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## Poland

### Fresh Deciduous Fruit

### Apples and Concentrated Apple Juice

**2007**

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**Report Highlights:**

Polish production of apples and concentrated apple juice (CAJ) increased more than 10 percent in MY2006/2007 from the previous year. Dramatic declines of 50 percent or more in both products are expected in MY2007/2008 due to a late freeze in April and May 2007.

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Includes PSD Changes: Yes  
Includes Trade Matrix: Yes  
Annual Report  
Warsaw [PL1]  
[PL]

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## Executive Summary

MY2006/2007 production of apples was 11 percent higher compared with MY2005/2006 and reached 2.3 million MT. Because of strong domestic production, exports were up 44 percent while imports dropped by 28 percent.

In addition, the production of concentrated apple juice (CAJ) increased by 10 percent, and exports rose by 21 percent. CAJ imports decreased dramatically from 48,000 MT in MY2005/2006 to 14,000 MT in MY2006/2007.

As a result of an unexpected frost of minus 10°C in April/May 2007, apple production MY2007/2008 will be 50-60 percent down from the previous season and is projected to be between 1.3 and 1.5 million MT. CAJ production is projected to drop about 60 percent to 90,000 MT. Exports of fresh apples and CAJ are expected to drop as much as 50 percent as well.

Poland's per capita consumption of fruit and fruit products is less than half the EU's consumption, but apple consumption is on par with EU consumption levels and even higher than in France and Spain. The consumption of fruit juice is similar to the EU average.

## Production

Despite spring frost and a dry summer, the harvest for MY2005/2006 rose to 2.3 million MT. In addition, CAJ production rose 18 percent to 230,000 MT. Many farmers are replacing old orchards with new apple trees to improve their quality and compete in the fresh apple market.

In 2006, farms noted a shortage in seasonal workers. Apple production costs will increase in future years as labor supplies in Poland continue to tighten.

A mild winter and unusually high temperatures in March/April 2007 resulted in early fruit tree blooming. However, two hard frosts with temperatures dipping to minus 8-10°C, in late April and early May damaged almost half the apple trees in Poland. Specialists estimate that apple production in 2007 will be down about 50 percent to between 1.3 and 1.5 million MT. Poland is still in mid-harvest but reports confirm a steep decline in quality and quantity.

Polish CAJ production is expected to drop 60 percent this year because of lower domestic production and shortages of apples for processing in neighboring countries.

As Poland's apple producers shift their attention to higher-value apples for fresh consumption, FAS Warsaw expects CAJ production to fluctuate year to year depending on production, and decline gradually in the medium and long-term (for a more detailed review of long-term apple production, please see PL6061).

## State Aid for fruit producers

As in the entire EU, there are no subsidies for production or exports of stone fruit in Poland. Financial support is available for fruit producer organizations in specific cases. For example, when producers are facing low demand and low prices that would force them to incur losses, the Polish government can, under EU regulations, purchase the product for donation to charitable

organizations at acceptable prices. As all entrepreneurs, farmers can get financing for storage facilities and equipment for orchard protection.

## Trade

In MY2006/2007 the value of apple exports increased by 40 percent compared to the previous season. The biggest increase was in exports to Russia and Ukraine (almost tripled), as well as to Lithuania and Slovakia (doubled).

The value of CAJ in Euro did not change. Prices for CAJ were slightly lower, and the volume of exports increased by 3 percent offsetting the price declines. The significant decline in the value of the U.S. dollar led to the apparent increase in the value of CAJ exports of 23 percent expressed in U.S. dollar terms.

Poland's apple imports decreased in MY2006/2007, due to good domestic production. Meanwhile, imports of apples for processing decreased from 22,000 in MY2005/2006 to 6,756 MT, while imports of fresh apples for retail almost doubled from 7,922 in MY2005/2006 to 15,000 MT.

Imports of CAJ in MY2006/2007 decreased 71 percent compared with MY2005/2006, mainly due to higher local production and 35 percent increase of the price of imported CAJ.

Due to the poor harvest in 2007, exports of all fruits and fruit products will decrease in MY2007/2008. The biggest decrease will be in apple and CAJ exports which are forecast to fall 60 percent and 50 percent, respectively.

## Consumption

The prices on fruit and fruit products increased in 2006 by 3.4 percent compared with 2005. Apple prices increased by 17 percent in 2006, and by 100 percent in 2007. Retail prices of fruit and fruit products are lower in Poland than in other EU countries. In 2006 the average price of apples per kilo in Poland was less than half of the average price of apples in Germany.

According to the Main Statistical Office, the average consumption of fruit and fruit products was 42.6 kilos per capita in 2006 and decreased by 4.6 kilos from 2005. Consumption of apples decreased by 10.8 percent due to the overall increase of prices.

Lower apple production and higher prices will decrease the consumption of apples and apple juice in MY2007/2008.

