

Voluntary Report – Voluntary - Public Distribution

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Report Name: Raspberry Market Brief

Country: Poland

Post: Warsaw

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Report Highlights:

Although Poland is relatively new to commercial raspberry production, it has become the European Union's (EU) largest raspberry producer. From 2006 to 2016, Polish raspberry production doubled and the raspberry area reached 29,300 hectares (HA). In 2020, Poland's raspberry crop reached 116,000 metric tons (MT), a 53-percent increase over 2019. 80 percent of Polish raspberries are processed. Poland has become a significant exporter of frozen raspberries, mainly to the other EU markets.

General Information:

Production and Area

Poland is the EU's largest raspberry producer. Despite being relatively new to commercial raspberry production, Poland is now the world's fifth largest raspberry producer and accounts for over half of total EU production. From 2004 to 2006, Polish annual raspberry production averaged about 58,000 MT. The total production area during that period was roughly 16,000 HA. By 2016, production increased to 129,000 MT and the production area reached 29,300 HA. While annual production tends to fluctuate based on weather conditions, Poland's raspberry area has remained relatively stable in recent years (see Table 1). The province of Lubelskie accounts for 70 percent of Polish raspberry production.

Table 1: Annual Polish Raspberry Area, Yield, and Production

Year	Area (000) HA	Yield MT/HA	Production (000) MT
2015	27.4	2.86	78.3
2016	29.3	4.41	129.1
2017	29.3	3.57	104.5
2018	29.6	3.91	115.6
2019	29.5	2.56	75.7
2020*	28.8	4.03	116.0

Source: Polish Statistical Office

Most Polish raspberry farms are not irrigated and depend on favorable weather conditions. Polish raspberries are harvested by hand and in recent years, farmers have experienced a seasonal labor shortage. In 2020, COVID-19 restrictions prevented many Ukrainian workers from entering Poland, which increased labor costs for local producers.

Table 2: 2019 Raspberry Production by Region

Country Region	Area, Ha	Yields MT/Ha	Production, MT	Area	Yields	Production
				2018=100		
Poland	29,522	2.56	75,660	99.76	65.6	65.4
Dolnośląskie	318	3.25	1,033	99.0	88.8	87.9
Kujawsko-Pomorskie	186	3.38	629	102.9	103.4	106.5
Lubelskie	20,741	2.60	54,021	99.8	60.5	60.5
Lubuskie	48	3.52	167	81.5	82.6	67.4
Łódzkie	358	2.20	786	100.9	82.1	82.8
Małopolskie	360	3.44	1,240	99.5	92.2	91.8
Mazowieckie	3,357	2.43	8,142	104.0	86.8	90.1
Opolskie	24	3.59	85	107.1	77.2	82.7
Podkarpackie	741	2.20	1,629	80.3	51.3	41.1
Podlaskie	408	1.79	728	99.2	98.4	97.5
Pomorskie	105	2.36	247	96.7	92.2	89.3
Śląskie	51	3.68	186	100.0	73.6	73.7
Świętokrzyskie	562	3.58	2,012	100.5	94.2	94.7
Warmińsko-Mazurskie	434	2.38	1,034	99.7	89.5	89.4

Wielkopolskie	336	2.55	856	102.9	107.6	110.5
Zachodniopomorskie	1,495	1.91	2,858	99.9	80.6	80.5

Source: Polish Statistical Office

In 2020, the raspberry crop reached 116,000 MT, a 53-percent increase over 2019. Despite the spring drought and frosts, spring raspberry varieties yielded abundantly. Rainfall in May and June also ensured a good harvest for all fall varieties. In Poland, fall-harvested raspberries account for 60 percent of total production. Polish fall varieties can bear fruit until October.

