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Post: Warsaw

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Report Highlights:

In Marketing Year (MY) 2021, FAS Warsaw forecasts Poland's total cherry production at 213,000 metric tons (MT), consisting of 165,000 MT of sour cherries and 48,000 MT of sweet cherries. Post forecasts that the processing industry will use about 200,000 MT of cherries, ten percent more than in 2020. Also in MY 2021, Post forecasts Polish peach production at 8,600 MT, a 1.2 percent increase over last year's production.

General Information:

Cherries

Production

FAS Warsaw forecasts total production for Polish sweet and sour cherries for MY 2021/22 at 213,000 MT, a six percent increase over the last year. Total production will consist of 165,000 MT of sour cherries and 48,000 MT of sweet cherries. The MY 2021/22 cherry orchard area remains almost unchanged from the previous year at 40,000 hectares (HA). Modernization of cherry orchards is progressing. In 2020 some cherry producers replaced old trees with more profitable cherry tree varieties. Official data for MY 2020/21 sour cherry production amounts to 157,000 MT. However, according to Polish industry stakeholders, MY 2020/21 production of sour cherries amounted to 100,000 - 120,000 MT. Regarding sweet cherry production, official data, and industry estimates are equal, and amount to 44,000 MT.

Weather conditions were quite variable in Poland during winter 2020/21. At the end of 2020, air temperatures exceeded the long-term average for that period in the past five years. As a result, Cherry trees entered winter dormancy much later than usual. In February 2021, temperatures dropped significantly. Thanks to the snow cover, most of the fruit trees survived this winter in good condition. Most regions experienced no winterkill, although isolated minor damage occurred on some immature trees or in neglected orchards. Cold weather in spring slowed down the development of flower buds of cherry trees and left tree development two weeks behind schedule. Despite sudden cold spells, which hit Poland particularly hard in April-May, the slowing down of vegetation helped the flower buds to survive. Low temperatures at the beginning of this year’s spring also contributed to the shortening of the flowering period of cherry trees. The intensity of flowering was lower and pollinator activity was reduced in comparison with last year. Due to frequent rains in many parts of the country, it was difficult to carry out chemical protection of plants against fungal diseases. June was warm, with weather conditions favorable for fruit development. The sweet and sour cherry harvest started two weeks later than usual. At the time of the drafting of this report, Fruit quality was generally good, however varied depending on production region and fruit variety. Disease and pest outbreaks increased due to increased rains and humidity. Some producers noted the occurrence of a powdery mildew in their orchards.

Table 1: Cherry Production in Poland, (MT)

MY Begin April	MY 2019/20	MY 2020/21	MY 2021/22 f
Sour cherries	151,900	157,000	165,000
Sweet cherries	44,400	44,000	48,000
Total cherries	196,300	201,000	213,000

Source: Polish Statistical Office
f- forecast

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

MY Begin April	MY 2019/20	MY 2020/21	MY 2021/22 f
Sour cherries	29,400	29,800	29,000
Sweet cherries	9,800	10,000	11,000
Total cherries	39,200	39,800	40,000

Source: Polish Statistical Office
f- forecast

Consumption and Processing

Sweet cherries are picked in July and August, depending on cherry variety, 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. Over half of Poland's sour cherries are frozen, 70-80 percent of which are exported to the world. 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.

In MY 2021/22 domestic consumption of sour cherries will increase in comparison with the last year. Due to low export prices for cherries this year, some producers gave up exports and took advantage of the increased domestic demand. Preparation of fresh fruit for exports is more costly than for domestic market. It requires cherry producers to fulfill additional, and more labor-intensive procedures, than for the domestic market.

Sweet cherry consumption is also forecast to increase due to the larger fresh cherry supply. Post forecasts cherry fruit processing almost unchanged from the previous year. The structure of processing can change for higher share of cherry juice concentrate in production at the expense of jam production. Production of frozen cherries will increase due to availability of good quality fruits for the industry this year.

Consumption of stone fruit and related products in Poland strongly varies year by year depending on the harvest. In MY 2020/21 stone fruit consumption was the lowest in the last six years and amounted to 3.96 kilograms per person. The highest level of per person consumption was reached in MY 2018/19, with 5.16 kilograms per capita consumption.

