

# Horticulture today in Poland – challenges

Departament for Food Processing and Agricultural Markets  
Ministry of Agriculture and Rural Development



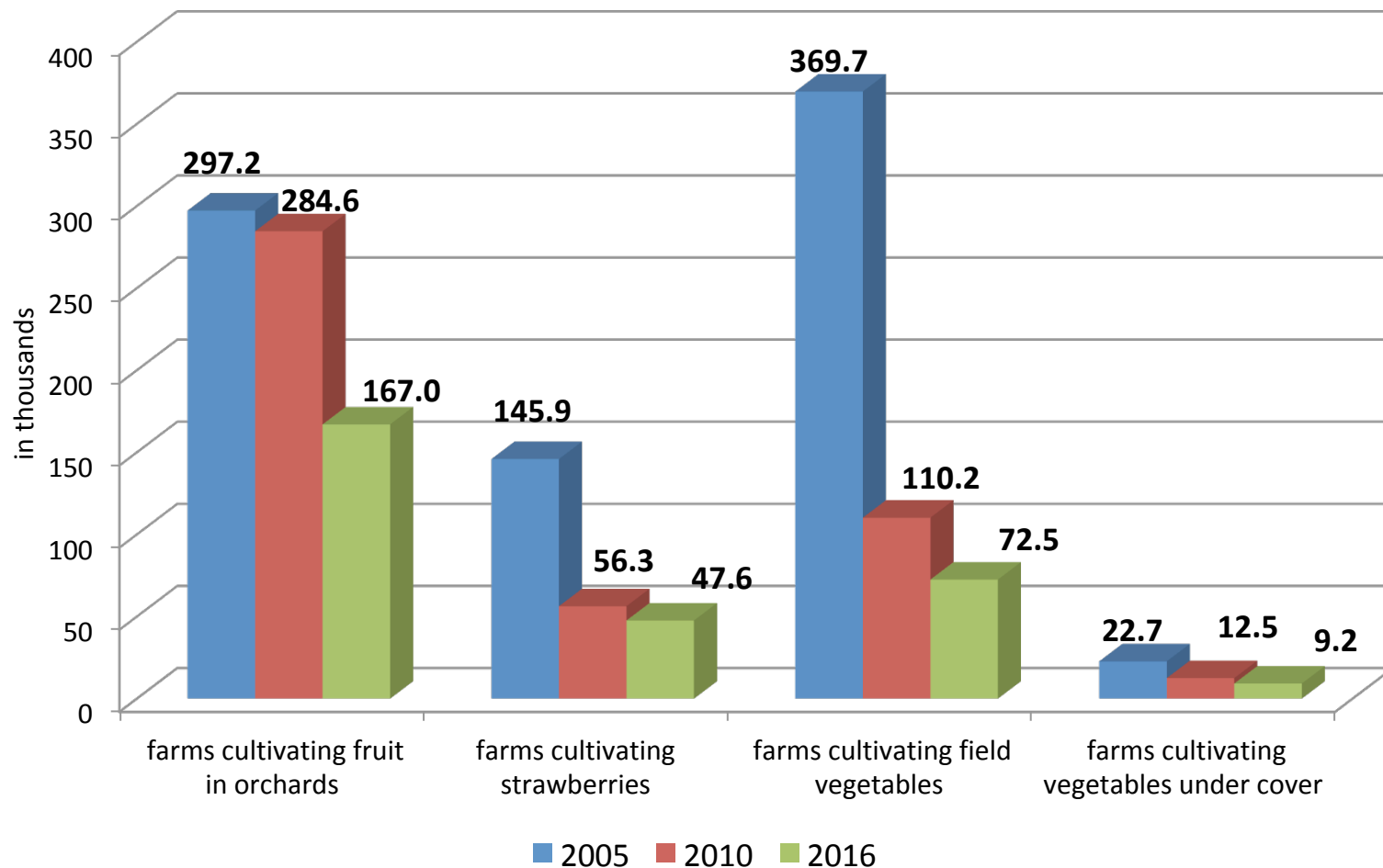
14th October 2020



# Importance of fruit and vegetables sector

- Volume of farm level production of **8,8 – 10,3 million tons** per year
- Production area **573 thousand ha** (ca **3,9%** of farmland area)
- Share of total agriculture production value – **15%**
- Share of total crop production value- **31%**
- **Important employer**
  - **167,0** thous. farms producing fruit in orchards
  - **47,6** thous. of farms with strawberries
  - **72,5** thous. of farms with field vegetables
  - **9,2** thous. of farms with vegetables under cover
  - **29,5** thous. jobs in processing

