VF-Concept

Vegetables & Fruits products

Polish market of industrial raspberries

CANADA 2012

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Vice President
VF-Concept

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VF-Concept's factories location

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- Polish PRODUCTION of frozen fruits and vegetables (000'mt)

Year	2000	2006	2010	2011
Frozen vegetables	320	465	530	545
Frozen fruits	300	400	315	320

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- Polish EXPORT of frozen fruits and vegetables (000'mt)

Year	2000	2006	2010	2011
Frozen vegetables	220	295	332	350
Frozen fruits	248	308	272	273

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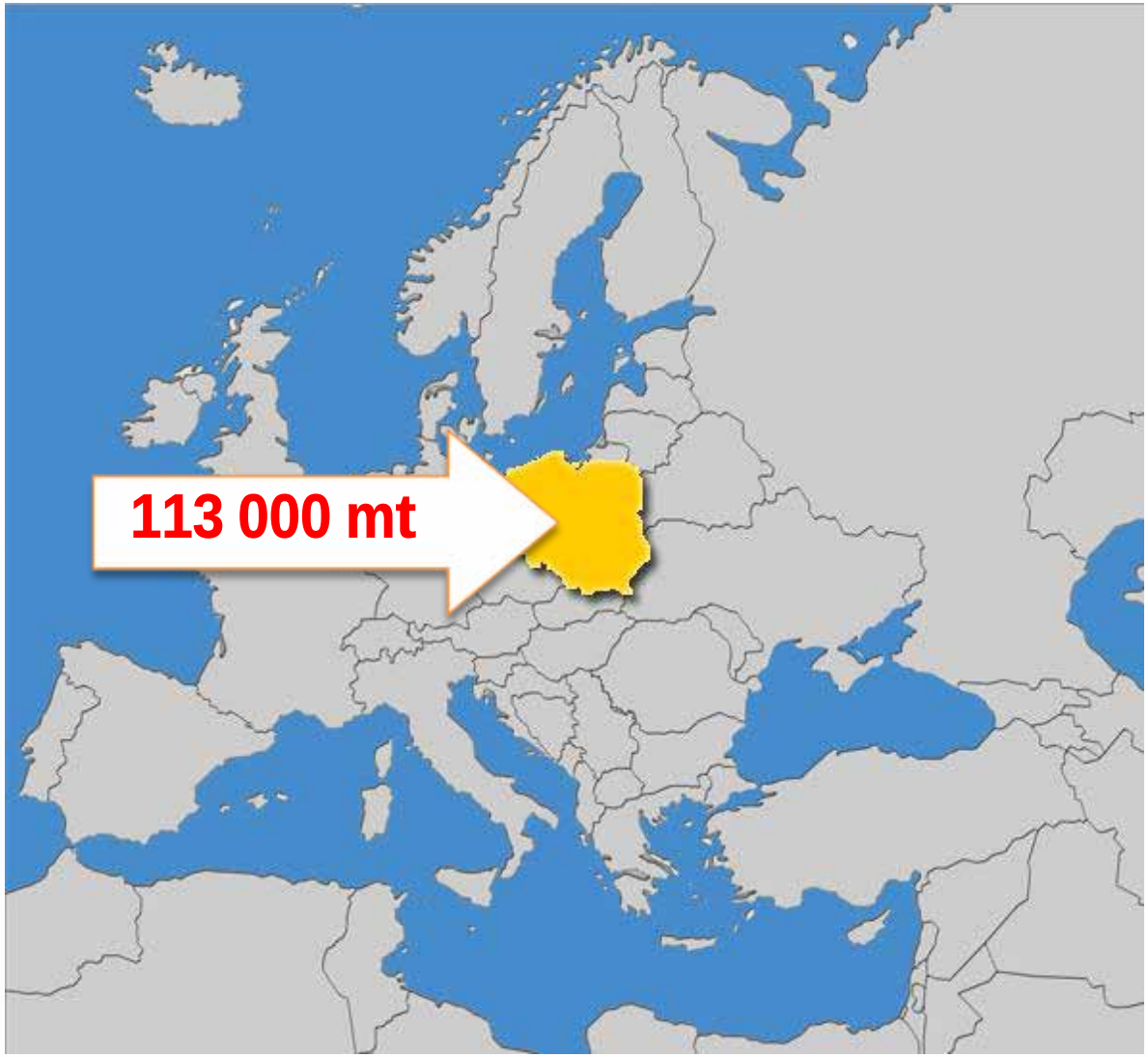
Polish Production of raspberries 2011



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General informations

Varieties grown in Poland

Glen Ample (Summer week 26 till 32)
Malling Seeding (Summer week 26 till 32)
Polka (Autumn week 33 till 43)
Polana (Autumn week 33 till 43)

Climate conditions in Poland

Relatively cold winters lasting 3 months (temperature drops to -25°C) and hot summers. Daily average air temperature is at least 5°C .The average annual rainfall is 600 mm.

