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**Date:** 4/13/2015

**GAIN Report Number:**

## Poland

**Post:** Warsaw

### Poland - Grain and Feed Annual

**Report Categories:**

Grain and Feed

Agricultural Situation

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**Report Highlights:**

Total Poland's production of grain for marketing year (MY) 2015/16 is forecast to decline by about 7 percent to 29.4 million metric tons (MMT). This is the result of more average yield expectations this year. In 2015 total grain acreage is expected to remain on par with 2014 and 2013 acreage. In MY 2014/15 Poland's grains production is estimated at 31.7 MMT, the third consecutive year of very good grain crops. Favorable weather conditions during the vegetation period and the harvest led to record high yields and to the largest ever grain harvest in Poland. As crops exceeded domestic use to a much higher extent than in last year, export potential for the 2014/15 year increased significantly. Better grain quality than western European countries' and price competitiveness increased demand for Polish grains from non EU regions. In MY 2014/15 total exports are expected to reach 4.8 MMT. Supplies of grain for human consumption are projected lower than for feed stuffs. In 2014 grain's lower protein and gluten content diminished share of grains for human consumption.

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

**MY 2015/16**

Total production of wheat, rye, mixed grains, triticale, barley, corn and oats in 2015/16 MY is forecast to decrease by about 7 percent to 29.4 million metric tons (MMT). This is a result of more average yield expectations in comparison with last year's much higher than average results. Weather conditions for winter grain development in Poland were good until the end of March 2015. The winter has been very mild and there have been no winterkill so far. Current planting health is assessed well. Soil moisture is reported to be well enough as well. Total acreage for winter grain plantings is estimated to be at the level of the 2014 year.

**MY 2014/15**

Poland's 2014 grain production is estimated at 31.7 million metric tons, the third consecutive year of very good grain crops. In 2014 total grain acreage remained on par with 2013 acreage. Favorable weather conditions during the vegetation period and the harvest led to record high yields producing the largest ever grain harvest in Poland. The general grain quality from the harvest 2014 is assessed well, without mycotoxin contamination, but with low protein and gluten content. Comparing with the year 2013, the average quality of grain is assessed lower. Supply of grain for human consumption is projected lower than for feed stuffs.

Area, yields, production of grains total in Poland\*

<b>Poland</b>	<b>Area (million/Ha)</b>	<b>Yield (MT/Ha)</b>	<b>Total Production (MMT)</b>
2011	7.7	3.46	26.6
2012	7.6	3.73	28.4
2013	7.4	3.84	28.3
<b>2014</b>	<b>7.4</b>	<b>4.30</b>	<b>31.7</b>
2013=100	100.0	112	112.0
<b>2015**</b>	<b>7.3</b>	<b>4.01</b>	<b>29.4</b>
2014=100	0.99	0.93	0.93

Source: Main Statistical Office, Poland

\* excluding buckwheat and millet

\*\* FAS/Warsaw forecast

Area of grain sowings in Poland in the years 2012 – 2015, (000) HA

Poland	2012	2013	2014*	2015*	Structure of sowings in 2012 (%)	Structure of sowings in 2014 (%)
Wheat	2,077	2,138	2,339	2,300	27.3	31.7
Rye	1,042	1,173	885	1,000	13.7	12.0
Mixed grains and triticale	2,270	2,189	2,186	2,100	29.8	29.6
Barley	1,160	820	808	820	15.2	11.0
Corn	544	614	678	660	7.2	9.2
Oats	514	434	480	450	6.8	6.5
Total	7,607	7,368	7,376	7,330	100.0	100.0

