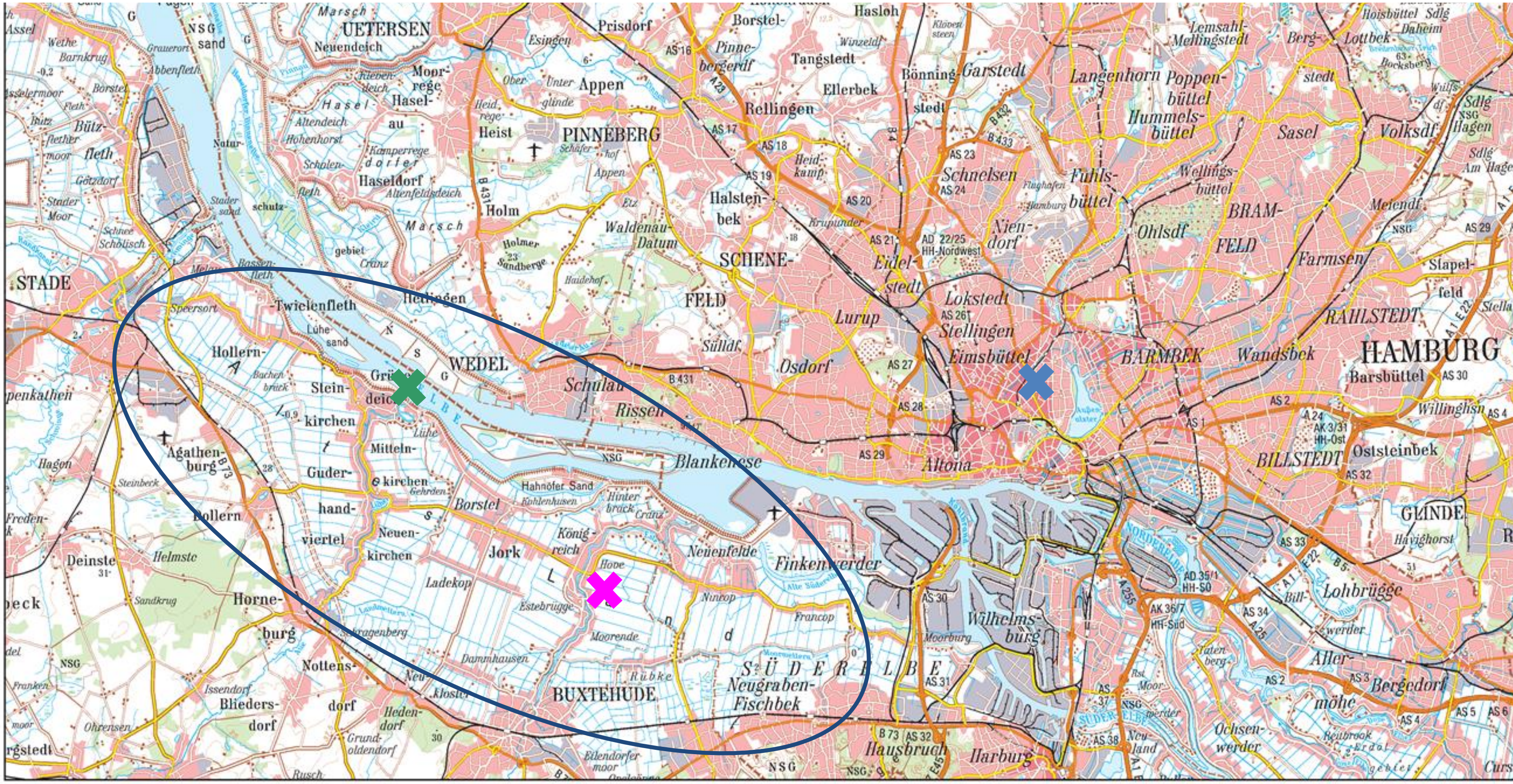
Further regions:

