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## Poland

**Post:** Warsaw

### Poland Becomes a Leading Exporter of Apples

**Report Categories:**

Fresh Deciduous Fruit

Fresh Fruit

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**Report Highlights:**

Poland's MY 2012/13 product is estimated at 2.9 million metric tons, accounting for 26 percent of total EU production. While increasing production was favorably supported by weather this year, growing investment in orchard development and better organization of producer groups in recent years are the catalysts for the apple sector's rising productivity. With domestic consumption of fresh apples on the decline, Poland relies on external demand, primarily in Russia, Belarus, and Kazakhstan, and the process industry to dispose of its crop annually. MY2012/13 projections for fresh apple exports to reach 900,000 metric tons and for apple juice concentrate production to exceed 250,000 metric tons. Poland, one of the leading beneficiaries of the EU's School Fruit Scheme, receives EUR 12.3 million per in financial aid from the EU to operate this scheme.

## General Information:

### Area planted and production

Poland's MY 2012/13 total production of apples is estimated at 2,850 thousand metric tons (MT). This represents a 14 percent growth in comparison to MY 2011/2012. The crop yield is higher despite the 2012 winter kill that reduced the number of apple trees on plantations by 2.6 percent in relation to MY 2011/12. Favorable weather conditions during blossoming and fruit maturation were the main reason for this year's good crop. The arctic freeze which settled with no snow cover on the landscape affected mostly only very young trees. As such stock had yet to contribute to the nation's apple production their loss will not influence this year's projected production.

There are about twenty main varieties of apples produced commercially in Poland with production amounting to 2,608 thousand MT. The dominant varieties produced are: Idared, Jonagold, and Champion. The great majority of commercial production consists of dessert apple types. Local varieties like Antonowka are designated both for the fresh market as well as for industrial processing, because of its higher level of acidity. Non-commercial production is used both for fresh consumption and occasionally for processing when market prices rise sufficiently to attract farmer's attention.

## Production, Supply and Demand Data Statistics

(Marketing Year: July/June)

Apples Fresh, Poland	MY 2010/11	MY 2011/12	MY 2012/13*	
Area planted	180,000	190,000	185,000	HA
Commercial production	1,690,000	2,269,000	2,608,000	MT
Non-commercial production	188,000	224,000	242,000	MT
Production total	1,878,000	2,493,000	2,850,000	MT
Intra EU-27 imports	68,687	44,945	25,000	MT
Extra EU-27 exports	4,526	256	0	MT
Total imports	73,213	45,201	25,000	MT
<b>TOTAL SUPPLY</b>	<b>1,951,213</b>	<b>2,538,201</b>	<b>2,875,000</b>	<b>MT</b>
Fresh domestic consumption	470,000	600,000	500,000	MT
Intra EU-27 exports	51,280	74,497	83,800	MT
Extra EU-27 exports	393,410	724,704	816,200	MT
Total exports	444,690	799,201	900,000	MT
For processing	1,036,523	1,139,000	1,475,000	MT
<b>TOTAL DISTRIBUTION</b>	<b>1,951,213</b>	<b>2,538,201</b>	<b>2,875,000</b>	<b>MT</b>
Balance	0	0	0	

Sources: Global Trade Atlas, the Main Statistical Office Poland, FAS/Warsaw

\*FAS/Warsaw forecast

### 2011 Area Harvested and Apple Crops by Variety in Poland

	Area HA	Total=100	Crops MT	Total=100
TOTAL	183,526	100	2,493.1	100

Idared	28,128	15.3	352.8	14.2
Jonagold	20,766	11.3	296.4	11.9
Champion	18,261	10.0	280.8	11.3
Cortland	15,665	8.5	202.5	8.1
Lobo	14,078	7.7	194.1	7.8
Gloster	11,157	6.1	202.6	8.1
Golden Delicious	7,796	4.2	139.1	5.6
Ligol	7,675	4.2	114.6	4.6
Elstar	5,861	3.2	91.1	3.7
Red Delicious	5,372	2.9	65.0	2.6
Gala	4,750	2.6	55.3	2.2
Melrose	4,678	2.5	63.0	2.5
Spartan	4,359	2.4	56.4	2.3
McIntosh	4,216	2.3	48.6	1.9
Antonowka	3,595	2.0	40.4	1.6
Others	27,169	14.8	290.3	11.6

