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Poland

Dairy

Annual Dairy Report

1998

Prepared by:

Stan Phillips, Agricultural Attache

U.S. Embassy

Drafted by:

PR

Report Highlights:

Despite the ban on Polish dairy products introduced by the EU in December 1997 and the Russian crisis which started in September 1998, milk production is expected to grow one percent in CY1998 and an additional three percent in CY1999.

Production of cheese and butter are expected to increase in CY1998 while Nonfat Dry Milk and Dry Milk production are expected to decrease.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
Annual Report
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Executive Summary

Milk production is expected to grow one percent in CY1998 and additional three percent in CY1999. Milk output is expected to grow in 1999 despite a projected decline in dairy cow inventories as individual cows yields increase. Production of cheese and butter is expected to increase in CY1998 along with higher milk output. The increase in cheese production is largely the result of high demand for export and growing domestic consumption. Increased butter production also results from growing demand from consumers caused by strong promotional activities of the dairy industry who are struggling for market share against margarine producers. The CY1998 outputs of NFD and WDM are expected to decrease by two and five percent, respectively, as a result of the EU import ban on Polish dairy products. Production of NFD and WDM is forecast to recover in CY1999 in response to better export prospects as the EU ban is eased.

Average retail prices for dairy products in CY1997 increased by 12 percent, compared to an annual inflation rate of 13 percent. Higher output of milk and lower exports of dairy products are expected to result in higher consumption of all dairy products in CY1998.

Polish trade of dairy products in 1998 is strongly affected by the ban for Polish dairy products introduced by the EU in December 1997 (see report PI7031) and the Russian crisis which started in September 1998. Poland traditionally exports non-fat dried milk (NFD) to the EU. As a result of the ban, total exports of Polish NFD are expected to drop from 112,115 tons in 1997 to an estimated 90,000 tons in 1998. It is expected that the EU ban will be lifted before the end of 1998 as five Polish plants were approved in September 1998 by the EU's veterinary inspection for export to the EU market. The Russian crisis affected mostly Polish exports of cheese and ice cream. In the first half of 1998, Poland exported 13,430 tons of hard cheese largely to the Russian market. It is estimated that in the second half of 1998, Polish exports of hard cheese will drop to 3,570 tons.

The United States accounted for 11 percent of Poland's cheese exports in CY1997, compared to 34 percent in CY1996. Exports of cheese to the U.S. appear to have been replaced by a greater focus on the Russia market in 1997. Given the current situation in Russia, the focus may shift back to the U.S. market.

PS&D Table, Dairy, Milk, Fluid (000 MT; 000 Head)

PSD Table						
Country:	Poland					
Commodity:	Dairy, Milk, Fluid					
		1997		1998		1999
	Old	New	Old	New	Old	New
Calendar Year Begin		01/1997		01/1998		01/1999
Cows In Milk	3550	3550	3600	3496	0	3400
Cows Milk Production	11980	11980	12200	12100	0	12550
Other Milk Production	30	30	30	30	0	30
TOTAL Production	12010	12010	12230	12130	0	12580
Intra EC Imports	0	0	0	0	0	0
Other Imports	0	1	0	0	0	0
TOTAL Imports	0	1	0	0	0	0
TOTAL SUPPLY	12010	12011	12230	12130	0	12580
Intra EC Exports	0	0	0	0	0	0
Other Exports	0	5	0	3	0	0
TOTAL Exports	0	5	0	3	0	0
Fluid Use Dom. Consum.	5644	5640	5630	5300	0	5400
Factory Use Consum.	5716	5716	6000	6127	0	6430
Feed Use Dom. Consum.	650	650	600	700	0	750
TOTAL Dom. Consumption	12010	12006	12230	12127	0	12580
TOTAL DISTRIBUTION	12010	12011	12230	12130	0	12580
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

Production

Poland's milk production is expected to increase one percent from a year ago to 12.1 million tons in CY1998 as a result of favorable prices and increasing milk yields. The CY1997 average yield per cow, at 3,340 kilograms (kgs), was up two percent from the previous year. There are over 700 dairy plants processing milk but a trend toward consolidation appears to be emerging. Poland's milk quality is one of the major constraints in fast development of the dairy industry. As a result of low microbiological quality of raw milk, EU banned imports of all Polish dairy products in December 1997.

