

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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Voluntary - Public

Date: 8/17/2018

GAIN Report Number:

Poland

Post: Warsaw

Polish Apple Growers Expect Record Harvest

Report Categories:

Agricultural Situation

Fresh Fruit

Fresh Deciduous Fruit

Approved By:

Jonn Slette, Agricultural Attaché

Prepared By:

Mira Kobuszyńska, Agricultural Specialist

Report Highlights:

In marketing year (MY) 2018/19 FAS Warsaw expects that Polish apple producers will see a record-level harvest. Post forecasts Poland's apple production to reach 4.0 million metric tons (MMT), a 43-percent increase from MY 2017/18. Post also expects MY 2018/19 fresh-apple exports to increase significantly over the previous year, due to record production and good dessert-fruit quality.

Area Planted and Production

FAS Warsaw forecasts Polish MY 2017/18 apple production in at 2.8 MMT. Moreover, Post expects that MY 2018/19 production will reach a record 4.0 MMT, a 43-percent increase over MY 2017/18.

According to official data published by the Government of Poland's (GOP) Main Statistical Office (MSO), apple production in MY 2018/19 will reach 3.6 MMT. MSO estimated apple production for MY 2017/18 at 2.4 MMT. In recent years, the Polish apple industry's production data has been notably higher than GOP data. For MY 2018/19, the industry estimates the apple crop at 4.5-5.0 MMT, and for MY 2017/18 at 2.9 MMT. Wild apple production data for processing remains the most opaque.

Poland's apple area decreased in MY 2017/18, mostly due to tree maturation and some older orchards taken out of production. Some Polish apple growers converted orchard area into other, more profitable types of production following a long period of low apple prices. In MY 2018/19 Poland's apple orchards area is estimated at 176,000 HA.

The 2017/18 winter was mild and most apple-growing regions saw no winterkill. Some orchards experienced minor damage on very young trees during a cold snap in late February and early March 2018. Higher-than-average temperatures in April shortened the flowering period and accelerated fruit development by two weeks. Flowering was abundant on mature trees, but budding was more moderate, as pollinators were not able to keep pace with the trees. Dry conditions during the spring moderated flowering on young trees. Occurrences of disease and pests were significantly reduced in MY 2018/19, although a few orchards reported the occurrence of powdery mildew. In mid-August, isolated hail severely damaged the dessert-apple crop some areas of central Poland. Localized weather incidents are not likely to affect Poland's total apple crop. Low market prices, especially for industrial apples for processing, coupled with labor shortages for field work may stop some farmers from harvesting all of their fruit this year.

Champion and Idared continue to be the most-cultivated Polish apple varieties. The most popular dessert varieties include also Jonagold, Ligol, Gloster, and Cortland. According to industry sources, Red Delicious, Gala, Jonaprince, and Red Chief are popular for new plantings. Attempts at growing Elstar were not successful due to climactic conditions.

Trade

Post expects MY 2018/19 fresh-apple exports to increase significantly from the previous year, due to record production and good dessert fruit quality. During first ten months of MY 2017/18, Polish apple exports were 42 percent lower than the corresponding period in MY 2016/17, mostly due to reduced exports to Belarus and Kazakhstan. However, exports of apples, mostly for processing, to Germany and Netherlands increased by 33 percent.

Table 1: Apple Production by Marketing Year (July/June)

Apples Fresh, Poland	MY 2015/16	MY 2016/17	MY 2017/18	MY 2018/19*	
Area planted	180,400	177,200	176,400	176,000	HA
Production total	3,145,800	3,604,200	2,441,400	3,600,000	MT

Source: The Main Statistical Office Poland

Table 2: Area Harvested and Apple Crops by Variety in Poland

	2016				2017			
	Area (000) HA	Total =100	Crops (000) MT	Total =100	Area (000) HA	Total =100	Crops (000) MT	Total =100
TOTAL	177.2	100.0	3604.3	100.0	176.4	100.0	2441.4	100.0
Idared	32.1	18.1	682.4	18.9	32.0	18.2	461.4	18.9
Champion	18.2	10.3	393.0	10.9	17.7	10.1	269.1	11.0
Jonagold	16.9	9.5	344.8	9.6	16.6	9.4	220.2	9.0
Ligol	14.3	8.1	310.8	8.6	14.0	7.9	212.9	8.7
Gloster	9.7	5.5	219.3	6.1	10.0	5.7	154.7	6.3
Cortland	8.4	4.7	149.9	4.2	8.3	4.7	109.9	4.3
Gala	7.7	4.3	165.9	4.6	7.7	4.4	113.7	4.7
Golden Delicious	7.6	4.3	161.0	4.5	7.4	4.2	110.3	4.5
Lobo	6.8	3.8	135.3	3.8	6.8	3.9	92.8	3.8
Elstar	5.6	3.1	115.0	3.2	5.5	3.1	77.8	3.2
Antonowka	4.6	2.6	80.0	2.2	4.4	2.5	51.8	2.1
Jonatan	3.5	2.0	68.0	1.9	3.8	2.2	48.1	2.0
Spartan	3.5	2.0	73.2	2.0	3.5	2.0	50.9	2.1
Red Delicious	3.5	1.9	63.5	1.8	3.8	2.1	43.8	1.8
Others	34.8	19.8	642.2	17.7	34.9	19.8	429.0	17.6

