

## THE APPLE MARKET IN POLAND

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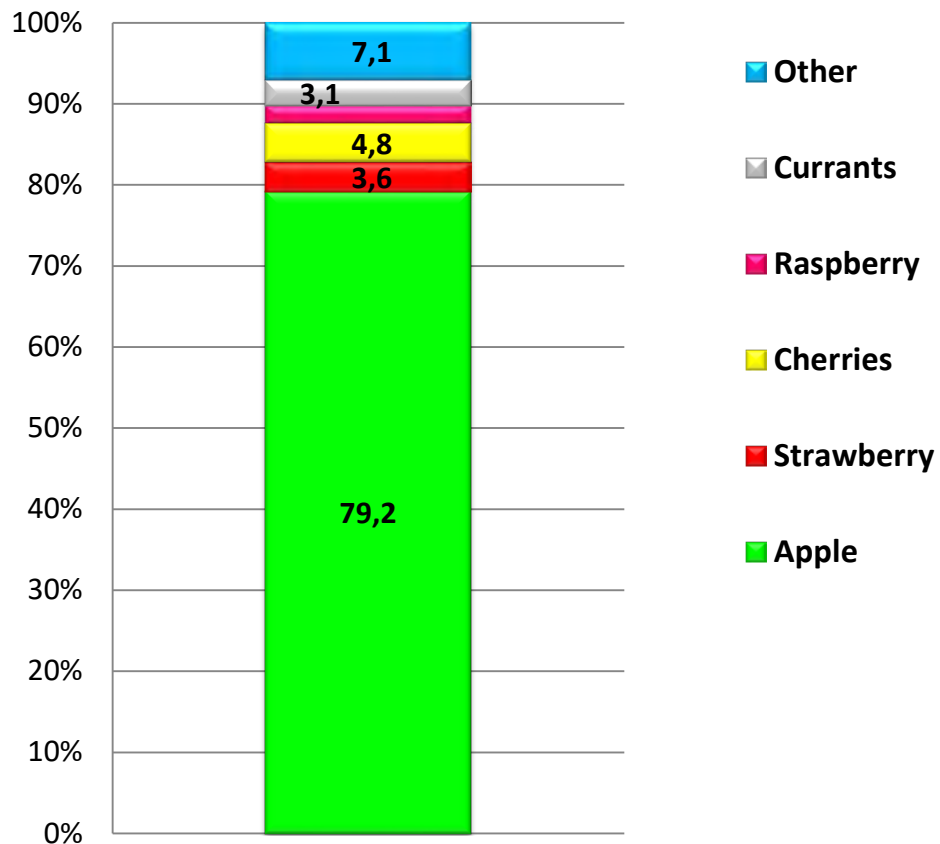
# IMPORTANCE OF HORTICULTURE SECTOR PRODUCTS IN AGRICULTURAL PRODUCTION, FOOD INDUSTRY AND AGRICULTURAL AND FOOD EXPORT IN THE YEARS 2018-2022



Specification	%	Position
Share in the commodity value of agriculture	16	2
including: crop products	40	1
Share in the production value of the food sector	10	3
Share in agri-food exports	13	2

Source: based on data from the Central Statistical Office (GUS) and the Ministry of Finance (MF)

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



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

# SOLD PRODUCTION VALUE OF FRUIT AND VEGETABLE PRODUCTS, JUICES, NECTARS AND BEVERAGES IN 2021



Specification	Value mln zł	%
Frozen fruits	2557	19,5
Juices	4751	36,3
- Apple juices	2154	16,4
Frozen vegetables	1866	14,2
Other preserves	5860	30,0
TOTAL	13045	100,0

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

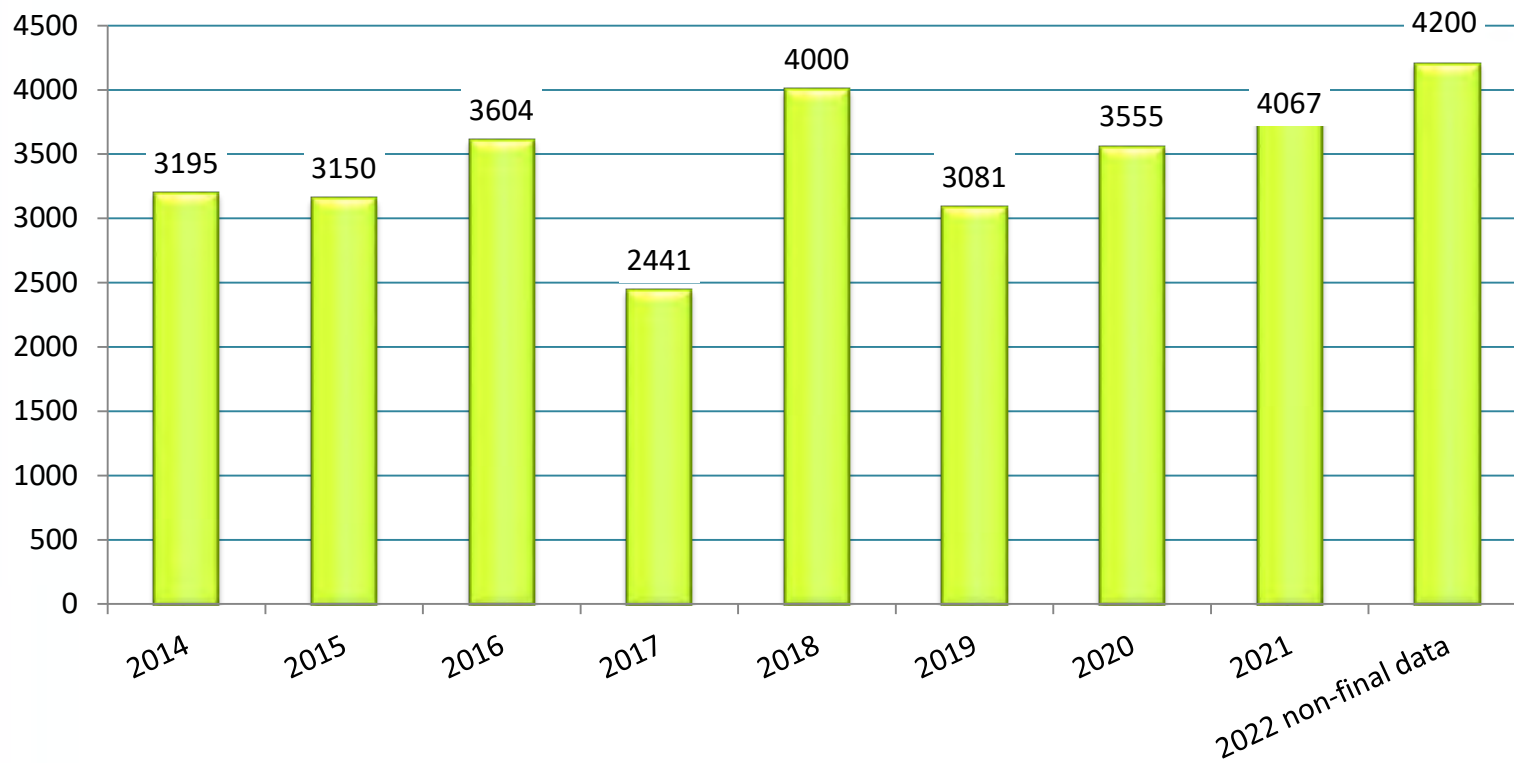
# EXPORT VALUE OF FRUITS, VEGETABLES AND THEIR PRESERVES ON AVERAGE IN 2019-2021