Trade

In MY 2020/21 fresh cherry exports from Poland reached 7,439 MT and were valued at $7.9 million. Of these exports, 95 percent of the volume was destined for the EU market. The leading importer of Polish cherries in the EU is traditionally Germany, with over an 80 percent share in Poland's total cherry exports. Germany is the main export market for Polish sour cherries for processing. Polish producers continue to seek out new export markets after Russia blocked EU agricultural imports in 2014. Russia used to be Poland's main cherry export market and accounted for about 60 percent of total Polish cherry exports. After 2014, Polish exporters increased sales to Belarus and Ukraine, although in recent years exports to these countries also diminished significantly. In MY 2020/21 the main out of EU export destinations for sour cherries were Belarus and Moldova. However, export sales were much lower than in recent years. In MY 2021/22 Post forecasts exports of cherries to be almost five percent higher from the previous year due to the better harvest. Exports of sweet cherries will also increase.

In MY 2020/21 cherry imports increased by 50 percent from the previous year due to low production and stocks, reaching 4,960 MT. Poland sourced fresh sweet cherries from, Greece, Serbia, Austria, and Germany, and fresh sour cherries from Serbia. Post forecasts that in MY 2021/22 Poland will import 2,500 MT cherries, half of the volume imported last year.

Table 3: Cherry Sour and Sweet Production, Supply and Demand, (MT), (HA)

MY Begin April	MY 2019/20	MY 2020/21	MY f 2021/22
Area Planted	39,200	39,800	40,000
Total Production	196,300	201,000	213,000
Intra EU-27 Imports	2,737	3,498	2,000
Non-EU-27 Imports	571	1,462	500
Total Imports	3,308	4,960	2,500
TOTAL SUPPLY	199,608	205,960	215,500
Consumption Fresh and for Processing	193,700	198,521	207,700
EU-27 Exports	5,002	6,822	7,000
Non-EU-27 Exports	906	617	800
Total Exports	5,908	7,439	7,800
TOTAL DISTRIBUTION	199,608	205,960	215,500

Source: FAS Warsaw
f- forecast

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

Partner Country	MY Begin April			Market Share (%)			Change 2020/19	
	2018	2019	2020	2018	2019	2020	Amount	Percent
_World	9,480	5,105	7,009	100	100	100	1,905	37.3
EU 27 Brexit	7,851	4,440	6,634	82.82	86.98	94.65	2,194	49.4
Non-EU	1,629	665	375	17.18	13.02	5.35	-289	-43.6
Germany	6,143	3,528	5,861	64.8	69.11	83.62	2,333	66.1
Netherlands	218	194	242	2.3	3.81	3.45	47	24.3
Hungary	199	240	237	2.09	4.7	3.39	-3	-1.1
Belarus	1,408	356	202	14.86	6.97	2.88	-154	-43.4
Moldova	0	95	114	0	1.85	1.63	20	20.8

Source: Trade Data Monitor

Table 5: Poland's Sour Cherries Fresh Top Export Destinations, Value ($000)

Partner Country	MY Begin April			Market Share (%)			Change 2020/19	
	2018	2019	2020	2018	2019	2020	Amount	Percent
_World	8,519	5,421	7,103	100	100	100	1,682	31.0
EU 27 Brexit	7,775	5,033	6,809	91.27	92.85	95.87	1,776	35.3
Non-EU	744	388	294	8.73	7.15	4.13	-94	-24.2
Germany	6,053	3,876	5,923	71.05	71.5	83.39	2,047	52.8
Netherlands	132	153	237	1.55	2.83	3.33	83	54.3
Latvia	318	171	201	3.74	3.16	2.83	30	17.4
Hungary	167	276	188	1.97	5.1	2.65	-88	-31.8
Belarus	483	194	183	5.66	3.58	2.58	-11	-5.7

Source: Trade Data Monitor

Table 6: Poland's Sour Cherries Fresh Top Imports by Origin, Quantity (MT)

Partner Country	MY Begin April			Market Share (%)			Change 2020/19	
	2018	2019	2020	2018	2019	2020	Amount	Percent
_World	657	854	322	100	100	100	-532	-62.3
EU 27 Brexit	653	834	180	99.5	97.7	55.9	-654	-78.4
Non-EU	4	20	142	0.5	2.3	44.1	122	-
Serbia	3	0	142	0.48	0	44,12	142	0
Estonia	20	2	114	3.04	0.2	35.6	113	-
Italy	0	0	21	0.01	0	6.6	21	0

Source: Trade Data Monitor

Table 7: Poland's Sweet Cherries Fresh Top Export Destinations, Quantity (MT)