Consumption

Demand for milk and dairy products has been growing since 1996. In CY1997, total domestic per capita consumption of dairy products expressed in milk equivalent (not counting butter) amounted to 202 liters and was 3.1 percent higher than in 1996. On-farm consumption of milk is expected to grow in CY1998 and 1999 as

hog inventories rise to the peak of the production cycle. There is a continuing trend towards a decrease in direct sales of milk by farmers to consumers and higher procurement of milk by dairy plants. Dairy plants procured 59 percent of total milk production in CY1997 compared to 55 percent in CY1996. Milk procurement prices have been growing constantly during last year, reaching 0.65 zls per liter (\$US .18) in April 1998. During the summer months, there was a seasonal drop of milk procurement prices due to higher supplies. Milk procurement prices are forecast to grow in the last quarter of CY1998 and in CY1999 because of growing demand for most dairy products.

Prices Table, Milk, Fluid

Prices Table					
Country:	Poland				
Commodity:	Milk, Fluid				
Year:	1998				
Prices in (currency)	zlotys	per (uom)	one liter of 3.2% UHT milk		
Year	1997	1998	% Change		
Jan	1.93	2.05	6.2%		
Feb	1.95	2.06	5.6%		
Mar	1.96	2.07	5.6%		
Apr	1.98	2.08	5.1%		
May	1.98	2.08	5.1%		
Jun	1.98	2.08	5.1%		
Jul	1.98	2.07	4.5%		
Aug	1.98	2.07	4.5%		
Sep	1.99	2.07	4.0%		
Oct	1.99				
Nov	1.99				
Dec	2.01				

Trade

In CY1997, Poland's imports of fluid milk amounted to 1,104 tons compared to 135 tons in CY1996. Domestic output of UHT milk in paper packages, has increased along with exports of this product to Hungary and Russia.

Import Trade Matrix, Milk, Fluid

Import Trade Matrix			
Country:	Poland	Units:	Tons
Commodity:	Milk, Fluid		
Time period:	I-XII		
Imports for	1997		1998
U.S.		U.S.	
Others		Others	
Germany	900	Hungary	50
France	136	Czech Republic	50
Hungary	40		
Czech Republic	28		
Total for Others	1104		100
Others not listed			
Grand Total	1104		100

Export Trade Matrix, Milk , Fluid

Export Trade Matrix			
Country:	Poland	Units:	Tons
Commodity:	Milk, Fluid		
Time period:	I-XII		
Exports for	1997		1998
U.S.	1	U.S.	0
Others		Others	
Hungary	2558	Hungary	2000
Russia	1290	Russia	500
Germany	175		
Azerbaijan	112		
Moldovia	84		
The Netherlands	77		
Ukraine	42		
Great Britain	37		
Total for Others	4375		2500
Others not listed	139		500
Grand Total	4515		3000

Policy

The GOP has established a minimum procurement price of 0.55 zlotys per liter for grade A (best quality) milk which was valid from May 1, 1997 to April 30, 1998. The Agency for Agricultural Markets (AAM) is responsible for supporting this price through intervention purchases of butter and NFDM. In 1997, the Agency for Agricultural Markets procured a total of 10,200 tons of butter and released 5,000 tons of butter to stabilize the domestic market. Intervention on the NFDM market in 1997 amounted to 19,400 tons sold (mostly exported) by AAM and 12,303 procured in the summer season during the peak of production. The import tariff for fluid milk is 40 percent from all origins.