Source: Main Statistical Office, Poland

\* FAS/Warsaw estimation and forecast

Production of grains in Poland in the years 2012 – 2015, (000) Metric Tons

Poland	2012	2013	2014*	2015*	Structure of production in 2012 (%)	Structure of production in 2014 (%)
Wheat	8,608	9,485	11,600	10,600	30.3	36.6
Rye	2,888	3,359	2,800	2,850	10.2	8.8
Mixed grains and triticale	7,270	7,295	8,100	7,300	25.6	25.6
Barley	4,181	2,934	3,200	2,950	14.7	10.1
Corn	3,996	4,040	4,500	4,400	14.1	14.2
Oats	1,468	1,190	1,500	1,300	5.2	4.7
Total	28,411	28,303	31,700	29,400	100.0	100.0

Source: Main Statistical Office, Poland

\* FAS/Warsaw estimation and forecast

## **Trade**

For 2015/16 Poland's grain export potential is expected to decrease in comparison with last year's, due to a lower crop forecast. For 2014/15 MY total grain exports are expected to reach 4.8 MMT with the biggest share to soft wheat (64 percent of total grain export volume). In 2014/15 MY wheat export is expected to exceed last year's volume by almost 15 percent mostly due to the relatively good quality of grain and competitive pricing. Saudi Arabia, Germany, Algeria and

Morocco are the main export destinations for Poland. The share of non EU exports in total grain export sales from Poland has continued to increase each year with wheat exports developing fastest. Exports of other grains like rye, barley, triticale and corn is forecast to decline for 2014/15 in comparison with 2013/14 MY. A sharp decline of rye exports is predicted for 2014/15 MY. Higher than average yields did not offset the lower acreage of plantings that decreased domestic supply and export potential for rye for Poland.

Poland's main grain and cereal products suppliers are the EU states. Their share of total Polish grain imports is estimated to reach 87 percent in MY 2014/15. For 2014/15 it is forecast that total grain import, including intra EU trade, will amount to 1.1 MMT, less in comparison with last year.

#### Grain Exports from Poland, (000) MT

	MY 2012/13		MY 2013/14		MY 2014/15*	
	Total exports	Non EU-28 exports	Total exports	Non EU-28 exports	Total exports	Non EU-28 exports
Wheat	1,472	394	2,685	1,345	3,100	1,950
Rye	574	0	1,046	19	565	15
Corn	1,307	31	925	24	775	25
Barley	412	88	194	114	180	0
Mixed grains & triticale	144	0	264	0	180	0
Oats	75	0	33	2	40	0
<b>Total</b>	<b>3,984</b>	<b>513</b>	<b>5,147</b>	<b>1,504</b>	<b>4,840</b>	<b>1,990</b>

Source: Global Trade Atlas

#### Grain Imports to Poland, (000) MT

	MY 2012/13		MY 2013/14		MY 2014/15*	
	Total imports	Non EU-28 imports	Total imports	Non EU-28 imports	Total imports	Non EU-28 imports
Wheat	494	10	759	17	615	15
Rye	15	3	11	5	18	3
Corn	189	87	402	246	250	120
Barley	116	0	268	0	200	0
Mixed grains & triticale	4	0	6	0	3	0
Oats	7	0	17	0	7	0
<b>Total</b>	<b>825</b>	<b>100</b>	<b>1,463</b>	<b>268</b>	<b>1,093</b>	<b>138</b>

## Wheat

### Wheat Production, Trade, Consumption

<b>Poland</b>	<b>2012/13</b>	<b>2013/14</b>	<b>2014/15*</b>	<b>2015/16*</b>	
<b>Marketing Year Begin</b>	<b>July, 2012</b>	<b>July, 2013</b>	<b>July, 2014</b>	<b>July, 2015</b>	
Area	2,077	2,138	2,339	2,300	(000) HA
Production	8,608	9,485	11,600	10,600	(000) MT
MY Imports	494	759	615	715	(000) MT
MY Imp. From U.S.	0	0	0	0	(000) MT
MY Exports	1,472	2,685	3,100	2,700	(000) MT
Feed	3,000	3,150	3,300	3,500	(000) MT
FSI Consumption	5,405	5,353	5,511	5,364	(000) MT
Total Consumption	8,405	8,503	8,811	8,864	(000) MT

Source: FAS/Warsaw, Global Trade Atlas, Main Statistical Office, Poland

\*FAS/Warsaw estimation and forecast

### **MY 2015/16**

For 2015/16 wheat production in Poland is forecast at 10.6 MMT. The acreage of wheat plantings for the harvest 2015 is expected to diminish by 2 percent in comparison with the previous year.

