

THE SITUATION ON APPLE MARKET AND ITS PRESERVES IN POLAND

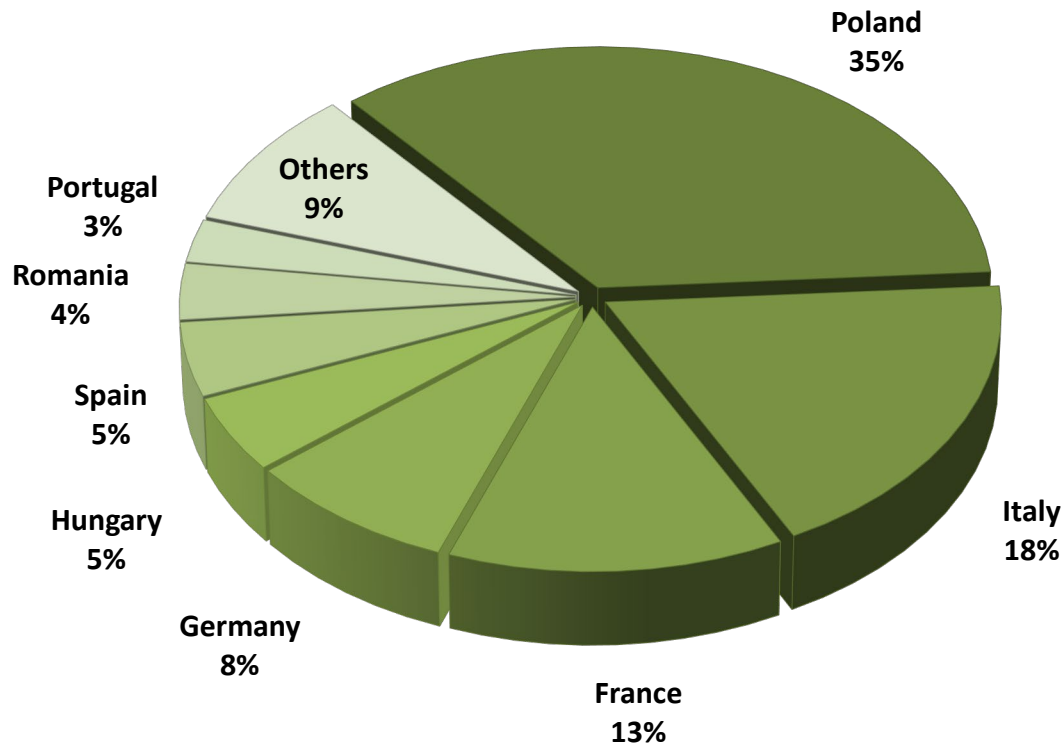
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WORLD APPLE PRODUCTION (MILLION TONNES)

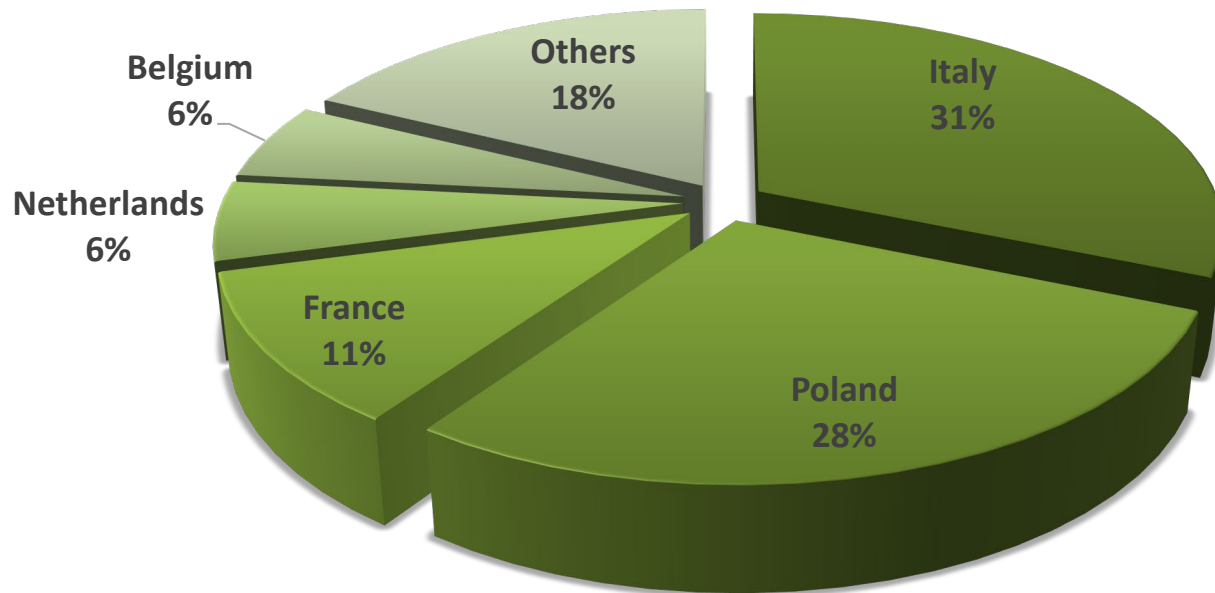
Countries	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
China	41,39	33,00	42,43	44,07	45,97	41,00
EU	9,80	14,81	11,48	11,94	12,28	12,77
Poland	2,44	4,00	3,08	3,56	4,07	4,27
USA	5,09	4,48	4,85	4,51	4,34	4,49
India	1,92	2,37	2,37	2,30	2,30	2,35
Iran	1,94	2,24	2,21	2,21	2,21	2,21
Russia	1,36	1,61	1,78	1,54	1,54	1,54
Ukraine	1,46	1,15	1,12	1,12	1,12	1,12
South Africa	0,84	0,89	0,99	1,16	1,17	1,10
Chile	1,33	1,21	1,12	1,10	1,05	1,04
Other	7,04	6,48	6,62	6,45	6,19	6,37
Total	75,19	71,85	78,58	80,68	82,64	78,76