STILL NO VARIETY SUITABLE FOR MECHANICAL HARVEST

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- 100% of plantations in private hands
- Size of Polish plantations:
  - 0 - 0,5 ha (29,4%)
  - 0,5 - 1 ha (41,2 %)
  - 1 -3 ha (17,6%)
  - >3 ha (11,8 %)

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Raspberry cultivation in Poland by region

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Summer varietes

- More stabil waether conditions
- Just in time for a few big producers
- If is lack of goods after season
- Tradition ; safety

Autumn varietes

- Lower production costs
- Easy production – even for not profesional fruits growers
- Better crop (usually)
- Long period – better utilisation of pickers

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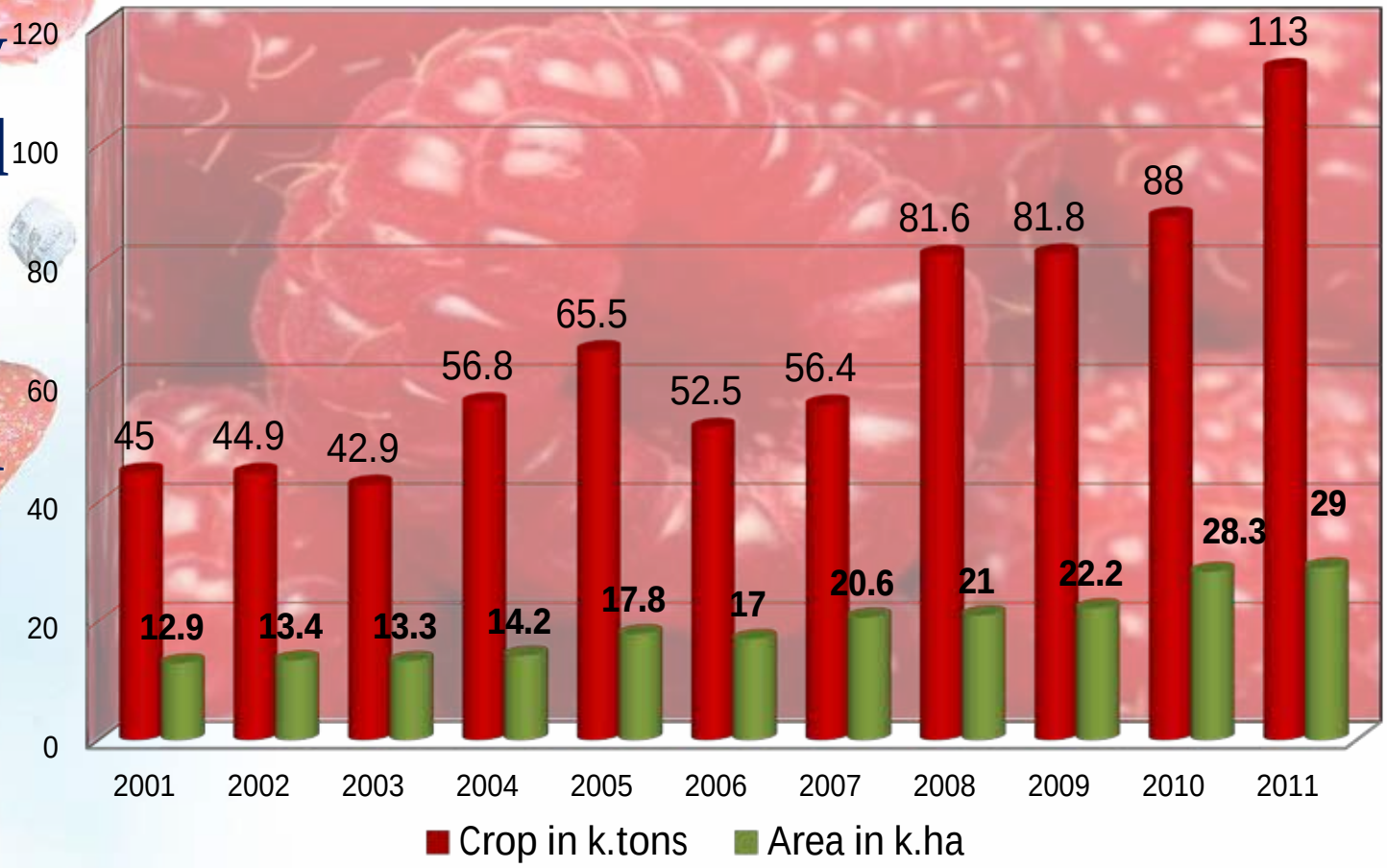
Polish raspberry crops and growing area 2001-2011