Domestic consumption is expected to increase due to forecasted growth in feed use. Good weather conditions during a mild winter allow for good yield prospects and for assumption that there will be 3 percent higher yield than the last six years' average.

### **MY 2014/15**

Wheat harvest for 2014 is estimated at 11.6 MMT, 22.3 percent higher than in 2013. High prices for wheat and good profitability of wheat production were the main drivers for growing acreage of wheat sowings in MY 2014/15. Wheat acreage is estimated at 2.3 million hectares. In the season 2014/15, due to a record harvest in 2014, the total supply of wheat is much higher than last year's, even despite the very low initial stocks level. Feed use is expected to show a growing tendency, mostly due to poultry industry development. In 2014 falling prices of feedstuffs created an incentive for hog production. The demand for feed quality wheat increased from both the feed industry and swine

producers who prepare on-farm feedstuffs. Human consumption of wheat is forecast to stabilize on last year's level. For 2014/15 Poland is expected to be a meaningful exporter of wheat. The good 2014 harvest of relatively good quality grain created a large surplus of grain for export. In the first five months of MY 2014/15 non EU exports increased by over 70 percent in comparison with last season. Growing demand for soft wheat from Saudi Arabia, Algeria and Morocco was the main driver for such fast export growth dynamics.

## **Rye**

### Rye Production, Trade, Consumption

<b>Poland</b>	<b>2012/13</b>	<b>2013/14</b>	<b>2014/15*</b>	<b>2015/16*</b>	
<b>Marketing Year Begin</b>	<b>July, 2012</b>	<b>July, 2013</b>	<b>July, 2014</b>	<b>July, 2015</b>	
Area	1,042	1,173	885	1,000	(000) HA
Production	2,888	3,359	2,800	2,850	(000) MT
MY Imports	15	11	18	15	(000) MT
MY Imp. From U.S.	0	0	0	0	(000) MT
<b>MY Exports</b>					
	574	1,046	565	575	(000) MT
Feed	650	500	510	510	(000) MT
FSI Consumption	1,820	1,863	1,710	1,790	(000) MT
Total Consumption	2,470	2,363	2,220	2,300	(000) MT

Source: FAS/Warsaw, Global Trade Atlas, Main Statistical Office, Poland

\*FAS/Warsaw estimation and forecast

### **MY 2015/16**

For 2015 production of rye is forecasted a bit higher than for 2014, to increase to 2.85 MMT. The acreage of plantings for the 2015 harvest is reported to be much higher than last year's, up by 13 percent. Industry demand raised farmers' interest for increasing rye planting. Human consumption and feed use will be stable.

### **MY 2014/15**

In 2014 production of rye decreased by almost 17 percent and amounted to 2.8 MMT. The sharp drop in production was the result of lower rye acreage as the yield and health of plants were good. Very high prices for rye in Poland led to a diminishing demand for rye as a feedstuff. Rye was mostly replaced by triticale which was much more profitable.

The declining tendency of human consumption of rye foodstuffs stopped. For 2014 /15 MY human consumption is expected to stabilize on the level of the year 2013/14. The use of grains in the feed industry shows quite the opposite direction. The demand for alcohol production has increased and was the main driver for rye production dynamics.