Source: USDA

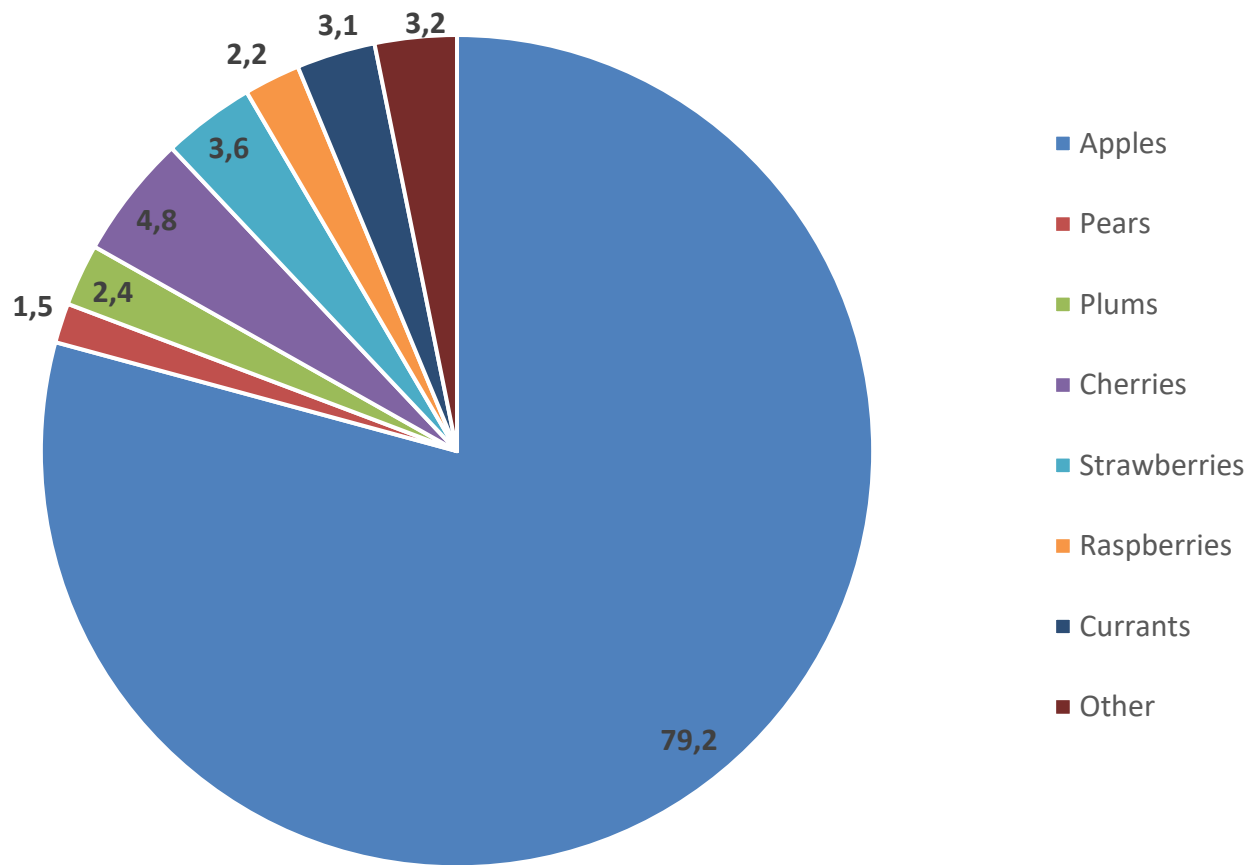
GEOGRAPHICAL STRUCTURE OF APPLE HARVEST VOLUME IN EU IN YEAR 2023



GEOGRAPHICAL STRUCTURE OF APPLES EXPORT IN EU IN YEAR 2022

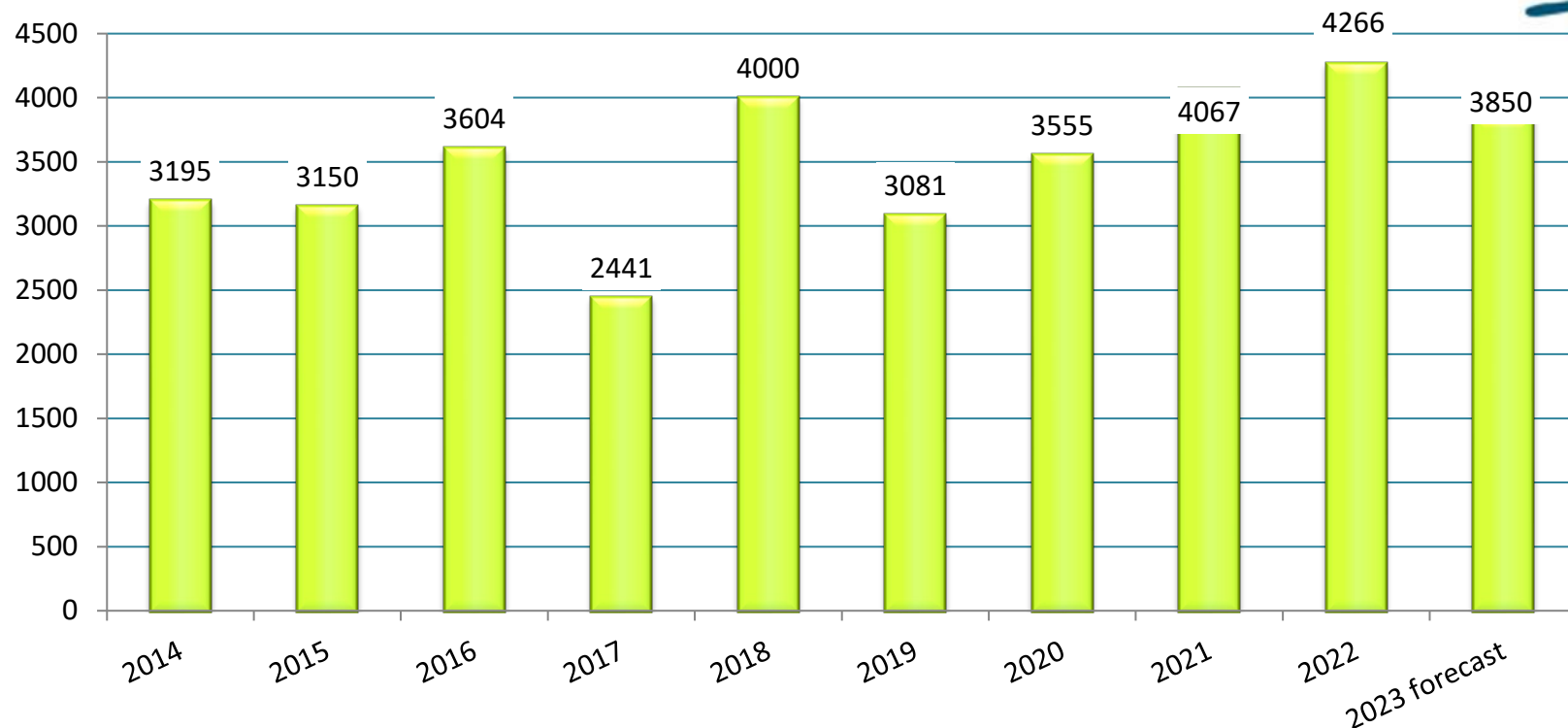