# Number of farms by crop type

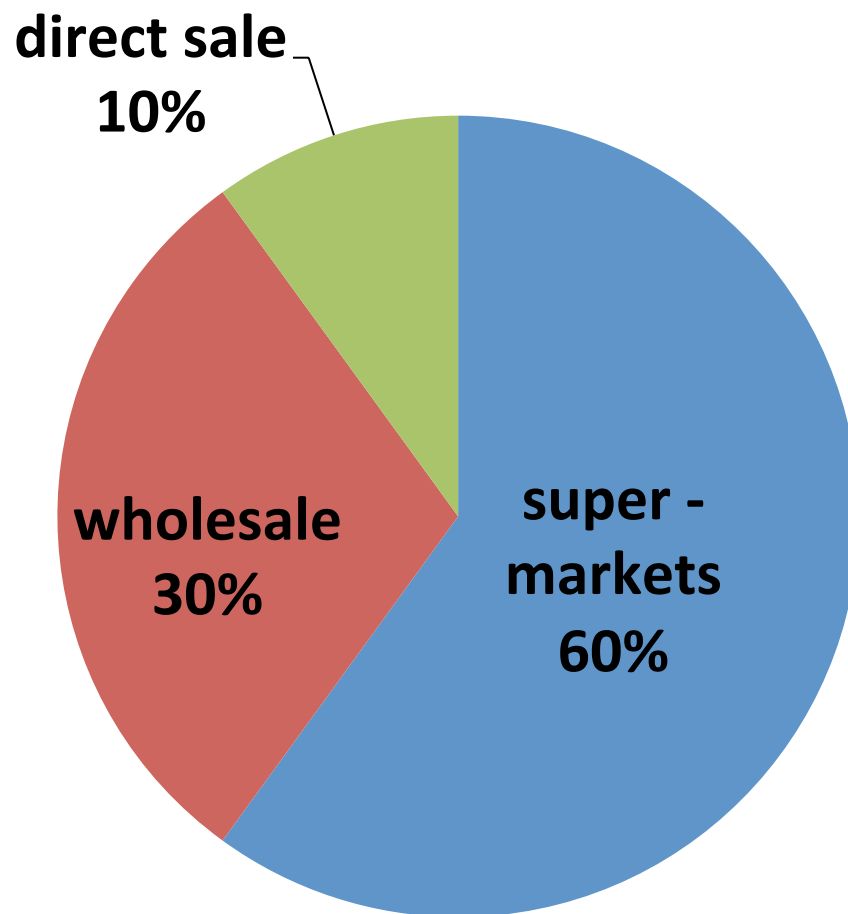


Source: Central Statistical Office



## Distribution channels on fruit and vegetables market – estimation, 2020

Share of supply value



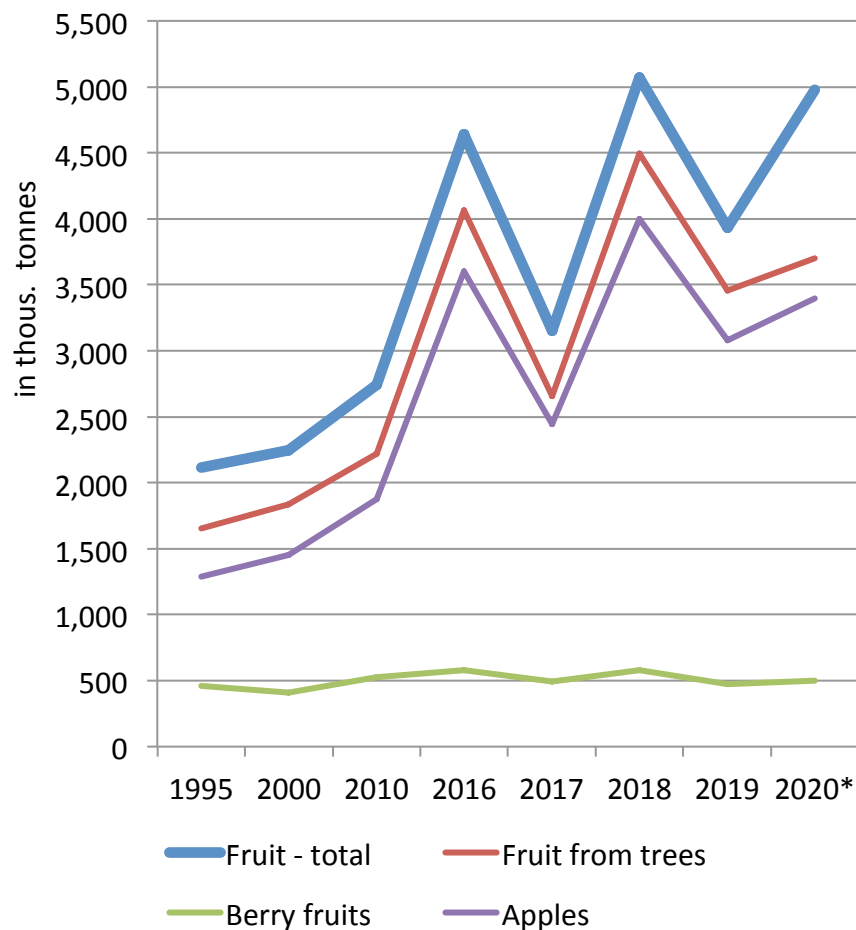


# Fruits

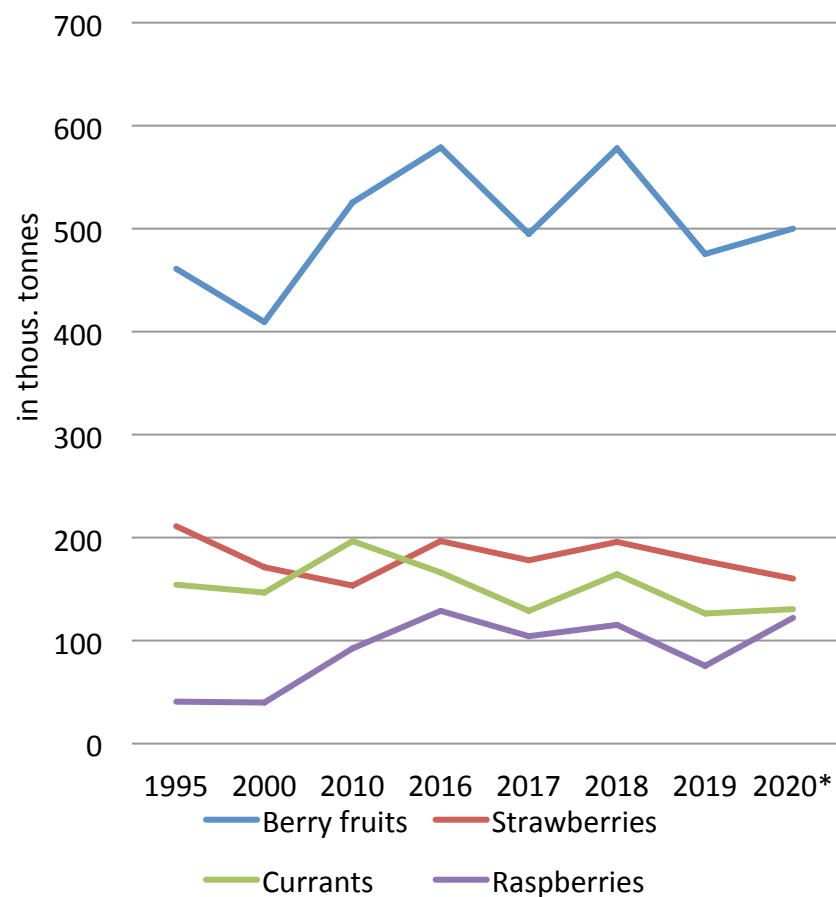


# Fruit production in Poland in 1995-2020

## Fruit production in Poland in 1995-2020



## Berry fruit production in Poland in 1995-2020



Source: Central Statistical Office

\*preliminary data



# Poland - position in world fruit production ranking

## ➤ Apples:

1. China
2. United States of America
- 3. Poland**

## ➤ Currants

1. Republic of Russia
- 2. Poland**

## ➤ Sour cherries

1. Republic of Russia
2. Ukraine
- 3. Poland**

## ➤ Goosberries

1. Germany