- Mecklenburg-Western Pomerania
- Brandenburg
- Thuringia
- Baden-Wuerttemberg

2. Apple Production in Germany

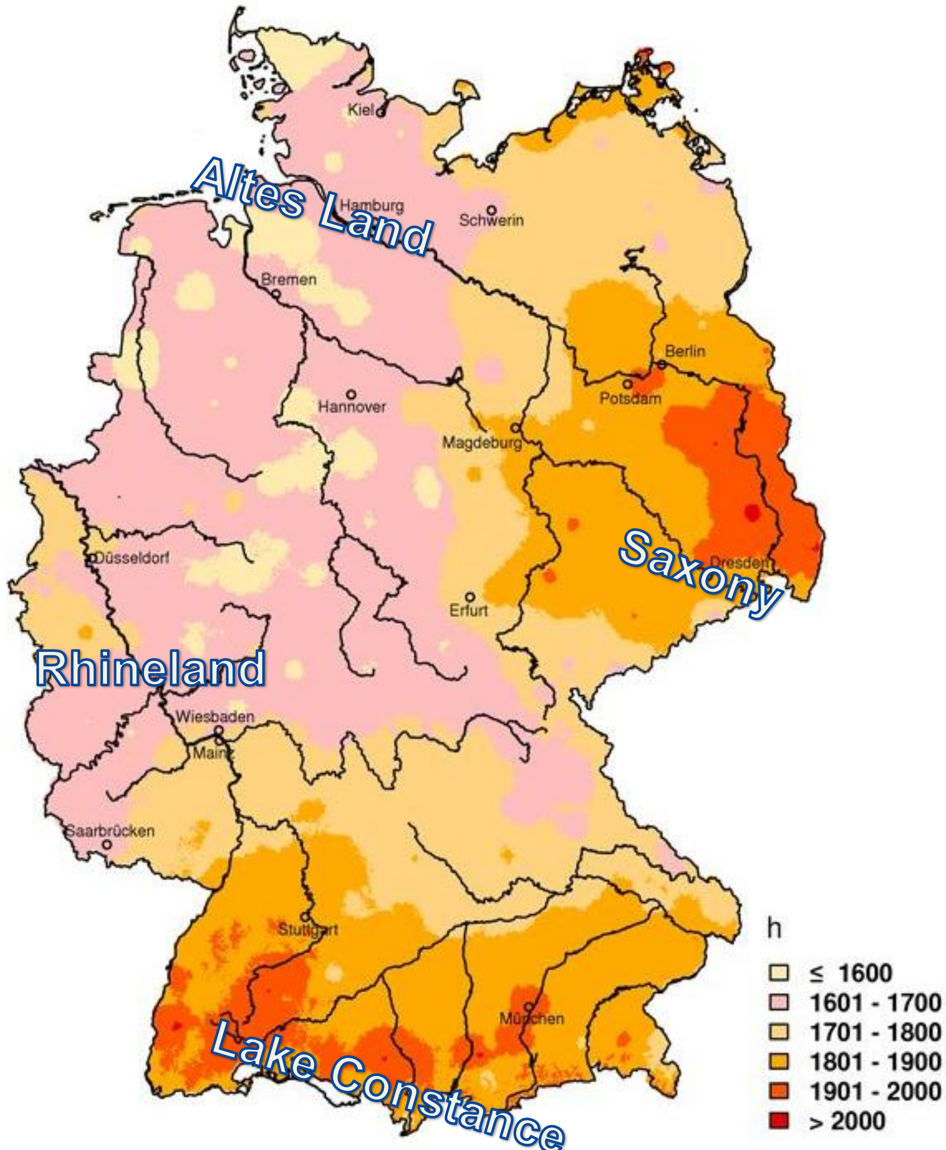
