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Report Name: Cherry Production Forecast to Drop in Poland

Country: Poland

Post: Warsaw

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Report Highlights:

For year 2025, FAS Warsaw forecasts Poland's total cherry production at 115,000 metric tons (MT), consisting of 80,000 sour cherries and 35,000 of sweet cherries. If realized, this would be thirty percent lower production than the previous year and over a fifty percent decrease from the six-year average. Frosts in April and May damaged cherry orchards, especially impacting early-fruiting varieties.

Production

MY 2025/26

FAS Warsaw forecasts total production for Polish sweet and sour cherries for MY 2025/26 at 115,000 MT, an almost thirty percent decrease from the last year and a fifty-three percent decrease from the six-year average. Production is expected to consist of 80,000 MT of sour cherries and 35,000 MT of sweet cherries. There are expected to be fewer sour and sweet cherries due to frosts, mainly in mid-April 2025. These frosts occurred several times from March to the end of May. Early fruit varieties suffered the most, and this will delay the arrival of fruit supply from the new harvest in MY 2025/26. For several years now, sour and sweet cherries in Poland have not reached their full yield potential due to unfavorable weather conditions including cold, drought, and/or or hail. This forecast is preliminary and may change, as a more accurate estimate of losses and harvest potential will be possible in late June.

MY 2024/25

In MY 2024/25, sour and sweet cherry production amounted to 161,200 MT, according to the Polish Statistical Office. This MY 2024/25 harvest was significantly lower than in previous years and 32 percent lower than in MY 2023/24. According to this data, sour cherry production amounted to 110,200 MT, with the harvest down by nearly 35 percent compared to the previous year. Sweet cherry production was estimated at 51,000, and its decline compared to the previous year was 26 percent.

Table 1: Cherry Production in Poland, (MT)

Calendar Year	2023	2024	2025 f
Sour cherries	168,700	110,200	80,000
Sweet cherries	68,800	51,000	35,000
Total cherries	237,500	161,200	115,000

Source: Polish Statistical Office
f- FAS forecast

Area

MY 2025/26

The MY 2025/26 cherry orchard area is forecasted to increase slightly by 0.3 percent from the previous year to 34,500 hectares (HA), mainly due to new plantings of sour cherry orchards. Modernization of cherry orchards is progressing. During 2020-25 some cherry producers replaced old trees with more profitable cherry tree varieties. New plantings of sour cherries are replacing apple trees, as well as old and less profitable cherry varieties. In addition, there has reportedly been some switching to cherry from berry crops such as black and red currants, and recently, raspberries.

MY 2024/25

According to the Polish Statistical Office, in MY 2024/25 the area of cherry orchards diminished by about one percent, and in general area has been stable with little variation in recent years.

Table 2: Cherry Orchard Area in Poland, (HA)

Calendar Year	2023	2024	2025 f
Sour cherries	25,300	24,900	25,000
Sweet cherries	9,600	9,500	9,500
Total cherries	34,900	34,400	34,500

Source: Polish Statistical Office
f- FAS forecast

Table 3: Sour Cherry Orchards Area in Poland, Comparison from different sources (HA)

Calendar Year	Source: Polish Statistical Office	Source: Agricultural Market Modernization Agency EU Agency under the supervision of the Ministry of Agriculture	Difference between data from different sources
2020	24,800	11,230	13,570
2021	25,300	16,430	8,870
2022	26,000	16,757	9,243
2023	25,300	17,246	8,054
2024	24,900	18,058	6,842

Source: Polish Statistical Office and Agricultural Market Modernization Agency

There are large differences in the estimated area of cherries in Poland, depending on the source of information. These differences concern government institutions (see Table 3). For example, in MY 2024/25, the Polish Statistical Office estimates the area of sour cherries at 24,900 HA, while the Agricultural Market Modernization Agency of European Union under the supervision of the Ministry of Agriculture, estimates it at 18,058 HA.

The Polish industry, including the National Association of Cherry Producers, claims that according to their estimates, the actual area of cherry cultivation is more similar to the data presented by the Modernization Agency. According to the Association, the productivity of sour cherry cultivation in Poland is no less than 10 MT per HA, and on average in recent years approximately 15 MT per HA. This would mean, according to the industry, that the area under cherry cultivation may have been overestimated, although it is possible that the differences in the data are due to differences in methodology. For example, one institution estimates commercial production, while the other also includes production from home gardens. In Poland, production from home gardens sometimes reaches the market during the high-harvest season.

Weather Conditions

According to Polish Statistical Office reports, the winter dormancy period from autumn 2024 to spring 2025 was conducive to maintaining the good condition of fruit trees in orchards. However, the winter was mild, which increased the threat of pests. Powdery mildew, scab, and other plant pests appeared more often than before. On commercial plantations, this resulted in the need for more intensive chemical protection and thus an increase in production costs.

In mid-March 2025, due to strong drops in air temperature, there were local minor frost damage, especially to young shoots and flower buds of cherry trees. In plantations that suffered hail damage in 2024, a decrease in the number of flower buds was also observed. Trees entered the flowering period at

dates close to the multi-annual average. A factor negatively affecting the condition of trees at that time was the lack of rainfall leading to lower soil moisture.