PS&D Table, Dairy, Cheese (000MT)

PSD Table						
Country:	Poland					
Commodity:	Dairy, Cheese					
		1997		1998		1999
	Old	New	Old	New	Old	New
Calendar Year Begin		01/1997		01/1998		01/1999
Beginning Stocks	21	21	20	10	20	16
Production	145	158	150	180	0	160
Intra EC Imports	0	0	0	0	0	0
Other Imports	3	2	3	2	0	2
TOTAL Imports	3	2	3	2	0	2
TOTAL SUPPLY	169	181	173	192	20	178
Intra EC Exports	0	0	0	0	0	0
Other Exports	16	16	17	17	0	16
TOTAL Exports	16	16	17	17	0	16
Human Dom. Consumption	133	155	136	159	0	152
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	133	155	136	159	0	152
TOTAL Use	149	171	153	176	0	168
Ending Stocks	20	10	20	16	0	10
TOTAL DISTRIBUTION	169	181	173	192	0	178
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	2	0	2	0	2

Production

During the first six months of CY1998, production of cheese increased by 16 percent in comparison to the same period in 1997. Driven by strong demand early in the year from Russia and larger fluid milk availabilities, Polish manufacturers are expected to increase cheese output 13 percent in CY1998 despite the EU import ban and collapse of Russian demand after September. Output is forecast to decrease by 12 percent in CY1999 due to reduced demand for export to Russia.

Consumption

Hard cheese consumption in CY1998 is expected to increase an estimated two percent. Annual per capita consumption of hard cheese in CY1997 amounted to 3.36 kilograms. Consumption is forecast to decline in CY1999 due to lower output.

Prices Table, Dairy, Cheese

Prices Table					
Country:	Poland				
Commodity:	Cheese				
Year:	1998				
Prices in (currency)	zlotys	per (uom)	1 kg of gouda cheese		
Year	1997	1998	% Change		
Jan	11	12.86	16.9%		
Feb	11.22	13.08	16.6%		
Mar	11.61	13.32	14.7%		
Apr	12.09	13.52	11.8%		
May	12.58	13.69	8.8%		
Jun	12.86	13.54	5.3%		
Jul	12.89	13.34	3.5%		
Aug	12.81	13.2	3.0%		
Sep	12.72	13.07	2.8%		
Oct	12.66				
Nov	12.73				
Dec	12.83				

Trade

Russia was a primary export market for Polish cheese in 1997 and the first eight months of 1998. During the first six months of 1998 Poland exported 13,430 tons of hard cheese primarily to Russia. As a result of limited demand from Russia and EU's ban for dairy products, total exports of hard cheese in CY1998 are estimated to amount to 17,000 tons. The United States was the second largest importer of hard cheese from Poland in CY1997.

Import Trade Matrix, Dairy, Cheese

Import Trade Matrix			
Country:	Poland	Units:	tons
Commodity:	Cheese		
Time period:	I-XII		
Imports for	0		1998
U.S.	2	U.S.	5
Others		Others	

The Netherlands	528	The Netherlands	500
Czech Republic	459	Czech Republic	500
France	310	France	300
New Zealand	280	New Zealand	300
Germany	274	Germany	300
Australia	220		
Denmark	171		
Switzerland	115		
Sweden	71		
Russia	18		
Total for Others	2446		1900
Others not listed	38		500
Grand Total	2486		2405

Export Trade Matrix, Dairy, Cheese

Export Trade Matrix			
Country:	Poland	Units:	tons
Commodity:	Cheese		
Time period:	I-XII		
Exports for	0		1998
U.S.	1731	U.S.	1700
Others		Others	
Russia	9101	Russia	9000
Ukraine	1138	Ukraine	1000
The Netherlands	757	Latvia	1500
Latvia	422		
Azerbaijan	361	Moldova	500
Lithuania	316	Lithuania	200
Malta	260		
Italy	230		
Moldova	206		
Denmark	180		
Total for Others	12971		12200
Others not listed	912		3100
Grand Total	15614		17000

Policy

The tariff for hard cheeses is 35 percent with the following exceptions: from the EU 25 percent, from Czech and Slovak Republics five percent and from Lithuania 30 percent.

