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Update on the situation of processed apples in Europe 2023

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Outlook for 2022 (pres. in september 2022)



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Starting point:

- **AJC stocks** in EU/Non-EU **on average level**, **recovery of demand after 2 years Covid**
- **Competitiveness against China** in US/Canada/South Africa for European AJC ?
- AJC production in Ukraine ?

Challenges:

- Freight costs push up prices for imports of (sweet) AJC (China, Turkey,...)
- Reliability of supply chain due to limited container availability & risk of port closures
- **Increasing energy costs -> significant impact on production costs (Europe + China)**
- Import duties from China into US ??
- Inflation-increase -> impact on consumption ?

Opportunities:

- Rising demand for NFC in Europe (Focus Poland)
- Growing interest for sustainability/sustainable AJC

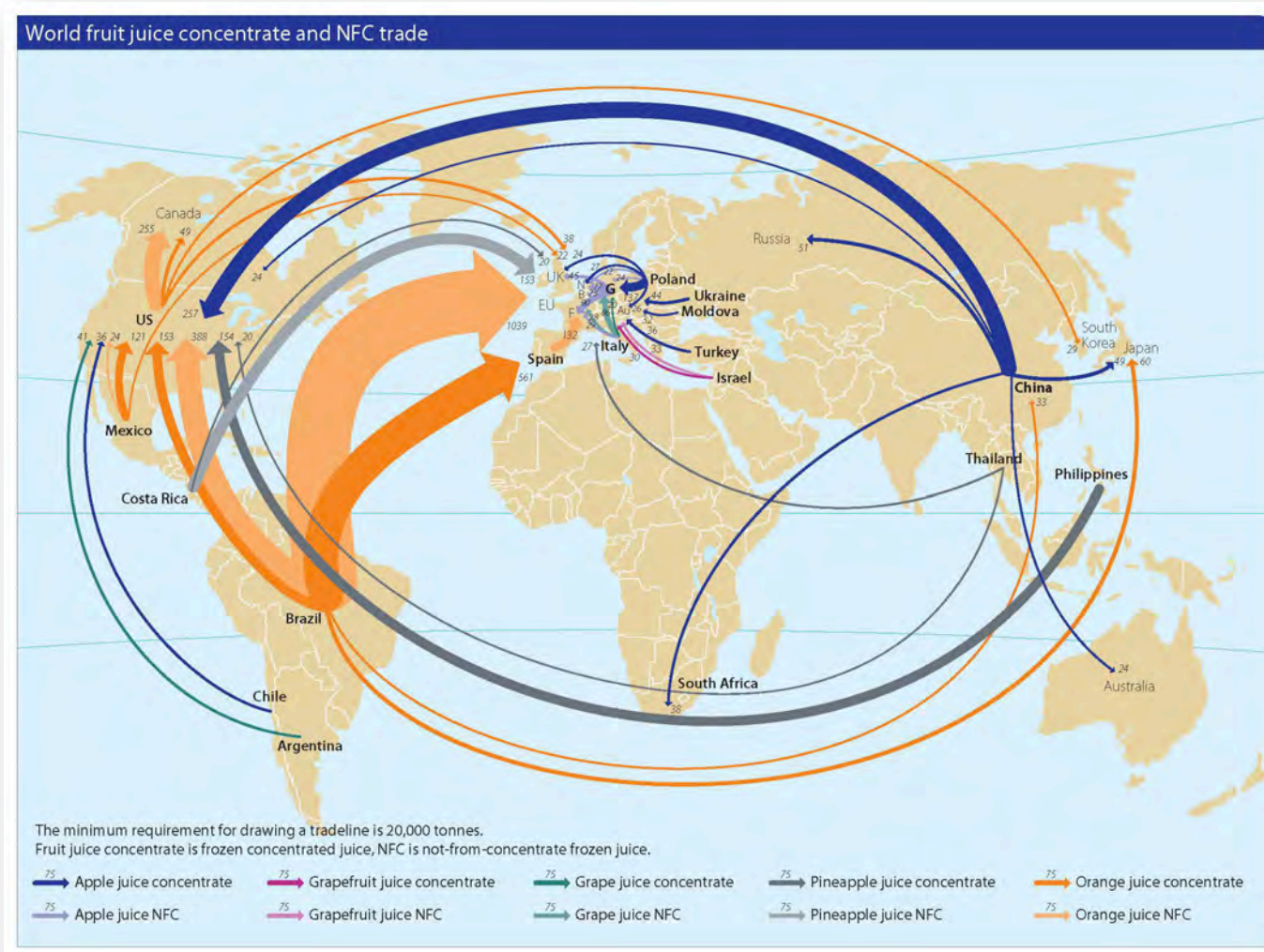
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World fruit juice concentrate and NFC trade (source: Rabobank 2019)