STRUCTURE OF FRUIT HARVEST VOLUME IN POLAND IN YEARS 2018-2022 (%)



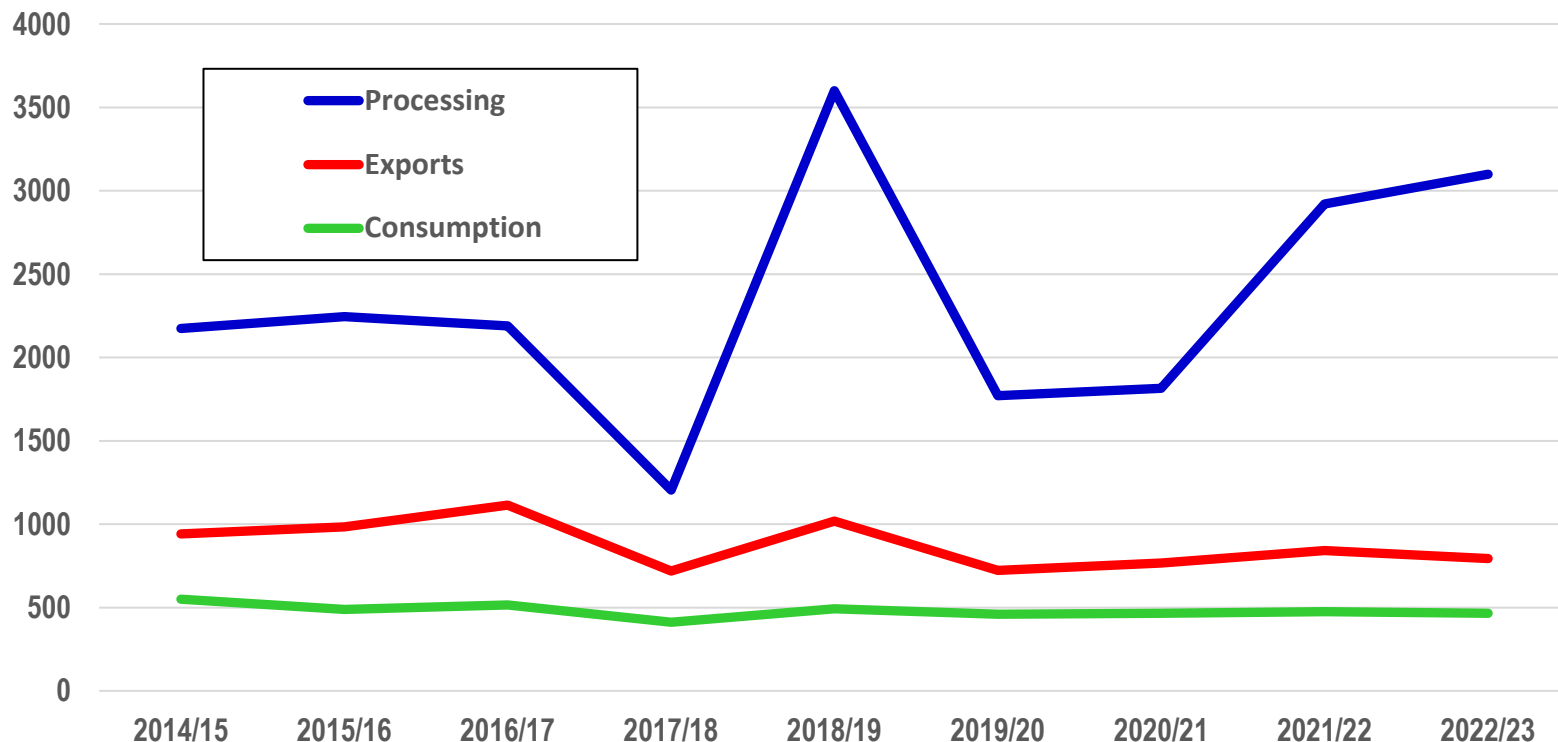
Source: based on data from the Central Statistical Office (GUS).

APPLE HARVEST IN POLAND (THOUSANDS OF TONS)