In April and early May, there were severe frosts, interspersed with warmer days, which caused damage to flowers and already-set fruit. Low air temperatures also reduced the activity of pollinators. The owners of peach, apricot, sour cherry, and sweet cherry orchards suffered very large losses. On some cherry plantations, the losses locally reached 90 percent. The amount of frost damage was highly variable, but frost damage occurred throughout the country. Sometimes in neighboring orchards, depending on their location, the differences in losses were huge, which makes it difficult to forecast the harvest.

May 2025 was significantly colder in Poland than the long-term average; in the northern regions there were local nights with negative soil temperatures, even down to -7 degrees Celsius. Currently, the Polish government and local industry are carrying out analysis of losses on a national scale. The flowering and pollination period was very short. In addition, the persistent low air temperatures in May, very unusual for this time of year, and the lack of rainfall, have had an adverse effect on the effectiveness of fertilization and plant protection.

Production Structure and Costs

In Poland, the production of sour cherries dominates, and they are mainly used in processing to produce frozen cherries and juices and, to a lesser extent, consumed as fresh fruit. Sweet cherries are consumed fresh and constitute a different market, with different recipients and forms of processing than sour cherries.

The local marketing year for cherries starts in June for early varieties and reaches its peak in July. In the past, the cherry harvest season in Poland began later than the export peak from competing countries, such as Hungary, Serbia, and Turkey. Imports of cherries from these countries provided consumers with the possibility of longer availability of these fruits in fresh form on the market. However, in recent years, the beginning of the cherry harvest in Poland, due to usually warmer spring and early summer, begins earlier and sometimes imports compete with local production. Industry sources report that this is particularly impactful for cherry growers in Poland, whose production costs have increased significantly in the last five years including rising costs of energy and costs related to implementing EU policies. As a result, the prices of imported fruits have become more competitive than local production.

Production of stone fruit in Poland has become more unstable, mainly due to unpredictable weather phenomena. Also, fruit growers are looking for ways to reduce production costs. One of the basic problems for them is labor costs and difficulties in finding seasonal workers during the harvest period. In Poland, manual harvesting of cherries has dominated so far, and the most sought after by the industry were cherries with stems, as the purchase prices of these are significantly higher than those without. In Poland, cherry producers are increasingly investing in machinery and switching to mechanical harvesting. Unfortunately, such harvesting reduces yields and shortens the life of fruit trees, increasing the need for more frequent plantings. This increases the demand for cherry trees for new plantings.

The profitability of cherry production in Poland is relatively low, with fragmented farms and a deterioration in the economic situation of smaller farms. To achieve high profitability of cherry

production, the industry estimates that it is necessary to increase the production area above 30 HA per farm. However, most cherry orchards in Poland do not meet this condition.

Consumption and Processing

With the 2025 harvest level being very low, it is expected that processors and exporters will compete intensely for the raw material. Adding to the tight supply of new fruit, reportedly processing plants also have little to no stocks of either frozen fruit or concentrate. The overall availability of sour cherries on the European market is also anticipated to be much lower due to expectations of significantly smaller production in Hungary, Turkey and Serbia. Producers who were not affected by the frost disaster are expecting much more favorable purchase prices offered by processing plants this year than previously.

Sweet cherries are picked in July and August and are consumed seasonally, typically fresh, and mostly unprocessed. Sour cherries are widely used by food processors to make frozen fruits, juice concentrates, jams, and marmalade. Although apple juice and apple concentrate remain dominant in Poland's juice sector, sour cherry and plum nectars are increasingly important. Poland is the EU's largest producer of frozen fruit products and concentrated fruit juices. Sour cherries are grown mainly for processing. 75 percent of cherries produced in Poland are directed to the production of concentrated juice and NFC (not from concentrate), and 20 percent are frozen (of which 70-80 percent are sold for export). Dessert sour cherries account for only three percent of production.

In MY 2025/26 domestic consumption of sour cherries is expected to decrease from the previous year. Because of low cherry availability in domestic and European markets, and following high export prices for cherries this year, some producers are expected to increase exports and take advantage of the strong foreign demand. However, the preparation of fresh fruit for export is more costly than for selling on the domestic market, and requires cherry producers to fulfill additional, and more labor-intensive procedures.

Sweet cherry consumption is also forecast to decrease due to the limited fresh sweet cherry supply. FAS Warsaw forecasts cherry fruit processing higher from the previous year, because according to information obtained, freezers in Poland were already empty in May. The structure of processing can shift towards a higher share of cherry juice concentrate in production at the expense of frozen fruit production. Production of frozen cherries will depend on the consumer response to the high prices of frozen fruit. Due to the relatively high cost of electricity in Poland, some analysts report that the production of frozen food in Poland is becoming less and less competitive. Consumption of stone fruit and related products in Poland varies strongly year by year depending on the harvest.