PS&D Table, Dairy, Butter (000 MT)

PSD Table						
Country:	Poland					

Commodity:	Dairy, Butter					
		1997		1998		1999
	Old	New	Old	New	Old	New
Calendar Year Begin		01/1997		01/1998		01/1999
Beginning Stocks	3	3	3	11	4	12
Production	176	178	180	180	0	180
Intra EC Imports	0	0	0	0	0	0
Other Imports	6	5	6	1	0	1
TOTAL Imports	6	5	6	1	0	1
TOTAL SUPPLY	185	186	189	192	4	193
Intra EC Exports	0	0	0	0	0	0
Other Exports	13	3	14	3	0	5
TOTAL Exports	13	3	14	3	0	5
Domestic Consumption	169	172	171	177	0	176
TOTAL Use	182	175	185	180	0	181
Ending Stocks	3	11	4	12	0	12
TOTAL DISTRIBUTION	185	186	189	192	0	193
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

Production

Butter production in CY1998 is expected to be up by one percent. During the first six months of 1998, industrial production of butter (excluding home churning) increased by two percent in response to higher milk production. Most butter is produced during the summertime peak of raw milk supplies. Peak demand for butter is in November/December. Home churning is estimated at 30,000 tons per year. Output of butter in CY 1999 is expected to remain at the 1998 level due to expected higher output of WDM, ice cream and milk desserts.

Consumption

After a 7 percent increase in CY1997, butter consumption is expected to increase by an additional two percent in CY1998.

Prices Table, Dairy, Butter

Prices Table					
Country:	Poland				
Commodity:	Butter				

Year:	1998				
Prices in (currency)	zlotys	per (uom)	200 grams package		
Year	1997	1998	% Change		
Jan	2.19	2.34	6.8%		
Feb	2.24	2.36	5.4%		
Mar	2.26	2.36	4.4%		
Apr	2.28	2.35	3.1%		
May	2.27	2.3	1.3%		
Jun	2.21	2.2	-0.5%		
Jul	2.14	2.14	0.0%		
Aug	2.11	2.12	0.5%		
Sep	2.12	2.09	-1.4%		
Oct	2.14				
Nov	2.17				
Dec	2.28				

In August 1998, butter prices were almost the same as in August of the previous year. High stocks of butter and competition from margarine are expected to keep prices of butter near CY1998 prices in CY1999.

Trade

During the first six months of 1998, imports of butter amounted to 440 tons compared with 4,374 tons in the first half of 1997. In CY1998, exports of butter are expected to remain at the 1997 level.

Import Trade Matrix, Dairy Butter

Import Trade Matrix			
Country:	Poland	Units:	tons
Commodity:	Butter		
Time period:	I-XII		
Imports for	1997		1998
U.S.	25	U.S.	
Others		Others	
The Netherlands	1233	The Netherlands	250
Great Britain	998	Great Britain	200

Australia	850	Australia	200
France	438	France	200
Czech Republic	342	Czech Republic	100
Ireland	250		
New Zealand	231		
Denmark	148		
Norway	115		
Total for Others	4605		950
Others not listed	311		50
Grand Total	4941		1000

Export Trade Matrix, Dairy Butter

Export Trade Matrix			
Country:	Poland	Units:	tons
Commodity:	Butter		
Time period:	I-XII		
Exports for	1997		1998
U.S.		U.S.	
Others		Others	
The Netherlands	1197	The Netherlands	300
Germany	811	Germany	200
Russia	212	Russia	1000
Azerbaijan	174	Ukraine	500
Georgia	150	Georgia	400
Ukraine	131		
France	77		
Great Britain	68		
Uzbekistan	36		
Estonia	24		
Total for Others	2880		2400
Others not listed	145		600
Grand Total	3025		3000

Policy

The Government procures domestic butter in order to support producer prices of milk during periods of surplus production. The tariff rate on butter is 40 percent from all origins with the exception of Czech and Slovak Republics for which the tariff is 30 percent.