Topographic Map 1: 200.000 „Altes Land“

✖ Hotel Grand Elysee ✖ Lüheanleger ✖ Esteburg



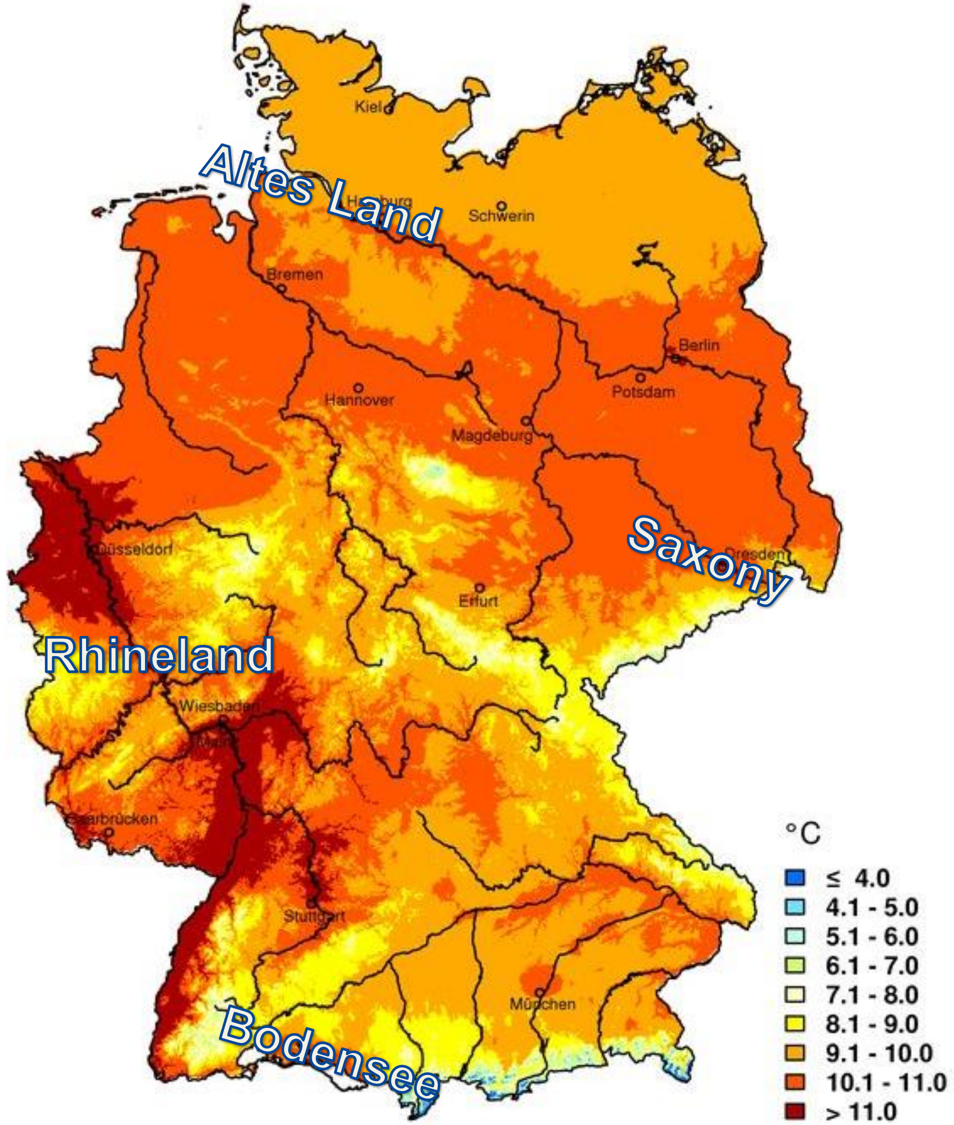
2. Apple Production in Germany

Sunshine