Specification	mIn EUR	%
<b>Fresh fruits</b>	<b>688,6</b>	<b>22,4</b>
- apples	331,7	10,8
<b>Fresh vegetables</b>	<b>321,2</b>	<b>10,4</b>
<b>Juices</b>	<b>602,2</b>	<b>19,6</b>
- apple juices	351,3	11,4
<b>Frozen fruits</b>	<b>525,3</b>	<b>17,1</b>
<b>Frozen vegetables</b>	<b>288,6</b>	<b>9,4</b>
<b>Other fruit preserves</b>	<b>312,3</b>	<b>10,1</b>
<b>Other vegetable preserves</b>	<b>341,3</b>	<b>11,0</b>
<b>TOTAL</b>	<b>3079,5</b>	<b>100,0</b>

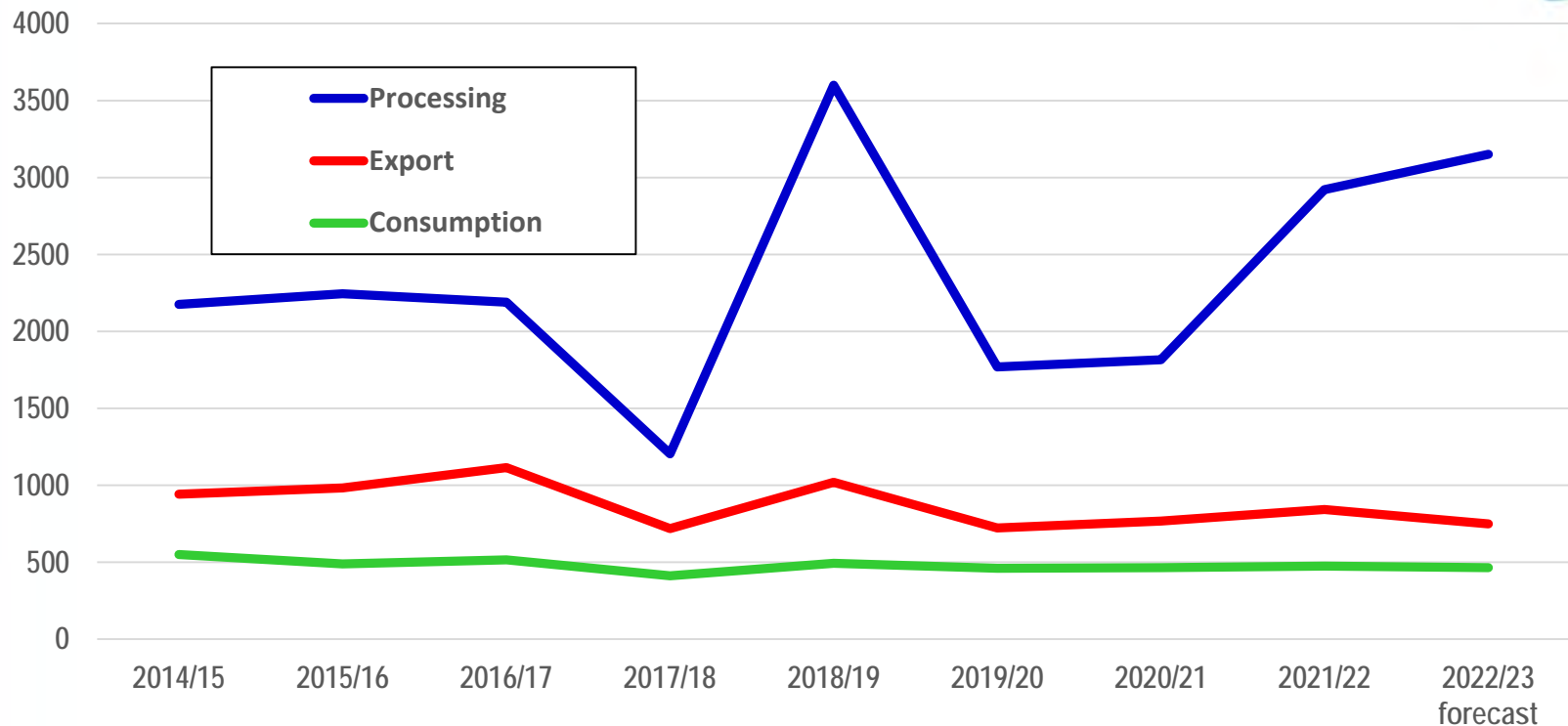
Source: based on data from Ministry of Finance (MF)

## APPLE HARVEST IN POLAND (THOUSANDS OF TONS)



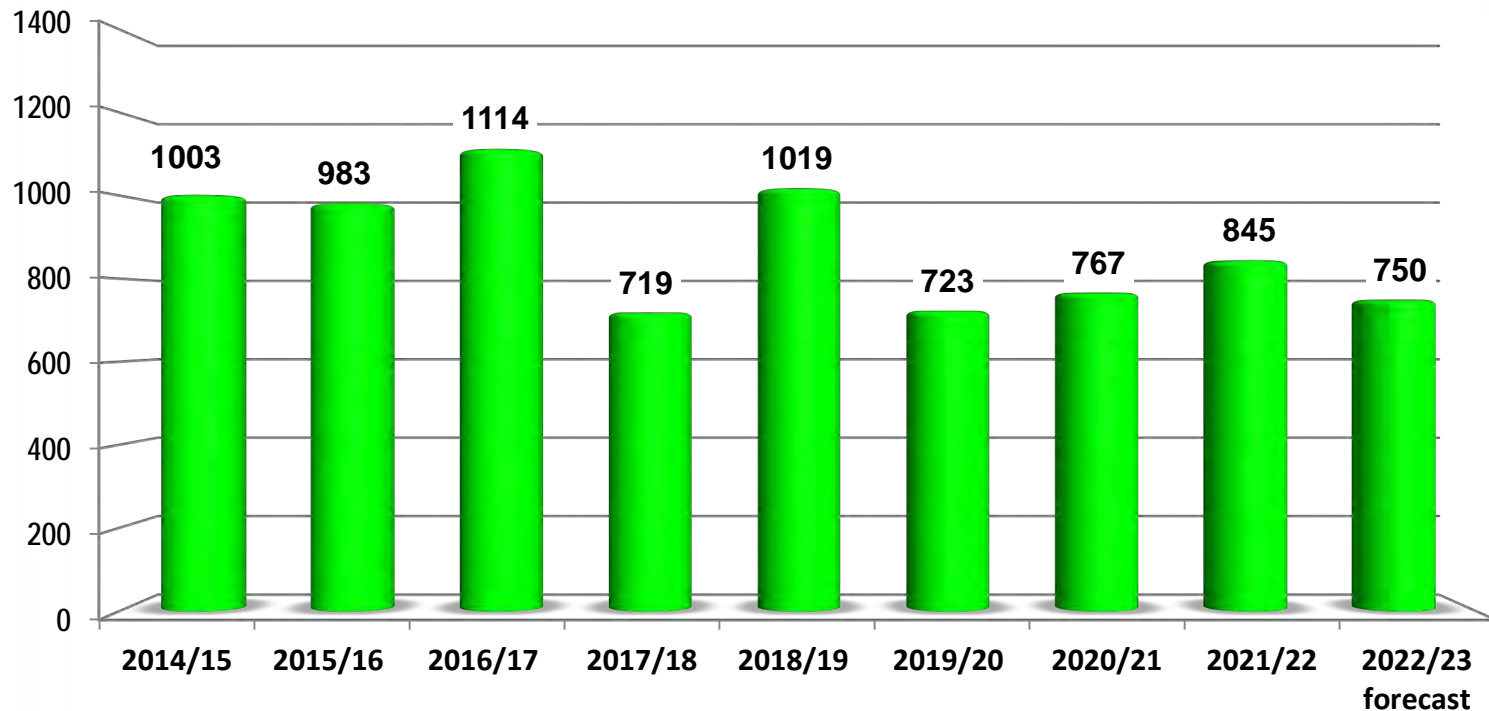
Source: based on data from the Central Statistical Office