PS&D Table, Dairy, Milk, Nonfat Dry (000 MT)

PSD Table						
Country:	Poland					

Commodity:	Dairy, Milk, Nonfat Dry					
	1997		1998		1999	
	Old	New	Old	New	Old	New
Calendar Year Begin	01/1997		01/1998		01/1999	
Beginning Stocks	10	10	11	5	4	15
Production	123	120	125	118	0	120
Intra EC Imports	0	0	0	0	0	0
Other Imports	3	9	3	6	0	8
TOTAL Imports	3	9	3	6	0	8
TOTAL SUPPLY	136	139	139	129	4	143
Intra EC Exports	0	0	0	0	0	0
Other Exports	90	112	100	90	0	110
TOTAL Exports	90	112	100	90	0	110
Human Dom. Consumption	0	0	0	0	0	0
Other Use, Losses	35	22	35	24	0	33
Total Dom. Consumption	35	22	35	24	0	33
TOTAL Use	125	134	135	114	0	143
Ending Stocks	11	5	4	15	0	0
TOTAL DISTRIBUTION	136	139	139	129	0	143
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

Production

As a result of the EU's ban on Polish dairy products, Poland reduced production and exports of NFDM in CY1998. Total domestic output of NFDM is expected to increase by two percent in CY1999.

Consumption

No official data is available on domestic consumption of NFDM. AgOffice estimates that consumption of NFDM will increase by about nine percent in CY1998 to 24 thousand tons due to reduced exports. Domestic consumption of NFDM mainly consists of production of feed concentrates and milk replacers. NFDM is also used by the bakery industry.

Trade

Exports of NFDM increased by 45 percent in CY1997 as a result of higher output of milk and a partial change of export markets. Exports are forecast to drop in CY1998 because of the EU's ban on import of Polish dairy products. Traditionally Poland has been selling NFDM to the EU countries for re-export to North Africa and Middle Eastern countries. Since 1994 Poland started to sell NFDM directly to North African and Asian

customers. Poland imported some NFDM in CY1997, mainly from Russia and Ukraine.

Import Trade Matrix, Dairy, Milk, Nonfat, Dry (000 MT)

Import Trade Matrix			
Country:	Poland	Units:	tons
Commodity:	Milk, Nonfat, Dry		
Time period:	I-XII		
Imports for	0		1998
U.S.	2	U.S.	
Others		Others	
Russia	4368	Russia	3000
Ukraine	2844	Ukraine	2000
Byelorus	546	Byelorus	500
Switzerland	520	Switzerland	400
Lithuania	297	Lithuania	200
Romania	160	Romania	100
Germany	50		
Belgium	44		
Great Britain	33		
Total for Others	8862		6200
Others not listed	34		200
Grand Total	8898		6400

Export Trade Matrix, Dairy, Milk, Nonfat, Dry (000 MT)

Export Trade Matrix			
Country:	Poland	Units:	tons
Commodity:	Milk, Nonfat, Dry		
Time period:	I-XII		
Exports for	0		1998
U.S.		U.S.	
Others		Others	
Algeria	31508	Algeria	30000

The Netherlands	18162	The Netherlands	2000
Germany	10907	Germany	2000
Egypt	5751	Egypt	10000
Bangladesh	4798	Bangladesh	6000
Vietnam	4681	Vietnam	5000
Belgium	4196	Belgium	1000
Japan	3377	Japan	4000
France	2848	France	1000
Indonesia	2227	Indonesia	3000
Total for Others	88455		64000
Others not listed	23695		26000
Grand Total	112150		90000

Policy

The tariff rate for NFDM is 70 percent. For NFDM imported from Czech and Slovak Republics and Hungary, the tariff is 37 percent and from Lithuania 20 percent.

PS&D Table, Dairy, Whey, Dried

PSD Table						
Country:	Poland					

Commodity:	Dairy, Dried Whey					
		1997		1998		1999
	Old	New	Old	New	Old	New
Calendar Year Begin		01/1997		01/1998		01/1999
Beginning Stocks	1	0	0	0	0	0
Production	6	1	0	1	0	1
Intra EC Imports	0	0	0	0	0	0
Other Imports	6	0	0	0	0	0
TOTAL Imports	6	0	0	0	0	0
TOTAL SUPPLY	13	1	0	1	0	1
Intra EC Exports	0	0	0	0	0	0
Other Exports	10	0	0	0	0	0
TOTAL Exports	10	0	0	0	0	0
Human Dom. Consumption	0	0	0	0	0	0
Other Use, Losses	3	1	0	1	0	1
Total Dom. Consumption	3	1	0	1	0	1
TOTAL Use	13	1	0	1	0	1
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	13	1	0	1	0	1
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

Production

There is no data available on production and consumption of dried whey. AgOffice estimates that in CY1997 production amounted to 1,000 tons. Production is expected to remain at the same level in CY1998.