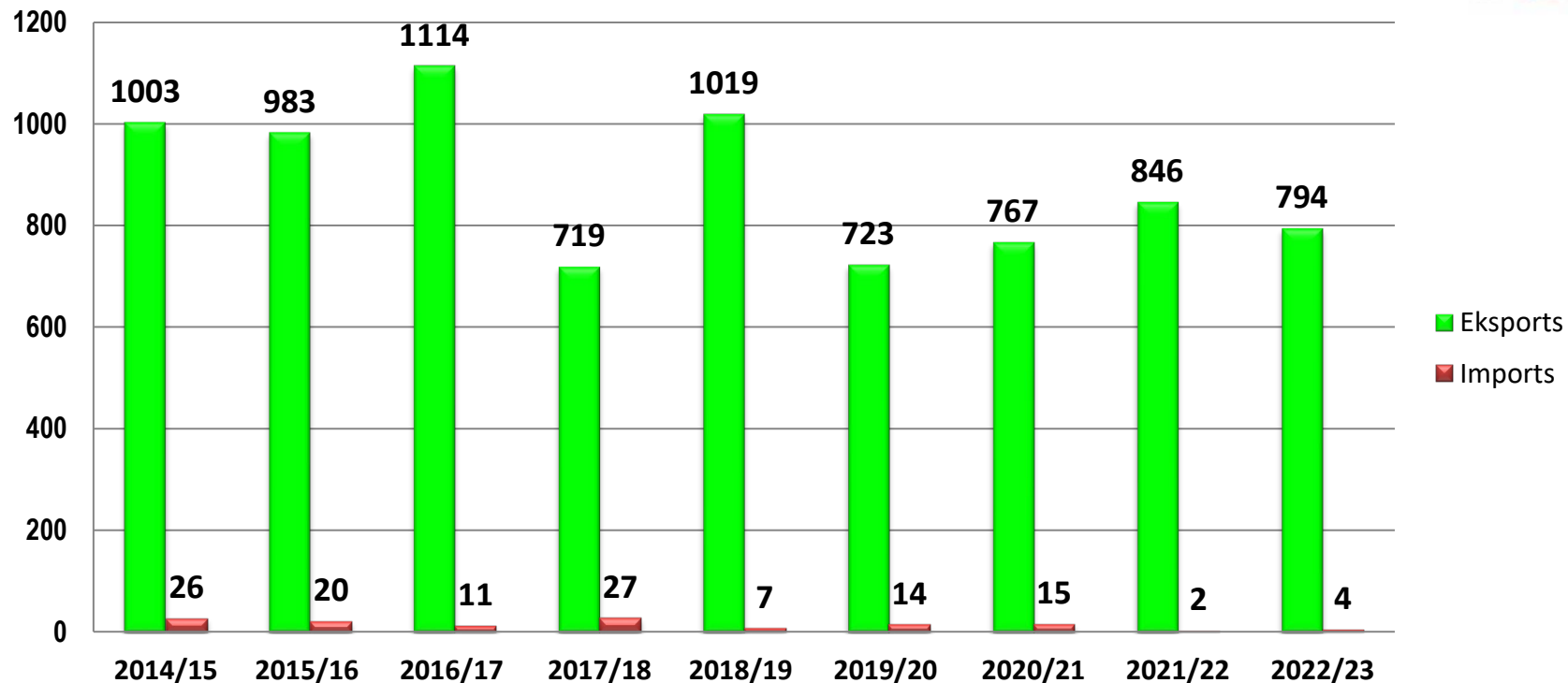
Source: based on data from the Central Statistical Office

EXPORTS, CONSUMPTION AND PROCESSING OF APPLES IN POLAND (THOUSANDS OF TONS)



Source: based on data from the Central Statistical Office, Ministry of Finance (MF) and Polish Association of Juice Producers (KUPS)

EXPORTS AND IMPORTS OF APPLES IN POLAND (THOUSAND TONNES)



Source: based on data from Ministry of Finance (MF)