2. Ukraine
- 3. Poland**

## ➤ Raspberries

1. Republic of Russia
2. Mexico
3. Serbia
- 4. Poland**



Source: Top world fruit producers according to FAO, 2018



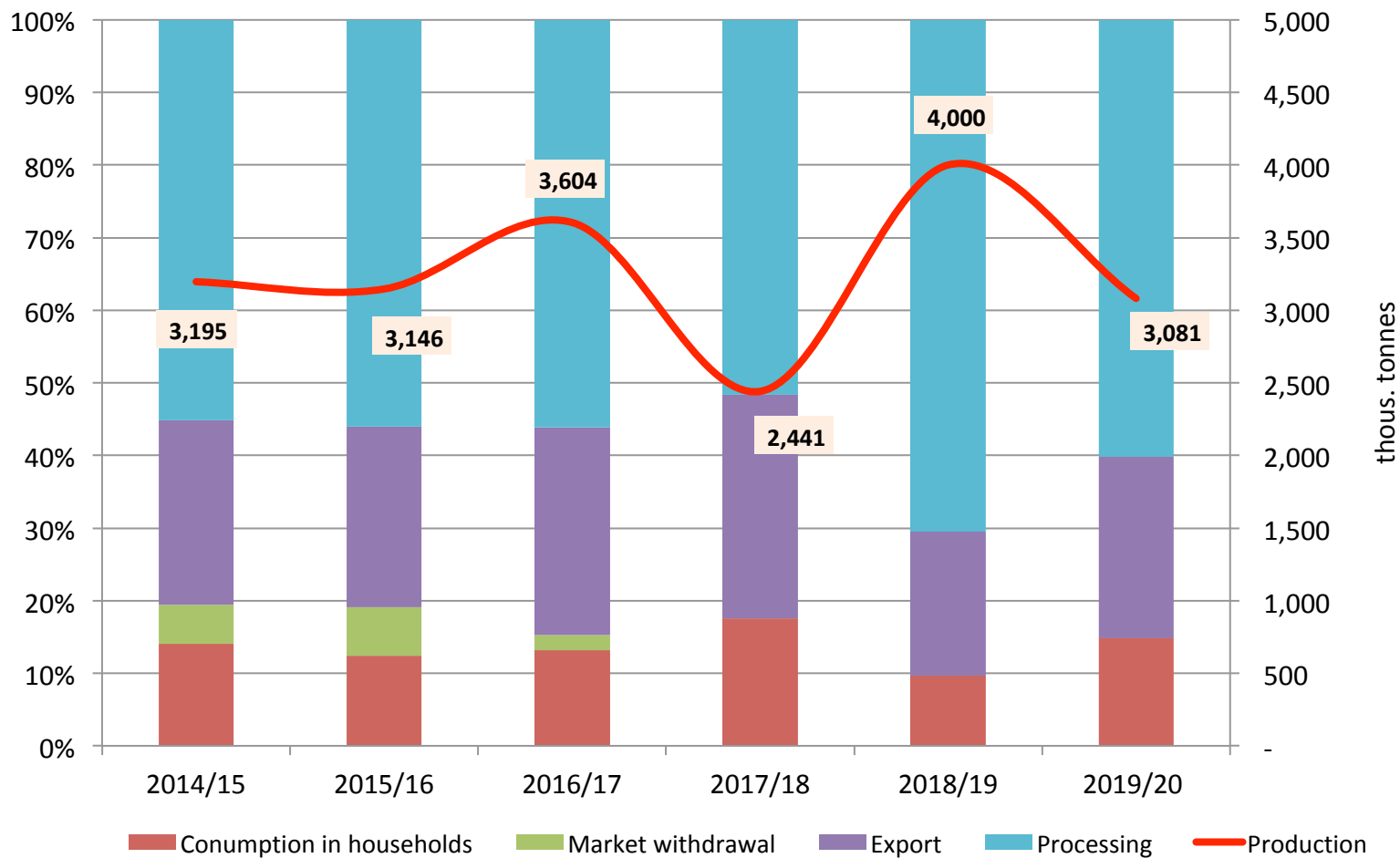


# Apples

**Poland is currently the largest producer and exporter of apples in Europe**

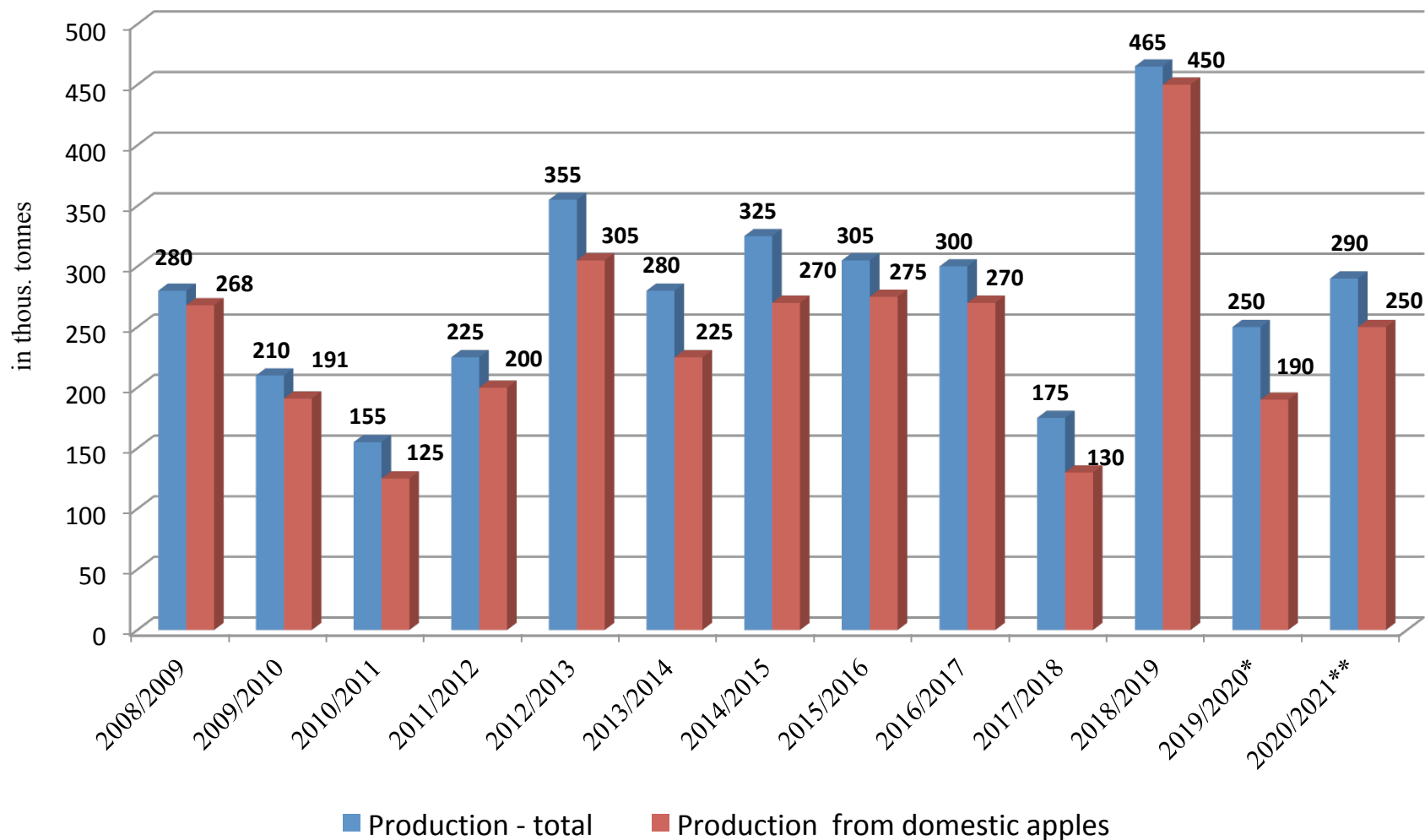


# Distribution of domestic apple production



Source: IERiGŻ-PIB

# Production of apple juice concentrate (in thous. tonnes)



- \* estimation; \*\* forecast
- Source: IERiGŻ-PIB

# Foreign trade – fruit

Export of fresh fruit in 2016-2020										
Specification	2016	2017	2018	2019	I-VII 2020*	2016	2017	2018	2019	I-VII 2020*
	in thous. tonnes					mln euro				
Apples	1092,1	1037,5	810,4	990,1	<b>410,9</b>	316,8	351,6	334,9	333,1	<b>203,3</b>