Source: The Main Statistical Office Poland

Table 3: Poland, Export Statistics for Fresh Apples, in MT (HS: 080810)

Year Ending: June								
Partner Country	Unit	Quantity			% Share			% Change 2017/2016
		2015	2016	2017	2015	2016	2017	
World	T	1,002,903	982,870	1,102,031	100.00	100.00	100.00	12.12
Belarus	T	290,036	422,841	504,192	28.92	43.02	45.75	19.24
Kazakhstan	T	61,161	54,868	78,317	6.10	5.58	7.11	42.74
Romania	T	50,717	63,744	64,396	5.06	6.49	5.84	1.02
Germany	T	115,800	57,664	53,475	11.55	5.87	4.85	- 7.26
Serbia	T	20,238	37,546	45,883	2.02	3.82	4.16	22.20
Ukraine	T	62,794	24,644	41,643	6.26	2.51	3.78	68.98
Czech Republic	T	59,749	38,615	37,425	5.96	3.93	3.40	- 3.08
Lithuania	T	71,813	44,769	32,058	7.16	4.55	2.91	- 28.39
Egypt	T	10,286	25,622	22,184	1.03	2.61	2.01	- 13.42
Latvia	T	65,468	45,813	18,664	6.53	4.66	1.69	- 59.26
Netherlands	T	10,365	10,471	17,136	1.03	1.07	1.55	63.65

Source: Eurostat

Table 4: Poland, Exports, Fresh Apples by Value (\$) (HS: 080810)

Year Ending: June							
Partner Country	United States Dollars			% Share			% Change 2017/2016
	2015	2016	2017	2015	2016	2017	
World	343,717,813	329,998,973	368,114,962	100.00	100.00	100.00	11.55
Belarus	81,136,425	121,190,486	148,302,505	23.61	36.72	40.29	22.37
Kazakhstan	22,856,969	17,664,009	24,687,803	6.65	5.35	6.71	39.76
Romania	18,124,700	23,245,029	24,107,274	5.27	7.04	6.55	3.71
Germany	28,001,789	15,217,805	15,521,956	8.15	4.61	4.22	2.00
Czech Republic	24,065,466	15,797,613	15,324,858	7.00	4.79	4.16	- 2.99
Ukraine	21,163,758	8,262,477	13,275,225	6.16	2.50	3.61	60.67
Lithuania	29,486,287	18,565,272	13,008,199	8.58	5.63	3.53	- 29.93
Serbia	5,538,684	10,154,581	11,740,104	1.61	3.08	3.19	15.61
Latvia	27,796,869	18,221,076	7,604,510	8.09	5.52	2.07	- 58.27
Egypt	3,728,583	10,799,996	7,061,711	1.08	3.27	1.92	- 34.61
Hungary	1,383,754	1,499,505	6,120,211	0.40	0.45	1.66	308.15
Sweden	4,271,099	4,853,846	5,958,048	1.24	1.47	1.62	22.75
Slovakia	3,346,548	4,065,901	5,646,157	0.97	1.23	1.53	38.87
United Kingdom	4,525,998	4,036,342	5,591,019	1.32	1.22	1.52	38.52
Netherlands	2,812,577	2,645,002	4,903,212	0.82	0.80	1.33	85.38

Source: Eurostat

Table 5: Poland, Exports, Fresh Apples by Volume (MT) and Value (\$) (HS: 080810),

10 Month Ending: April					
Partner Country	Unit	2017		2018	
		USD	Quantity	USD	Quantity
World	T	281,360,614	887,304	282,483,661	516,932
Belarus	T	109,447,393	399,573	65,733,692	147,512
Germany	T	13,501,970	49,677	29,948,019	59,996
Romania	T	18,826,136	54,765	21,364,799	34,611
Czech Republic	T	12,045,380	31,350	16,058,367	22,747
Kazakhstan	T	16,355,336	55,344	14,320,275	33,989
Netherlands	T	4,145,752	14,530	11,884,962	25,487
Sweden	T	4,720,527	10,571	9,543,859	12,897
Lithuania	T	8,877,692	24,081	8,746,536	13,681
Serbia	T	9,542,919	39,261	7,880,795	19,063
Egypt	T	6,901,935	21,912	7,876,727	15,009
Slovakia	T	4,739,093	13,231	7,443,552	10,855
Jordan	T	2,439,429	5,764	6,525,257	9,297

Source: Eurostat