## **Mixed Grains & Triticale\***

### Mixed Grains and Triticale Production, Trade, Consumption

<b>Poland</b>	<b>2012/13</b>	<b>2013/14</b>	<b>2014/15**</b>	<b>2015/16**</b>	
<b>Marketing Year Begin</b>	<b>July, 2012</b>	<b>July, 2013</b>	<b>July, 2014</b>	<b>July, 2015</b>	
Area	2,270	2,189	2,186	2,100	(000) HA
Production	7,270	7,295	8,100	7,300	(000) MT
MY Imports	4	6	3	3	(000) MT
MY Imp. From U.S.	0	0	0	0	(000) MT
MY Exports	144	264	180	100	(000) MT
Feed	6,500	6,500	6,800	6,900	(000) MT
FSI Consumption	680	780	790	790	(000) MT
Total Consumption	7,180	7,280	7,590	7,690	(000) MT

Source: FAS/Warsaw, Global Trade Atlas, Main Statistical Office, Poland

\*Mixed grain & triticale complex include triticale and the threshed seeds of different varieties of grains like wheat, barley, oats, rye planted on the same field as a one crop.

\*\*FAS/Warsaw estimation and forecast

### **MY 2015/16**

The declining tendency in mixed grains production, with replacement by triticale, is expected to continue. A small recovery in hog production will increase farmers' interest in growing triticale. Mixed grains and triticale use for bio-ethanol production is relatively small, amounting to about 2.5 percent of domestic use. The demand for both varieties of grains from the industry is very unstable. For 2015/16 year it is forecasted to increase in comparison with the last year.

### **MY 2014/15**

The declining tendency to grow mixed grains is going on in Poland. Triticale production is moving in the opposite direction than mixed grains production. The acreage of mixed grains diminished by 20 percent while acreage of triticale increased by 20 percent. High yields in 2014 boosted mixed grain and triticale production to 8.1 MMT. The main direction of mixed grains use is on-farm feed use which is more and more unprofitable and it is being replaced by the more profitable triticale. An ample supply of triticale also resulted in increased exports, mostly to Germany but also to Scandinavian and the Baltic countries.

## **Barley**

### Barley Production, Trade, Consumption

<b>Poland</b>	<b>2012/13</b>	<b>2013/14</b>	<b>2014/15*</b>	<b>2015/16*</b>	
<b>Marketing Year Begin</b>	<b>July, 2012</b>	<b>July, 2013</b>	<b>July, 2014</b>	<b>July, 2015</b>	
Area	1,160	820	808	820	(000) HA
Production	4,181	2,934	3,200	2,950	(000) MT
MY Imports	116	268	200	350	(000) MT
MY Imp. From U.S.	0	0	0	0	(000) MT
MY Exports	412	194	180	50	(000) MT
Feed	2,400	2,100	2,100	2,130	(000) MT
FSI Consumption	1248	1185	1,165	1,138	(000) MT
Total Consumption	3,648	3,285	3,265	3,268	(000) MT

Source: FAS/Warsaw, Global Trade Atlas, Main Statistical Office, Poland

\*FAS/Warsaw estimation and forecast

### **MY 2015/16**

According to the reports on the acreage of sowings for the year 2015 harvest the total barley plantings area will increase marginally to 820,000 ha and the predicted crop would amount to 3 MMT. The crop forecast will be smaller by 8 percent as the result of lower yields, close to last years' average results, much lower than last year's record yields. Winter barley is reported to be in worse health condition than other winter varieties of grains after the winter. Although as the larger proportion of barley in Poland is being sown in spring, the condition of winter plants should not affect the main barley crop.

It is forecasted that domestic use of barley for feed will stay on line with last year's use. Demand from the industry for beer production use should stay below last year's level.

### **MY 2014/15**

In 2014/15 plantings of barley fell due to economic reasons. Low prices for barley made some farmers give up this grain replacing it with other types of grain, especially for rapeseed if agro-technical reasons allowed for that. For 2014 barley production is estimated to be 9 percent higher than last year, despite much lower acreage of barley plantings. Due to high yields, barley production amounted to 3.2 MM. Domestic demand for beer remains stable for 2014/15 MY. Foreign demand for malt declined.