# 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)

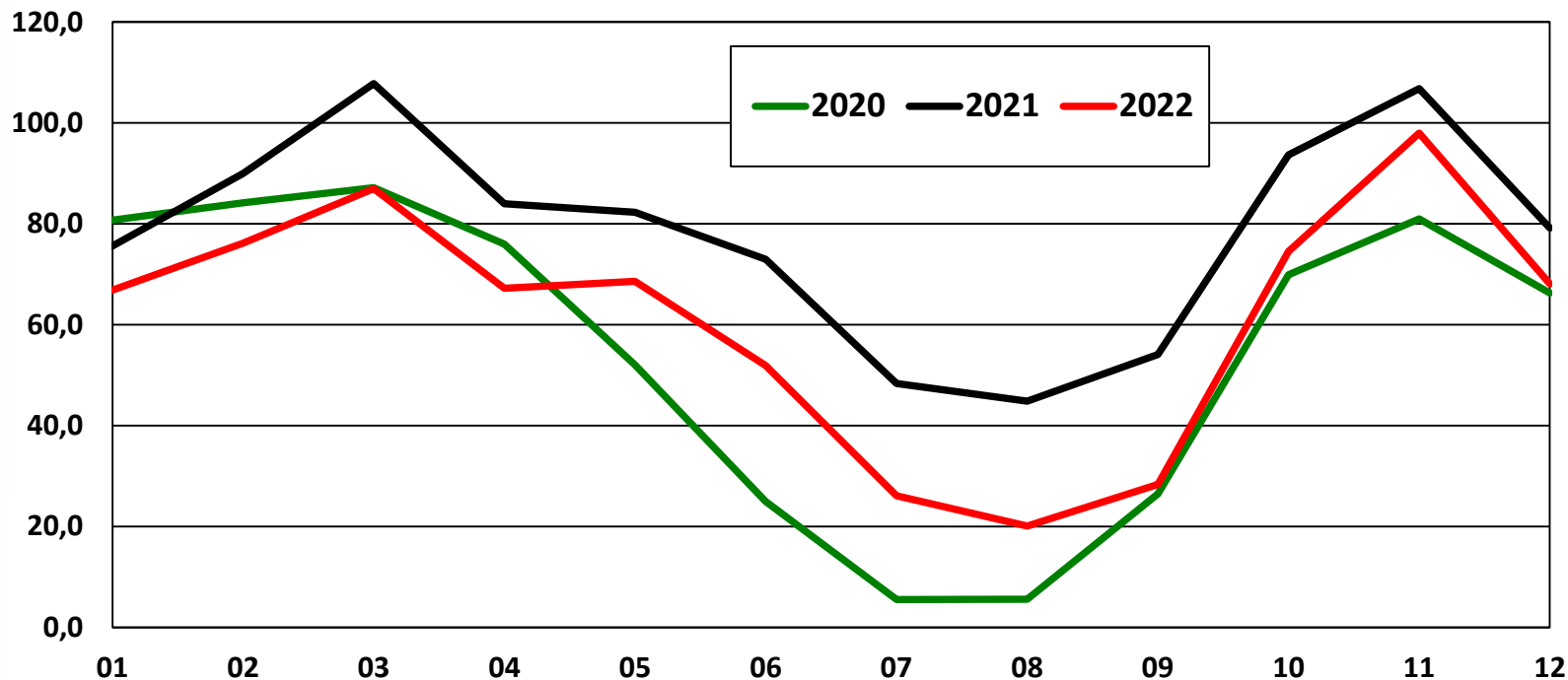
## EXPORTS OF APPLES FROM POLAND (THOUSANDS OF TONS)