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Reason of developing of raspberries production in last years :

- Attractive and stabil price
- Increase of consumption
- UE subvention for raspberry production on the level (400 Euro/ha)

Destination of polish raspberries :

- Juice ; concentrates & puree - 32 %
- Fresh market 8 -10 %
- Frozen 58 – 60 %

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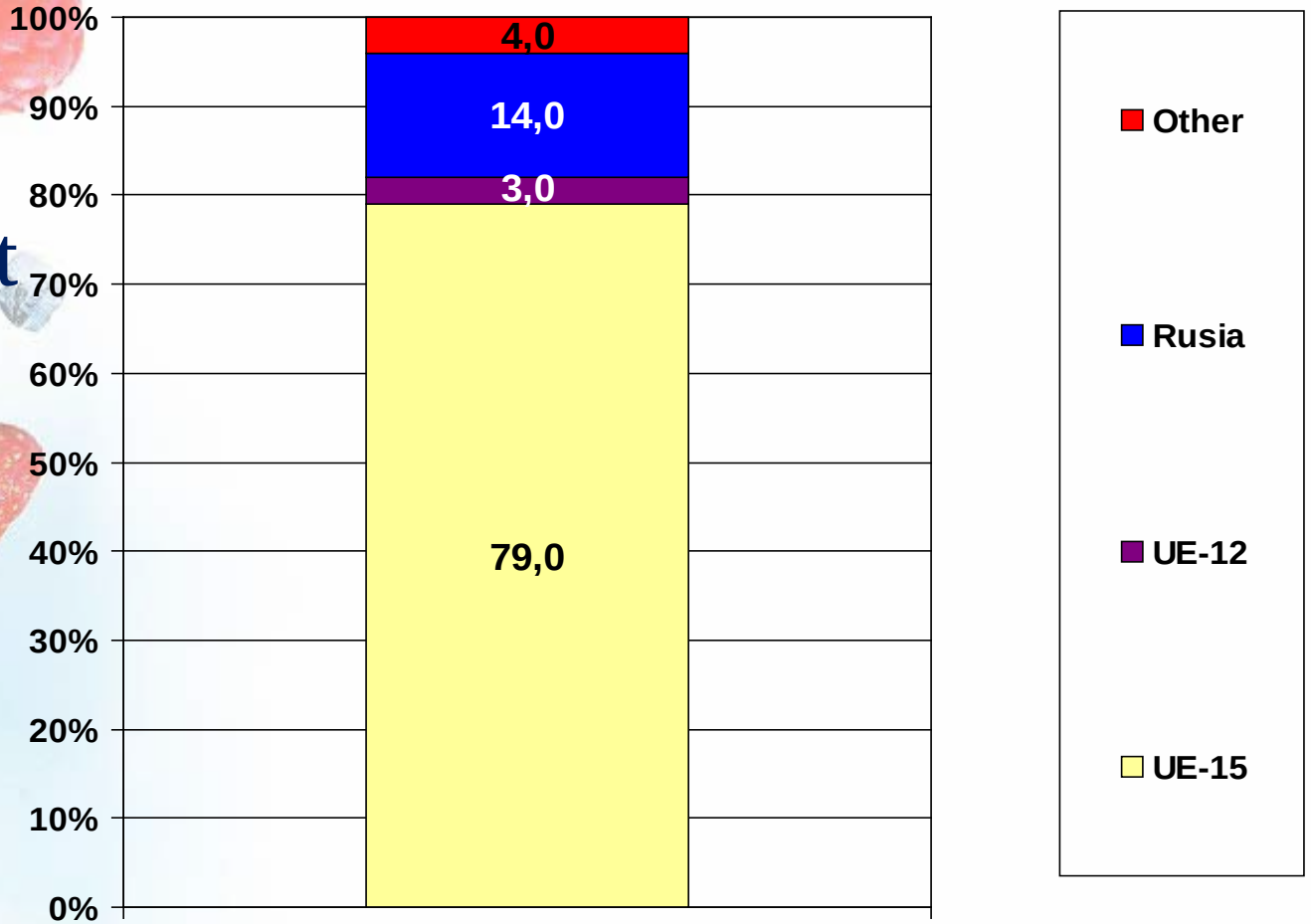
Directions of Polish exports of frozen fruit



