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# GAIN Report

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## Poland

**Post:** Warsaw

### Poland's 2013 Cereal Crop Projected Lower

**Report Categories:**

Grain and Feed

Agricultural Situation

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**Report Highlights:**

Poland's total grains production is forecast down due to the late spring and heavy rains during the first half of June. The risk of fungal disease risk is growing as wet conditions persist.

**General Information:****Area and production of grains**

In 2013 total domestic cereal production (including corn) is forecasted at 27.4 million metric tons (MMT), or a 3.6 percent decrease compared to the previous year. The decrease is the result from smaller crops of corn, barley, mixed grains and oat.

In 2013, area sown is estimated at 7.8 million hectares (HA), or a 2.7 percent increase over 2012. In 2013, yields on all winter cereal varieties are expected to exceed that recorded the previous year.

Table 1: Area, yields, production of grains total in Poland

<b>Poland</b>	<b>2012/13</b>			<b>2013/14*</b>		
	<b>Area (Thousand /HA)</b>	<b>Yield (MT/HA)</b>	<b>Total Production (MMT)</b>	<b>Area (Thousand /HA)</b>	<b>Yield (MT/HA)</b>	<b>Total Production (MMT)</b>
Wheat	2,077	4.14	8,608	2,200	4.20	9,200
Rye	1,042	2.77	2,900	1,100	2.70	2,950
Barley	1,161	3.60	4,200	1,020	3.20	3,270
Mixed Grains	1,278	3.00	3,900	1,200	2.83	3,386
Triticale	992	3.38	3,300	1,250	3.20	4,020
Oat	514	2.86	1,500	540	2.50	1,300
Corn	544	7.35	4,000	500	6.50	3,250
Total	7,608	X	28,408	7,810	X	27,376

Source: Main Statistical Office

\*FAS forecast

Basic factors influencing the current 2013 cereal crop forecast for Poland are:

- Very good status of wintering of all winter cereals,
- Extraordinary late spring – about 4-5 weeks late, according to the region, which resulted in delays in spring cereal sowings and late start of winter cereals vegetation,
- Favorable weather in early spring – without spring frost, often occurring at this time of the year,
- Currant (first half of June 2013) unfavorable weather conditions – strong rains and numerous flooding farmlands,
- Changes in cropping patterns in favor of corn.

Table 2: Production of grains by variety, thousand Metric Tons

<b>Poland</b>	<b>2008/09</b>	<b>2009/10</b>	<b>2010/11</b>	<b>2011/12</b>	<b>2012/13</b>	<b>2013/14*</b>	<b>Change Projected 2012/13 - 2013/14* ( %)</b>
Wheat	9,275	9,790	9,408	9,339	8,608	9,200	7.0
Rye	3,449	3,713	2,852	2,601	2,888	2,950	1.7
Barley	3,619	3,984	3,397	3,326	4,180	3,270	(-22.1)
Mixed Grains	3,673	3,884	3,340	3,373	3,920	3,386	(-13.2)
Triticale	4,460	5,234	4,576	4,235	3,349	4,020	21.2
Oat	1,262	1,415	1,517	1,382	1,468	1,300	(-13.3)
Corn	1,844	1,707	1,994	2,392	3,996	3,250	(-18.7)
<b>Total</b>	<b>27,582</b>	<b>29,727</b>	<b>27,084</b>	<b>26,647</b>	<b>28,408</b>	<b>27,376</b>	<b>(-3.9)</b>

Source: Main Statistical Office

\* FAS estimate

Heavy rains the first half of June which led to some lowland flooding has not had measureable impact on cereals production. Local damage in south-west Poland has been recorded but should not affect the country's final output. The risk of fungal diseases is, however, growing with the wet conditions and could become a threat to crop yields absent dry weather in the near future. Farmers report an inability to enter wet fields to apply plant protection measures to ward off molds, a threat specific to corn plantings. The coming weeks will be decisive for this year's spring crops if meteorological conditions remain as currently existing in Poland.

