

USDA Foreign Agricultural Service

# GAIN Report

Global Agricultural Information Network

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## Poland

**Post:** Warsaw

### **Drought Negatively Affected Polish Corn Crop**

**Report Categories:**

Agricultural Situation

Grain and Feed

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**Report Highlights:**

Post estimates Polish corn production in marketing year (MY) 2018/19 at 3.2 million metric tons (MMT), a 20 percent decrease from MY 2017/18. Corn quality in Poland varied widely region to region. Moisture content averaged 22 percent and kernel size was smaller than usually. There is no threat of fusarium this year.

### Production and planting area

Polish corn production in MY 2018/19 will reach 3.2 MMT, a 20-percent decrease from MY 2017/18. The corn area planted decreased by 1.2 percent from MY 2017/18. According to Polish Association of Corn Producers (PACP) the combined area planted for silage and grain reached 1.2 million Ha in MY 2018/19. 53 percent of the crop was harvested early for silage, while 47 percent of the crop fully matured.

The 2018 corn harvest started in the western part of Poland in early September, somewhat earlier than usually, and recently concluded in the southeastern region. According to the European Commission's yield forecast, Polish will reach 6.04 metric tons (MT) per hectare (Ha) in MY 2018/19. The Polish Main Statistical Office's (MSO) forecast is lower, at 5.76 MT per Ha, while PACP estimates are slightly higher at 5.77 MT per Ha.

In MY 2018/19, yields and grain quality varied widely from region to region. Western areas saw lower yields and smaller kernel sizes. Dry matter content averaged about 35 percent, although it sometimes reached up to 50 percent. In eastern Poland, yields were higher and the moisture content was lower.

The average national moisture content was 22 percent, ranging from 14 percent in the west to 25 percent in eastern regions.

Throughout the spring and late summer of 2018, a severe regional drought adversely affected overall grain production in Poland. Hot and dry conditions in May and June dried of the top soil and matured the plants too early, thereby limiting production potential. Despite the spring and early summer drought, Poland's corn crop looked relatively good through July, when rainfall boosted plant development. However, subsequent dry conditions in August stunted ear development and ultimately led to yield reductions. The dry weather virtually eliminated any risk of fusarium this year. Polish farmers generally do not irrigate their crops.

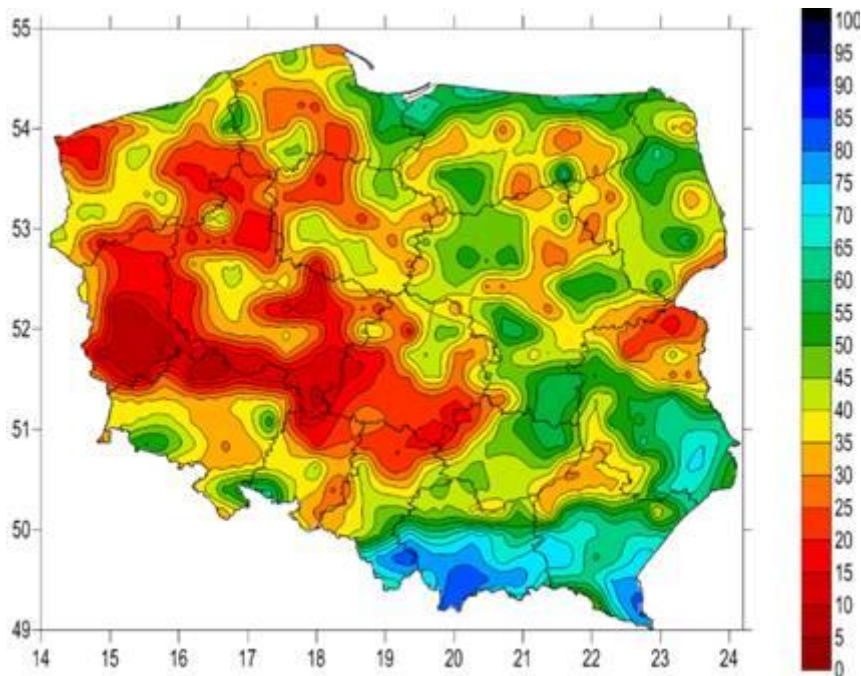
**Table 1: Area, Yields, Production of Corn for Grain in Poland**