Pears	49,6	42,0	46,8	73,5	<b>49,5</b>	23,3	18,6	17,8	27,7	<b>18,6</b>
Strawberries	15,3	9,1	6,4	6,5	<b>13,1</b>	16,4	11,8	9,4	10,3	<b>10,0</b>
Raspberries	18,9	10,8	11,4	7,7	<b>4,2</b>	32,4	18,4	16,0	17,5	<b>10,0</b>
Sour cherries	9,2	1,9	9,3	5,4	<b>2,8</b>	6,8	2,5	7,3	5,0	<b>2,7</b>
Cherries	7,2	0,6	4,3	0,9	<b>0,3</b>	6,9	1,1	3,7	1,1	<b>0,5</b>
Plums	9,2	3,3	9,7	6,9	<b>0,8</b>	4,7	3,2	4,6	4,5	<b>0,9</b>
Black currants	1,7	3,4	2,5	1,6	<b>1,1</b>	1,1	1,9	1,2	0,9	<b>1,2</b>

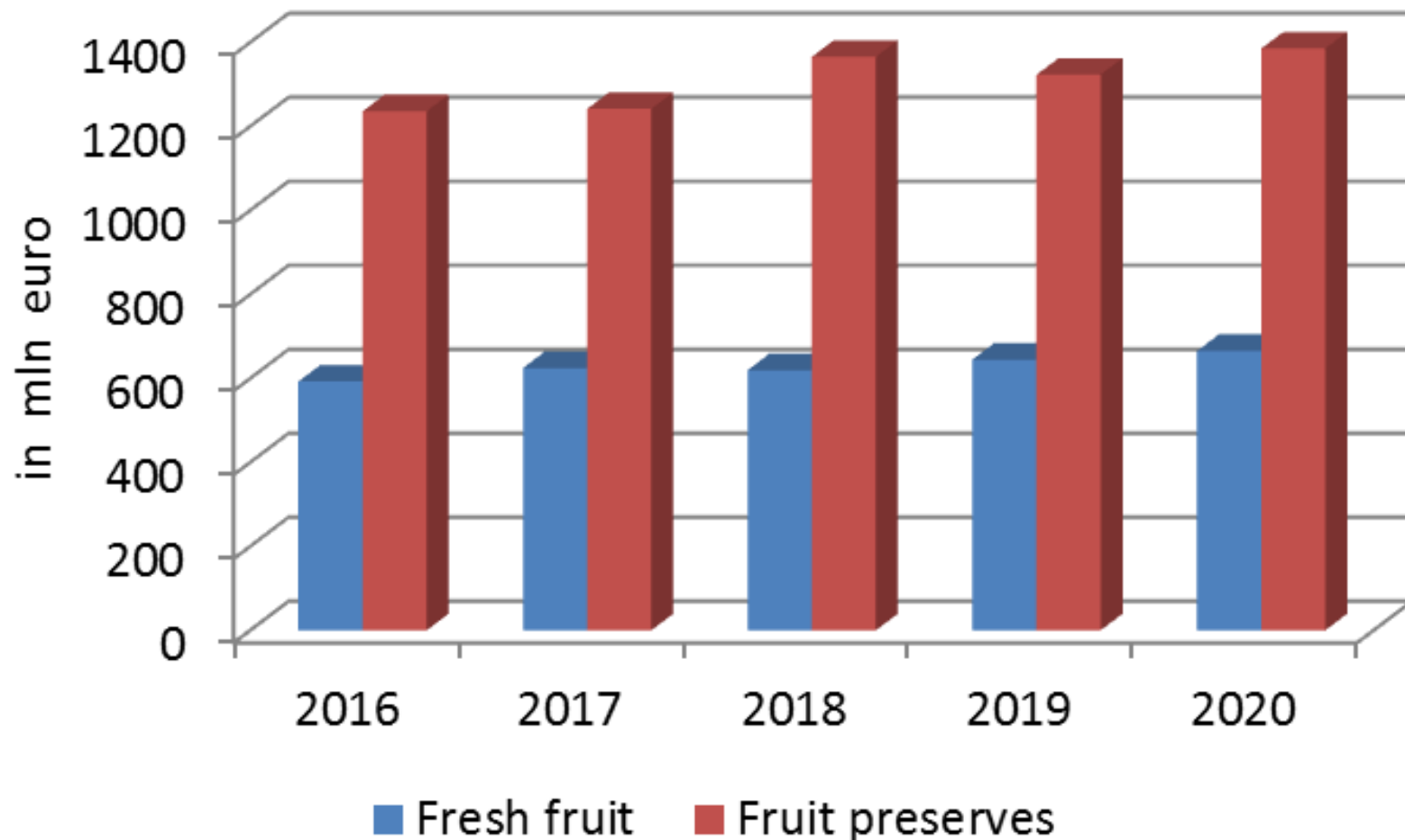
Source: Ministry of Finance

\*preliminary data

- Fruit **IMPORT** is 1,5-1,7 million tonnes per year.
- The Polish import of fruit is dominated by the import of citrus fruits (including bananas, oranges, lemons and mandarins).