Total cereal production tendencies have been changing; to a great extent from adjustments in cropping patterns. In 2012, corn share of total crop production increased significantly – to 14.4 percent, up from the 2011 level of 9.3 percent. In 2013, acreage of corn proves to be lower than the last year but it is still exceeding the average of previous years. The extraordinary late spring has been the reason for this year's higher corn share in total grains crop planting. Corn and barley are the only cereals which can meet so late agri-technical requirements.

Table 3: Import of grains by variety, thousand Metric Tons

<b>Poland</b>	<b>2008/09</b>	<b>2009/10</b>	<b>2010/11</b>	<b>2011/12</b>	<b>2012/13*</b>	<b>Change Projected 2011/12 – 2012/13* (%)</b>
<b>Wheat</b>	828	781	655	1,019	700	(-31)
<i>Intra EU</i>					690	
27	759	754	647	967		
<i>Extra EU</i>					10	
27	69	28	8	52		
<b>Rye</b>	20	5	19	90	30	(-67)
<i>Intra EU</i>					26	
27	20	5	19	52		
<i>Extra EU</i>					4	
27	0	0	0	37		
<b>Barley</b>	200	141	218	231	160	(-31)
<i>Intra EU</i>					160	
27	197	141	218	231		
<i>Extra EU</i>					0	
27	3	0	0	0		
<b>Oat</b>	8	5	5	5	8	+60
<i>Intra EU</i>					8	
27	8	5	5	5		
<i>Extra EU</i>					0	
27	0	0	0	0		
<b>Corn</b>	888	324	325	456	170	(-63)
<i>Intra EU</i>					150	
27	660	316	269	359		
<i>Extra EU</i>					20	
27	228	8	56	97		
<b>Total</b>	<b>1,944</b>	<b>1,256</b>	<b>1,222</b>	<b>1,801</b>	<b>1,068</b>	<b>(-59.3)</b>
<i>Intra EU</i>						
27	1,644	1,221	1,158	1,614	1,034	(-64.1)
<i>Extra EU</i>						
27	300	35	64	187	34	(-18.2)

Source: Main Statistical Office

\* FAS estimate

In MY 2012/13 Poland's exports of basic grains increased by 157 percent, while imports decreased by almost 60 percent. The higher level of exports was possible as the good crops generated above average stocks. EU countries were the primary destinations as smaller crops of corn, rye, and wheat generated

higher demand for Polish grains than witnessed a year ago.

In MY 2013/14 Poland's potential for grain exports is expected to diminish as smaller crops are forecasted. Domestic grain use is expected to show a decline mainly because of decreasing feed demand from a smaller animal sector. The cereals available for trade will diminish.

Table 4: Export of grains by variety, thousand Metric Tons

<b>Poland</b>	<b>2008/09</b>	<b>2009/10</b>	<b>2010/11</b>	<b>2011/12</b>	<b>2012/13*</b>	<b>Change Projected 2011/12 – 2012/13* ( %)</b>
<b>Wheat</b>	1426	1240	848	701	1500	114
<i>Intra EU 27</i>	811	662	751	642	1300	
<i>Extra EU 27</i>	615	578	97	59	200	
<b>Rye</b>	348	531	209	96	450	369
<i>Intra EU 27</i>	348	505	176	96	450	
<i>Extra EU 27</i>	1	26	33	0	0	
<b>Barley</b>	31	90	173	128	370	189
<i>Intra EU 27</i>	31	90	141	128	350	
<i>Extra EU 27</i>	0	0	32	0	20	
<b>Oat</b>	13	43	28	28	80	186
<i>Intra EU 27</i>	13	40	26	28	80	
<i>Extra EU 27</i>	0	3	3	0	0	
<b>Corn</b>	182	205	118	509	1350	165
<i>Intra EU 27</i>	182	200	118	504	1300	
<i>Extra EU 27</i>	0	5	0	5	50	
<b>Total</b>	<b>2000</b>	<b>2109</b>	<b>1376</b>	<b>1462</b>	<b>3750</b>	<b>157</b>
<i>Intra EU 27</i>	1385	1497	1212	1398	3480	149
<i>Extra EU 27</i>	615	612	164	64	270	322

Source: Main Statistical Office

\* FAS estimate