Previous reports about apples and CAJ:

[PL 6061 – Fresh Deciduous Fruit – Apples and CAJ – Annual Report](#)

PL 7025 – Fruit Frost Damage

[PL 7038 – Fruit Frost Damage - Update](#)

[PL 7039 – Apples and CAJ – PSD update](#)

Tables  
Apples – PSD

SD Table									
Country	Poland								
Commodity	Apples, Fresh						(HA)(1000 TREES)(MT)		
	2005	Revised		2006	Estimate		2007	Forecast	
	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New
Market Year Begin		07/2005	07/2005		07/2006	07/2006		07/2007	07/2007
Area Planted	169700	169700	169700	170000	170000	162000	0	170000	165000
Area Harvested	145000	145000	145000	150000	150000	140000	0	75000	70000
Bearing Trees	157000	157000	157000	157250	157250	157250	0	78000	78000
Non-Bearing Trees	20000	20000	20000	19000	19000	19000	0	99000	99000
Total Trees	177000	177000	177000	176250	176250	176250	0	177000	177000
Commercial Production	1945000	1945000	1945000	2270000	2270000	2175000	0	1148000	1300000
Non-Comm. Production	130000	130000	130000	130000	130000	125000	0	52000	52000
Production	2075000	2075000	2075000	2400000	2400000	2300000	0	1200000	1352000
Exports	25403	25403	29922	8000	8000	21756	0	50000	40000
Total Supply	2100403	2100403	2104922	2408000	2408000	2321756	0	1250000	1392000
Fresh Dom. Consumption	506000	506000	506000	510000	510000	455400	0	310000	250000
Exports, Fresh	429218	429218	375290	430000	430000	540419	0	120000	300000
Or Processing	1165185	1165185	1223632	1468000	1468000	1325937	0	820000	842000
Withdrawal From Market	0	0	0	0	0	0	0	0	0
Total Distribution	2100403	2100403	2104922	2408000	2408000	2321756	0	1250000	1392000

## Apples – Exports

<b>Export Trade Matrix</b>			
<b>Country</b>	Poland		
<b>Commodity</b>	Apples, Fresh		
Time Period	July-Jun	Units:	MT
Exports for:	2006		2007
U.S.	0	U.S.	
Others		Others	
Ukraine	64599	Ukraine	177909
Lithuania	63084	Lithuania	135610
Belarus	59464	Belarus	48306
Czech Rep.	31551	Russia	36399
Romania	20991	Czech Rep.	25875
Latvia	15352	Slovakia	14100
Russia	12448	Germany	12867
Germany	10015	Moldova	12859
Estonia	7589	Latvia	12708
Slovakia	7578	Estonia	6753
Total for Others	292671		483386
Others not Listed	33240		57033
Grand Total	325911		540419

## Apples – Imports

<b>Import Trade Matrix</b>			
<b>Country</b>	Poland		
<b>Commodity</b>	Apples, Fresh		
Time Period	Jul-Jun	Units:	MT
Imports for:	2006		2007
U.S.		U.S.	
Others		Others	
Netherlands	6255	Netherlands	6530
Lithuania	5873	Slovakia	4367
Germany	3696	Italy	2259
Slovakia	2735	Austria	2161
Italy	1619	Germany	1767
Austria	1451	Czech Rep.	1328
Spain	757		997
Czech Rep.	739		429
Total for Others	23125		18412
Others not Listed	6797		3344
Grand Total	29922		21756

## Concentrated Apple Juice – PSD

PSD Table									
Country	Poland								
Commodity	Apple Juice, Concentrated						(MT)		
	2005	Revised		2006	Estimate		2007	Forecast	
	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New
Market Year Begin		07/2005	07/2005		07/2006	07/2006		07/2007	07/2007
Deliv. To Processors	1165185	1165185	1223632	1468000	1468000	1325937	0	820000	842000
Beginning Stocks	3000	3000	3000	1500	1500	1500	3000	3000	3500
Production	185000	185000	185000	235000	235000	230000	0	141000	90000
Imports	47965	47965	47965	13000	13000	14000	0	50000	40000
Total Supply	235965	235965	235965	249500	249500	245500	3000	194000	133500
Exports	226965	226965	226965	238000	238000	232500	0	186500	123000
Domestic Consumption	7500	7500	7500	8500	8500	9500	0	6000	8000
Ending Stocks	1500	1500	1500	3000	3000	3500	0	1500	2500
Total Distribution	235965	235965	235965	249500	249500	245500	0	194000	133500

## Concentrated Apple Juice – Exports

<b>Export Trade Matrix</b>			
<b>Country</b>	Poland		
<b>Commodity</b>	Apple Juice, Concentrated		
Time Period	Jul-Jun	Units:	MT
Exports for:	2006		2007
U.S.	212	U.S.	312
Others		Others	
Germany	148103	Germany	164583
UK	18744	Austria	24492
Austria	16351	UK	22641
Netherlands	8059	Netherlands	8225
Czech Rep.	6702	Czech Rep.	5622
Slovakia	3773	France	4540
Norway	3055	Norway	3258
Spain	1350	Spain	3175
France	1103	Slovakia	1111
Total for Others	207240		237647
Others not Listed	15995		26184
Grand Total	223447		264143

## Concentrated Apple Juice – Imports

<b>Import Trade Matrix</b>			
<b>Country</b>	Poland		
<b>Commodity</b>	Apple Juice, Concentrated		
Time Period	Jul-Jun	Units:	MT
Imports for:	2006		2007
U.S.	0	U.S.	0
Others		Others	
Germany	12620	Germany	5702
Netherlands	6470	Czech Rep.	3172
Romania	5556	Netherlands	2088
Italy	4598	Italy	1069
China	3457	China	914
Moldova	1561	Ukraine	594
Turkey	1400	Turkey	41
Czech Rep.	792	Romania	3
Ukraine	226		
Total for Others	36680		13583
Others not Listed	2724		2729
Grand Total	39404		16312