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Production of frozen fruits (thousand tons)

Fruits	2001/02-2003/04 average	2004/05-2006/07 śaverage	2007/08	2008/09	2009/10	2010/11	2011/12 forecast
Total	**305**	**400**	**330**	**345**	**335**	**305**	**313**
Strawberry	140	165	120	130	131	120	113
Raspberrier	20	37	40	48	47	47	52
Blackcurrant	23	21	16	22	19	19	15
Redcurrant	13	13	12	13	13	13	14
Gooseberry	5	4	4	5	6	4	5
Other frozen and chilled fruits	104	160	138	127	119	102	114

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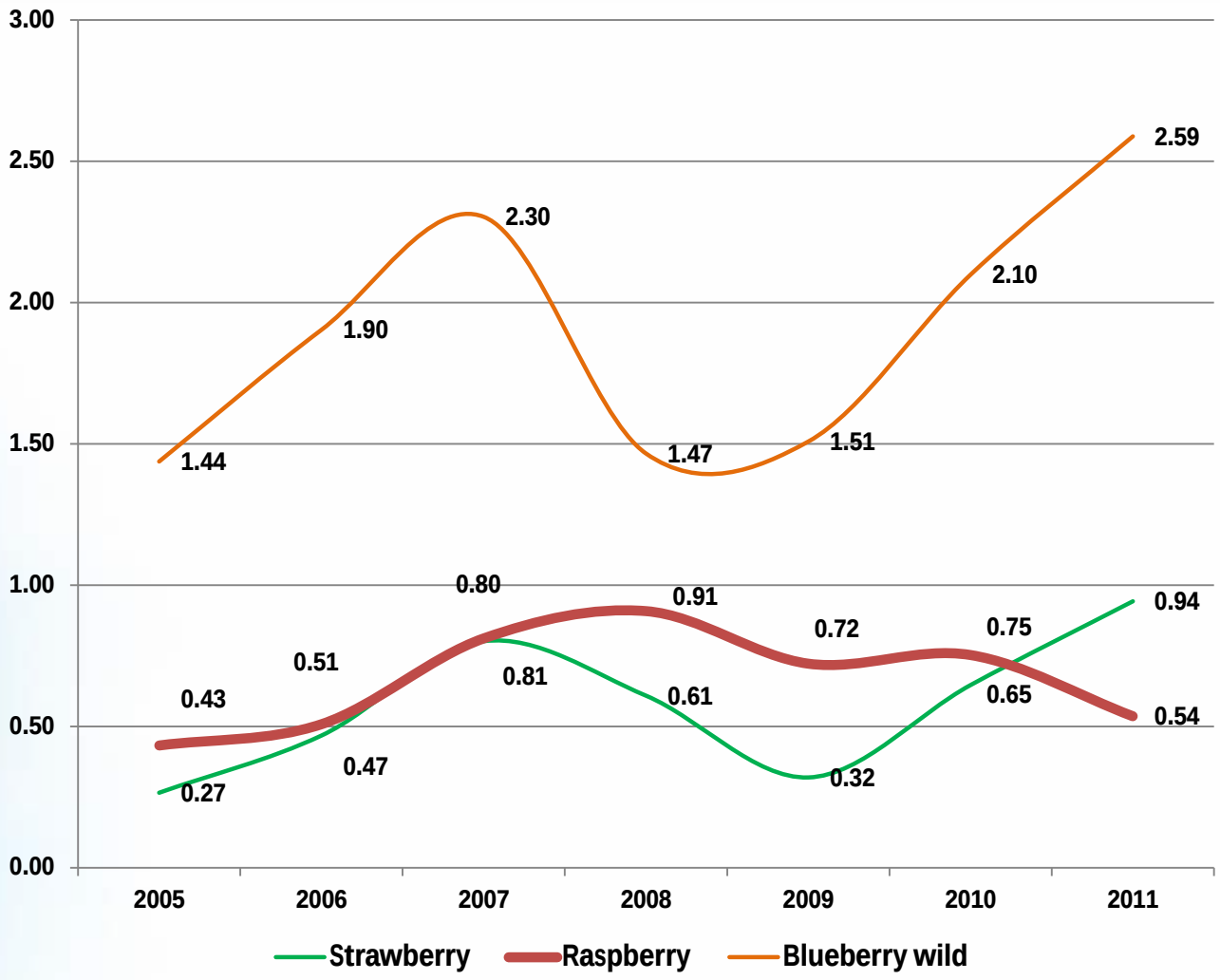
Raw material prices (€/kg)