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Situation apple market worldwide 2022



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China 2022

Appx 35 Mio. ton
22 % less than last season

EU 2022

12,1 Mio. ton
20 % above prior year

Deutschland

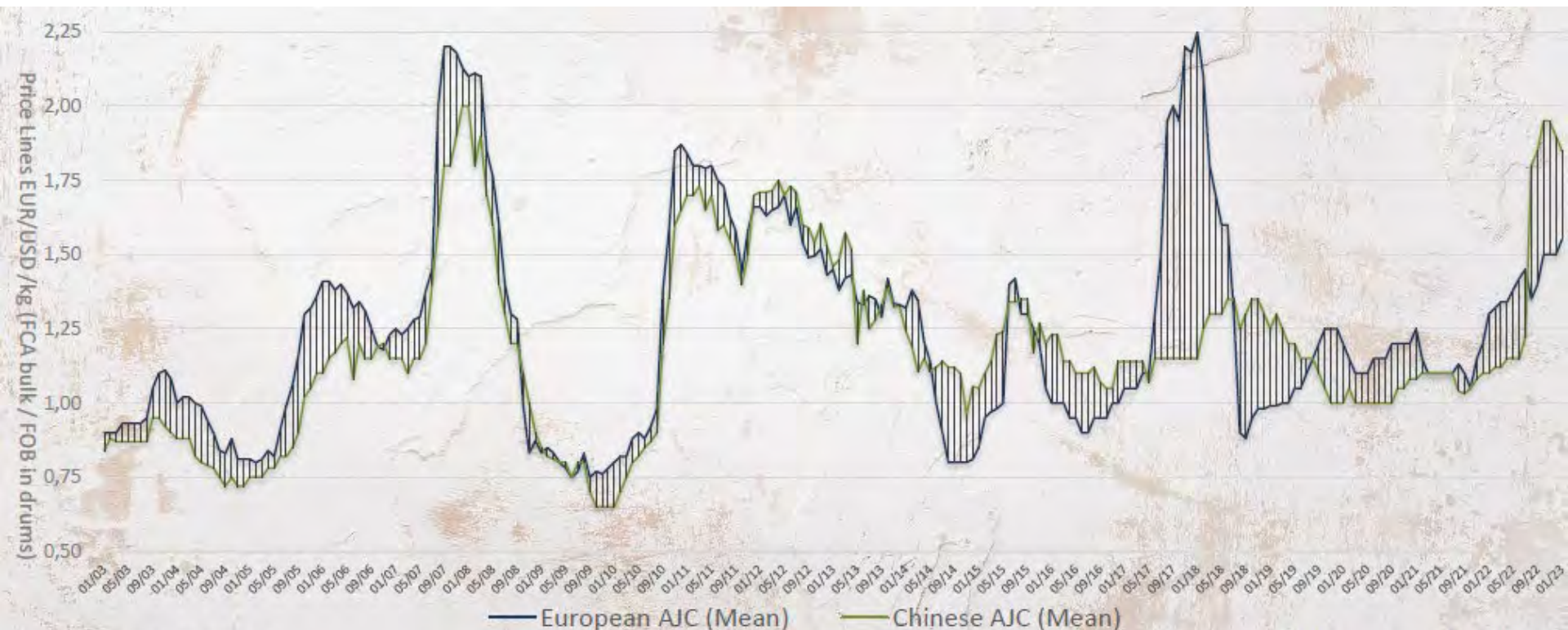
1,06 Mio. ton
6 % above prior year

European + Chinese Apple Juice Concentrate

(January 2003 – January 2023)