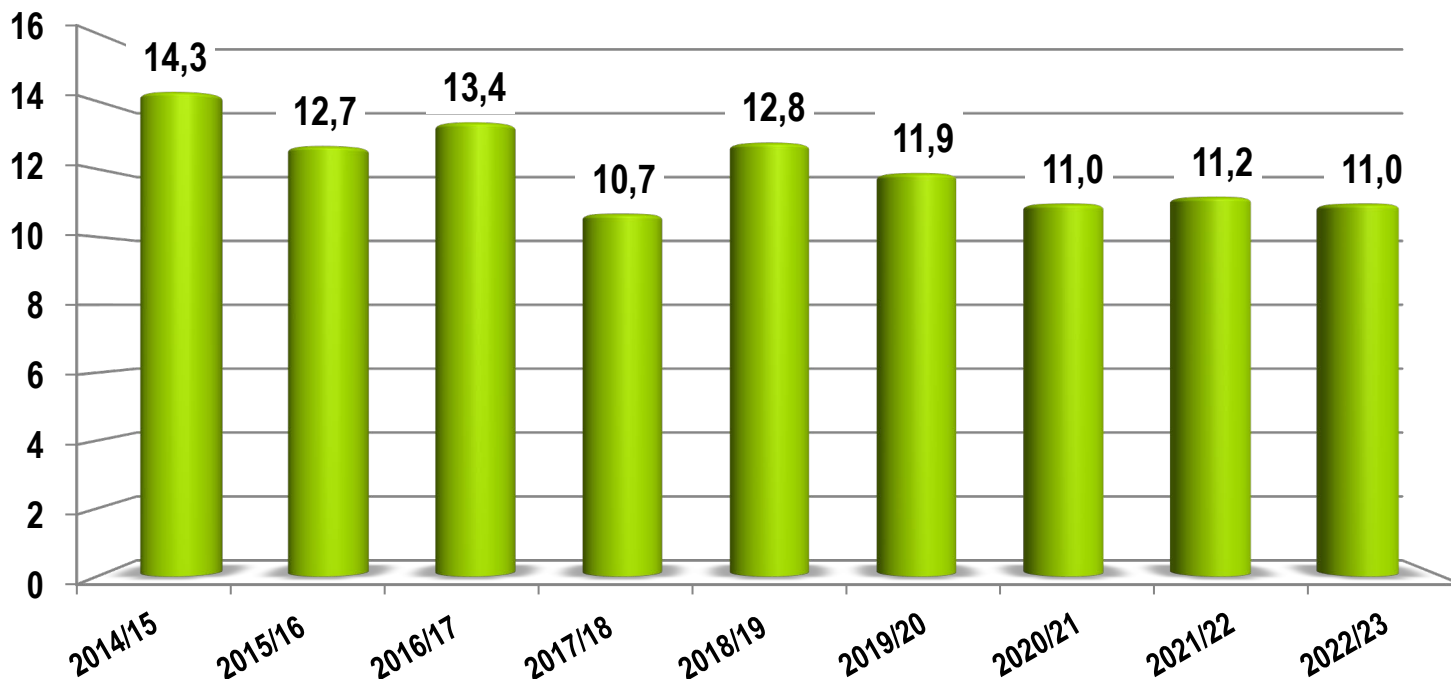
GEOGRAPHICAL STRUCTURE OF POLISH APPLE EXPORTS



Countries	2019/20		2020/21		2021/22		2022/23	
	quantity thousand tonnes	price EUR/kg	quantity thousand tonnes	price EUR/kg	quantity thousand tonnes	price EUR/kg	quantity thousand tonnes	price EUR/kg
Germany	51,9	0,38	94,8	0,27	119,0	0,24	66,0	0,29
Austria	0,5	0,48	1,0	0,40	6,2	0,25	14,0	0,20
Sweden	21,5	0,54	18,2	0,52	20,3	0,47	26,5	0,54
Romania	67,6	0,54	59,3	0,50	61,7	0,44	78,2	0,41
Czechia	32,9	0,55	25,6	0,55	29,4	0,44	21,2	0,46
Lithuania	28,2	0,51	14,8	0,43	19,6	0,35	27,3	0,32
Hungary	15,7	0,47	13,6	0,43	18,4	0,36	55,9	0,29
Belarus	149,0	0,37	116,0	0,33	63,2	0,34	38,8	0,36
Kazakhstan	57,9	0,42	47,2	0,35	57,8	0,33	57,5	0,38
Egypt	83,4	0,47	105,1	0,46	153,9	0,41	78,2	0,41
United Kingdom	10,6	0,66	11,9	0,67	16,2	0,57	19,7	0,60
India	9,9	0,67	6,1	0,58	15,5	0,57	34,2	0,58
Mongolia	6,7	0,37	6,4	0,46	12,7	0,42	14,1	0,44
TOTAL	722,6	0,46	767,3	0,41	844,5	0,38	793,5	0,44

Source: based on data from Ministry of Finance (MF)

APPLE CONSUMPTION IN POLAND (KG/PERSON)

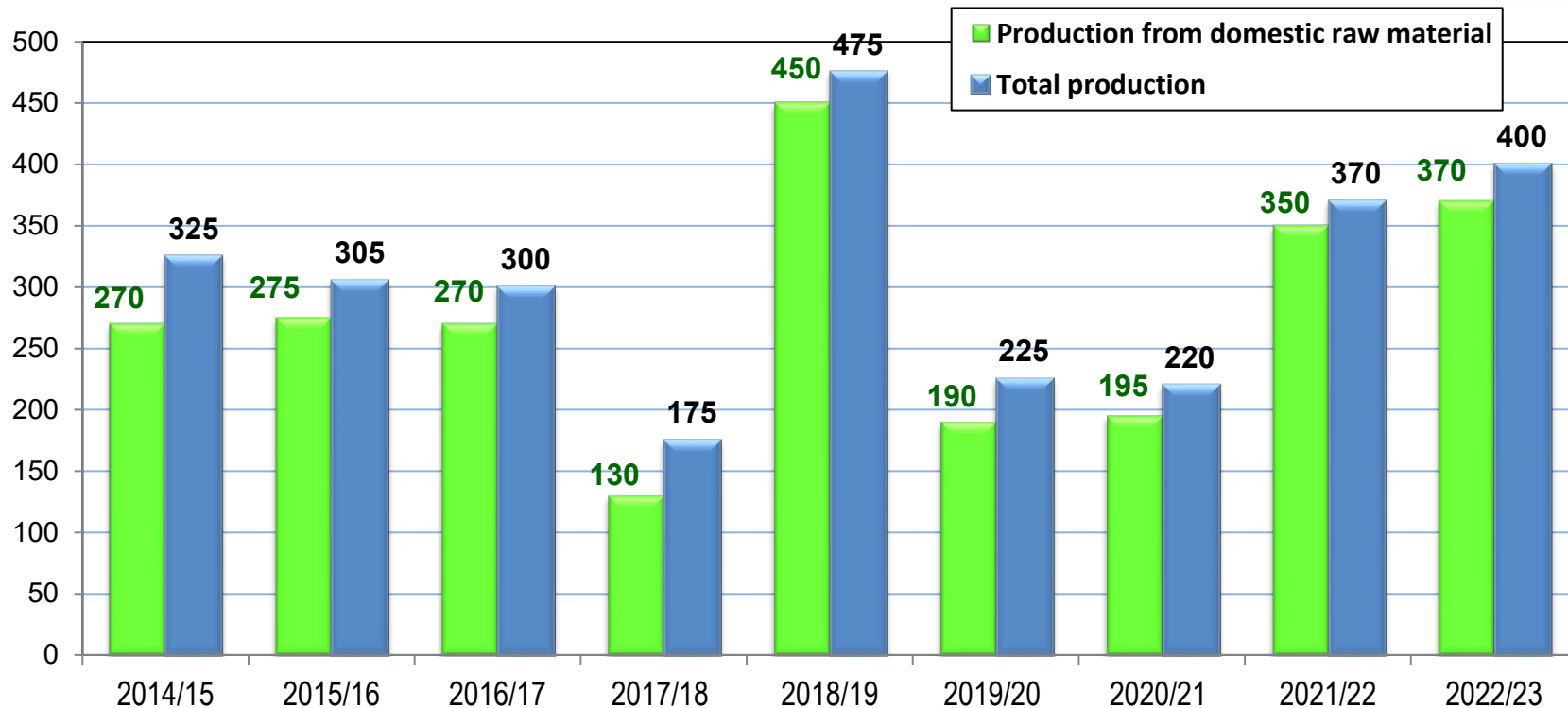


Source: based on data from the Central Statistical Office

PRODUCTS MADE OF APPLES DIRECTLY

- 🍏 Apple Juice Concentrate
- 🍏 NFC Juices (Not From Concentrate)
- 🍏 Cider
- 🍏 Peeled apples (frozen)
- 🍏 Puree
- 🍏 Mousses (dessert)
- 🍏 Must (for vine production)
- 🍏 Dried

PRODUCTION OF CONCENTRATED APPLE JUICE IN POLAND (IN THOUSANDS OF TONS)