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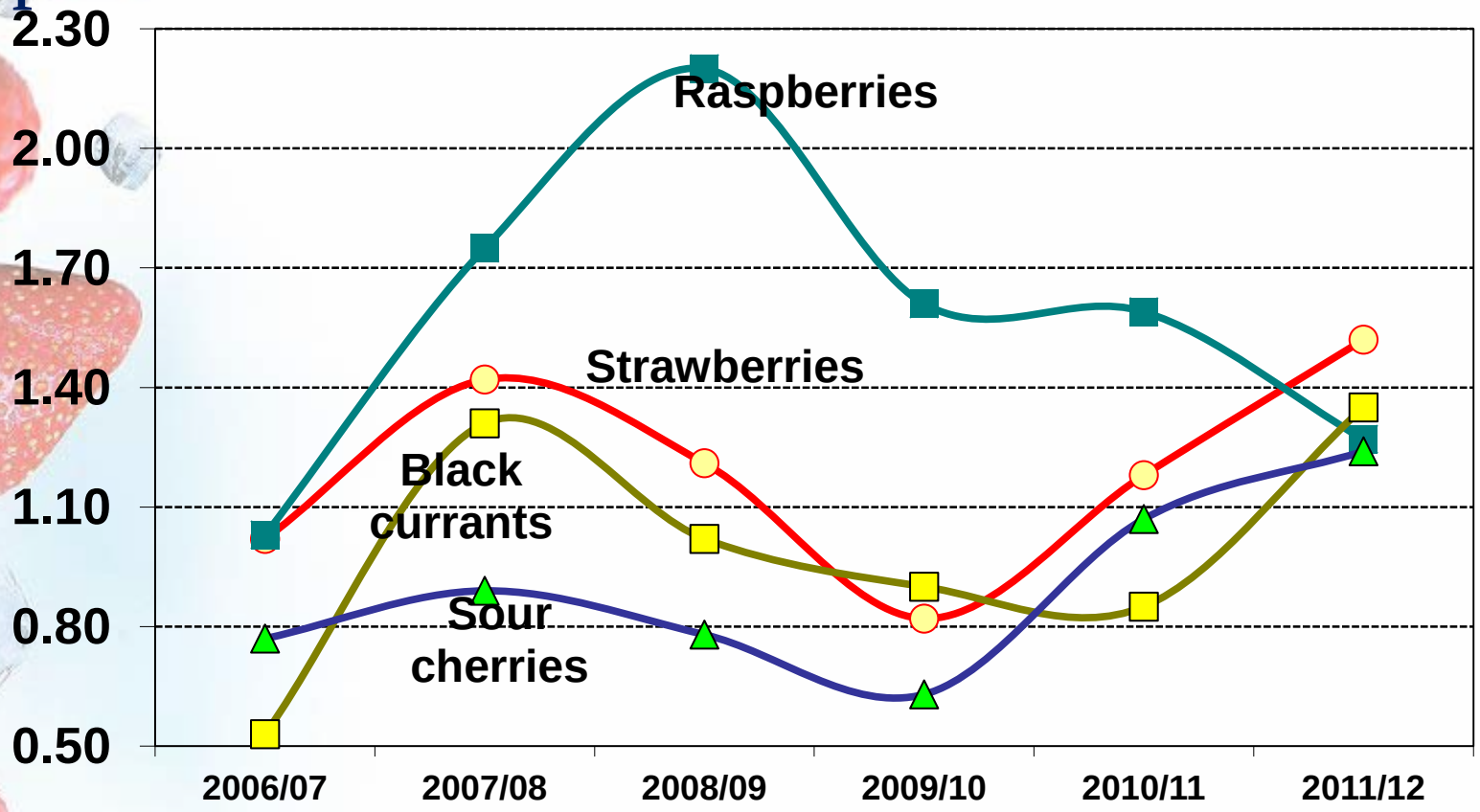
Frozen fruits - export prices €/kg