Consumption

Consumption of dried whey in CY1997 is estimated at 1,000 tons and is expected to remain stable in CY1998.

Trade

Official data on trade of dried whey are not available.

Policy

The tariff rate for whey is 35 percent. For Czech and Slovak Republics, Romania, Lithuania and Latvia there is a preferential tariff of 14 percent.

PS&D Table, Dairy, Dry Milk (000 MT)

PSD Table						
Country:	Poland					
Commodity:	Dairy, Dry Whole Milk Powder					

	1997		1998		1999	
	Old	New	Old	New	Old	New
Calendar Year Begin		01/1997		01/1998		01/1999
Beginning Stocks	1	1	1	1	1	1
Production	37	40	38	38	0	40
Intra EC Imports	0	0	0	0	0	0
Other Imports	1	0	1	1	0	1
TOTAL Imports	1	0	1	1	0	1
TOTAL SUPPLY	39	41	40	40	1	42
Intra EC Exports	0	0	0	0	0	0
Other Exports	4	3	4	2	0	2
TOTAL Exports	4	3	4	2	0	2
Human Dom. Consumption	34	37	35	37	0	39
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	34	37	35	37	0	39
TOTAL Use	38	40	39	39	0	41
Ending Stocks	1	1	1	1	0	1
TOTAL DISTRIBUTION	39	41	40	40	0	42
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

Production

It is estimated that total domestic output of WDM will decrease five percent in CY1998 reflecting lower demand for export. Please note that data for production, consumption and trade of WDM include infant formula.

Consumption

No official data is available on domestic consumption. AgOffice estimates that despite lower output, consumption of WDM in CY1998 will remain at the 1997 level due to lower exports.

Prices Table, Dry Milk

Prices Table					
Country:	Poland				
Commodity:	Dry Milk				
Year:	1998				

Year	1997	1998	% Change
Jan	4.69	5.15	9.8%
Feb	4.76	5.23	9.9%
Mar	4.81	5.27	9.6%
Apr	4.86	5.31	9.3%
May	4.91	5.34	8.8%
Jun	4.93	5.34	8.3%
Jul	4.94	5.33	7.9%
Aug	4.94	5.33	7.9%
Sep	4.96	5.36	8.1%
Oct	4.99		
Nov	5.04		
Dec	5.07		

Trade

In CY1997, most of Poland's exports of WDM were shipped to the Netherlands. Exports are expected to drop in CY1998 because of the EU's import ban.

Import Trade Matrix, Dairy, Dry Milk

Import Trade Matrix			
Country:	Poland	Units:	tons
Commodity:	Milk, Dry		
Time period:	I-XII		
Imports for	0		1998
U.S.		U.S.	
Others		Others	
France	88	The Netherlands	500
Germany	33	France	200
Russia	13	Germany	200
Total for Others	134		900
Others not listed	2		100
Grand Total	136		1000

Export Trade Matrix, Dairy, Dry Milk

Export Trade Matrix			
Country:	Poland	Units:	tons
Commodity:	Milk, Dry		
Time period:	I-XII		
Exports for	0		1998
U.S.		U.S.	
Others		Others	
The Netherlands	2261	The Netherlands	500
Russia	314	Russia	500
Hungary	249	Hungary	250
France	62	France	50
Germany	50	Germany	50
Denmark	50	Denmark	50
Spain	24		
Total for Others	3010		1400
Others not listed	145		200
Grand Total	3155		1600

Policy

The tariff rate for WDM is 80 percent for all origins. Czech and Slovak Republics and Hungary have a preferential tariff rate of 37 percent. For WDM imported from Lithuania the tariff is 20 percent. The tariff rate for infant formula is 5 percent.