# Foreign trade – fruit and fruit preserves

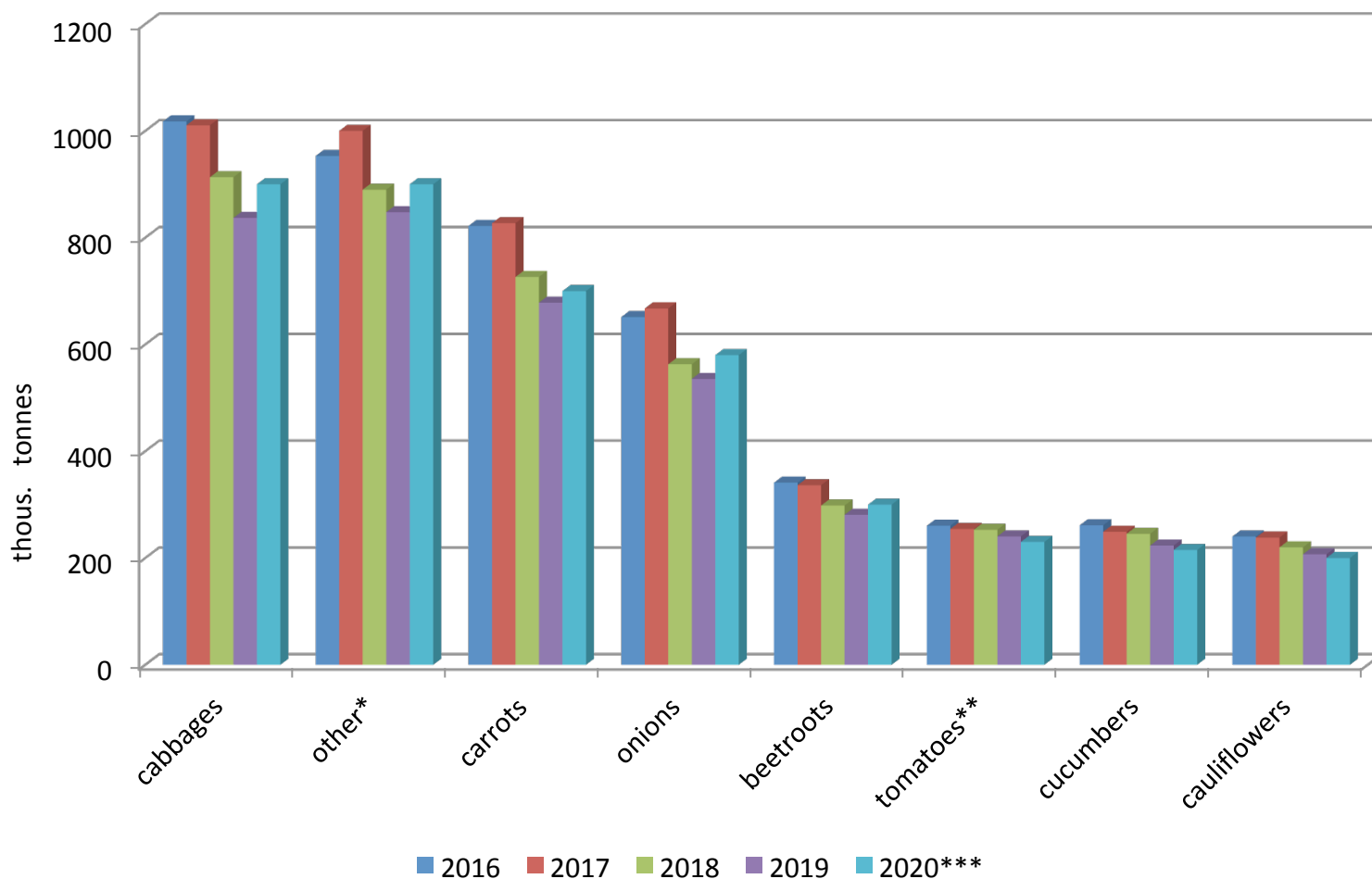
Value of export of fruit and fruit preserves (in mln euro)





# Vegetables

# Vegetables production in Poland in 2016 – 2020



\* parsley, legumes, peppers, sweetcorn, celery, lettuce and more; \*\* tomatoes field production only;

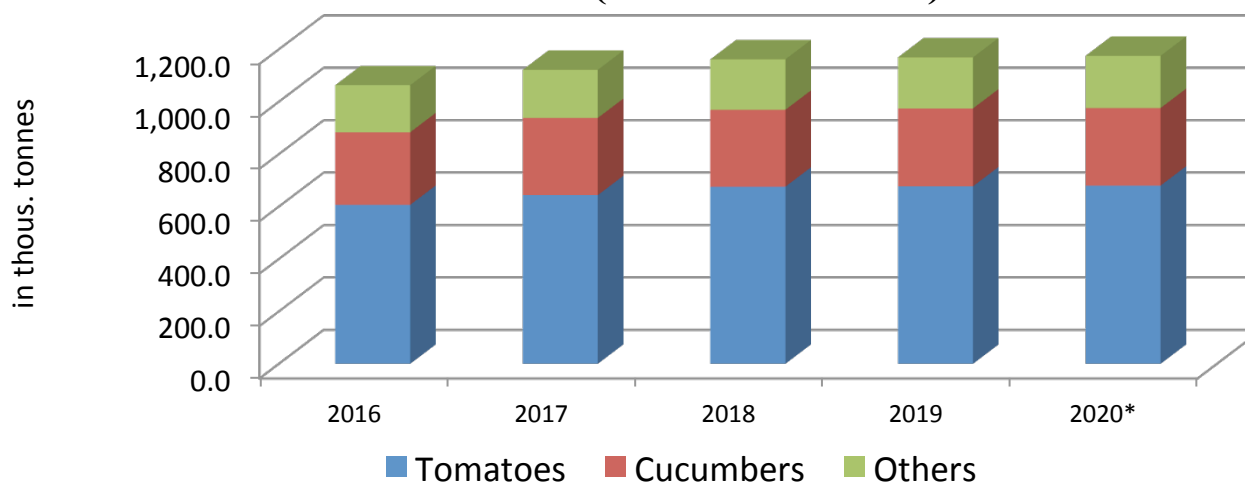
\*\*\*preliminary data

Source: Central Statistical Office

# Production of vegetables in greenhouses in Poland

Cultivating area (in ha)	2016	2017	2018	2019	2020*
<b>Vegetables - total</b>	<b>5 556,0</b>	<b>5 628,9</b>	<b>5 669,7</b>	<b>5 586,4</b>	<b>5 615,0</b>
Tomatoes	2 179,6	2 150,3	2 140,8	2 102,6	2 105,0
Cucumbers	1 127,8	1 139,6	1 115,4	1 110,8	1 100,0
Other	2 248,6	2 339,0	2 413,5	2 373,0	2 410,0