Partner Country	MY Begin April			Market Share (%)			Change 2020/19	
	2018	2019	2020	2018	2019	2020	Amount	Percent
_World	4,410	804	429	100	100	100	-375	-46.6
EU 27 Brexit	2,391	562	187	54.2	70.0	43.6	-375	-66.7
Non-EU	2,019	242	242	46	30	56	0	-
Belarus	1,943	182	207	44.1	22.7	48.3	25	13.5
Germany	866	339	132	19.6	42.2	30.8	-207	-61.0
Russia	0	20	20	0.0	2.4	4.6	0	0.0

Source: Trade Data Monitor

Table 8: Poland's Sweet Cherries Fresh Top Export Destinations, Value (000$)

Partner Country	MY Begin April			Market Share (%)			Change 2020/19	
	2018	2019	2020	2018	2019	2020	Amount	Percent
_World	4,398	1,179	763	100	100	100	-415	-35.2
EU 27 Brexit	2,874	848	498	65.3	72.0	65.2	-350	-41.3
Non-EU	1,524	331	265	34.7	28.0	34.7	-65	-19.9
Germany	807	492	229	18.4	41.8	30.1	-263	-53.4
Belarus	1,380	230	205	31.4	19.5	26.9	-25	-10.8

Source: Trade Data Monitor

Table 9: Poland's Sweet Cherries Fresh Top Imports by Origin, Quantity (MT)

Partner Country	MY Begin April			Market Share (%)			Change 2020/19	
	2018	2019	2020	2018	2019	2020	Amount	Percent
_World	1,350	2,454	4,632	100	100	100	2,177	88.71
EU 27 Brexit	954	1,903	3,312	70.6	77.5	71.5	1,409	74.06
Non-EU	396	551	1,320	29.4	22.5	28.5	768	14.65
Greece	523	573	1951	38,77	23,34	42,13	1378	240.61
Serbia	274	246	773	20,31	10,01	16,7	528	214.99
Austria	0	111	410	0	4,54	8,86	299	268.36
Germany	82	370	325	6,1	15,06	7,02	-45	-12.12
Spain	182	638	262	13,52	26	5,66	-376	-58.91
Turkey	7	0	247	0,55	0	5,34	247	0

Source: Trade Data Monitor

Table 10: Poland's Sour Cherries Frozen Top Imports by Origin, Quantity (MT)

Partner Country	MY Begin April			Market Share (%)			Change 2020/19	
	2018	2019	2020	2018	2019	2020	Amount	Percent
_World	64,473	56,785	53,556	100	100	100	-3,229	-5.7
EU 27 Brexit	35,614	33,592	29,176	55.2	59.2	54.5	-4,416	-13.5
Non-EU	28,859	23,193	24,380	44.8	40.8	45.5	1,187	7.6
Germany	20,131	18,775	16,207	31.2	33.1	30.3	-2,568	-13.7
Belarus	20,265	16,336	14,716	31.4	28.8	27.5	-1,620	-9.9
France	2,913	3,727	3,463	4.5	6.6	6.7	-264	-7.1
Netherlands	2,826	3,124	3,009	4.38	5.5	5.6	-116	-3.7
United States	900	561	2,013	1.4	1.0	3.8	1,452	258.7

Source: Trade Data Monitor

Table 11: Poland's Sweet Cherries Frozen Top Export Destinations, Value ($000)

Partner Country	MY Begin April			Market Share (%)			Change 2020/19	
	2018	2019	2020	2018	2019	2020	Amount	Percent
_World	65,010	64,676	62,240	100	100	100	-2,436	-3,77
EU 27 Brexit	43,762	44757	39,071	67.3	69.2	62.8	-5,685	-12,7
Non-EU	21,248	19,919	23,169	32.7	30.8	37.2	3,249	8,93
Germany	22,592	24,457	20,519	34,75	37.8	33.0	-3,938	-16,1
Belarus	9,810	9,892	9,259	15,09	15,3	14.9	-633	-6,4
France	4,646	5,650	5,644	7,15	8.7	9.0	-5	-0,1
Netherlands	3,278	4,130	3,886	5,04	6.4	6.2	-244	-5,91
United Kingdom	3,863	2,295	2,725	5,94	3.5	4.4	430	18,73
United States	984	871	2,572	1,51	1.4	4.1	1,700	195,1

Source: Trade Data Monitor

Peaches and Nectarines.