Industrial Raspberry Processing

Roughly 80 percent of fresh Polish raspberries are processed. Although some are processed into jams and juice, most are frozen. In 2019, total frozen raspberry production reached 38,000 MT (out of 75,660 MT of total fresh production). Poland's total frozen raspberry production capacity is about 90,000 MT. The Polish fruit processing industry has developed quickly in recent years, largely due to international investment. Out of about 400 frozen fruit processors currently operating in Poland, over half are wholly or partly owned by German or French investors. The Institute of Horticulture and Pomology in Skierniewice is developing new raspberry varieties particularly suited for food processors.

Table 3: Average Farm Gate Prices for Raspberries

	2015	2016	2017	2018	2019	2020
PLN/kg	7.70	5.20	4.40	2.40	4.25	5.39-5.97
\$/kg	2.05	1.35	1.25	0.64	1.08	1.42-1.58

Source: Institute of Agriculture and Food Economics In Warsaw

Table 4: Production of Processing Industry, MT

	2015	2016	2017	2018	2019
Raspberry Concentrated Juice	2,000	4,000	4,500	4,500	3,000
Raspberry Frozen	44,900	70,370	53,150	60,920	38,000

Source: FAS Warsaw estimates based on National Union of Juice Producers data

International Trade

In 2019, Poland exported 32,000 MT of frozen raspberries, about 84 percent of total frozen raspberry production. Polish producers typically export frozen raspberries to other EU markets, chiefly Germany, the Netherlands, and Belgium. Fresh raspberry exports are considerably lower than frozen, and reached just 7,800 MT in 2019, mainly to Germany and the Netherlands. Poland's biggest competitor is Serbia, which also specializes in raspberries for processing and competes for the same markets. Because Serbian berries are harvested earlier, in years when Serbian production is high, Polish market prices tend to be negatively affected. Ukraine is emerging as Poland's second largest competitor, mainly due to the lower Ukrainian labor costs. Poland also imports small volumes of fresh raspberries, mainly from the Netherlands, Spain, and Ukraine.

Table 6: Imports of Fresh Raspberries by Supplying Country, MT

	2015	2016	2017	2018	2019	Market share 2019 (%)
World	1,867	1,782	2,125	2,677	3,130	100.0
<i>EU27+UK</i>	547	729	898	1,690	2,132	68.1
Netherlands	232	381	372	664	915	29.2
Ukraine	332	691	929	880	860	27.5
Spain	41	151	152	453	813	26.0

Table 7: Exports of Fresh Raspberries by Country Destination, MT

	2015	2016	2017	2018	2019	Market share 2019 (%)
World	17,727	18,578	12,926	9,443	7,820	100.0
<i>EU27+UK</i>	17,637	18,464	12,883	9,398	7,772	99.4
Germany	10,066	11,256	6,639	4,604	3,614	46.2
Netherlands	1,792	1,130	3,339	2,112	2,686	34.5
Belgium	3,369	3,562	966	1,211	589	7.5

Table 8: Exports of Fresh Raspberries by Country Destination, (000)\$

	2015	2016	2017	2018	2019	Market share 2019 (%)
World	43,384	35,744	23,796	15,703	18,691	100.0
<i>EU27+UK</i>	43,291	35,578	23,694	15,592	18,602	99.5
Germany	24,512	22,474	12,368	7,130	8,841	45.4
Netherlands	4,746	2,255	5,032	2,722	3,894	17.3
Belgium	8,801	5,670	1,433	1,117	839	8.5

Table 9: Exports of Fresh Raspberries by Quantity, Value, and Price

	2015	2016	2017	2018	2019
Quantity, MT	17,727	18,578	12,926	9,443	7,820
Value (000)\$	43,384	35,744	23,796	15,703	18,691
Price \$/kg	2.45	1.92	1.84	1.66	2.39

Policy

Polish raspberry producers are not currently eligible to receive any national or EU-level production or direct-payment subsidies. Polish legislation vis-à-vis the raspberry sector follows all EU horticultural regulations and directives regarding production and trade.

Attachments:

No Attachments.