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Poland - Rapeseed and Products Annual - Spring 2015

Report Categories:
Oilseeds and Products
Agricultural Situation
Biofuels

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Report Highlights:
For marketing year (MY) 2015/16, planted area of rapeseed is expected to diminish 2.3 percent in response to declining rapeseed prices as some producers switch to grains. As of the first week of April, the rapeseed crop development was assessed well with good prospects for abundant harvest. Poland's total production of rapeseed for MY 2015/16 is forecast to decline by 7 percent to 3 million metric tons (MMT). FAS Warsaw is forecasting the lower production number than in last (record) 2014 year because of predicted lower acreage and more average yield.

General Information

Area, yields and production of rapeseed in Poland

Poland	Area (000) Ha	Yield MT/Ha	Total Production (000) MT
2006-2010 year average	790	2.69	2,123
2012*	830	2.59	2,150
2013*	930	3.19	2,970
2014 estimates	942	3.43	3,227
2015 forecast*	920	3.26	3,000
2013-2014 change (%)	+1.3	+7.5	+8.7
2014-2015 change projected (%)	-2.3	-5.0	-7.0

Source: Poland's Main Statistical Office
* FAS Warsaw estimates and forecast

Poland is one of the leading producers of rapeseed in the EU, following Germany, France and the U.K. Rapeseed and the second one used in feeding after imported soybean meal. In Poland rapeseed acreage constitutes 95 percen has been rapidly increasing since 2004, the year of Poland's accession to the EU. Before the EU accession, Polar stable domestic demand which was at the level of 1 MMT (million metric tons), supported by rapeseed meal as a by During the last ten years rapeseed production increased by more than three times, over 3 MMT in 2014, driven by rapeseed was due to the expansion of acreage of plantings and adoption of modern technology. Use of qualified h expanded from 0.5 to over 0.9 million hectares.

Production Supply Demand Relations

MY 2015/16

For 2015/16 the rapeseed crop is forecast at 3 MMT, with 5 percent lower yield than the last (record) 2014 yea Plantings of winter rapeseed have been assessed well till the end of March 2015. There were no winter kill and plant Rapeseed acreage plantings for the harvest 2015 is estimated lower than last year. It amounts to 920,000 hec development of rapeseed acreage has stopped in Poland, mostly due to uncertainty connected with changes in the for the last two years made some farmers change their sowing preferences.