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Latest development impacting AJCs global trade flow



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Export volumes in t	2019	2020	2021	2022
China	385 573	420 396	419 099	399 139
Poland	347 104	209 019	226 787	227 338
Turkey	112 022	135 817	200 579	197 270
Chile	41 262	42 231	74 543	n.a.
Ukraine	101 974	51 103	63 947	67 000
Austria	77 597	56 972	55 453	54 533
Hungary	42 180	33 466	40 338	28 612
Netherlands	23 216	21 025	32 981	33 842
Germany	38 697	27 182	25 617	23 812
Moldova	58 164	46 328	24 866	20 200

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AJC - Imports EU

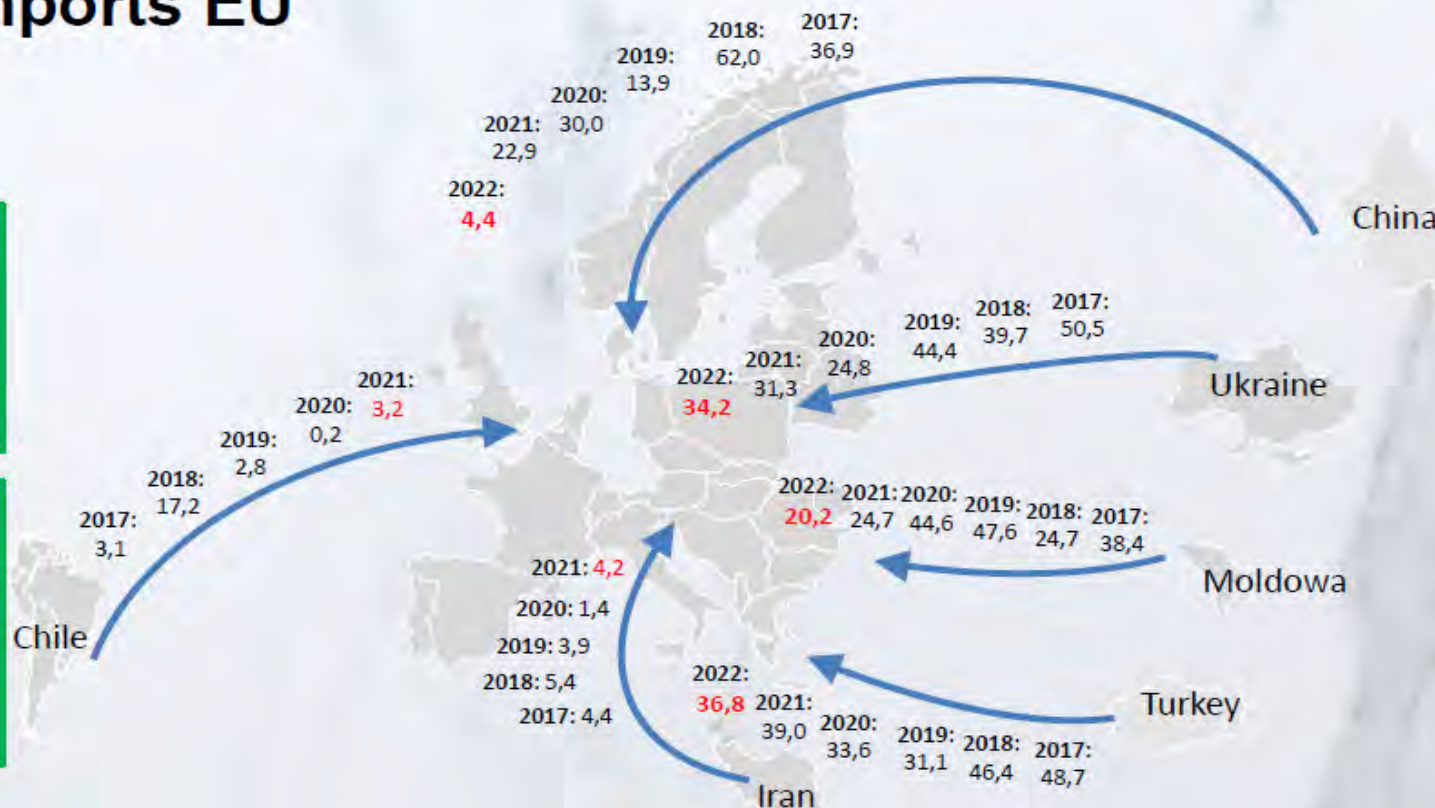
(in 1.000 t)