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



## EXPORTS OF APPLES FROM POLAND IN 2020-2022 (THOUSANDS OF TONS)



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

# GEOGRAPHICAL STRUCTURE OF POLISH APPLE EXPORTS

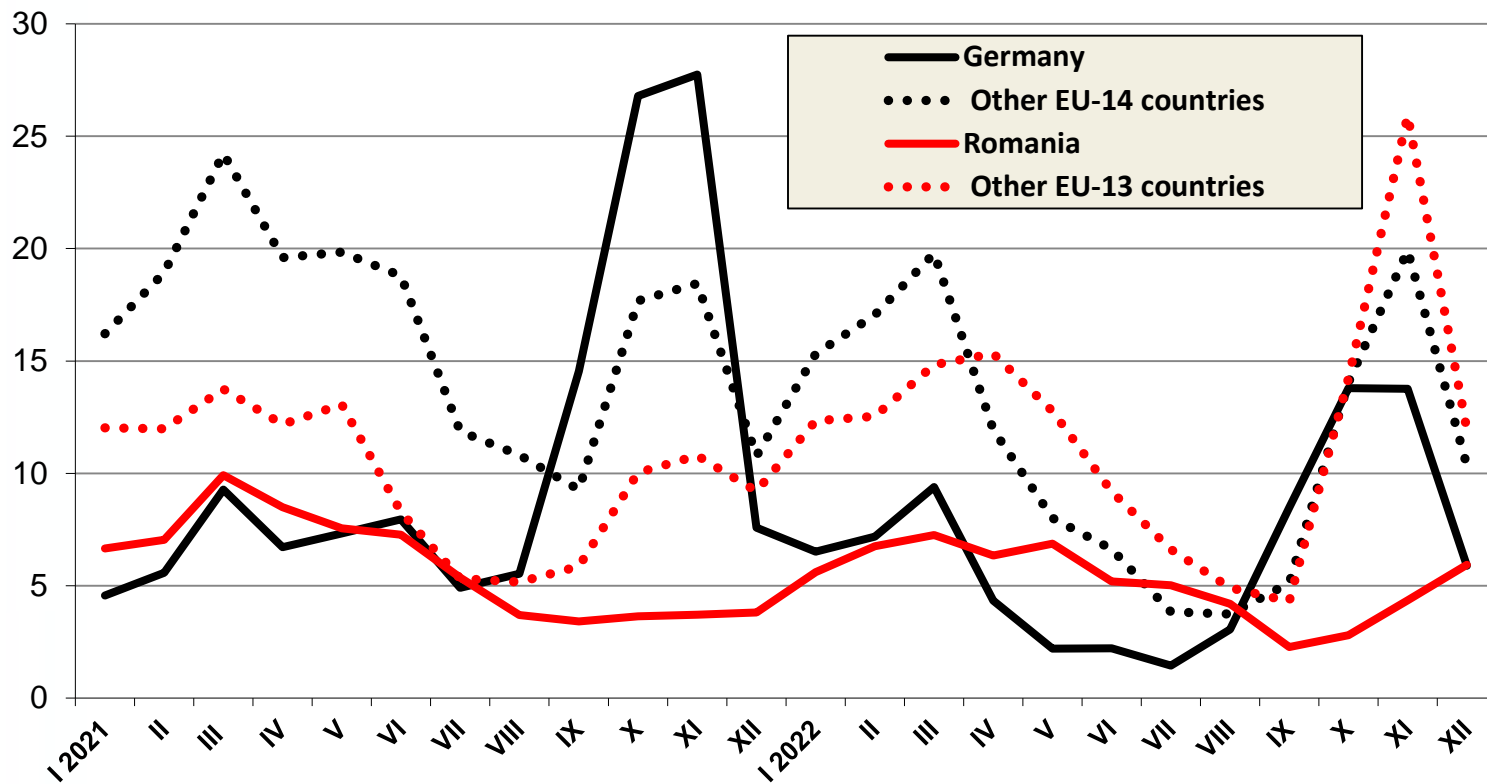


Countries	2019/20		2020/21		2021/22 <sup>1</sup>		2021 II half year		2022 II half year <sup>1</sup>	
	quantity thousand tons	price euro/kg	quantity thousand tons	price euro/kg	quantity thousand tons	price euro/kg	quantity thousand tons	price euro/kg	quantity thousand tons	price euro/kg
<b>EU-14*</b>	<b>140,0</b>	<b>0,45</b>	<b>259,1</b>	<b>0,37</b>	<b>276,6</b>	<b>0,33</b>	<b>166,0</b>	<b>0,28</b>	<b>103,4</b>	<b>0,34</b>
Germany	51,9	0,38	94,8	0,27	119,0	0,24	87,1	0,20	46,4	0,23
Austria	0,5	0,48	1,0	0,40	6,2	0,25	2,2	0,19	11,0	0,17
Sweden	21,5	0,54	18,2	0,52	20,3	0,47	8,7	0,44	9,9	0,51
<b>EU-13</b>	<b>197,3</b>	<b>0,52</b>	<b>157,7</b>	<b>0,48</b>	<b>185,0</b>	<b>0,41</b>	<b>70,0</b>	<b>0,39</b>	<b>92,5</b>	<b>0,34</b>
Romania	67,6	0,54	59,3	0,50	61,7	0,44	23,6	0,42	24,5	0,43
Czechia	32,9	0,55	25,6	0,55	29,4	0,44	14,0	0,41	8,8	0,43
Lithuania	28,2	0,51	14,8	0,43	19,6	0,35	6,8	0,32	14,2	0,24
Hungary	15,7	0,47	13,6	0,43	18,4	0,36	6,4	0,35	26,2	0,23
<b>CIS</b>	<b>209,7</b>	<b>0,38</b>	<b>167,2</b>	<b>0,34</b>	<b>137,2</b>	<b>0,36</b>	<b>52,7</b>	<b>0,30</b>	<b>30,1</b>	<b>0,37</b>
Belarus	149,0	0,37	116,0	0,33	63,2	0,34	34,5	0,29	12,3	0,30
Kazakhstan	57,9	0,42	47,2	0,35	57,8	0,33	17,0	0,30	14,3	0,36
<b>Other</b>	<b>175,7</b>	<b>0,48</b>	<b>183,4</b>	<b>0,47</b>	<b>245,7</b>	<b>0,44</b>	<b>138,1</b>	<b>0,44</b>	<b>89,1</b>	<b>0,50</b>
Egypt	83,4	0,47	105,1	0,46	153,9	0,41	99,4	0,43	41,5	0,39
United Kingdom	10,6	0,66	11,9	0,67	16,2	0,57	6,8	0,58	7,4	0,56
India	9,9	0,67	6,1	0,58	15,5	0,57	6,4	0,57	8,9	0,63
Mongolia	6,7	0,37	6,4	0,46	12,7	0,42	6,1	0,40	6,5	0,42
<b>TOTAL</b>	<b>722,6</b>	<b>0,46</b>	<b>767,3</b>	<b>0,41</b>	<b>844,5</b>	<b>0,38</b>	<b>426,9</b>	<b>0,35</b>	<b>315,1</b>	<b>0,39</b>

\* Excluding United Kingdom, 1/ preliminary data

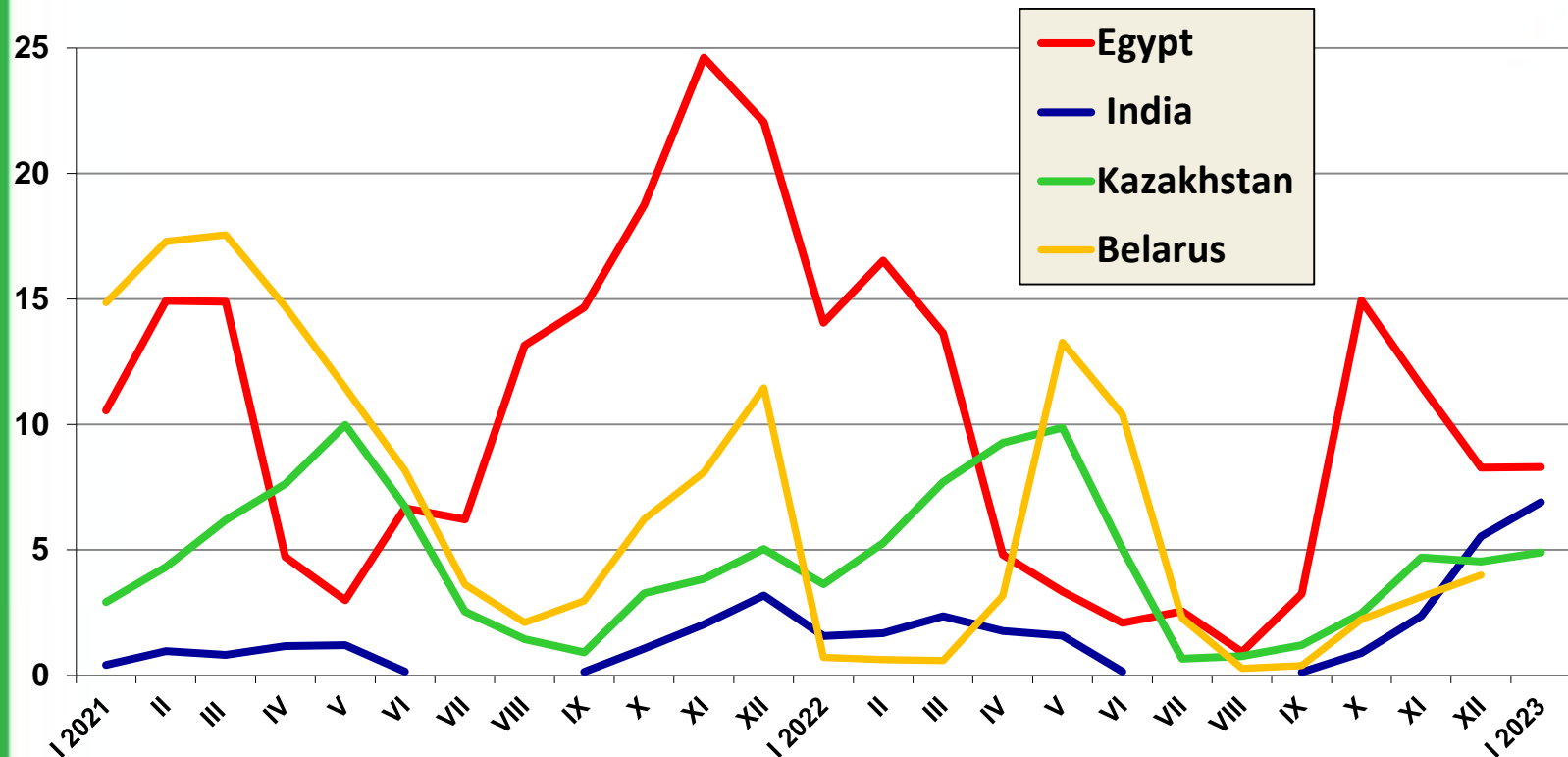
Source: based on data from Ministry of Finance (MF)