## Production of vegetables in greenhouses in Poland (in thous. tonnes)



\* preliminary data



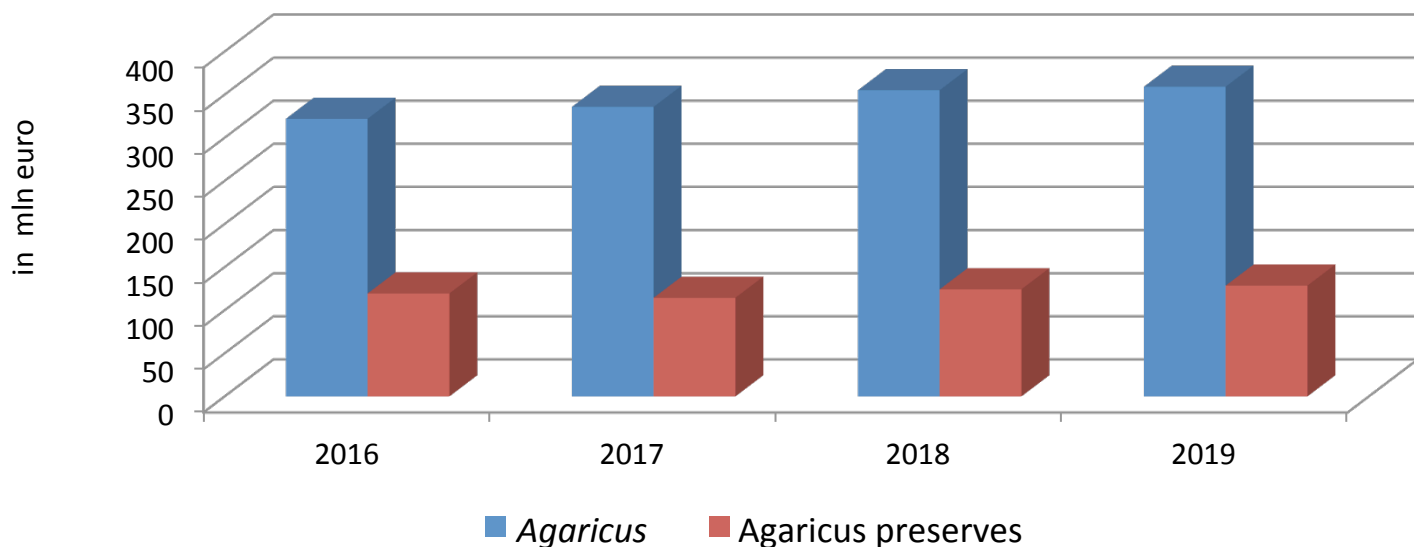


# Poland is big producer and exporter of *Agaricus*

Specification	2016	2017	2018	2019	2020*
Cultivation area in ha	243,0	244,0	245,0	246,0	247,0
Production (in thousand tonnes)	320,0	325,0	330,0	335,0	340,0

\*preliminary data,  
Source: IERiGŻ-PIB

## Value of export of *Agaricus* and its preserves in 2016-2020





# Poland – position in world vegetables production ranking

## ➤ Carrots

1. China
2. Uzbekistan
3. United States of America
4. ....
- 7. Poland**

## ➤ Cabbages

1. China
2. India
3. Republic of Korea
4. ....
- 9. Poland**

## ➤ Cauliflowers and broccoli

1. China
2. India
3. United States of America
4. ....
- 8. Poland**

## ➤ Mushrooms and truffles

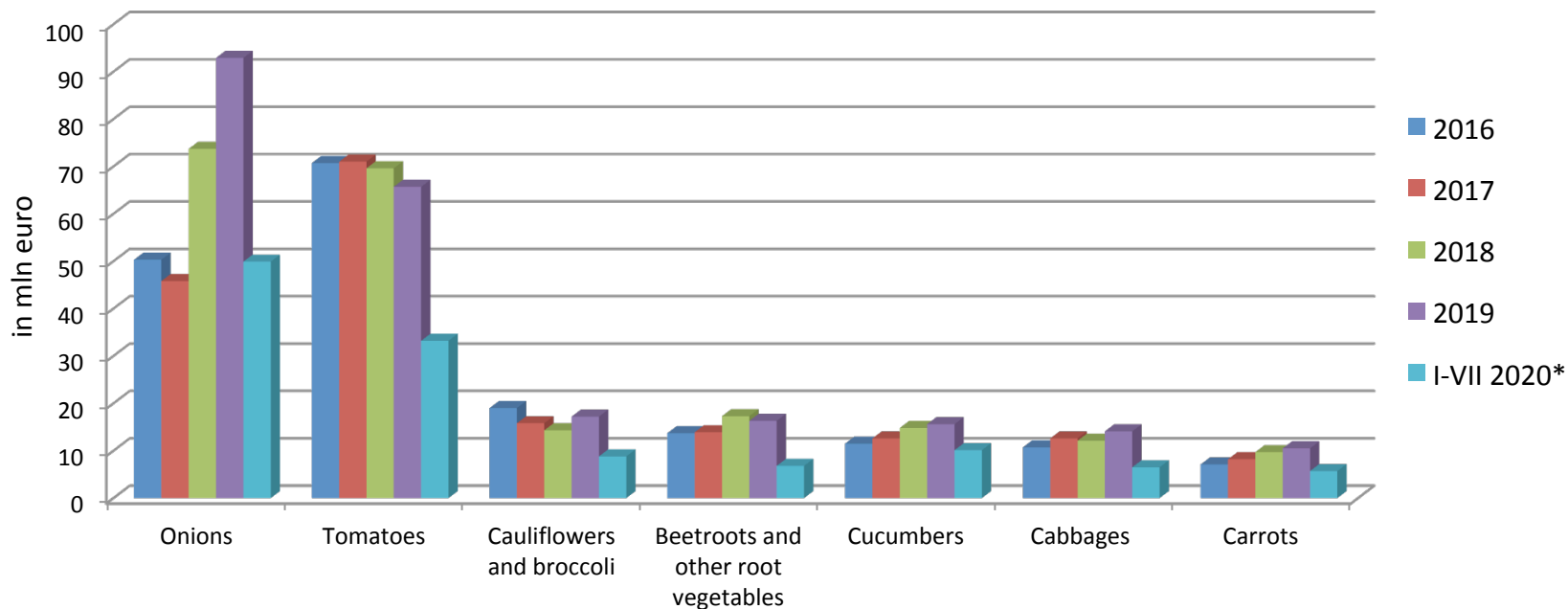
1. China
2. United States of America
3. Netherlands
- 4. Poland**