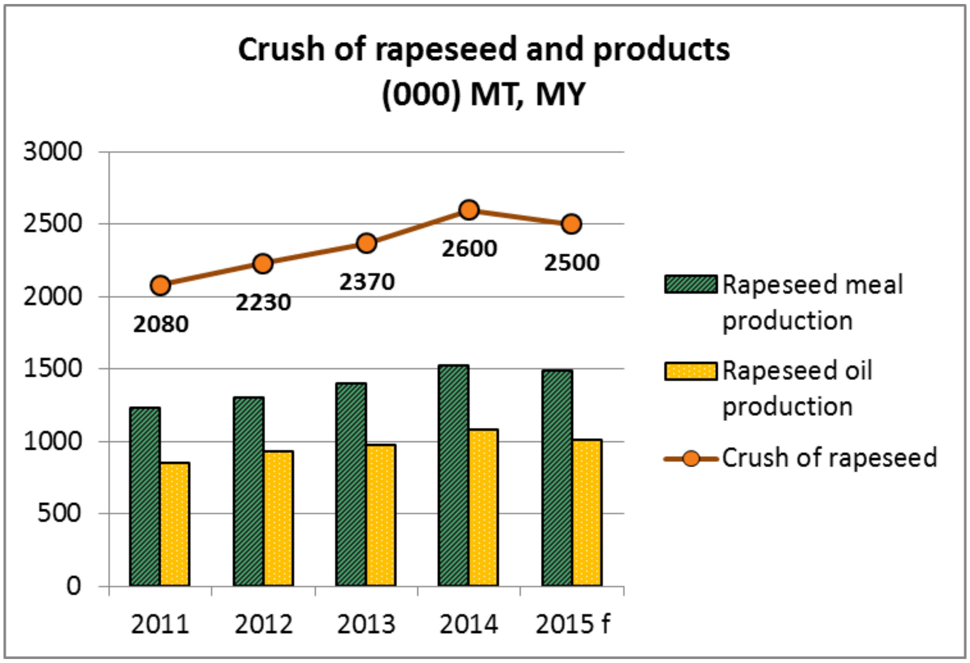
MY 2014/15

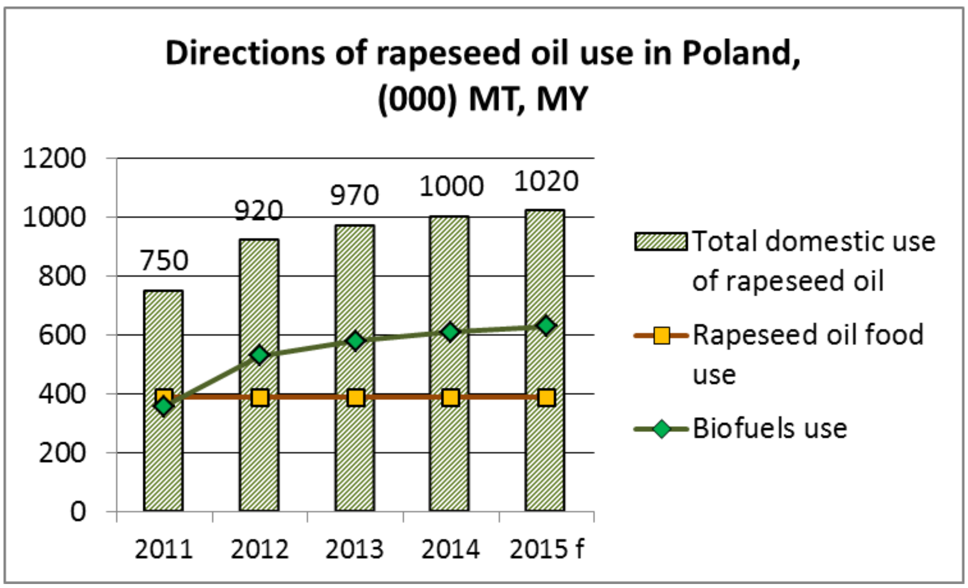
For MY 2014/15 the rapeseed harvest is estimated at 3.2 MMT, a record number in history and 9 percent higher tha price declines in 2013, but it was offset by spring rapeseed with a slight surplus. Total rapeseed planting area reache

The profitability of rapeseed production was low and in line with the 2013 results. Low rapeseed farm gate prices highly exceeded the average results of the last six years. This good yield resulted not only from favorable weather the intensive use of new hybrid rapeseed varieties. The quality of seeds is assessed as well.

A record harvest was followed by a record crush of 2.6 MMT. There have been two main incentives for crush gro demand from the bio-fuel industry. Feed use of rapeseed meal is estimated at a 2.6 percent increase over the level

increased by 5 percent, not as much as last year, due to the stable level of the National Indicative Target (7.1 percent
consumption of rapeseed oil stayed on line with the past few years. For several years human rapeseed oil consumpti





Trade

In 2014/15 the good harvest was followed by likely increased export potential for Poland. Despite 10 percent higher
24 percent and reach 0.9 MMT. The export volume represents almost 30 percent of total domestic rapeseed producti

Traditionally rapeseed is exported almost 100 percent to EU countries. There was an exception in MY 2013/14 whe
mostly Mexico and Canada.
For many years Germany has been the main purchaser of Polish rapeseed (70-80 percent of total export). Germany i
Sales usually accelerate during the first months after harvest due to relatively high moisture of Polish rapeseeds whi

drying of the commodity. In the first 6 months of 2014/15 MY over 0.7 MMT of rapeseed was exported versus 0.6

Despite a record crop in 2014/15 MY rapeseed imports are projected higher than in 2013/14. Higher imports are fore biofuels industry. Total imports are forecast at 370,000 MT. The biggest share (over 70 percent) in the growing impo In the first 6 months of 2014/15 MY Poland imported 120,000 MT of rapeseed, almost the same volume as last year.

Rapeseed trade, thousand Metric Tons (MY begins July 1st)

Poland	2011/12	2012/13	2013/14	20014/15*	Change Proj
Rapeseed import	604	340	191	370	
EU 28	222	105	59	120	
Non EU 28	382	235	132	250	
Rapeseed export	146	346	726	900	
EU 28	146	346	668	900	
Non EU 28	0	0	58	0	
Rapeseed trade balance	-458	6	535	530	
EU 28	-76	241	609	780	
Non EU 28	-382	-235	-74	-250	

Source: Eurostat, *FAS Warsaw estimates

Rapeseed meal trade, thousand Metric Tons (MY begins July 1st)