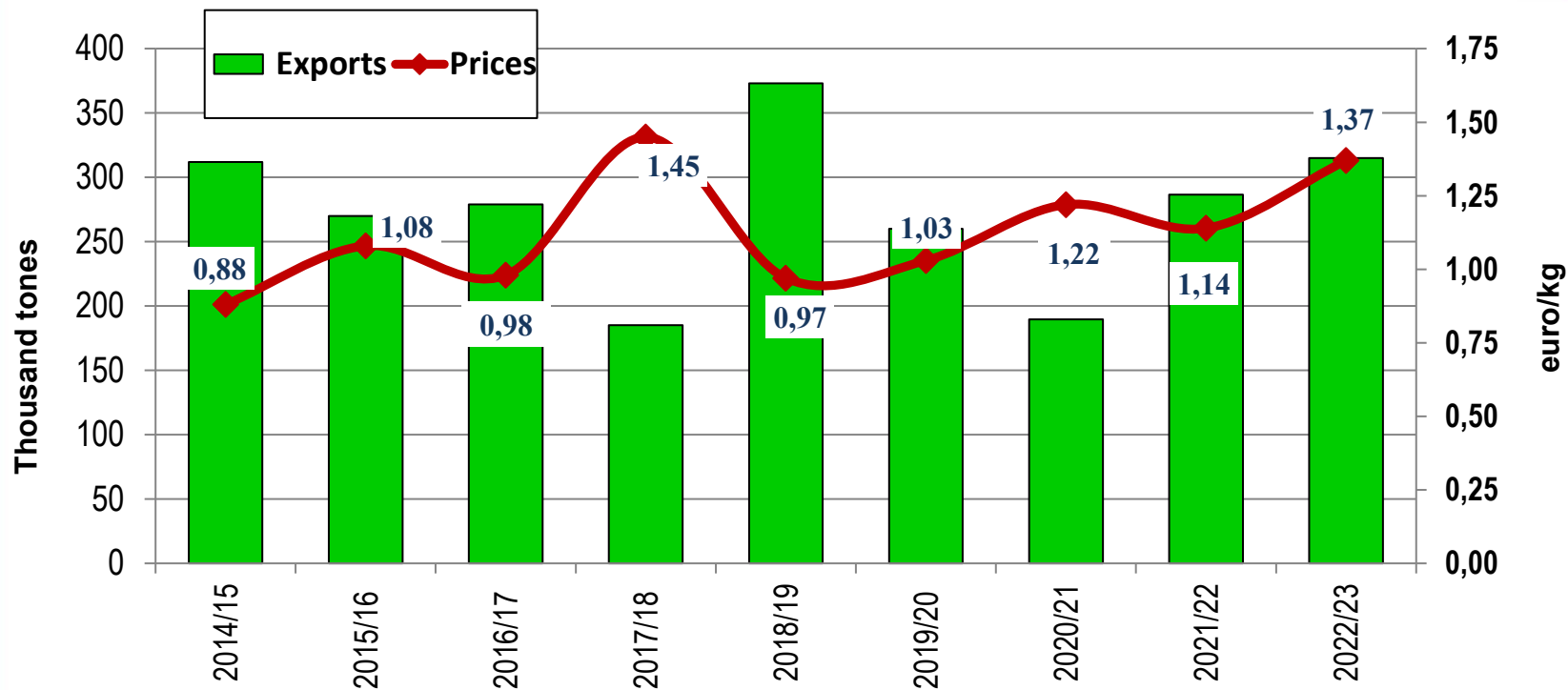


Source: based on data from the Central Statistical Office, Ministry of Finance (MF) and Polish Association of Juice Producers (KUPS)

IMPORT OF CONCENTRATED APPLE JUICE (CN 200979) TO POLAND

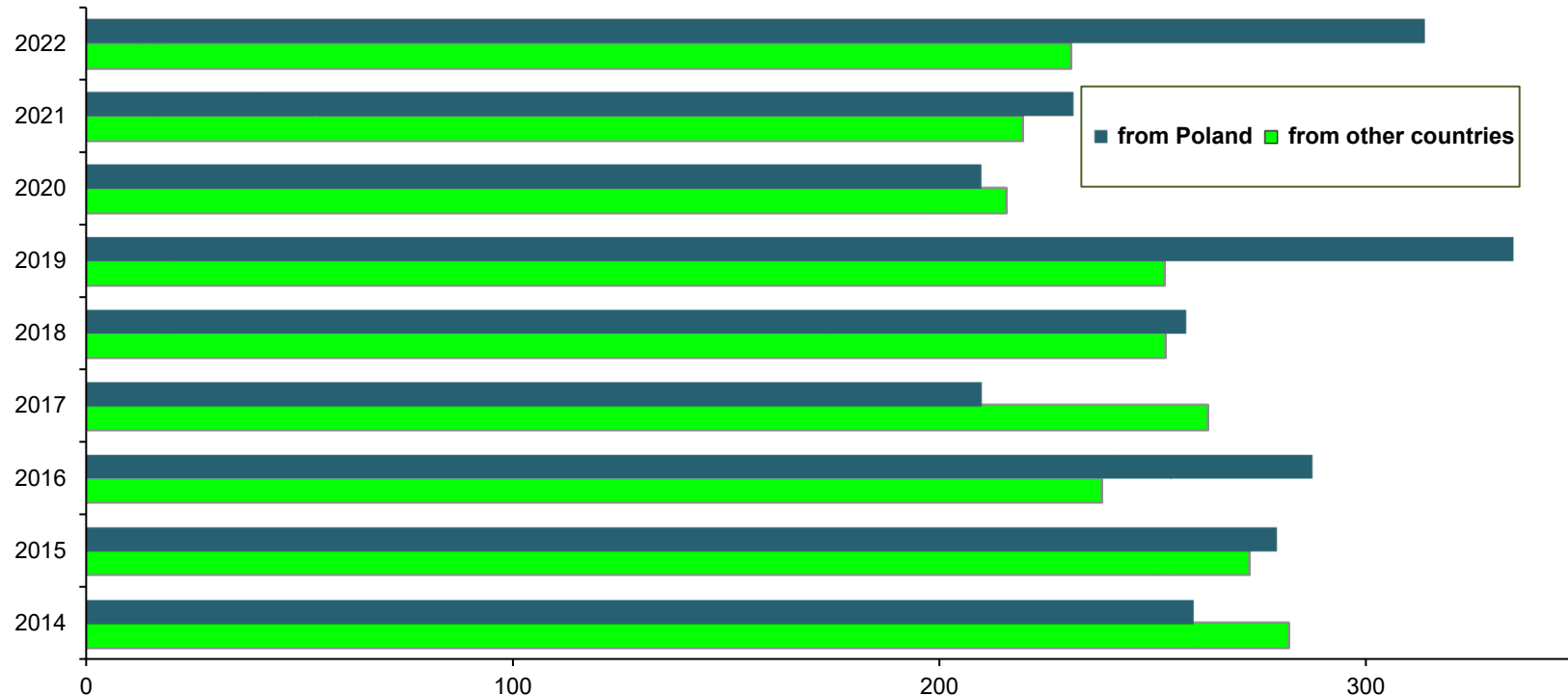
Country	Import in thousand tonnes				Prices in EUR/kg			
	2018/19	2019/20	2020/21	2022/23	2018/19	2019/20	2020/21	2022/23
Total	44,4	61,9	40,2	48,3	0,83	1,01	1,02	1,25
Ukraine	11,7	11,6	2,9	35,2	0,74	1,04	0,97	1,23
Moldova	23,1	39,2	21,8	8,1	0,74	0,97	1,00	1,18
Turkey	1,6	0,8	2,1	1,9	1,21	1,22	1,25	1,64
Others	8,0	10,3	13,4	3,1	2,11	2,09	2,06	1,68