Top world vegetables producers according to FAO, 2018

# Foreign trade - vegetables

## Value of export of fresh vegetables in 2016-2020 (in mln euro)



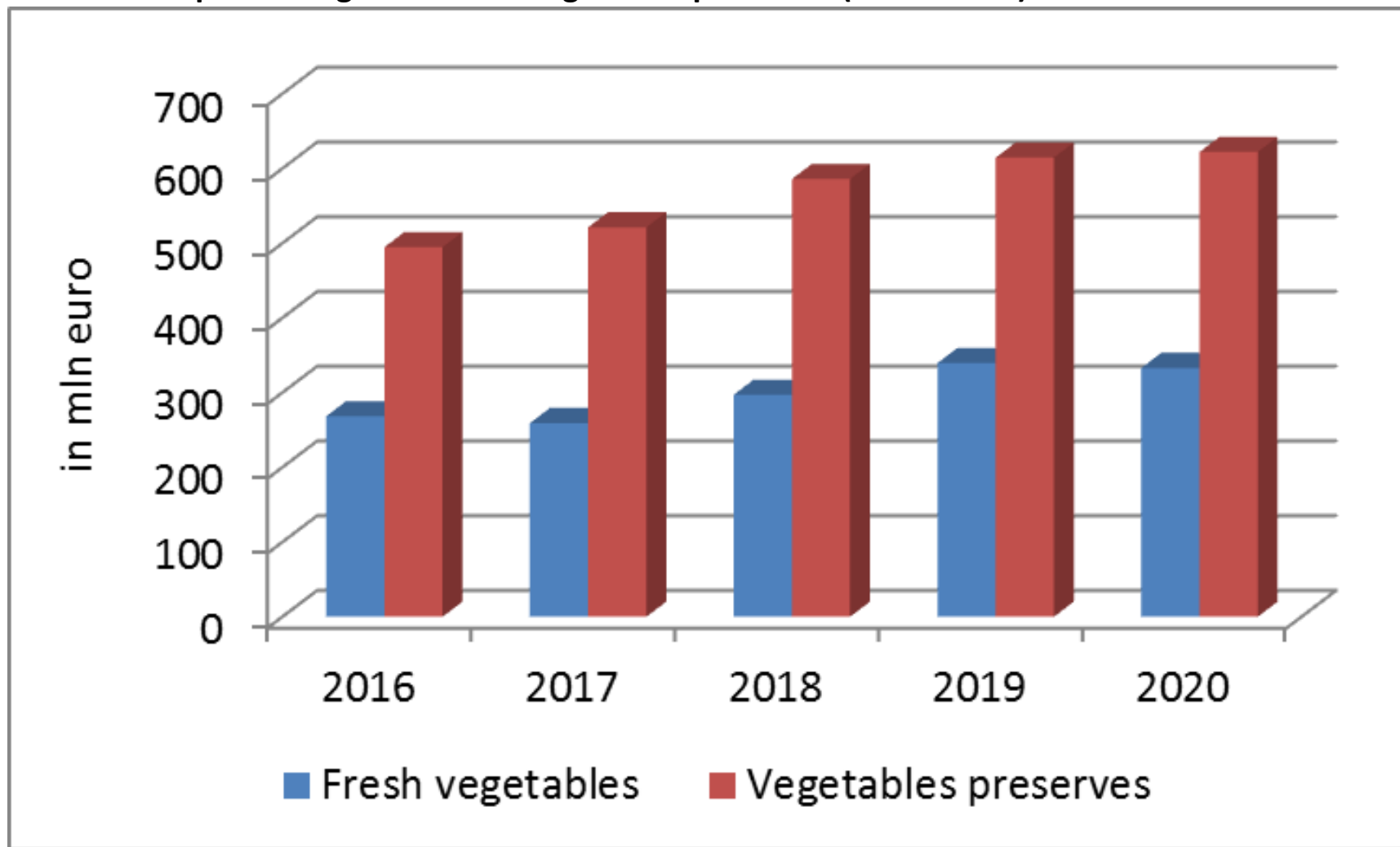
Source: Ministry of Finance

\*preliminary data

- Vegetables **IMPORT** amounts to 550-800 thousand tonnes per year.
- In the structure of fresh vegetables import the most important: tomatoes, onions, peppers and cucumbers, and among preserves: tomato products and frozen vegetables.

# Foreign trade – vegetables and vegetables preserves

Value of export of vegetables and vegetables preserves (in mln euro)





# Organization of fruit and vegetables sector in Poland

## Numbers of:

- **pre-recognized** fruit and vegetable **producer groups** - 3
- **recognized associations of** fruit and vegetable **producer organisations** – 1
- **recognized** fruit and vegetable **producer organisations** – 224
- recognized fruit and vegetable producer organisations implementing **operational programmes** - 23

**Degree of the fruit and vegetables sector organization - 20,7%**



# Support for recognized producer organisations

- CAP financial support for the implementation of operational programs of PO:
  - equal to the amount actually paid in the contributions of the members of the PO or the PO itself
  - limited to 50% of the actual expenditure incurred and 4.1% of the value of marketed production.
  - percentage increased to 4.6% when using crisis management measures.

## Activities in operational programs

- The catalog of activities that can be implemented by fruit and vegetable producer organizations under operational programs is defined in the "National strategy for sustainable operational programs of fruit and vegetable producer organizations and associations of fruit and vegetable producer organizations in Poland for 2018-2022".

### Examples of activities from the above-mentioned strategy:

- Production planning activities;
  - Actions to improve marketing or marketing;
  - Actions to support mergers of producer organizations.
- + obligatory pro-environmental element - 2 actions for environmental protection or 10% of the operational fund allocated to such actions



# Processing

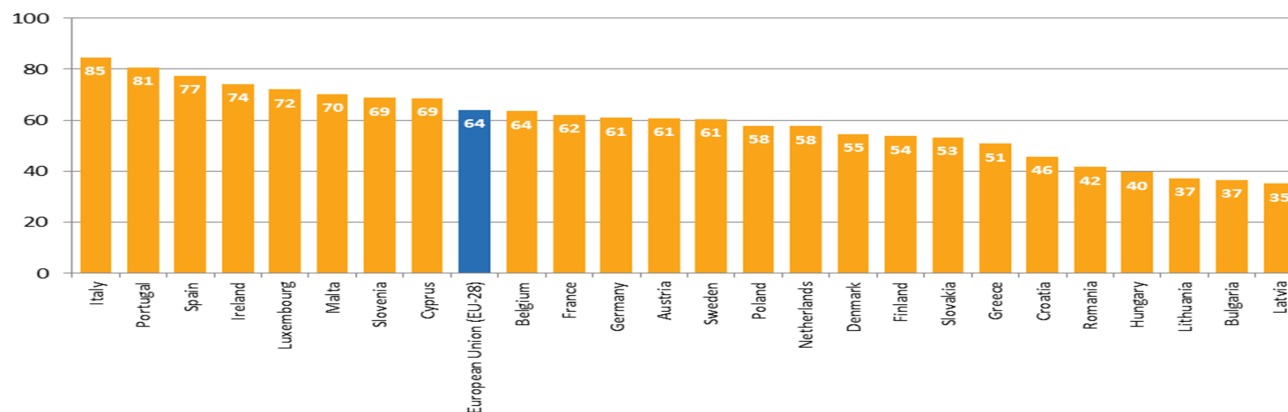
- ca 50% of fruit and ca 30% of vegetables production is being processed.
- **Fruits** - the deliveries for processing are dominated by apples for the production of apple juice concentrate, berries and sour cherries for the production of **frozen fruit** and **juice concentrates**.
- The structure of vegetable preserves is dominated by frozen vegetables, **ketchup** and **tomato sauces**, as well as **preserves** and **pickled vegetables**.
- The main sales channel for the fruit and vegetable processing industry is **export**
- In 2018, there were approx. **350 companies** operating in the fruit and vegetable processing industry.





# % of population consuming fruit and vegetables at least once a day in EU

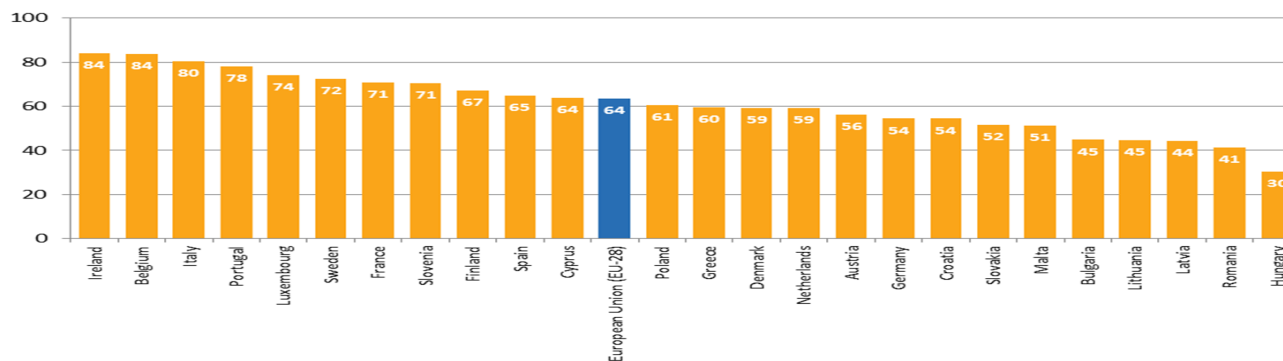
**Daily consumption of fruit in the EU, 2017**  
(% of the population)



Note: Survey results for this indicator for Czechia, Estonia and the United Kingdom have low reliability and have been excluded.  
European Union (EU-28): Eurostat estimate.