Poland	2011/12	2012/13	2013/14	20014/15*	Change P
Rapeseed meal import	18	53	61	55	
EU 28	16	48	40	35	
Non EU 28	2	5	21	20	
Rapeseed meal export	458	542	710	765	
EU 28	458	536	706	760	
Non EU 28	0	6	4	5	
Rapeseed meal trade balance	440	489	649	710	
EU 28	442	488	666	725	
Non EU 28	-2	1	-17	-15	

Source: Eurostat, *FAS Warsaw estimates

Rapeseed oil trade, thousand Metric Tons (MY begins July 1st)

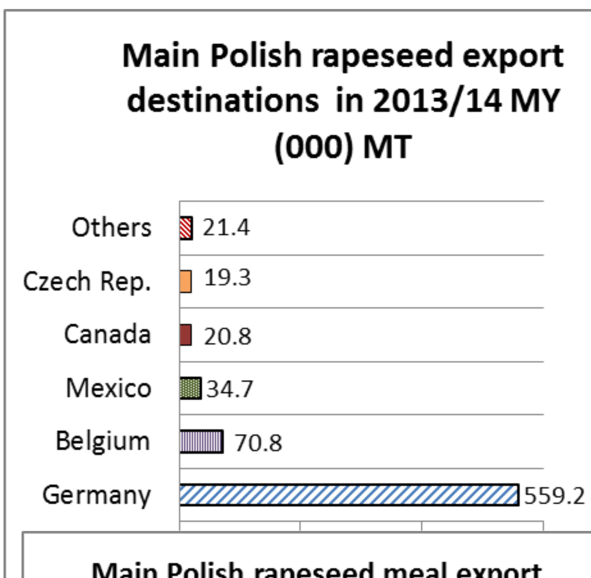
Poland	2011/12	2012/13	2013/14	20014/15*	Change Pr
Rapeseed oil import	101	94	117	120	
EU 28	98	92	110	110	
Non EU 28	3	2	7	10	

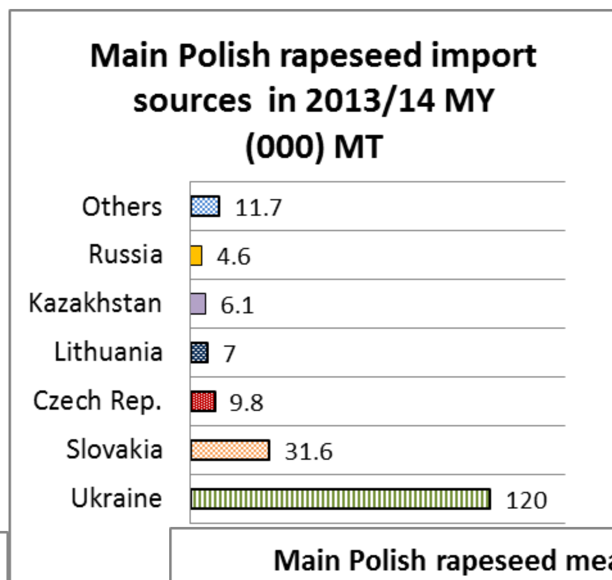
Rapeseed oil export	144	274	483	485	
EU 28	144	270	464	470	
Non EU 28	0	4	19	15	
Rapeseed oil trade balance	43	180	366	365	
EU 28	46	178	354	360	
Non EU 28	-3	2	12	5	

