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Poland

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Poland's sugar production lower

Report Categories:

Sugar

Agricultural Situation

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Report Highlights:

Poland finished its 2013 crop harvest in December. While not a repeat of the two previous record setting crops, the results were nonetheless satisfactory given early season weather challenges for producers. Sugar beet quality is good with sugar content estimated at 17.2 percent, only 2.3 percent less as compared to the 2012 result. The 2012 over-quota production translated in 2013 to less contracted area under cultivation. In MY 2013/14 the white sugar production from sugar beets is forecasted at 1.665 thousand MT, or 12.2 percent lower than in MY 2012/13.

General Information:

Area and sugar beet production, production of sugar.

Year 2013

In MY 2013/14 Poland's white sugar production from sugar beets has been forecasted at 1.665 thousand MT or 12.2 percent lower than in the last campaign.

In Poland total area of sugar beet plantations diminished to 185 thousands of hectares, that is by 4.2 percent as compared with last year. The decrease in acreage resulted from over-quota production in 2012. Due to the excess production, above the quota for MY 2012/13 - sugar refiners contracted less volume of sugar beets this year. Poland's production quota (1,405.6 thousand tons) used to be lower than domestic demand for sugar estimated at 1,600 thousand tons. As the consequence, although production exceeds needs for the domestic market, Poland needs to import sugar in order to serve domestic industry and personal demands.

In 2013 the very late spring led to delays in sugar beet sowings. In some regions of Poland the delays reached four weeks, but growing conditions later in the spring/summer proved favorable allowing plants to recover before harvest. Some loss in acreage did occur in early June due to heavy rains and localized flooding. The sunny, warm autumn helped lead to a good, quality harvest. The 2013 sugar beet crop yielded an estimated at 11,000 thousand MT. Given early season conditions producers were satisfied with the average yield estimated at 58 MT per Ha. Concentration of production is an on-going process driven by better, more efficient technologies that generate better yields. Over the last ten years plantation area per farmer has almost doubled.

Year 2012

In MY 2012/13 total white sugar production from sugar beet amounted to 1.9 million tons. Sugar production was the second highest over the last seven years.

The high sugar output was attributed to the following factors:

- expansion of plantation area,
- very favorable weather conditions during the sugar beet vegetation period. Hail and heavy rains, localized in some regions, had no impact on the national crop,
- technological progress in agricultural holdings and growing performance in the sugar processing industry (restructuring and modernization),
- high sugar prices provided incentive for sugar beet production,
- expanding demand from the domestic food processing industry (bakery, confectionary industry)

Table 1: Area, yields, production of sugar beets total in Poland

| Poland | Area (,000 HA) | Yield (MT/HA) | Total Production (,000 MT) |
|--------|-------------------|------------------|-------------------------------|
| 2005 | 286 | 41.6 | 11,912 |
| 2006 | 262 | 43.8 | 11,475 |
| 2007 | 247 | 51.3 | 12,682 |
| 2008 | 187 | 46.5 | 8,715 |
| 2009 | 191 | 54.3 | 10,849 |
| 2010 | 192 | 50.9 | 9,956 |
| 2011 | 190 | 61.1 | 11,605 |
| 2012 | 193 | 63.8 | 12,300 |
| 2013* | 185 | 58.0 | 11,000 |

Source: Institute of Agricultural and Food Economics

*Association of Sugar Beet Producers estimate

Chart 1

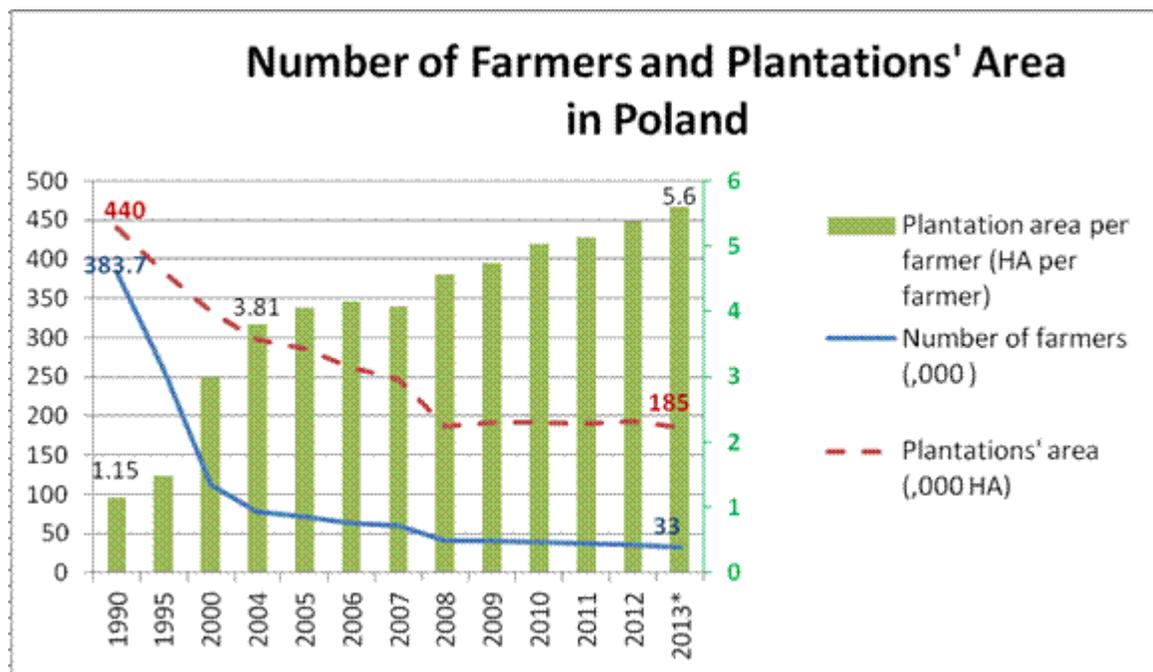


Table 2: Technological indicators for sugar production

| Poland | 2010/11 | 2011/12 | 2012/13 | 2013/14* |
|---------------------------------|---------|---------|---------|----------|
| Number of sugar plants | 18 | 18 | 18 | 18 |
| Sugar beets processed (,000 MT) | 9,959 | 11,605 | 12,300 | 11,000 |
| Sugar content (%) | 16.6 | 17.5 | 17.6 | 17.2 |
| Sugar production (,000 MT) | 1,466 | 1,859 | 1,895 | 1,665 |

Source: *Association of Sugar Beet Producers estimate.

