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**Country:** Poland

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**Report Highlights:**

In Marketing Year (MY) 2022, FAS Warsaw forecasts Poland's total cherry production at 261,500 metric tons (MT), consisting of 183,000 MT sour cherries and of 78,500 MT sweet cherries. Post forecasts that the domestic consumption of cherries will increase by 14.4 percent, mostly due to bigger availability of these fruits for the processing industry. Also in MY 2021, Post forecasts Polish peach production at 5,400 MT, a twenty percent increase over the previous year's production.

## Cherries

### **Production**

FAS Warsaw forecasts total production for Polish sweet and sour cherries for MY 2022/23 at 261,500 MT, a 15.9 percent increase over the last year. Total production will consist of 183,000 MT sour cherries and 78,500 MT sweet cherries. According to the forecast, in MY 2022/23 sour cherry production will increase by 9.8 percent year-on-year, and sweet cherry production by 32.8 percent. In MY 2022/23, cherry orchards' area increased by almost one percent in comparison with the previous year and amounted to 35,300 hectares (HA). Modernization of cherry orchards is progressing. In years 2021-22, some cherry producers replaced old trees with more profitable cherry varieties. Some apple growers are also changing their production profile to cherries as they are more profitable.

The MY2022/23 yield and harvest forecast in the report are based on official information from the Polish Statistical Office. The official forecast for MY 2022/23 cherry production exceeds the informal estimates of Polish industry stakeholders. Fruit trees area and yields data for MY2020/21, MY2021/22, MY2022/23 in the report have been revised and adjusted according to the results of the National Census of Agriculture, conducted in Poland in 2020. Official Polish Main Statistical Office data on the area, crops, and yield of fruit in Poland beginning with 2020 and the following years should not be compared with those from previous years. The Census results indicated a smaller area of fruit cultivation and yields higher than estimated for recent years, what has been included in the revised data published in this report.

2021/22 winter weather conditions were favorable for fruit trees in Poland. Abundant rainfall in the fall of 2021, supported sufficient water accumulation in the soil deeper layers. Relatively mild temperatures at the end of the year allowed trees to optimally enter physiological dormancy. Despite only slight snowfall over most of the country, no significant frost damage to trees and shrubs in orchards was recorded. The 2022 vegetation season for fruit trees began without major delays. However, generally plant and trees vegetation in Poland was slowed down due to insufficient rainfall in early spring. The lack of rain leading to soil drought was strong, especially in March 2022. Weather conditions improved in early April. Flowering of cherry trees in orchards over most of the country was intense and proceeded under good conditions, although locally slight delays were noted. Pollination was good this year. In the case of sour cherry trees, there was a greater fallout of buds than on sweet cherry and peach trees. This year's weather was particularly favorable for flowering of peach trees, which gave abundant crop.

**Table 1: Cherry Production in Poland, in (MT)**

<b>MY begin April</b>	<b>MY 2020/21</b>	<b>MY 2021/22</b>	<b>MY 2022/23 f</b>
Sour cherries	155,500	166,600	183,000
Sweet cherries	51,300	59,100	78,500
Total cherries	206,800	225,700	261,500

Source: Polish Statistical Office

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

<b>MY Begin April</b>	<b>MY 2020/21</b>	<b>MY 2021/22</b>	<b>MY 2022/23 f</b>
Sour cherries	24,800	25,300	25,500
Sweet cherries	10,400	9,700	9,800
Total cherries	35,200	35,000	35,300

Source: Polish Statistical Office

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This year, the biggest challenge for producers, except the weather conditions, were dramatically rising costs of production. Some farmers estimate the increase in the cost of purchasing pest control products, fuel costs, and other inputs at more than 50 percent over the previous year. In Poland, mineral fertilizers were on average 90 percent more expensive in January 2022 than a year earlier. At the same time, the rate of increase in the prices of individual fertilizer groups varied. Nitrogen fertilizer prices increased the most, with an average increase of 124 percent year-over-year.

### **Consumption and Processing**

In MY 2022/23 domestic consumption of sour cherries will increase in comparison with the last year due to better crops and increasing demand in the country. Domestic fruit processing has increased, both due to the health benefits of home-made products and due to raging inflation in Poland.

Sweet cherries are consumed in Poland as fresh fruit and are also sent for exports as fresh fruit. In MY 2022/23, sweet cherry domestic consumption will increase due to the greater crops and supply.

Post forecasts also cherry industrial fruit processing higher from the previous year. Domestic demand for fruit preserves and juices is growing. The structure of processing can change to a higher share of cherry juice concentrate in production at the expense of jam production. Production of frozen cherries will increase due to the availability of good quality fruits for the industry this year.