Source: The Main Statistical Office Poland

## **Trade**

### **Poland's Major Export Destinations - Apples Fresh, MT (year ending June) – HS 080810**

	MY 2009/10	MY 2010/11	MY 2011/12	MY 2011/12 Exports as % Share In World Trade
<b>World</b>	<b>786,678</b>	<b>444,690</b>	<b>799,200</b>	100
Intra EU-27	142,101	51,280	74,497	9
Extra EU-27	644,577	393,410	724,703	91
Russia	318,226	248,066	442,677	55
Belarus	37,746	41,195	134,414	17
Ukraine	252,268	80,290	111,219	14
Kazakhstan	28,811	19,178	31,322	4
Romania	21,252	4,776	13,157	2
Germany	16,798	5,547	10,932	1

Source: Global Trade Atlas

Poland is the largest exporter of apples in the European Union. In MY 2012/13 exports are expected to reach 900 thousand MT – 12.6 percent more than in MY 2011/12. The main external EU destinations are: Russia, Belarus, Ukraine, Kazakhstan, which buy 90 percent of all exported Polish fresh apples. Russia is the main importer among these countries buying 55 percent of Polish exports. Export destinations internally within the EU are more dispersed with the main clients being Germany and Czech Republic. With consumption flat in Poland, prospects for export growth rest with rising consumption in neighboring eastern European countries. New investments in controlled atmosphere cold storage facilities are planned with capacity expected to increase to one million MT by 2015.

In MY 2012/13 imports are projected to diminish by 45 percent Due to the large domestic crop. However, the primary source of imported dessert apples is Italy.

**Poland's Major Import Sources - Apples Fresh, MT (year ending June) – HS 080810**

	MY 2009/10	MY 2010/11	MY 2011/12	MY 2011/12 Exports as % Share In World Trade
<b>World</b>	<b>15,959</b>	<b>73,213</b>	<b>45,201</b>	100
Intra EU-27	15,897	68,687	44,945	99
Extra EU-27	62	4,526	256	1
Italy	2,782	14,084	10,988	24
Lithuania	0	3,148	9,602	21
Netherlands	8458	16,590	9,129	20
Germany	1,757	8,866	9,086	20
Belgium	1,127	5,779	1,697	4

Source: Global Trade Atlas

**CAJ production and trade**

Poland is the largest EU producer of apple juice concentrate (CAJ). In MY 2011/12 production was estimated at 250 thousand MT, up to 11 percent in comparison with the previous year. About 80 percent of CAJ production is exported. Internal consumption is diminishing thus leading the apple processing industry to be highly dependent on foreign markets.

**Poland's Major Export Destinations - CAJ, MT (year ending June) – HS 200979**

	MY 2009/10	MY 2010/11	MY 2011/12	MY 2011/12 Exports as % Share In World Trade
<b>World</b>	<b>214,669</b>	<b>158,015</b>	<b>194,991</b>	100
Intra EU-27	210,757	154,373	191,927	98
Extra EU-27	3,912	3,642	3,064	2
Germany	133,685	106,067	121,053	62
Austria	21,395	8,546	15,804	8
United Kingdom	22,984	12,175	15,388	8
Netherlands	8,097	7,918	14,310	7

Source: Global Trade Atlas

**Policy**

Poland is the largest recipient of EU funds for the School Fruit Scheme after Italy, Germany, and Romania.

[http://ec.europa.eu/agriculture/fruit-and-vegetables/school-fruit-scheme/index\\_en.htm](http://ec.europa.eu/agriculture/fruit-and-vegetables/school-fruit-scheme/index_en.htm)

Since the launch of the program in the school year 2009/10, financial aid for the scheme has grown to EUR 12.3 million per year, including 9.2 million from the EU budget and 3.1 million from national funds. In Poland the authority administrating the Scheme is the Agricultural Market Agency.

Fresh fruits, mostly apples, vegetables and fruit juices, including apple juice are available to children free of charge. In accordance with Commission Regulation (EC) No 288/2009 EU member states participating in the program are required to regularly assess the effectiveness of the program. Poland conducted its first assessment in school year 2010/11 by the Food and Nutrition Institute in Warsaw. The results showed that the program has been effectively shaping children's eating habits and has increased consumption of fruit and vegetables. The program has been a positive influence changing the eating behavior of children.