Imports EU total:

2017: 183,0
2018: 216,6
2019: 164,0
2020: 161,9
2021: 145,6

Imports others 2021:

Serbia: 8,8
Switzerland: 4,3
Georgia: 2,4
UK: 1,7
Brasil: 1,0
Macedonia: 0,9



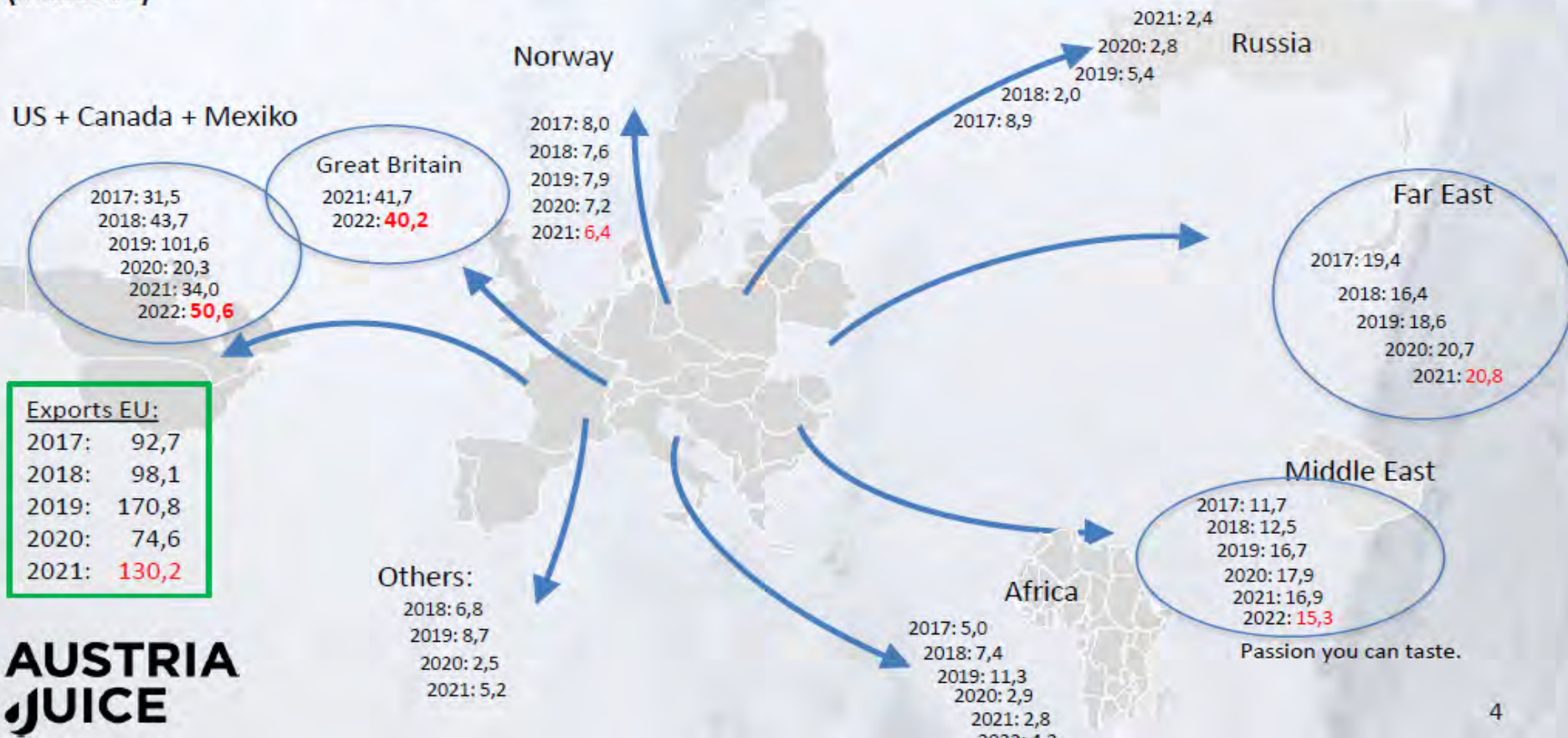
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AJC - Exports EU