### **Trade**

In MY 2021/22, fresh cherries exports volume from Poland amounted to almost 8,500 MT, of which over 90 percent was destined for the EU market. The leading importer of Polish cherries in the EU is traditionally Germany, with 75 percent share in total Poland's exports of cherries. Germany is the main export market for Polish sour cherries for processing. In MY 2021/22, the main export destination outside of the EU for sweet cherries was Belarus. In MY 2021/22, Poland exported to Belarus 338 MT of sweet cherries, before the embargo on EU food products. As of January 1, 2022, Belarus imposed an embargo on fruits from the European Union, including cherries from Poland. As of April 27, 2022, the embargo was suspended for selected fruits and vegetables from the EU, including Poland. In MY 2022/23, Post forecasts total exports of sour cherries higher than last year due to the abundant crop.

In MY 2021/22, cherry imports increased by 18 percent from the previous year, especially at the beginning of the season, before the emergence of domestic production, and reached 5,900 MT. Poland sourced fresh sweet cherries from, Greece, Serbia, Austria, and Germany, and fresh sour cherries from Serbia. Post forecasts that in MY 2022/23 Poland will import 5,700 MT cherries.

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

<b>MY Begin April</b>	<b>MY 2020/21</b>	<b>MY 2021/22</b>	<b>MY f 2022/23</b>
Area Planted	35,200	35,000	35,300
Total Production	206,800	225,700	261,500
Intra EU-27 Imports	3,522	4,410	4,300
Non-EU-27 Imports	1,481	1,484	1,400
Total Imports	5,003	5,894	5,700
<b>TOTAL SUPPLY</b>	<b>211,803</b>	<b>231,594</b>	<b>267,200</b>
Consumption Fresh and for Processing	204,451	223,136	255,300
EU-27 Exports	6,734	7,674	11,000
Non-EU-27 Exports	618	784	900
Total Exports	7,352	8,458	11,900
<b>TOTAL DISTRIBUTION</b>	<b>211,803</b>	<b>231,594</b>	<b>267,200</b>

Source: FAS Warsaw

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

<b>Partner Country</b>	<b>MY Begin April</b>			<b>Market Share (%)</b>			<b>Change 2021/20</b>	
	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>Amount</b>	<b>Percent</b>
_World	5,063	6,920	6,964	100	100	100	1,905	37.3
EU 27 Brexit	4,398	6,545	6,644	86.87	94.58	95.41	99	1.5
Non-EU	665	375	320	13.13	5.42	4.59	-55	-15.0
Germany	3,528	5,771	5,645	69.68	83.39	81.07	-125	-2.1
Belgium	1	0	324	0.03		4.65	324	
Netherlands	194	242	315	3.84	3.49	4.53	74	30.4
Belarus	356	202	159	7.03	2.91	2.28	-43	-21.1
Romania	77	80	140	1.51	1.16	2.02	60	74.6

Source: Trade Data Monitor

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

<b>Partner Country</b>	<b>MY Begin April</b>			<b>Market Share (%)</b>			<b>Change 2021/20</b>	
	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>Amount</b>	<b>Percent</b>
_World	5,347	6,988	6,396	100	100	100	-592	-8.5
EU 27 Brexit	4,960	6,694	6,237	92.75	95.8	97.52	-457	-6.8
Non-EU	387	294	159	7.25	4.2	2.48	-135	-46
Germany	3,876	5,807	4,961	72.49	83.1	77.57	-846	-14.6
Romania	55	76	491	1.03	1.09	7.68	415	542.5

Belgium	2		314	0.03		4.91	314	
Netherlands	153	237	271	2.87	3.39	4.24	35	14.6
Hungary	276	188	75	5.17	2.7	1.17	-113	-60.2

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 2021/20	
	2019	2020	2021	2019	2020	2021	Amount	Percent
_World	854	323	228	100	100	100	-95	-29.28
EU 27 Brexit	834	180	53	97.72	55.65	23.24	-127	-70.47
Non-EU	20	143	175	2.28	44.35	76.76	32	22.4
Serbia		143	175		44.35	76.76	32	22.4
Italy		21	18		6.53	7.66	-4	-17.1
Spain	50	12	17	5.9	3.84	7.53	5	38.9

Source: Trade Data Monitor

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

Partner Country	MY Begin April			Market Share (%)			Change 2021/20	
	2019	2020	2021	2019	2020	2021	Amount	Percent
_World	804	432	1,494	100	100	100	1063	246.2
EU 27 Brexit	562	190	1,030	70	43.97	68.93	840	442.7
Non-EU	242	242	464	30	56.03	31.07	222	92.0
Germany	339	132	682	42	30.62	45.62	550	415.9
Belarus	182	207	338	23	47.96	22.59	131	63.1
Lithuania	37	4	171	5	0.89	11.41	167	4351.6