Year 2015



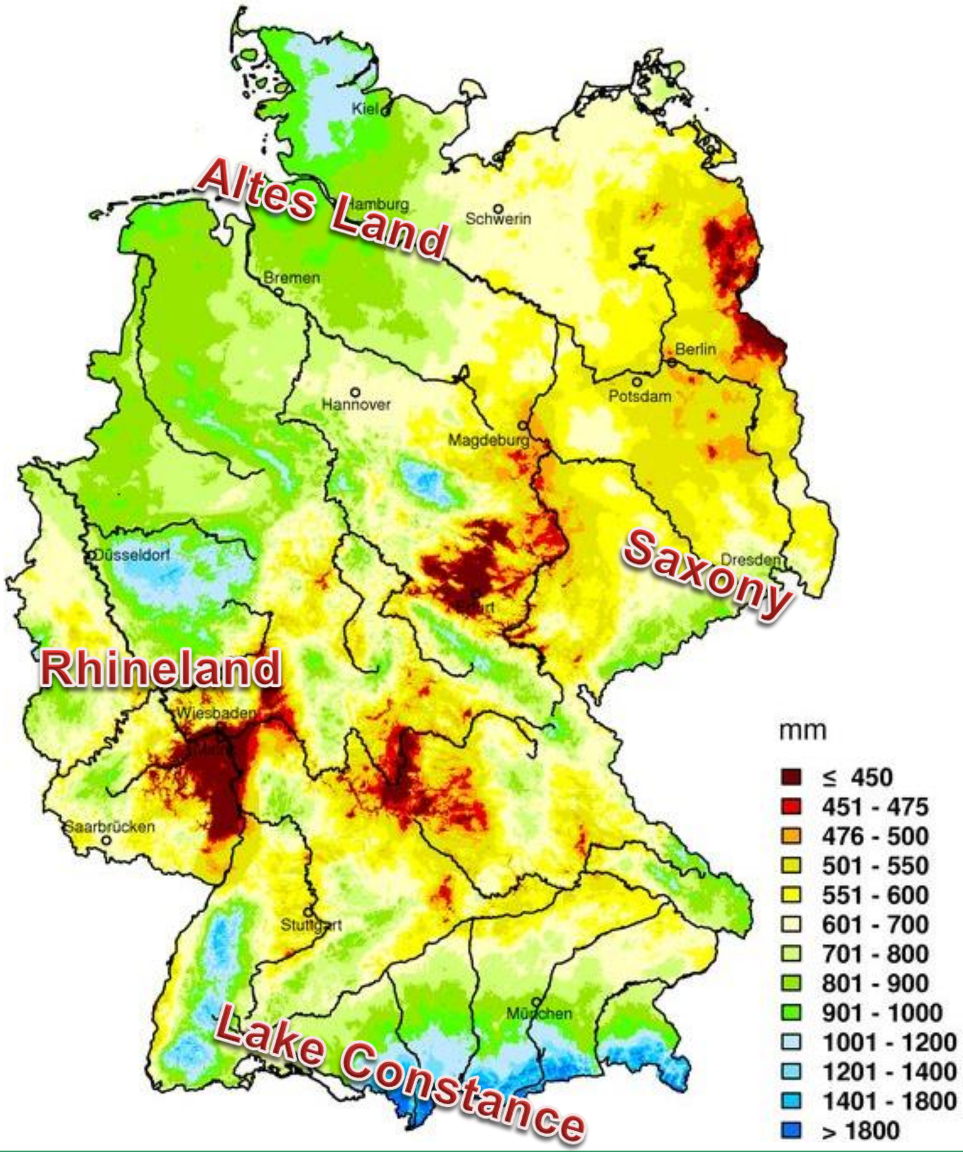
2. Apple Production in Germany

Temperature
Year 2015



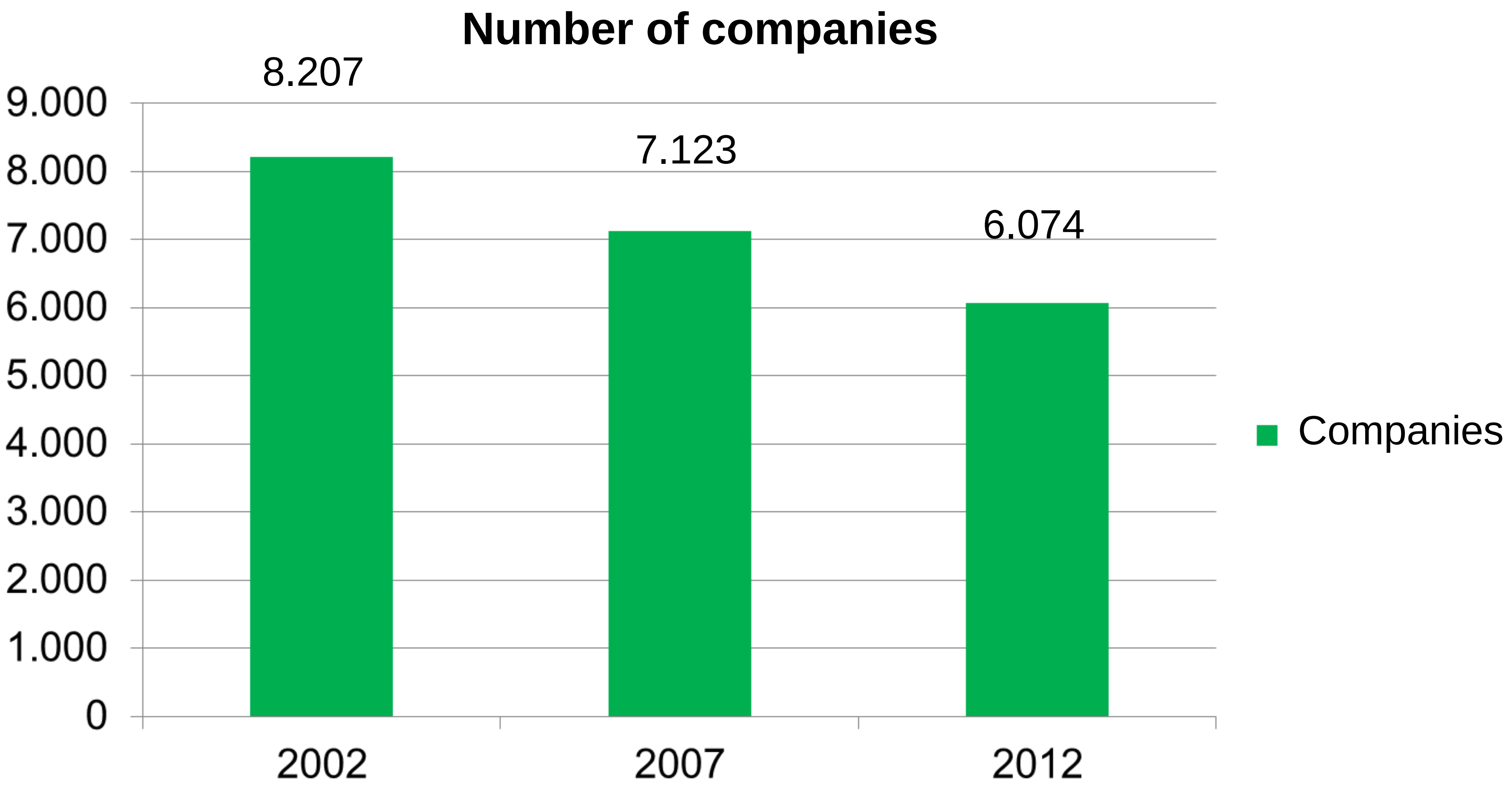