# EXPORTS OF APPLES FROM POLAND TO SELECTED COUNTRIES (THOUSANDS OF TONS)



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

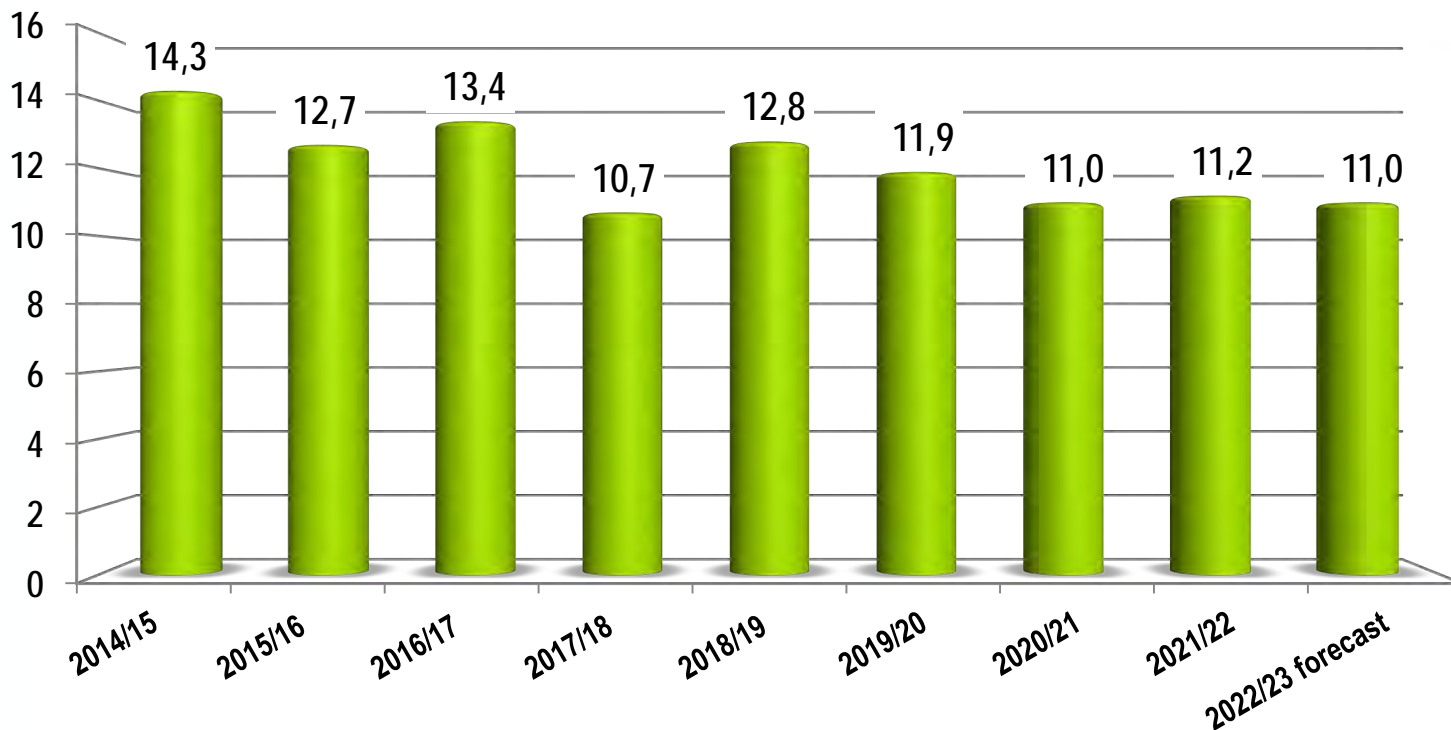
## EXPORTS OF APPLES FROM POLAND TO SELECTED COUNTRIES (THOUSANDS OF TONS)



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

I 2023 – data from Plant Health and Seed Inspection Service (PIORiN)