EXPORTS OF CONCENTRATED APPLE JUICE FROM POLAND (THOUSANDS OF TONS) AND EXPORT PRICES (EURO/KG)



Source: based on data from Ministry of Finance (MF)

EXPORTS OF CONCENTRATED APPLE JUICE FROM EU IN THOUSAND TONNES

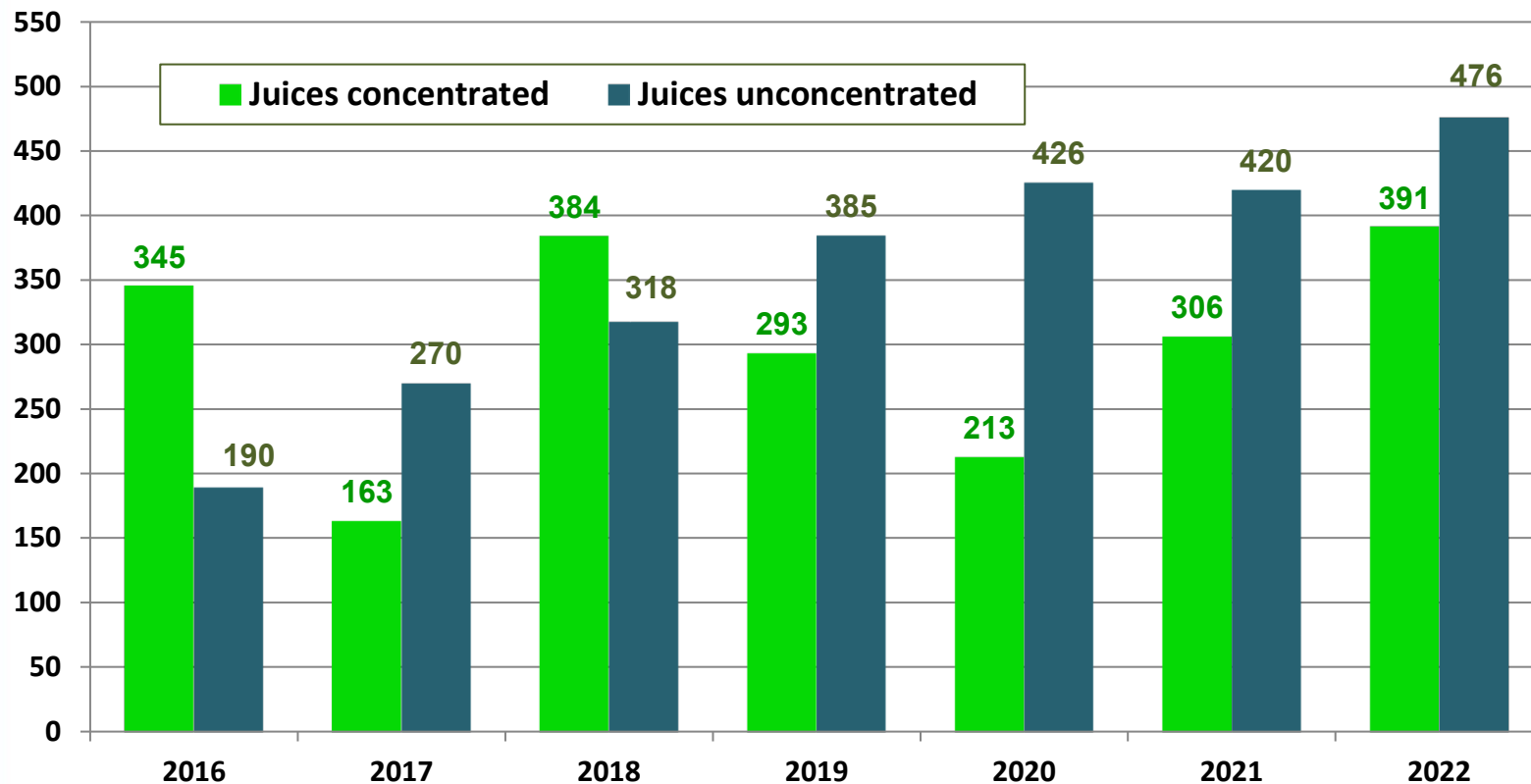


THE STRUCTURE OF POLISH EXPORTS OF CONCENTRATED APPLE JUICE

Countries	2019/20		2020/21		2021/22		2022/23	
	quantity thousand tonnes	price EUR/kg	quantity thousand tonnes	price EUR/kg	quantity thousand tonnes	price EUR/kg	quantity thousand tonnes	price EUR/kg
EU-14	178,2	1,06	149,4	1,22	206,0	1,14	214,8	1,35
Germany	109,7	1,08	89,0	1,20	101,9	1,13	104,9	1,34
Netherlands	26,1	0,97	26,2	1,23	35,4	1,16	32,7	1,41
Austria	8,1	1,10	9,5	1,20	28,4	1,10	27,4	1,17
France	10,6	1,06	6,5	1,23	13,8	1,18	18,4	1,47
EU-13	4,9	1,17	5,0	1,30	9,6	1,16	13,7	1,17
Hungary	0,7	1,24	1,0	1,25	4,5	1,11	5,2	1,31
Czechia	1,0	1,09	0,8	1,34	1,3	1,11	4,2	0,72
CIS	4,7	0,86	0,2	1,29	3,3	1,03	12,9	1,30
Russia	4,7	0,85	0,2	1,34	2,9	1,01	10,6	1,25
Other	71,9	0,98	35,1	1,22	67,7	1,12	74,6	1,49
United Kingdom	48,5	0,93	28,0	1,22	37,5	1,14	37,4	1,38