2. Apple Production in Germany

Precipitation Year 2015



2. Apple Production in Germany

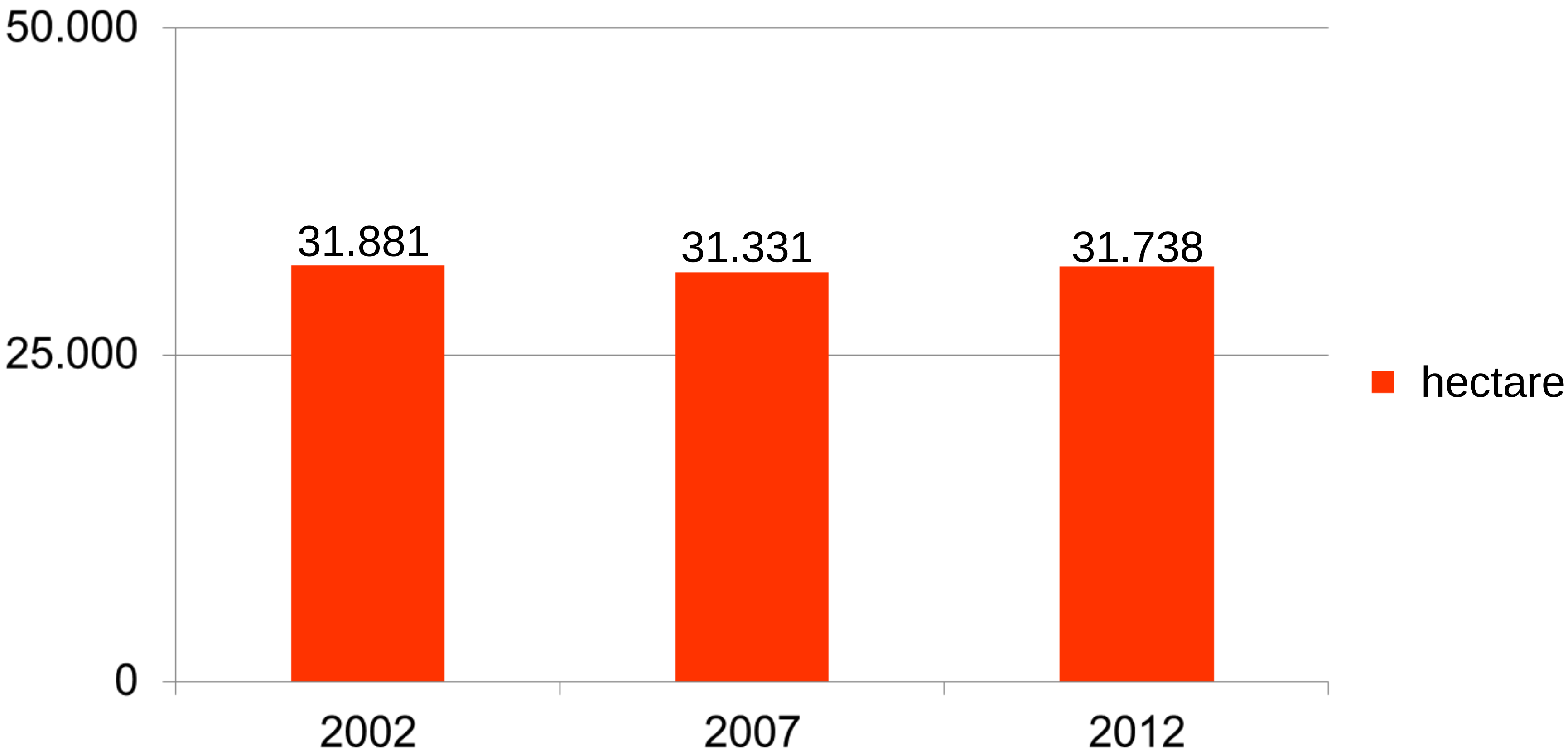
Cultivation of apples in Germany 2002 – 2012