Marketing Year (MY)	Area (000 HA)	Yield (MT/HA)	Production (000 MT)
	(000) Ha	(000) MT/Ha	(000) MT
2013/14	614	6.58	4,040
2014/15	678	6.59	4,468
2015/16	670	4.71	3,156
2016/17	594	7.32	4,343
2017/18	562	7.15	4,022
2018/19	555	5.76	3,202

Source: Main Statistical Office Poland

MY= Poland's local marketing year for corn is October-September

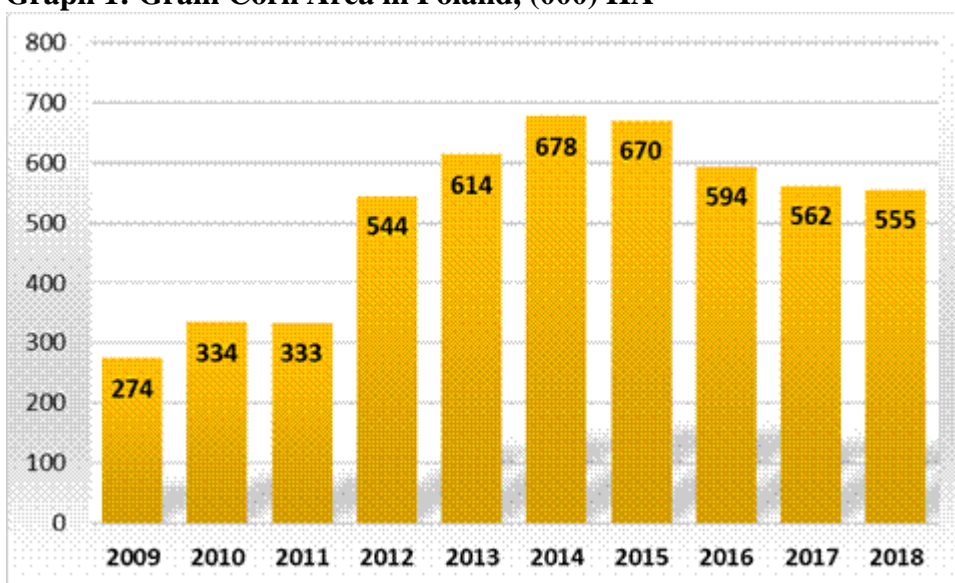
### Map 1: Soil moisture in Poland on August 20, 2018 at a depth of 7-28 cm



Source: Institute of Meteorology and Water Management in Poland

Corn production has a short history in Poland, although it has steadily increased since 2007. The main corn drivers have been Poland’s fast-growing poultry industry, and increasing export demand. From 2009 to 2014, Poland’s corn area increased 250 percent. Corn production is also expanding into new areas, notable eastern Poland, where previously corn was not a viable crop. Additionally, more advanced inputs and better access to hybrids are raising interest among farmers in raising corn.

**Graph 1: Grain Corn Area in Poland, (000) HA**



Source: Main Statistical Office Poland

**Domestic consumption**

53 percent of Poland's corn crop is harvested for silage or biomass, while 47 percent is allowed to fully mature. Poland's primary corn users are the feed millers, farmers for on-farm feed, and the biofuel industry. Total corn consumption in MY 2017/18 was 3.2 million metric tons (MMT), of which almost 90 percent was used by feed industry and for on-farm animal feed. Domestic human consumption of corn is small and amounts to 25,000 MT.

## Trade

Poland is a net corn exporter. In the first ten months of MY 2017/18, corn exports in value terms reached \$213 million. Corn imports during the same period were \$140 million. Exports by volume reached 975,000 MT during the first ten months of MY 2017/18, with almost 800,000 MT going to Germany. Imports by volume during the same period were 255,000 MT. In MY 2018/19, Post forecasts corn exports lower from the previous year, due to the lower production situation.

According to the Polish Grain and Feed Chamber an influx of Ukrainian corn imports is likely during the latter half of this MY. Some commercial and processing stakeholders are already reporting significant purchases of Ukrainian corn with expected delivery dates in January 2019.