(in 1.000 t)

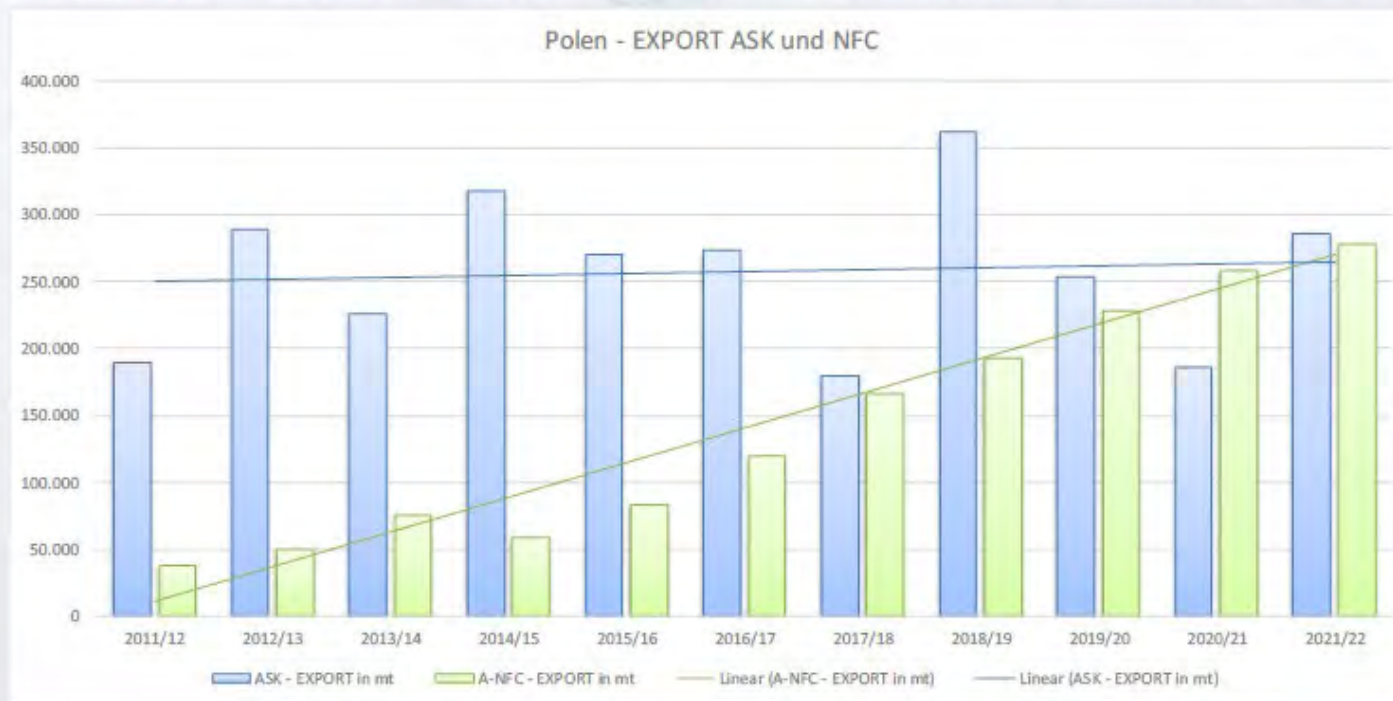


Poland: AJC and A-NFC – yearly exports



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		2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
ASK - EXPORT	in mt	189.729	289.520	225.841	318.337	270.115	273.728	179.675	361.765	253.338	186.427	286.242
A-NFC - EXPORT	in mt	37.445	49.574	75.196	58.999	83.570	119.250	166.206	192.241	228.075	257.806	278.235