Source: Trade Data Monitor

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

Partner Country	MY Begin April			Market Share (%)			Change 2021/20	
	2019	2020	2021	2019	2020	2021	Amount	Percent
_World	1,179	771	2,046	100	100	100	1,275	165.3
EU 27 Brexit	848	506	1,369	71.99	65.63	66.92	863	170.5
Non-EU	331	265	677	28.01	34.37	33.08	412	2.5
Germany	492	229	654	41.75	29.75	31.94	424	184.8
Belarus	230	205	393	19.51	26.59	19.18	187	91.4

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 2021/20	
	2019	2020	2021	2019	2020	2021	Amount	Percent
_World	2,454	4,680	5,665	100	100	100	986	21.1
EU 27 Brexit	1,903	3,343	4,357	77.53	71.43	76.9	1,014	30.4
Non-EU	551	1,337	1,308	22.47	28.57	23.1	29	-2.2
Greece	573	1,951	2,378	23.34	41.69	41.97	427	21.9
Spain	638	289	1,069	26	6.17	18.88	781	270.6
Serbia	246	791	741	10.01	16.9	13.08	-50	-6.3
Austria	111	410	463	4.54	8.77	8.16	52	12.7
Turkey		247	439		5.29	7.74	191	77.3
Germany	370	325	288	15.06	6.94	5.09	-36	-11.2

Source: Trade Data Monitor

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

Partner Country	MY Begin April			Market Share (%)			Change 2021/20	
	2019	2020	2021	2019	2020	2021	Amount	Percent
_World	56,807	53,593	58,917	100	100	100	5,324	9.9
EU 27 Brexit	33,594	29,188	35,224	59.14	54.46	59.79	6,036	20.7
Non-EU	23,213	24,405	23,693	40.86	45.54	40.21	-712	-2.9
Germany	18,776	16,204	19,380	33.05	30.24	32.89	3,175	19.6
Belarus	16,336	14,716	9,144	28.76	27.46	15.52	-5,572	-37.9
France	3,727	3,483	4,249	6.56	6.5	7.21	766	22.0
United States	561	2,013	3,912	0.99	3.76	6.64	1,899	94.3
Netherlands	3,124	2,962	3,112	5.5	5.53	5.28	150	5.1
Canada	870	1,859	2,923	1.53	3.47	4.96	1,065	57.3
Belgium	2,166	1,638	2,160	3.81	3.06	3.67	522	31.9
Ukraine	1,661	1,238	1,949	2.92	2.31	3.31	711	57.5

Source: Trade Data Monitor

**Table 11: Poland's Sour Cherries Frozen Top Exports by Origin, Value (\$000)**

Partner Country	MY Begin April			Market Share (%)			Change 2021/20	
	2019	2020	2021	2019	2020	2021	Amount	Percent
_World	64,709	62,162	69,825	100	100	100	7,663	12.3
EU 27 Brexit	44,762	38,980	42,328	69.17	62.71	60.62	3,347	8.6
Non-EU	19,947	23,244	27,497	30.83	37.29	39.38	4,253	18.3
Germany	24,460	20,467	21,304	37.8	32.93	30.51	836	4.1
Belarus	9,892	9,259	6,851	15.29	14.89	9.81	-2,407	-26.0

France	5,650	5,674	6,195	8.73	9.13	8.87	522	9.2
United States	871	2,572	5,040	1.35	4.14	7.22	2,468	96.0
Canada	1,188	2,572	4,381	1.84	4.14	6.28	1,810	70.4
Netherlands	4,131	3,797	3,748	6.38	6.11	5.37	-49	-1.3
Belgium	2,609	2,126	2,780	4.03	3.42	3.98	654	30.8
Ukraine	2,209	1,716	2,728	3.41	2.76	3.91	1,012	59.0

Source: Trade Data Monitor

**Table 12: Poland's Sour Cherries Frozen Top Imports by Origin, Quantity (MT)**

Partner Country	MY Begin April			Market Share (%)			Change 2021/20	
	2019	2020	2021	2019	2020	2021	Amount	Percent
_World	2,224	1,761	2,244	100	100	100	483	27.4
EU 27 Brexit	1,499	997	1,263	67.39	56.61	56.29	266	26.7
Non-EU	725	764	981	32.61	43.39	43.71	217	28.4
Germany	893	394	751	40.15	22.38	33.45	356	90.5
Serbia	284	458	606	12.76	26.01	26.99	147	32.2
North Macedonia	402	284	204	18.09	16.15	9.09	-80	-28.3
Hungary	318	432	171	14.29	24.51	7.64	-260	-60.3
Netherlands	17	21	165	0.75	1.22	7.38	144	671.9