**Table 2: Corn Imports by Quantity, (000) MT**

Partner Country	MY			% Share			% Change 2017/16
	2014/15	2015/16	2016/17	2014/15	2015/16	2016/17	
<b>World</b>	<b>279</b>	<b>503</b>	<b>379</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>- 24.50</b>
Ukraine	3	309	157	1.17	61.43	41.25	- 49.29
Hungary	34	14	70	12.12	2.81	18.51	397.08
Slovakia	76	35	62	27.25	6.91	16.29	78.16
Argentina	48	50	32	17.03	9.87	8.40	- 35.78
Czech Republic	41	21	31	14.59	4.17	8.30	50.40
France	16	13	13	5.81	2.65	3.41	- 2.75

Source: Global Trade Atlas

MY= Poland's local marketing year for corn is October-September

**Table 3: Corn Imports by Value, (000) \$**

Partner Country	MY			% Share			% Change 2017/16
	2014/15	2015/16	2016/17	2014/15	2015/16	2016/17	
<b>World</b>	<b>141,843</b>	<b>163,106</b>	<b>135,124</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>- 17.16</b>
France	50,832	36,386	33,381	35.84	22.31	24.70	- 8.26
Hungary	20,423	17,013	23,733	14.40	10.43	17.56	39.50
Ukraine	515	46,226	23,553	0.36	28.34	17.43	- 49.05
Slovakia	21,223	13,112	18,549	14.96	8.04	13.73	41.47
Austria	6,276	0,482	9,830	4.42	6.43	7.27	- 6.22
Argentina	11,947	12,709	9,055	8.42	7.79	6.70	- 28.75

Source: Global Trade Atlas

MY= Poland's local marketing year for corn is October-September

**Table 4: Corn Exports by Quantity, (000) MT**

Partner Country	MY			% Share			% Change
	2014/15	2015/16	2016/17	2014/15	2015/16	2016/17	2017/2016
<b>World</b>	<b>740</b>	<b>560</b>	<b>1,322</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>136.04</b>
Germany	654	456	723	88.38	81.35	54.71	58.74
Netherlands	-	9	229	0.01	1.60	17.35	2454.40
United Kingdom	4	2	124	0.57	0.41	9.34	5283.72
Denmark	33	23	50	4.43	4.17	3.74	111.94

Source: Global Trade Atlas

MY= Poland's local marketing year for corn is October-September

**Table 5: Corn Exports by Value, (000) \$**

Partner Country	MY			% Share			% Change
	2014/15	2015/16	2016/17	2014/15	2015/16	2016/17	2017/16
<b>World</b>	<b>149,017</b>	<b>115,637</b>	<b>240,555</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>108.03</b>
Germany	125,648	87,572	127,895	84.32	75.73	53.17	46.05
Netherlands	181	1,819	39,009	0.12	1.57	16.22	2045.08
United Kingdom	804	430	23,267	0.54	0.37	9.67	5307.54
Denmark	6,192	4,493	8,407	4.16	3.89	3.49	87.09

Source: Global Trade Atlas

MY= Poland's local marketing year for corn is October-September

**Table 6: Corn Imports by Quantity, (000) MT, and Value, (000) \$**

10 Month Ending: July				
Partner Country	MY 2016/17		MY 2017/18	
	Value	Quantity	Value	Quantity
<b>World</b>	<b>128,783</b>	<b>341</b>	<b>140,368</b>	<b>255</b>
Germany	33,885	13	40,746	13
Czech Republic	20,928	56	27,896	36
Denmark	18,039	59	20,078	46
Norway	20,191	135	12,867	82
Netherlands	8,961	33	12,683	47
Lithuania	9,955	4	11,564	4
Sweden	4,839	4	5,165	9
United Kingdom	21,690	115	1,641	9

Source: Global Trade Atlas

**Table 7: Corn Exports by Quantity, (000) MT, and Value, (000) \$**

10 Month Ending: July	
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Partner Country	MY 2016/17		MY 2017/18	
	Value	Quantity	Value	Quantity
<b>World</b>	<b>255,568</b>	<b>1,420</b>	<b>213,150</b>	<b>975</b>
Germany	140,348	801	161,015	782
Czech Republic	950	5	10,717	55
Denmark	9,898	57	8,996	42
Norway	7,753	45	3,358	18
Netherlands	38,815	238	3,305	13
Lithuania	3,429	17	2,546	11
Sweden	2,088	12	2,147	11
United Kingdom	21,690	115	1,641	9

Source: Global Trade Atlas