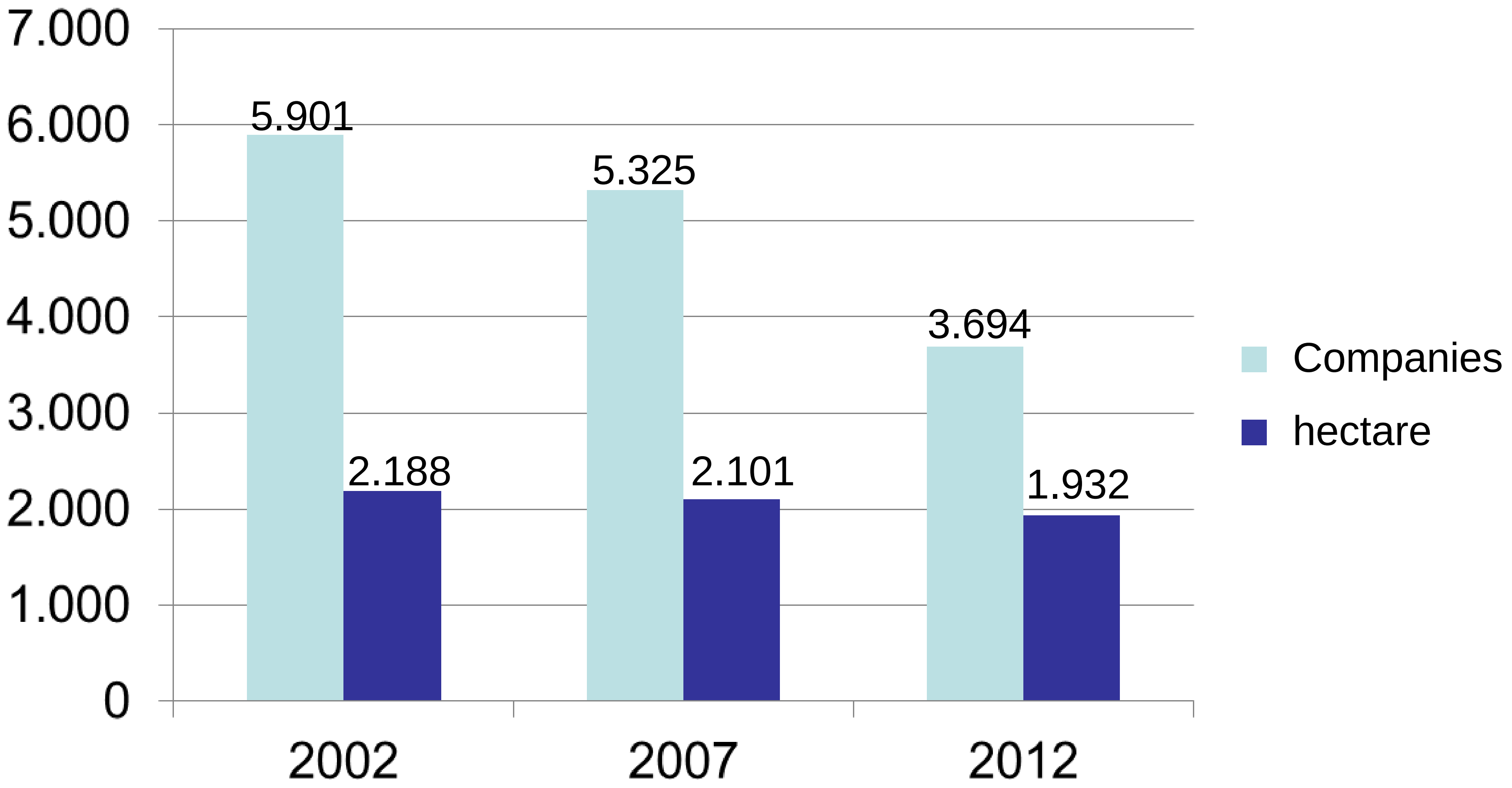
2. Apple Production in Germany

Cultivation of apples in Germany 2002 – 2012

Size of the cultivation area



Cultivation of pears in Germany 2007 – 2012



2. Apple Production in Germany

Apple producers by size structure in Germany 2012