Source: Trade Data Monitor

## Peaches and Nectarines

### **Production**

In MY 2022/23, Post forecasts production of peaches at 5,400 MT, a twenty percent increase over last year's crop. There were no winterkills in Polish peach orchards during winter 2021/22. Fortunately, in the autumn of 2021, thanks to heavy rainfall, the ground accumulated a lot of moisture in deeper layers. As a result, mature peach orchards did not suffer from moisture deficiency when the early spring 2022 brought scarcity of soil moisture. The problem, however, affected young trees with a still underdeveloped root system. Weather conditions improved in early April 2022. Flowering of peach trees was abundant. Pollination was good this year. The weather was particularly favorable for peach trees flowering compared to the previous year, which is the reason peach production is much greater this year than for other tree fruit.

In MY 2022/23 the area of peach orchards remains unchanged from the previous year and amounts to 1,000 HA. The previous MY 2021/22 was the first year to see an increase in peach tree area, after a long period of decline or stagnation in peach orchards acreage. Peach cultivation profitability has been very low in recent consecutive years in Poland. Farmers have not shown an interest in increasing peach orchards area in Poland 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 61,000 to 63,000 MT since MY 2020/21. In MY 2022/23, peach consumption will increase, due to better crops this year. Peach processing strongly depends on fruit prices, and generally takes a small share in peach domestic consumption. Peaches and nectarines are mostly consumed fresh. Nectarines are not grown in Poland. These fruits are imported into Poland.

## Trade

Poland is a net importer of peaches and nectarines. In MY 2021/22, Poland imported 73,933 MT of these fruits. Poland sources almost 100 percent of peaches and nectarines from the EU member states, mostly from Spain, Germany, Italy, Greece, Portugal, and the Netherlands. For MY 2022/23, imports of peaches and nectarines will decrease in comparison with the previous year due to the abundant domestic crop. 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. For MY 2022/23 Post forecasts Poland's peach exports at 15,600 MT.

**Table 13: Poland, Peaches Production, Supply and Demand, (MT), (HA)**

Market Year Begin January	MY 2020/21	MY 2021/22	MY f 2022/23
Area Planted	800	1,000	1,000
Total Production	3,800	4,500	5,400
Intra EU-27 Imports	68,552	72,807	72,100
Non-EU-27 Imports	1,137	1,126	1,100
Total Imports	69,689	73,933	73,200
TOTAL SUPPLY	73,489	78,433	78,600
Consumption Fresh and for Processing	61,075	62,734	63,000
EU-27 Exports	585	299	600
Non-EU-27 Exports	11,829	15,400	15,000
Total Exports	12,414	15,699	15,600
TOTAL DISTRIBUTION	73,489	78,433	78,600

Source: FAS Warsaw

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**Table 14: Poland's Peaches and Nectarines Fresh, Top Export Destinations, Quantity (MT)**

Partner Country	MY Begin January			Market Share (%)			Change 2021/20	
	2019	2020	2021	2019	2020	2021	Amount	Percent
_World	28,230	12,414	15,699	100	100	100	3,286	26.5
EU 27 Brexit	1,305	585	299	4.62	4.72	1.91	-286	-48.9
Non-EU	26,925	11,829	15,400	95.38	95.28	98.09	3,571	30.2
Belarus	15,665	6,183	6,293	55.49	49.81	40.08	110	1.8
Ukraine	10,209	4,219	6,259	36.17	33.99	39.87	2,040	48.4



Russia	59	1,356	2,093	0.21	10.93	13.33	737	54.4
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Source: Trade Data Monitor

**Table 15: Poland's Peaches and Nectarines Fresh, Top Imports by Origin, Quantity (MT)**

Partner Country	MY Begin January			Market Share (%)			Change 2021/20	
	2019	2020	2021	2019	2020	2021	Amount	Percent
_World	119,906	69,689	73,933	100	100	100	4,244	6.1
EU 27 Brexit	119,824	68,552	72,807	99.93	98.37	98.48	4,255	6.2
Non-EU	82	1,137	1,126	0.07	1.63	1.52	-11	-1.0
Spain	65,788	37,850	48,915	54.87	54.31	66.16	11,065	29.2
Germany	16,294	10,133	9,532	13.59	14.54	12.89	-602	-5.9
Italy	12,990	3,968	4,634	10.83	5.7	6.27	666	16.8

Source: Trade Data Monitor

**Attachments:**

No Attachments.