## Corn

### Corn Production, Trade, Consumption

<b>Poland</b>	<b>2012/13</b>	<b>2013/14</b>	<b>2014/15*</b>	<b>2015/16*</b>	
<b>Marketing Year Begin</b>	<b>September, 2012</b>	<b>September, 2013</b>	<b>September, 2014</b>	<b>September, 2015</b>	
Area	544	614	678	660	(000) HA
Production	3,996	4,040	4,500	4,400	(000) MT
MY Imports	189	402	250	270	(000) MT
MY Imp. From U.S.	1	1	1	1	(000) MT
MY Exports	1,307	925	775	675	(000) MT
Feed	2,350	3,000	3,300	3,400	(000) MT
FSI Consumption	461	705	748	747	(000) MT
Total Consumption	2,811	3,705	4,048	4,147	(000) MT

Source: FAS/Warsaw, Global Trade Atlas, Main Statistical Office, Poland

\*FAS/Warsaw estimation and forecast

### **MY 2015/16**

It is expected that the acreage of corn in 2015 will slightly diminish in comparison with last year due to lower profitability in 2014 and for the advantage of rapeseed. Corn production is forecasted for 4.4 MMT, 2 percent lower than last year's record crop. Demand from the feed industry is forecasted to continue to grow due to broiler production developments. Lower prices for corn in 2014 will keep corn use for bioethanol at a high level.

### **MY 2014/15**

In MY 2014/15 the acreage of corn for grain (excluding corn for silage) increased to 678,000 hectares, a new record number in history. Corn acreage increased by 11 percent in comparison with last year. Production of corn is estimated at 4.5 MMT. It is 0.5 MMT higher than last year's record. Regarding corn acreage and production there are big differences in numbers depending on sources.

The above numbers are the official numbers from the Polish state statistical office. According to some industry sources, corn acreage amounted to 620,000 hectares and production to 3.2 MMT. The differences in estimations can arise from a high level of differentiation of corn growing conditions in some regions of Poland which affected the level of yields. The early but cold spring in 2014 was not good for those plantings where seeds were planted at the very beginning of the planting season. FAS Warsaw assessed that in the case of corn, government estimation is much closer to the real situation. Poland remains a net exporter of corn, but the total export of this grain diminished in comparison with 2013/14. The main reason for that was the lower EU country demand and higher domestic use for both industrial and feed purposes. Corn use for feed is growing due to a continuing rise in poultry production. Poultry production is the main push in corn consumption in Poland. Human consumption of corn is very small and stable. An increase of industry use is expected due to the increase of ethanol and isoglucose production.

## Oats

### Oats Production, Trade, Consumption

<b>Poland</b>	<b>2012/13</b>	<b>2013/14</b>	<b>2014/15*</b>	<b>2015/16*</b>	
<b>Marketing Year Begin</b>	<b>July, 2012</b>	<b>July, 2013</b>	<b>July, 2014</b>	<b>July, 2015</b>	
Area	514	434	480	450	(000) HA
Production	1,468	1,190	1,500	1,300	(000) MT
MY Imports	7	17	7	10	(000) MT
MY Imp. From U.S.	0	0	0	0	(000) MT
<b>MY Exports</b>					
MY Exports	75	33	40	25	(000) MT
Feed	1,220	1,180	1,280	1,200	(000) MT
FSI Consumption	132	114	129	119	(000) MT
Total Consumption	1,352	1,294	1,409	1,319	(000) MT

Source: FAS/Warsaw, Global Trade Atlas, Main Statistical Office, Poland

\*FAS/Warsaw estimation and forecast

For 2015/16 the total supply for oats in Poland is expected to decline in comparison with the record last year. Lower acreage, in pair with forecasted lower than record yields, would lead to an 1.3 MMT crop.

In 2014 oats production amounted to 1.5 MMT. Almost 90 percent was used for feed purposes. Due to the very good harvest, the consumption of oats increased in 2014 year. The acreage of plantings varies up and down accordingly to the seasonal changes of prices of other grains – mainly rye and triticale. Oats export from Poland is almost exclusively directed to the internal EU market, with the biggest share of Spain.

MY= Poland's local marketing year of July to June except for corn which follows on October to September calendar.