## APPLE CONSUMPTION IN POLAND (KG/PERSON)

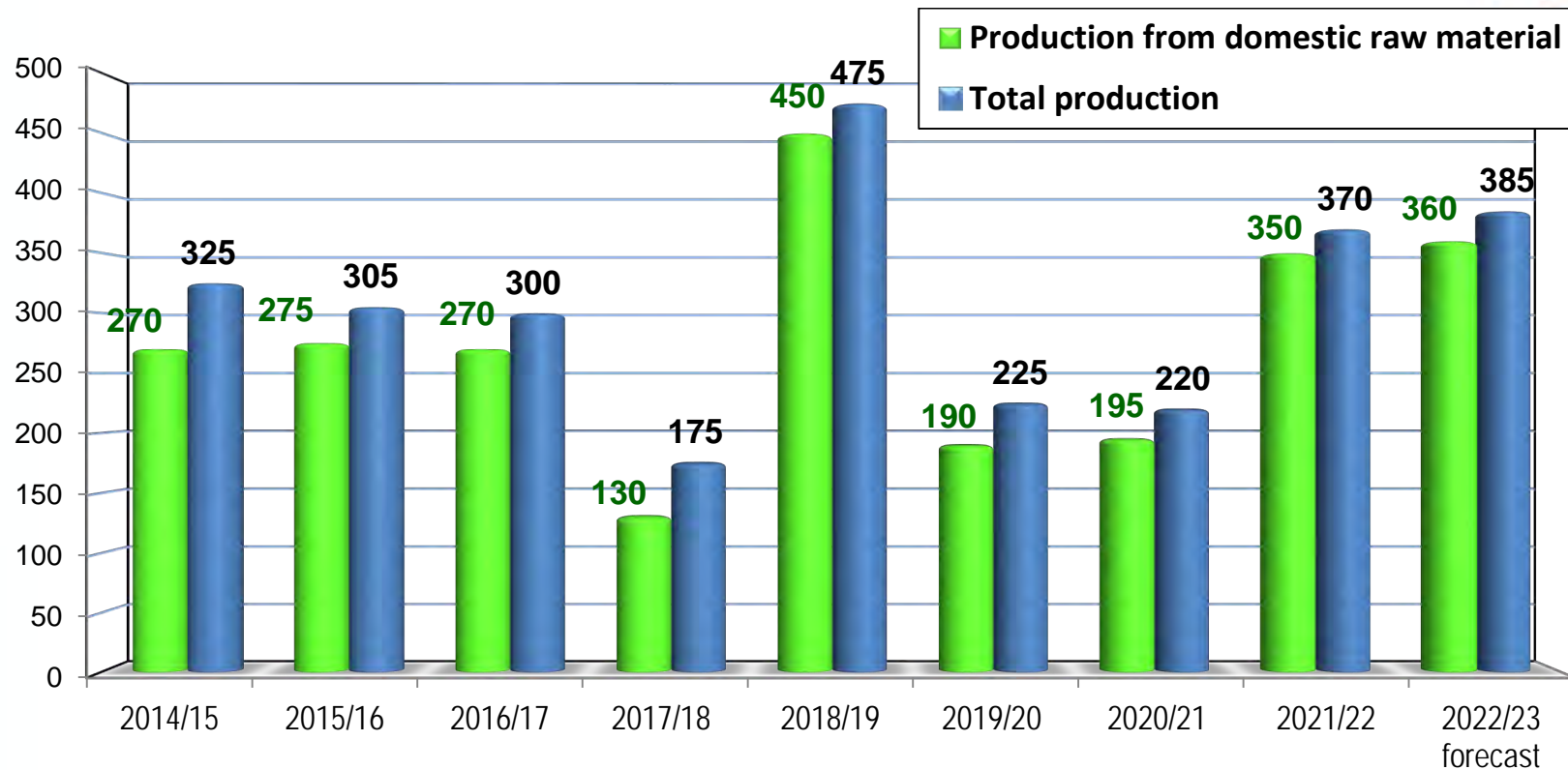


Source: based on data from the Central Statistical Office

## 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)

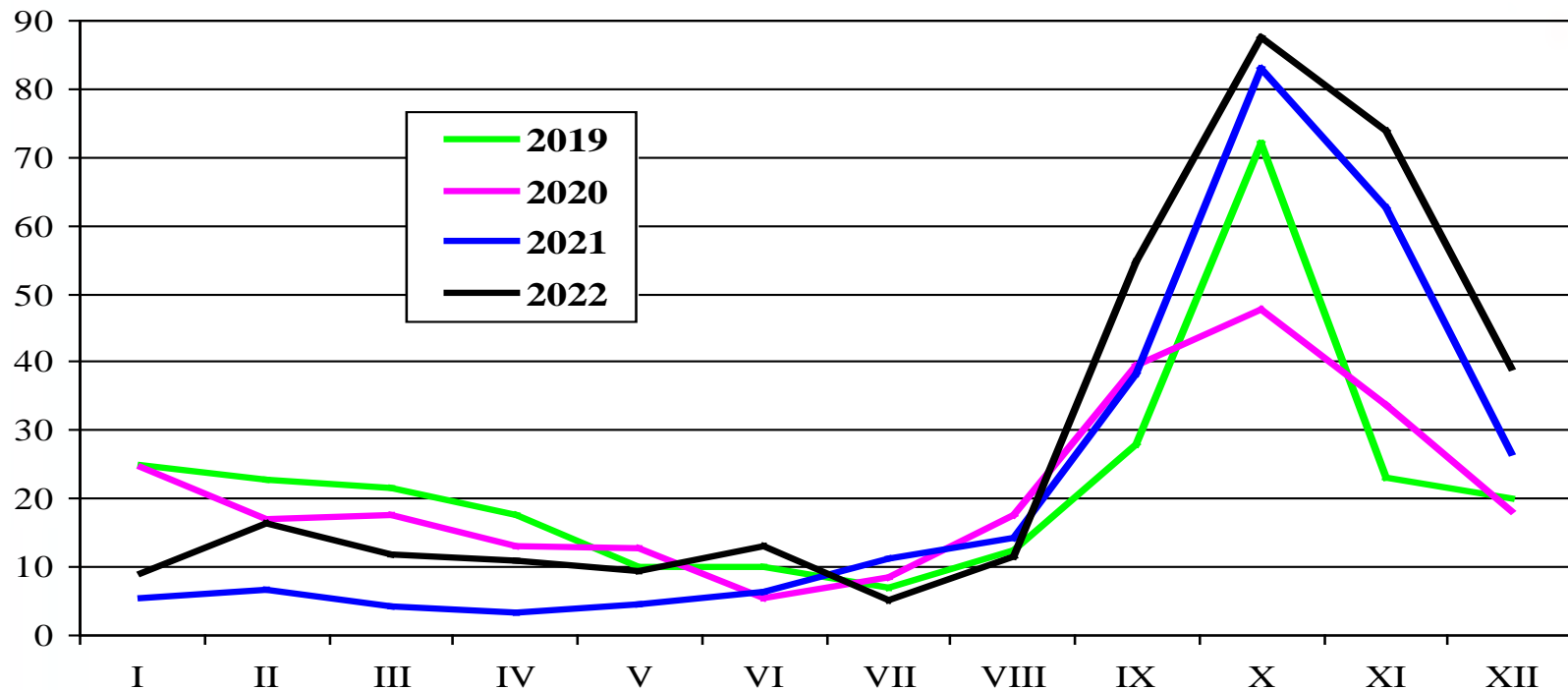
## IMPORT OF CONCENTRATED APPLE JUICE (CN 200979) TO POLAND

Country	Import in thousand tones				Prices in euro/kg				2021 II half year		2022 II half year	
	2018/19	2019/20	2020/21	2021/22	2018/19	2019/20	2020/21	2021/22	volume thous. t	price euro/kg	volume thous. t	price euro/kg
Total	44,4	61,9	40,2	32,7	0,83	1,01	1,02	1,05	14,2	0,99	36,9	1,21
Ukraine	11,7	11,6	2,9	11,7	0,74	1,04	0,97	1,03	3,1	0,96	28,7	1,21
Moldova	23,1	39,2	21,8	10,9	0,74	0,97	1,00	0,95	6,4	0,88	5,7	1,16
Turkey	1,6	0,8	2,1	4,1	1,21	1,22	1,25	1,26	2,0	1,22	0,9	1,45
China	1,3	3,0	6,1	0,7	0,92	0,87	0,93	1,28	0,4	1,09	-	-
Others	6,7	7,3	7,3	5,2	1,19	1,22	1,13	1,08	2,3	1,11	1,7	1,31