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Apple production in Germany 2012 – 2022, total, in Mio. l



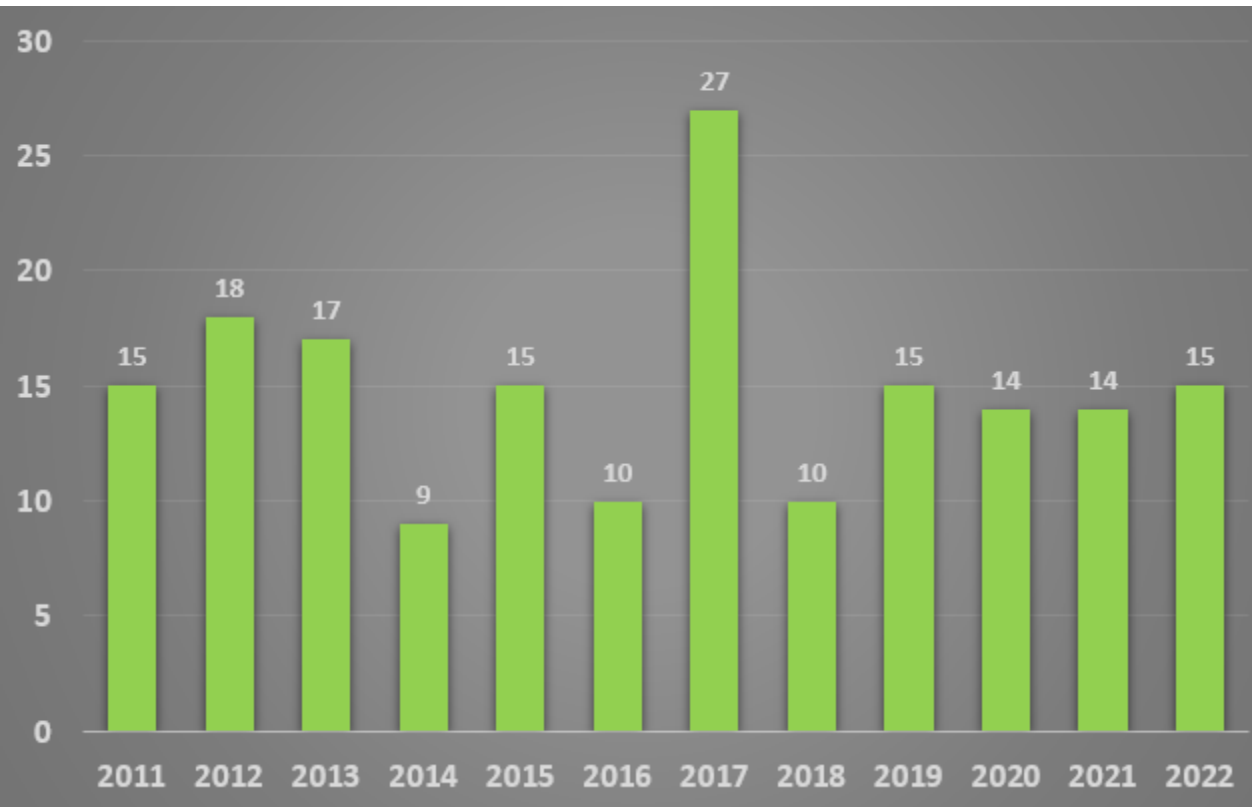
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Processing Apples delivered in Germany 2011 – 2022, conventional, in €/100 kg