Trade

In MY 2024/25 fresh sour cherry exports from Poland amounted to 2,693 MT, 21 percent less than the previous year, and were valued at $5.4 million. Of these exports, 98 percent of the volume was destined for the EU market. The leading importer of Polish cherries in the EU is traditionally Germany, with over 70 percent share in Poland's total sour cherry exports, primarily for processing. Polish producers continue to seek out new export markets and in MY 2023/24, Polish exporters increased sales to Hungary and Netherlands. However, in MY 2024/25, these sales have already dropped significantly due to smaller harvests. In 2025/26, the export potential of cherries from Poland is expected to shrink even more and it is feared in the industry that another year low availability of the raw materials could impact trade contacts and long-term business ties.

In MY 2024/25, Poland exported 599 MT of sweet cherries, 25 percent less than the previous year, worth $2.2 million. The main market for sweet cherries is the EU market, with a 63 percent share of Poland's total sweet cherry exports. The largest recipients are Poland's neighboring Lithuania and Germany. In MY 2023/24 and MY 2024/5, exports to the Netherlands also increased. Among countries outside the EU, sales to Belarus and the United Kingdom dominate. In MY 2025/26 sweet cherries exports will decrease due to a forecasted smaller harvest.

In MY 2024/25 cherry imports increased to 3,253 MT from 219 MT in the previous year, due to low production and stocks. To a greater extent, these were imports of dessert sweet cherries, mainly in the period before supplies from domestic harvests appeared, and to a lesser extent for processing. Poland sourced fresh sweet cherries from Hungary, Moldova, and Serbia. FAS Warsaw forecasts that in MY 2025/26 Poland's sweet cherries imports will increase significantly because of reduced domestic supplies.

Table 4: Poland's Sour Cherries Fresh Top Export Destinations, Quantity (MT)

Partner Country	MY April-March			Market Share (%)			Change MY 2024/25 /MY 2023/24	
	2022/23	2023/24	2024/25	2022/23	2023/24	2024/25	Amount	%
World	4,326	3,433	2,693	100	100	100	-719	-21
EU 27 Brexit	3,949	3,047	2,631	91	89	98	-34	-13
Non-EU	377	386	62	9	11	2	-325	-84
Germany	2,971	1,840	1,984	69	54	74	165	9
Hungary	376	835	248	9	24	9	-587	-70
Netherlands	406	56	187	9	2	7	131	233
Belgium	0	0	123	14.86	6.97	5	123	0
Belarus	279	20	60	0	1.85	2	40	200

Source: Trade Data Monitor

Table 5: Poland's Sour Cherries Fresh Top Imports by Origin, Quantity (MT)

Partner Country	MY April-March			Market Share (%)			Change MY 2024/25 /MY 2023/24	
	2022/23	2023/24	2024/25	2022/23	2023/24	2024/25	Amount	%
_World	653	219	3,253	100	100	100	3,034	1,389
EU 27 Brexit	377	28	2,691	58	13	83	2,663	9,462
Non-EU	276	191	562	42	87	17	371	196
Hungary	0	0	2,465	0	0	76	2,465	0
Moldova	12	0	411	2	0	13	411	0
Serbia	264	190	151	40	87	5	-39	-21

Source: Trade Data Monitor

Table 6: Poland's Sweet Cherries Fresh Top Export Destinations, Quantity (MT)

Partner Country	MY April-March			Market Share (%)			Change MY 23/24 - 24/25 /MY 2023/24	
	2022/23	2023/24	2024/25	2022/23	2023/24	2024/25	Amount	%
_World	4,410	804	599	100	100	100	-203	-25
EU 27 Brexit	2,391	562	380	54.2	70.0	63	-190	-33
Non-EU	2,019	242	219	46	30	37	-13	-6
Lithuania	236	107	103	14	13	17	-4	-4
Belarus	831	47	101	50	6	17	54	115
United Kingdom	66	117	88	4	15	15	-29	-25
Germany	373	57	79	22	7	13	22	39
Netherlands	20	84	73	1	10	12	-11	-13
Estonia	9	90	56	1	11	9	-34	-38
Latvia	41	127	41	2	16	7	-85	-67

Source: Trade Data Monitor

Table 7: Poland's Sweet Cherries Fresh Top Imports by Origin, Quantity (MT)

Partner Country	MY April-March			Market Share (%)			Change MY 2024/25 /MY 2023/24	
	2022/23	2023/24	2024/25	2022/23	2023/24	2024/25	Amount	%
_World	4,728	6,274	8,184	100	100	100	1,917	31
EU 27 Brexit	3,860	3,582	4,698	82	57	57	1,122	31
Non-EU	868	2,692	3,486	18	43	43	795	30
Turkey	22	1,362	1,829	0	22	22	467	34
Germany	745	1,301	1,752	16	21	21	451	35
Serbia	775	959	1,227	16	15	15	268	28
Greece	2,351	694	1,115	50	11	14	421	61
Bulgaria	0	518	1,019	0	8	12	501	97

Source: Trade Data Monitor

Attachments:

No Attachments.