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

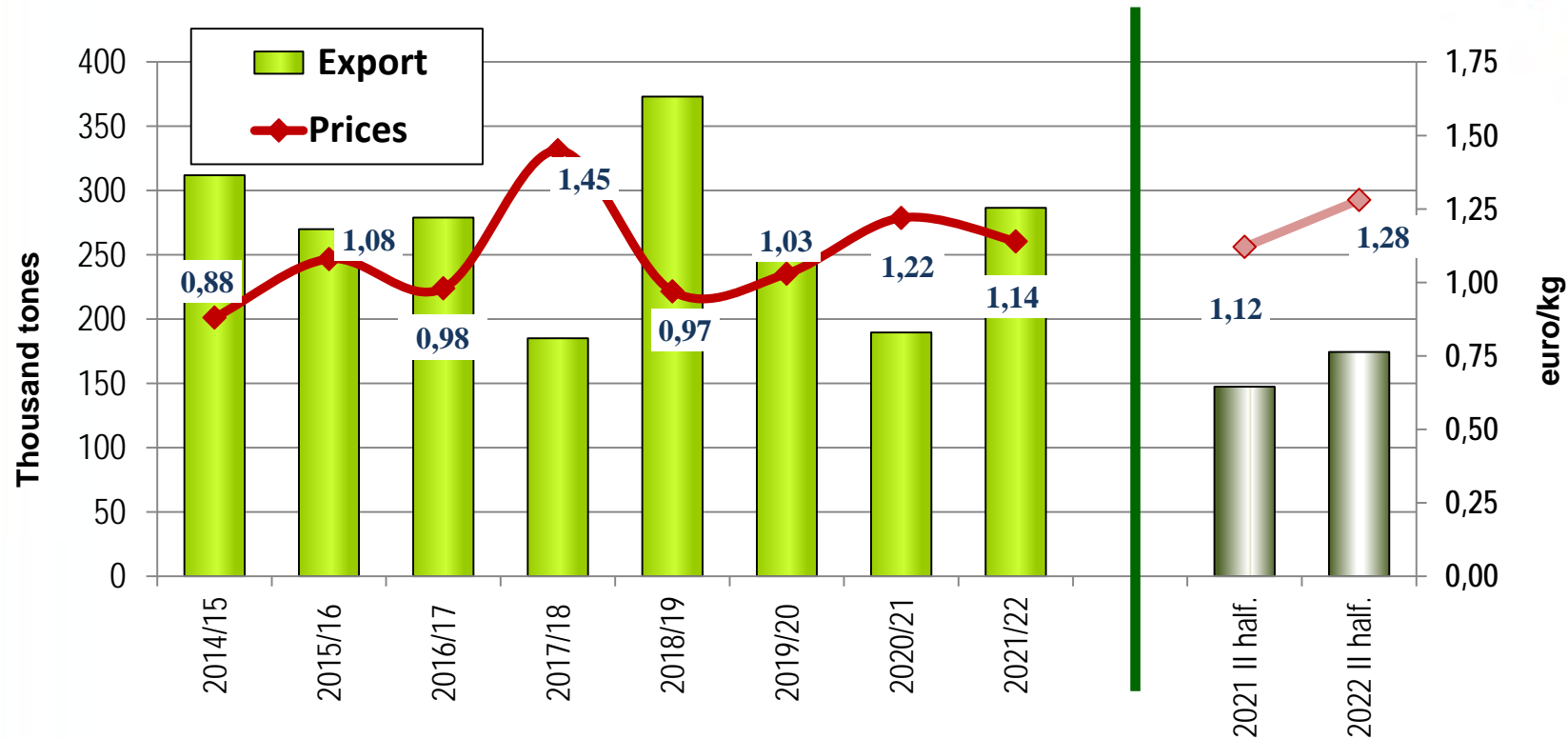


## PRODUCTION OF CONCENTRATED APPLE JUICE IN POLAND (THOUSANDS OF TONS)



Source: based on data from the Central Statistical Office

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



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



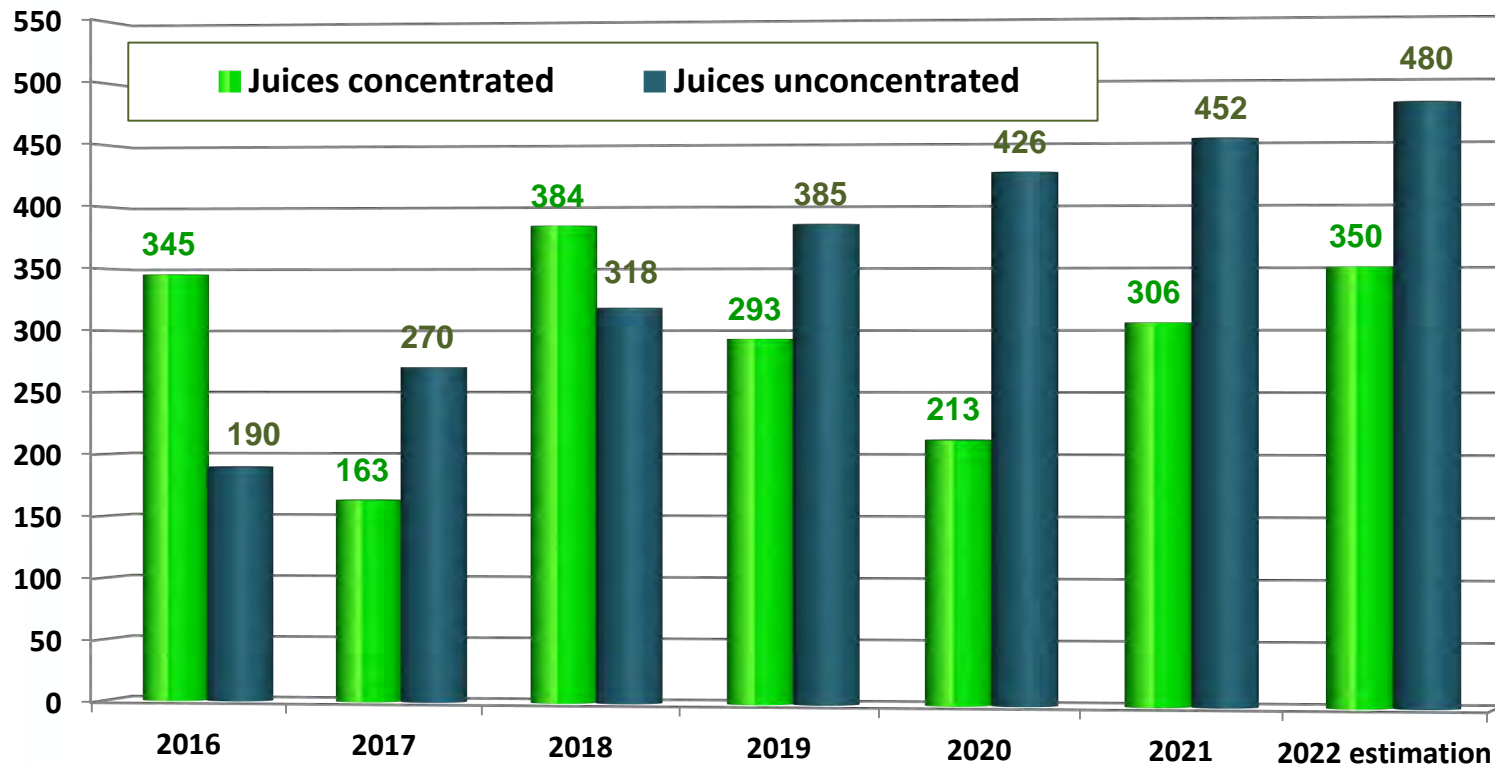
# THE STRUCTURE OF POLISH EXPORTS OF CONCENTRATED APPLE JUICE

Countries	2019/20		2020/21		2021/22 <sup>1</sup>		2021 II half year		2022 II half year <sup>1</sup>	
	quantity thousand tons	price euro/kg	quantity thousand tons	price euro/kg	quantity thousand tons	price euro/kg	quantity thousand tons	price euro/kg	quantity thousand tons	price euro/kg
<b>EU-14*</b>	<b>178,2</b>	<b>1,06</b>	<b>149,4</b>	<b>1,22</b>	<b>205,8</b>	<b>1,14</b>	<b>108,9</b>	<b>1,12</b>	<b>120,8</b>	<b>1,25</b>
Germany	109,7	1,08	89,0	1,20	101,6	1,13	56,8	1,10	57,4	1,24
Netherlands	26,1	0,97	26,2	1,23	35,4	1,16	17,8	1,13	18,0	1,35
Austria	8,1	1,10	9,5	1,20	28,4	1,10	15,4	1,11	21,7	1,12
France	10,6	1,06	6,5	1,23	13,9	1,18	6,3	1,14	8,8	1,39
<b>EU-13</b>	<b>4,9</b>	<b>1,17</b>	<b>5,0</b>	<b>1,30</b>	<b>9,5</b>	<b>1,16</b>	<b>4,0</b>	<b>1,18</b>	<b>8,6</b>	<b>1,12</b>
Hungary	0,7	1,24	1,0	1,25	4,5	1,11	1,5	1,05	4,3	1,27
Czechia	1,0	1,09	0,8	1,34	1,2	1,11	0,4	1,35	2,2	0,66
<b>CIS</b>	<b>4,7</b>	<b>0,86</b>	<b>0,2</b>	<b>1,29</b>	<b>3,2</b>	<b>1,04</b>	<b>1,7</b>	<b>0,95</b>	<b>7,9</b>	<b>1,27</b>
Russia	4,7	0,85	0,2	1,34	2,9	1,01	1,6	0,94	6,3	1,21
<b>Other</b>	<b>71,9</b>	<b>0,98</b>	<b>35,1</b>	<b>1,22</b>	<b>68,0</b>	<b>1,12</b>	<b>32,7</b>	<b>1,11</b>	<b>37,2</b>	<b>1,42</b>
United Kingdom	48,5	0,93	28,0	1,22	37,5	1,14	16,4	1,15	19,9	1,28
USA	14,6	1,07	2,3	1,01	23,4	1,08	12,5	1,04	14,1	1,63
<b>Total</b>	<b>259,9</b>	<b>1,03</b>	<b>189,6</b>	<b>1,22</b>	<b>286,6</b>	<b>1,14</b>	<b>147,3</b>	<b>1,12</b>	<b>174,5</b>	<b>1,28</b>