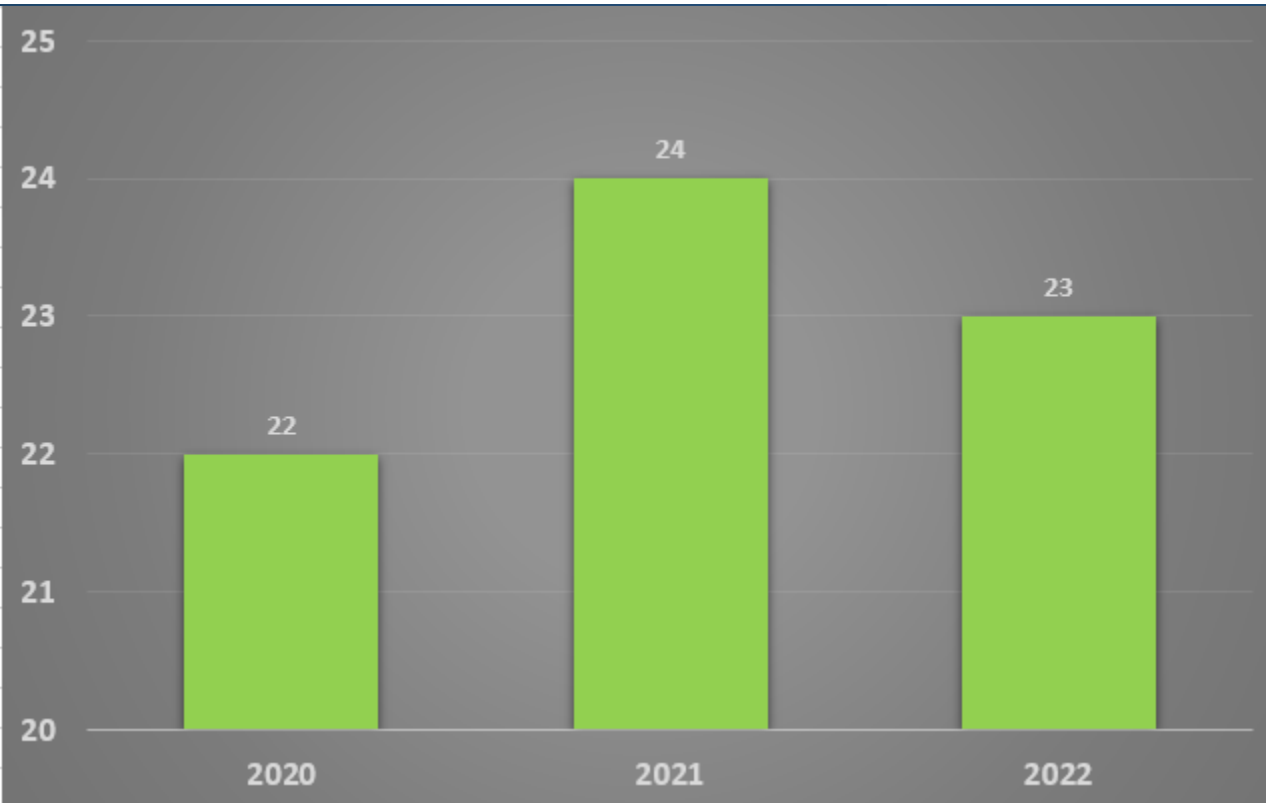
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Apples prices for apples delivered in Germany 2020 – 2022, organic, in €/100 kg



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Factors influencing the price of apple juice



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- Increase in gas, oil and gasoline by 200 – 300 €/t AJC
- Increase in all included energy costs such as packaging, glass, foils and closures (second inflation)
- Electricity costs unknown (state influenced)
- Price increases for 1 l juice necessary, but at what level do consumers accept this? (black currant – 10%)
- Apple juice consumption in Germany 2022 just slightly declining
- Organic juice lose market share due to higher prices

Summary: Situation in March 2023



- Market situation has relaxed
- Energy in 2022 was expensive but available
- Company have changed if possible to dual use (oil and gas)
- In 2023 oil and gas prices are going down but electric energy is still to expensive
- Markets for European AJC have been developed due to low Chinese harvest and higher prices and tariffs to the US
- Prices for table apples in fall insufficient for farmers so more apples went into processing
- Transport prices (Containers) are on the decline
- Consumers are getting more optimistic



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Your questions please!