USA	14,6	1,07	2,3	1,01	23,8	1,09	30,0	1,65
Total	259,9	1,03	189,6	1,22	286,5	1,14	315,9	1,37

Source: based on data from Ministry of Finance (MF)

PRODUCTION OF CONCENTRATED AND UNCONCENTRATED APPLE JUICES IN POLAND (IN THOUSAND TONNES)



Source: based on data from the Central Statistical Office

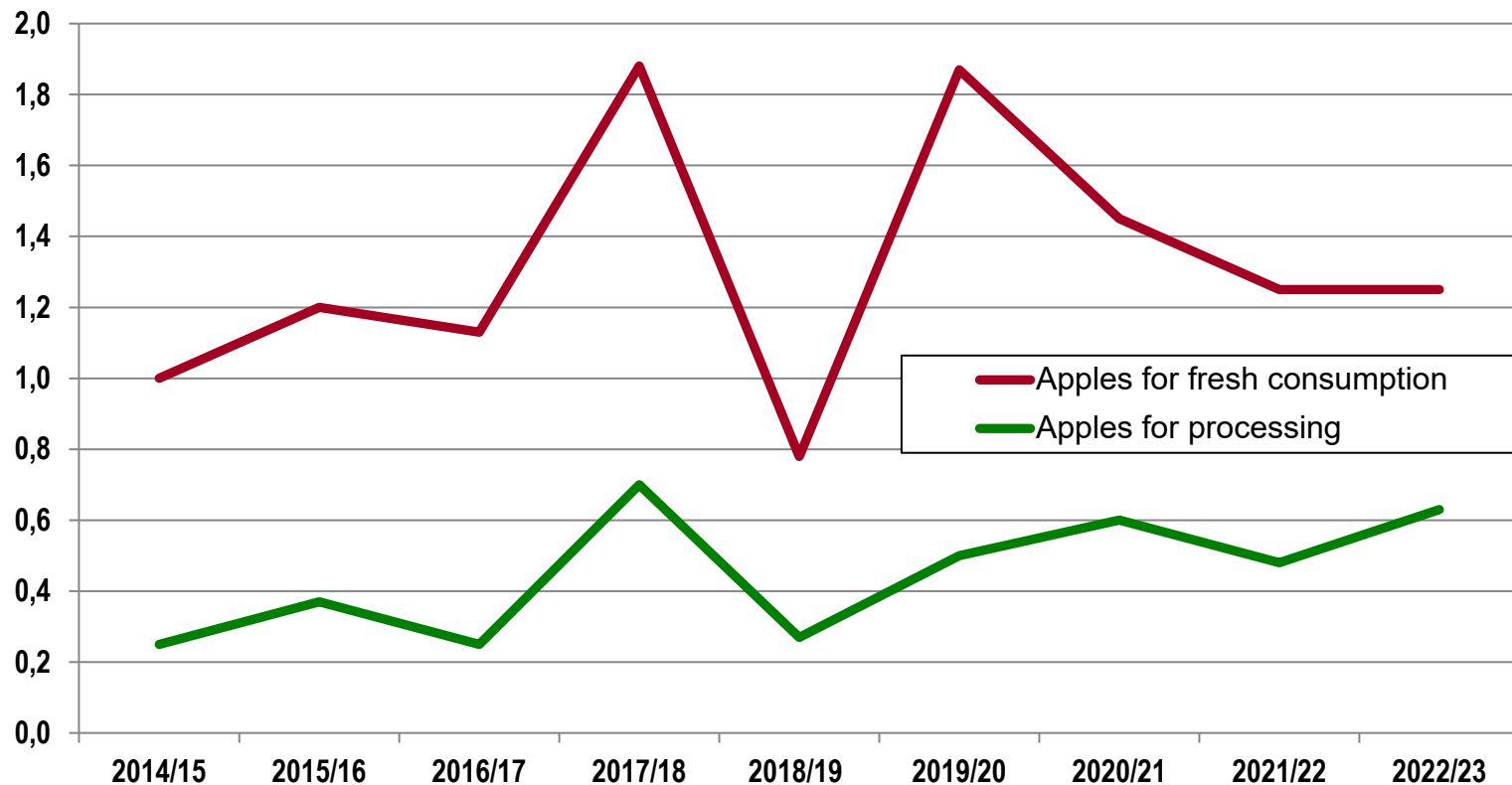


APPLE JUICE EXPORTS FROM POLAND

Specification	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
CONCENTRATED							
Volume (thousand tonnes)	279	185,4	372,5	259,9	189,6	286,5	315,9
Value (mln EUR)	274,7	268,7	362,1	268,9	231,6	325,6	434,1
Price (EUR/kg)	0,98	1,45	0,97	1,03	1,22	1,14	1,37
NOT CONCENTRATED							
Volume (thousand tonnes)	114,7	163,3	200,5	232,4	257,8	278,1	239,6
Value (mln EUR)	36,1	71,9	62,4	70,4	78,8	77,9	78,9
Price (EUR/kg)	0,32	0,44	0,31	0,3	0,31	0,28	0,33

Source: based on data from Ministry of Finance (MF)

PURCHASE PRICES OF APPLES ON THE MARKET OF FRESH PRODUCTS AND FOR PROCESSING (PLN/KG)



Source: data from IAFE NRI (IERiGŻ PIB)

THANK YOU FOR YOUR ATTENTION