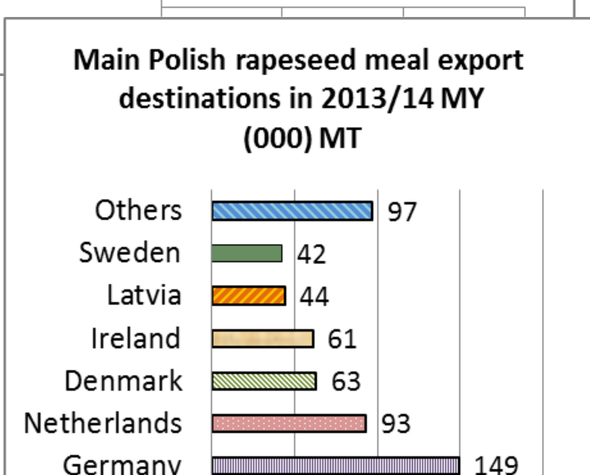
Source: Eurostat, *FAS Warsaw estimates

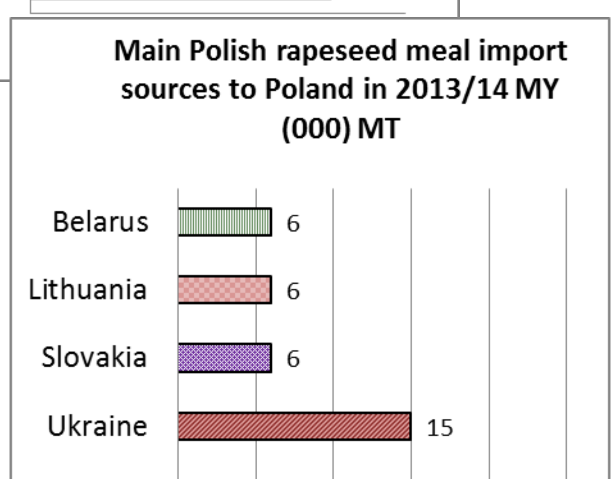
Plants after winter condition evaluation

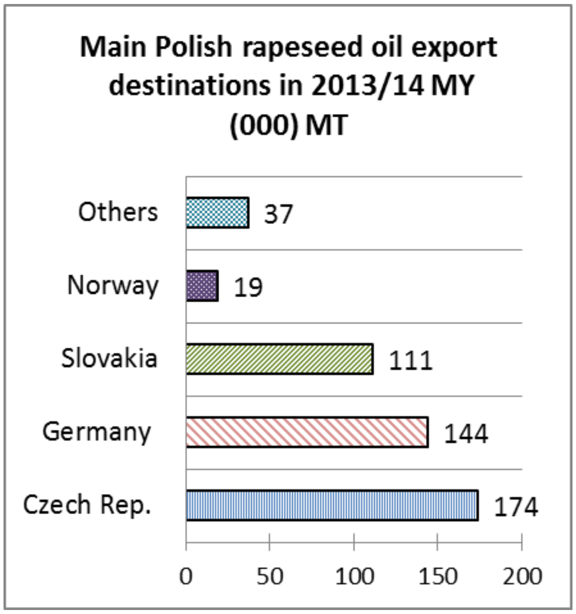
In the first half of April 2015, winter rapeseed was in good condition after a mild winter. In autumn 2015, rapesee
Unfortunately relatively warm weather increased a threat of diseases and activity of pests. Farmers had to use more
According to Polish farmers organizations, the EU regulation of 2013 restricting the use of neonicotinoids in rape
processing potential in Poland. Although this year plants are in good health conditions, the yield forecast should be
major concern for producers is the lack of soil moisture now but according to weather forecast heavy rain falls are e
Dry soil conditions lead to less efficient absorption of fertilizers and minerals, mainly nitrogen. Dryer conditions a
area for rapeseed cultivation. Until mid-May the risk of night frost remains a threat to plants.

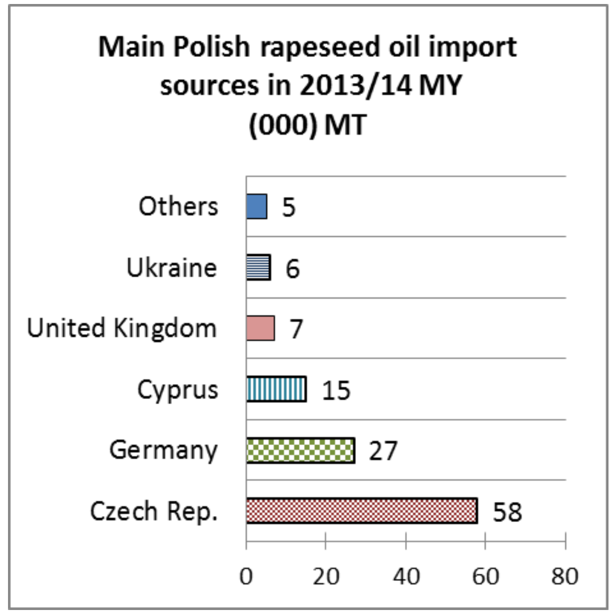









Main Polish rapeseed oil export destinations in 2013/14 MY
(000) MT
Others
37
Norway
19
Slovakia
111
Germany
144
Czech Rep.
174
0
50
100
150
200


Main Polish rapeseed oil import sources in 2013/14 MY
(000) MT
Others
5
Ukraine
6
United Kingdom
7
Cyprus
15
Germany
27
Czech Rep.
58
0
20
40
60
80