[ec.europa.eu/eurostat](https://ec.europa.eu/eurostat)

**Daily consumption of vegetables in the EU, 2017**  
(% of the population)

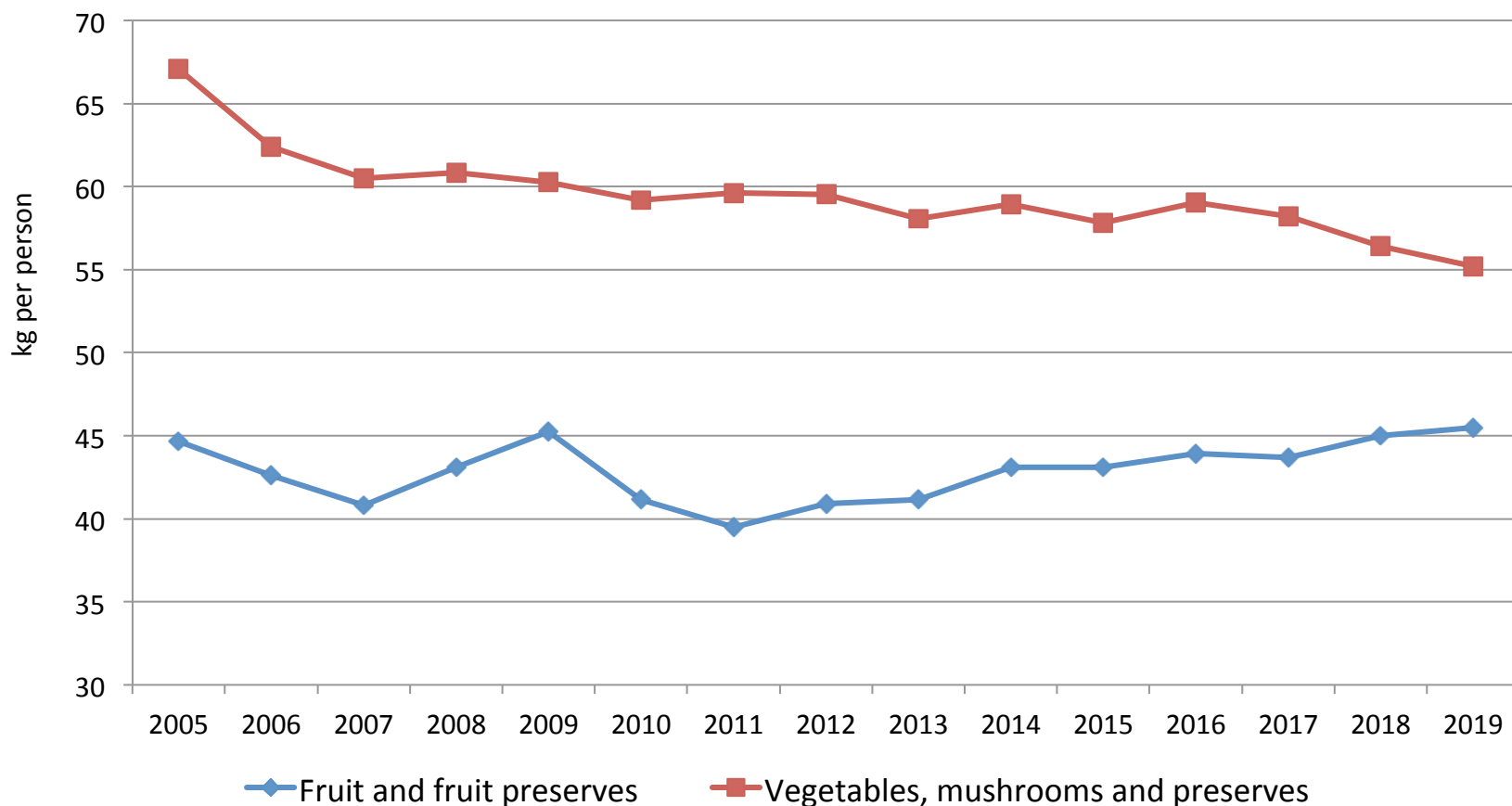


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European Union (EU-28): Eurostat estimate.

[ec.europa.eu/eurostat](https://ec.europa.eu/eurostat)

# Consumption of fresh and processed fruit and vegetables in Poland

## Average consumption of fruit, vegetables and their preserves in households in Poland (kg per person)



## Horticulture knowledge system in Poland

- There is a rich **scientific base**, incl. : Institute of Horticulture in Skierniewice, Institute of Agricultural Economics and Food Economy - National Research Institute, Institute of Soil Science and Plant Cultivation in Puławy.
- Public and private **advisory services**.
- **Horticulture faculties** at major Agricultural Universities (Warsaw, Poznań, Lublin, Wrocław, Kraków, Olsztyn, Szczecin)
- Several active **agricultural unions and organizations** representing various segments of **horticultural sector**.





## CAP new financial perspective (2022-2027)

- Support for the fruit and vegetable market will be included in the **Strategic Plan**
- Both **specific** and **unspecific support** measures are being considered
- **Support to POs** (sectoral interventions) will be continued;
- **Priorities** (coherent with the F2F EU strategy)
  - (i) quality aspects
  - (ii) enhancing producer groups and organisations
  - (iii) sustainability (environment aspects)



# Challenges

- Stabilization of market situation (price volatility)
- Searching for new, alternative markets and removing of barriers to foreign trade
- Increasing domestic consumption
- Labour costs
- Proper contractual relations in the market chain (issue of bargain position of farmers)
- Increasing producers' knowledge of the market development
- Adapting products quality in response to changing consumers' expectations
- Implementation of "Farm To Fork Strategy" (e.g. limiting chemical plant protection products)



# Answer to challenges

- Increasing market organization (**producer organizations**, farmers' cooperatives);
- Efforts for opening **new (export) markets** (incl. promotion);
- Promotion of **healthy eating habits** (eg. school scheme, promotion);
- Enhancing compliance with regulations on commercial **quality standards** by market participants;
- Increasing access to **economic and technological knowledge** for producers;
- Improving **information systems** (on market situation, prices technologies) to support farmers' investment decisions.



# Ministry of Agriculture and Rural Development

**Thank you for your attention!**

