

USDA Foreign Agricultural Service

# GAIN Report

Global Agricultural Information Network

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## Poland

**Post:** Warsaw

### Poland Reopens Chinese Poultry Market

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Trade Policy Monitoring

Poultry and Products

Sanitary/Phytosanitary/Food Safety

**Approved By:**

Jonn Slette, Agricultural Attaché

**Prepared By:**

Piotr Rucinski, Agricultural Specialist

**Report Highlights:**

Poland's Chief Veterinary Officer (CVO) announced that China lifted its import ban on Polish poultry meat, which was imposed since December 2016 due to an avian influenza (AI) outbreak. Although Chinese authorities recognized Poland as free from AI in November 2017, it took almost another year for Poland to regain market access. Poland is the largest producer of poultry meat in Europe. In 2017, Poland exported almost 50 percent of its production, valued at \$1.9 billion.

## General Information:

On September 2018, China reopened its poultry market for five Polish poultry slaughter plants and one cold storage facility. Poland initially gained access to China's poultry market in 2012, but trade stopped in December 2016 when China banned Polish poultry meat due to an outbreak of highly pathogenic avian influenza (HPAI). At the end of November 2017, Chinese authorities recognized Poland as free from AI. On July 3, 2018, a new protocol was signed regarding the export of poultry meat between the Poland and China during a high-level Chinese visit to Poland. It was signed by the Chinese Minister of General Administration of Customs Ni Yuefeng and Polish Minister of Agriculture and Rural Development Jan Krzysztof Ardanowski. Since July, additional negotiations followed between Polish veterinary authorities and the Chinese Customs Administration (GACC) regarding technical aspects, including health certificate language, which official veterinary authorities are eligible to sign certificates, and new pre-shipment procedures. Poland is now one of only five countries allowed to export poultry to China and the only eligible European country. Before the December 2016 ban, Polish exports to China were mainly frozen whole wings (HS 02071430) and frozen cuts (HS 02071460). In 2017, Polish poultry meat exports were redirected to Hong Kong.

Table 1: Polish Export of Poultry Meat (MT)

Partner Country	Quantity			% Change 2017/2016
	2015	2016	2017	
World	698,970	831,583	1,017,526	22
Hong Kong	22,348	23,591	35,332	50
China	10,358	12,232	852	- 93

Source: GTA

Table 2: Value of Export of Poultry Meat (\$000)

Partner Country	United States Dollars			% Change 2017/2016
	2015	2016	2017	
World	1,343,801	1,448,065	1,872,484	29
Hong Kong	27,179	34,026	51,143	50
China	21,410	25,483	1,043	-96

Source: GTA

The following five Polish poultry plants re-gained eligibility to export to China:

1. SUPERDROB SPÓŁKA AKCYJNA; address: 05-480 Karczew, ul. Armii Krajowej 80. (Veterinary identification number: 14170501)
2. Przedsiębiorstwo Produkcyjne Usługowo – Handlowe PROSPER Spółka z o.o.; address: 14-105 Łukta, ul. Warmińska 14A. (Veterinary identification number: 28153901)
3. STORTEBOOM HAMROL Sp.z o.o.; address: 62-066 Granowo Kotowo 1a. (Veterinary identification number: 30053903)
4. Zakłady Drobiarskie „Koziegłowy” Sp. z o.o.; address: 62-028 Koziegłowy, ul. Piaskowa 3 (Veterinary identification number: 30210501)
5. INDYKPOL S.A.; address: 10-370 Olsztyn, ul. Jesienna 3 (Veterinary identification number: 28620501)

FAS Warsaw estimates that Polish chicken meat production in 2018 will increase by three percent over 2017. This increase will be driven by growing exports to other EU member states. Domestic consumption is expected stabilize, as poultry prices are growing in comparison to pork and beef. Poultry consumption in Poland is higher than the EU average. According to the Polish Association of Poultry Producers, poultry meat production consists mainly of chicken broilers (81 percent) and turkey broilers (14 percent), for which there is strong demand from domestic meat processors. Duck meat and goose meat are largely exported to Western Europe, mainly Germany. Polish poultry production is based on locally produced grains (mainly corn) and 2 million tons of soybean meal from South America and the United States.

## **Trade**

During the first six months of 2018, chicken meat exports increased by ten percent over the same period in 2017. Total 2018 Polish exports of poultry meat will amount to 1.03 million metric tons, six percent more than 2017. In 2017, Poland exported almost 50 percent of its poultry meat production. FAS Warsaw forecasts that in 2019, exports will increase by an additional three percent, mainly because of higher export outside of the EU. In 2017, 87 percent of chicken meat exported from Poland was bound for other EU markets and only 13 percent to third countries. Major export markets for Polish poultry meat within the EU are UK, Germany, and France. Outside the EU, Poland is a substantial chicken meat exporter to Ukraine and Hong Kong.