\* Excluding United Kingdom, 1/ preliminary data

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

## PRODUCTION OF CONCENTRATED AND UNCONCENTRATED APPLE JUICES IN POLAND (IN THOUSANDS OF TONS)



Source: based on data from the Central Statistical Office

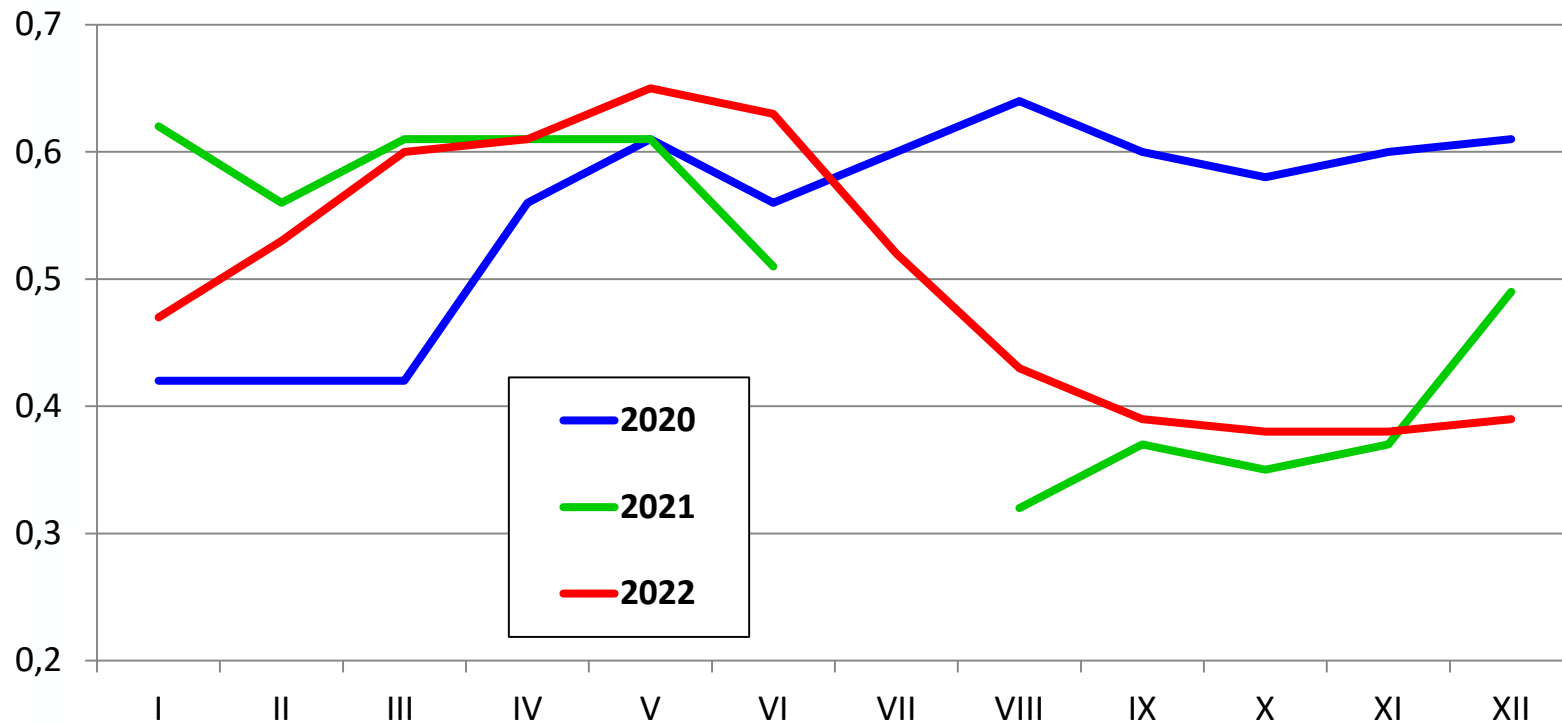
# APPLE JUICE EXPORT FROM POLAND



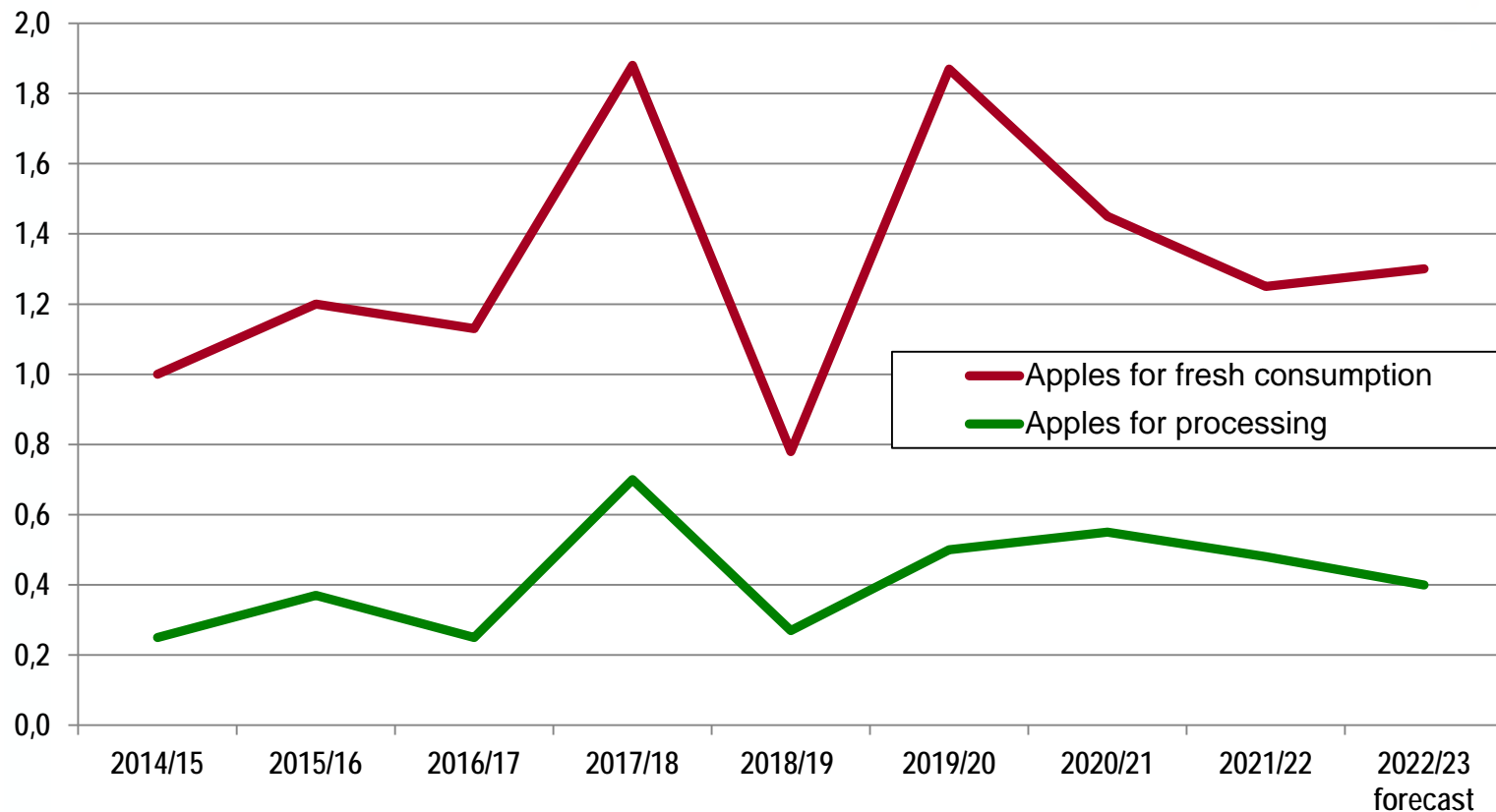
Specification	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
<b>CONCENTRATED</b>						
Volume (thousand tons)	279,0	185,4	372,5	259,9	189,6	286,6
Value (mln euro)	274,7	268,7	362,1	268,9	231,6	325,6
Price (euro/kg)	0,98	1,45	0,97	1,03	1,22	1,14
<b>NOT CONCENTRATED</b>						
Volume (thousand tons)	114,7	163,3	200,5	232,4	257,8	278,0
Value (mln euro)	36,1	71,9	62,4	70,4	78,8	77,9
Price (euro/kg)	0,32	0,44	0,31	0,30	0,31	0,28

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

## PURCHASE PRICES OF APPLES FOR PROCESSING PLN/KG (EX-WORKS)



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



Source: data from IERiGŻ PIB

***THANK YOU FOR YOUR ATTENTION***