Production

In MY 2021/22 Post forecasts peach production at 8,600 MT, a 1.2 percent increase over last year's crop. There were no winterkills in Polish peach orchards during winter 2020/21, but spring 2021 brought frost in April and May. The spring cold spells did not affect Polish peach orchards negatively, as most trees are mature, with deep roots. There was enough rain and soil moisture were good enough this spring. However, due to low air temperatures the vegetation of plants and trees was slowed down, and the fruit harvest was delayed of one or two weeks, depending on the region.

In MY 2021/22 the area of peach orchards increased slightly in comparison with the previous year and amounted to 2,400 ha. This is the first year after a long period of decline or stagnation in peach orchards acreage. Peach cultivation profitability has been very low for a few consecutive years in Poland. Farmers are not interested in increasing peach orchards area so far.

Consumption

Domestic consumption of peaches and nectarines in Poland is very unstable and very price sensitive. It has increased in the last few years and varies from 64,000 to 105,000 MT since MY 2016/17. In MY 2021/22 peach consumption will increase, however it remains at relatively low levels due to the third small crop in a row and high consumer prices. Peach processing strongly depends on fruit prices, and generally takes a small share in peach domestic consumption. Peaches and nectarines are mostly consumed fresh.

Trade

Poland is a net importer of peaches and nectarines. Poland sources almost 100 percent of peaches and nectarines from EU member states, primarily Spain, Germany, Greece, and the Netherlands. In MY 2020/21 Poland imported 68,000 MT of these fruits. This was a big drop compared to the previous year and to the average level of imports in the previous years, which usually exceeded 100,000 MT. Changes in import volume depend not only on domestic consumption trends, but also on the volume of shipments to the neighboring non-EU countries, like Belarus and Ukraine. In MY 2020/21, exports to these countries decreased by half. Domestic demand also decreased by 40 percent, mainly due to high prices and greater price competitiveness of other types of fruit. Post expects peaches and nectarines imports rebound in MY 2021/22. For MY 2020/21 Post forecasts Poland's peach exports at over 26,000 MT.

Table 12: Poland, Peaches Production, Supply and Demand, (MT), (HA)

Market Year Begin January	MY 2019/20	MY 2020/21	MY f 2021/22
Area Planted	2,300	2,300	2,400
Total Production	8,500	8,500	8,600
Intra EU-27 Imports	119,824	66,904	110,000
Non-EU-27 Imports	82	1,137	400
Total Imports	119,906	68,041	110,400
TOTAL SUPPLY	128,406	76,541	119,000
Consumption Fresh and for Processing	100,176	64,129	92,919
EU-27 Exports	1,305	585	700
Non-EU-27 Exports	26,925	11,827	20,000
Total Exports	28,230	12,412	26,081
TOTAL DISTRIBUTION	128,406	76,541	119,000

Source: FAS Warsaw
f- forecast

Table 13: Poland's Peaches and Nectarines Fresh, Top Export Destinations, Quantity (MT)

Partner Country	MY Begin January			Market Share (%)			Change 2020/19	
	2018	2019	2020	2018	2019	2020	Amount	Percent
_World	15,800	28,230	12,412	100	100	100	-15,818	-5.6
EU 27 Brexit	1,848	1,305	585	117	4,6	4,7	-721	-55.2
Non-EU	13,952	26,925	11,827	88.3	95.4	95.3	-15,097	-0.8
Belarus	9,343	15,665	6,183	59.1	55.5	49.8	-9,482	-60.5
Ukraine	4,590	10,209	4,219	29.1	36.2	34.0	-5,991	-58.7
Russia	0	59	1,356	0.0	0.2	10.9	1,297	-

Source: Trade Data Monitor

Table 14: Poland's Peaches and Nectarines Fresh, Top Imports by Origin, Quantity (MT)

Partner Country	MY Begin January			Market Share (%)			Change 2020/19	
	2018	2019	2020	2018	2019	2020	Amount	Percent
_World	109,393	119,906	68,041	100	100	100	-51,865	-43.3
EU 27 Brexit	109,145	119,824	66,904	99.8	99.9	98.3	-52,920	-44.2
Non-EU	248	82	1,137	0.2	0,1	1.7	1,055	-
Spain	49,589	65,788	36,856	45.3	54.9	54.2	-28,932	-44.0
Greece	18,649	10,469	12,131	17.1	8.7	17.8	1,662	15.9
Germany	12,116	16,294	10,127	11.1	13.6	14.9	-6,167	-37.9

Source: Trade Data Monitor

Attachments:

No Attachments.