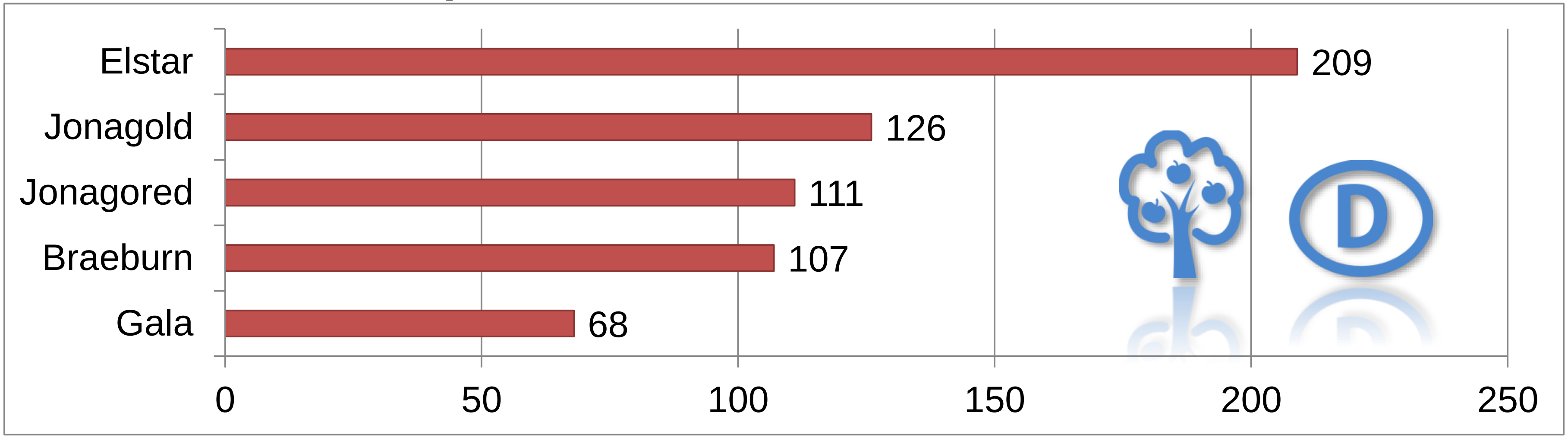
	Companies		Areas		Trees	
	Number	in %	ha	in %	Number	in %
< 5 ha	4.174	68,7	4.246	13,4	7.600.928	10,6
5 ha < 10 ha	772	12,7	4.163	13,1	10.155.354	14,2
10 ha	1.128	18,6	23.329	73,5	53.854.360	75,2
Total	**6.074**		**31.738**		**71.610.642**	

2. Apple Production in Germany

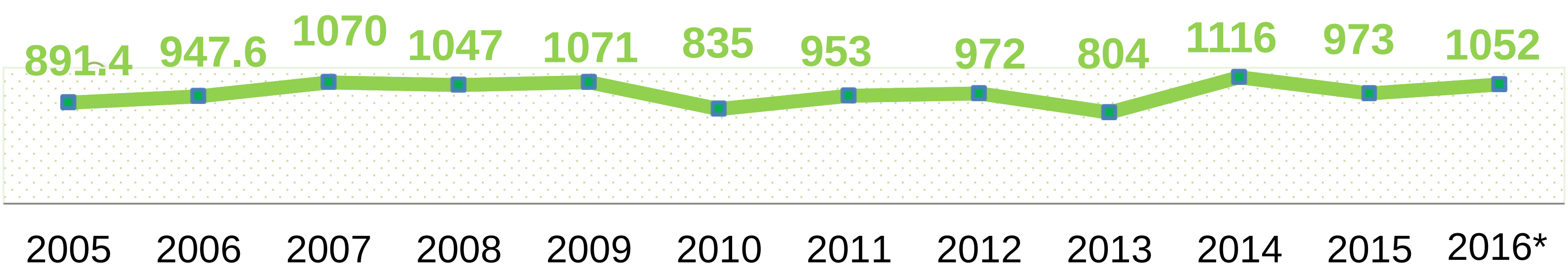
Apple harvest in Germany

*forecast

market production 2016* in thousand tonnes

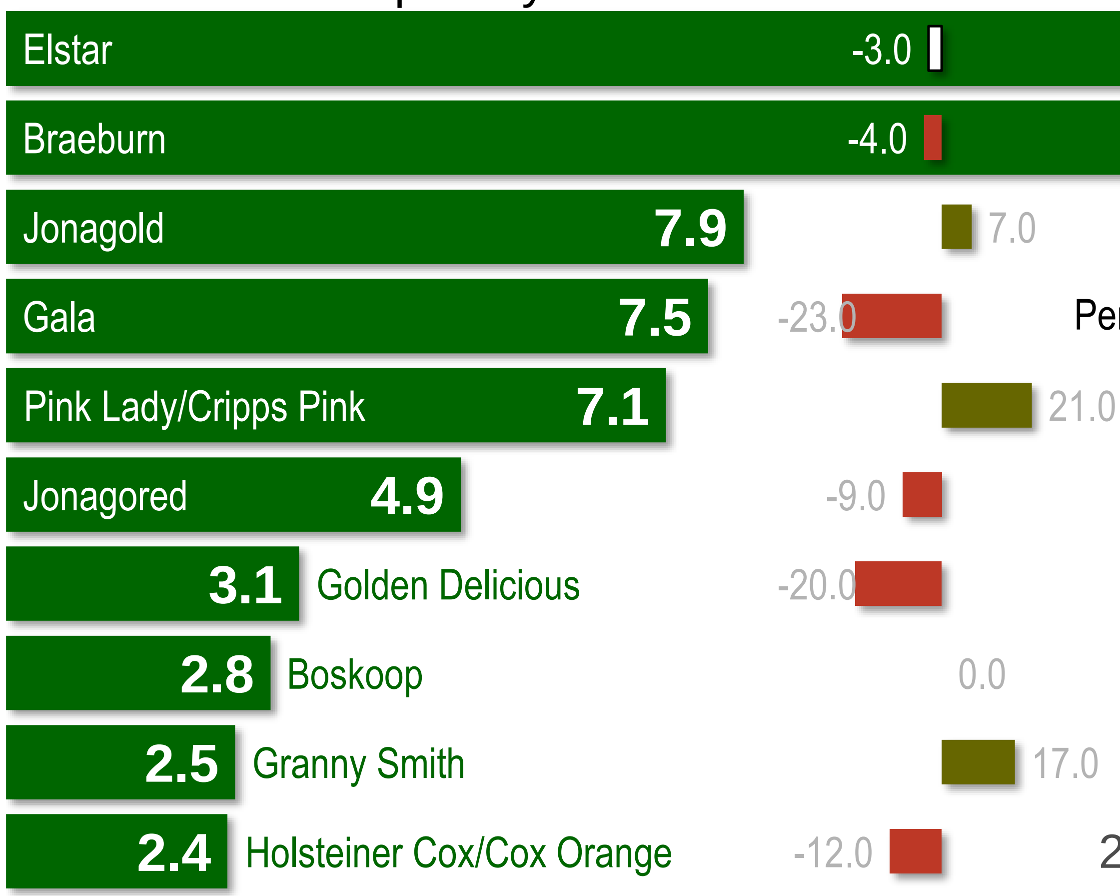


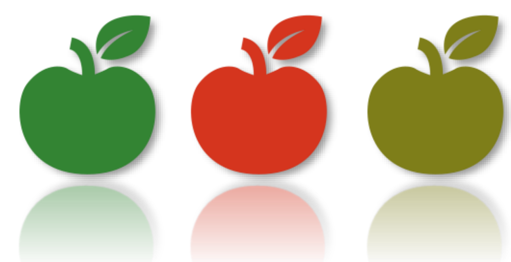
Germany in total in thousand tonnes



Best-selling apple type in Germany

TOP 10 by purchasing unit per private household in 2015
Share of the total quantity in %





19,0 kg
27,97 Euro
2015 per private household

Bundesvereinigung der Erzeugerorganisationen Obst und Gemüse e.V. (BVEO)

Bundesausschuss Obst und Gemüse (BOG)

Quantity structures in Germany 2014/15

(except crop of orchards, in 1,000 t)

	Apple	Pear
Harvest	1,000	40
Processing	250	8
Yield loss	50	2
Imports	520	165
Exports	80	15
Available	**1,140**	**180**
Market loss	114	18
Private demand (at home)	935	156
Out (en route)	91	6

Marketing structure in %

	Apples	Pears
Marketing by producer organizations	60 - 65%	40 - 45%
Direct sale (´farm gate sale´)	10%	15%
Direct marketers / retail	25 bis 30%	ca. 40%

Purchase of private households in Germany

Amount	Apple	Pear
Discount store	45%	46%
Full-Range supplier	37%	40%
Directly at the producer	5%	3%
Other than grocery retail	13%	15%

Value	Apple	Pear
Discount store	40%	
Full-Range supplier	42%	
Online	< 1%	

3. Marketing Channels

German consumers buy…

about 2/3 of the goods which are prepacked

32 %	1 kg foodtainer
45 %	2 kg bag
23 %	about 3 kg or more large containers

including 4 % organic fraction

Many thanks for your attention!