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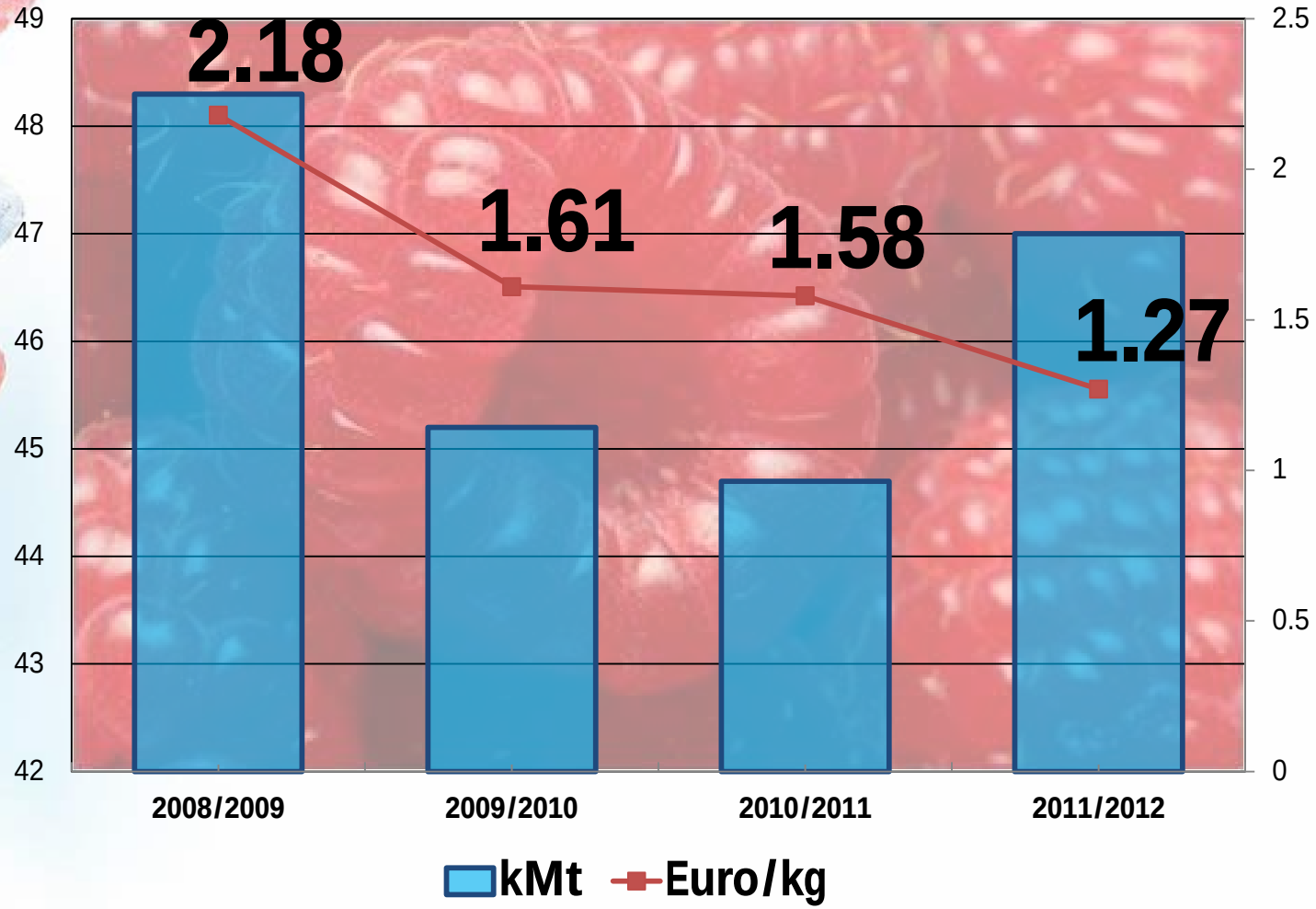
Frozen raspberries - export from Poland



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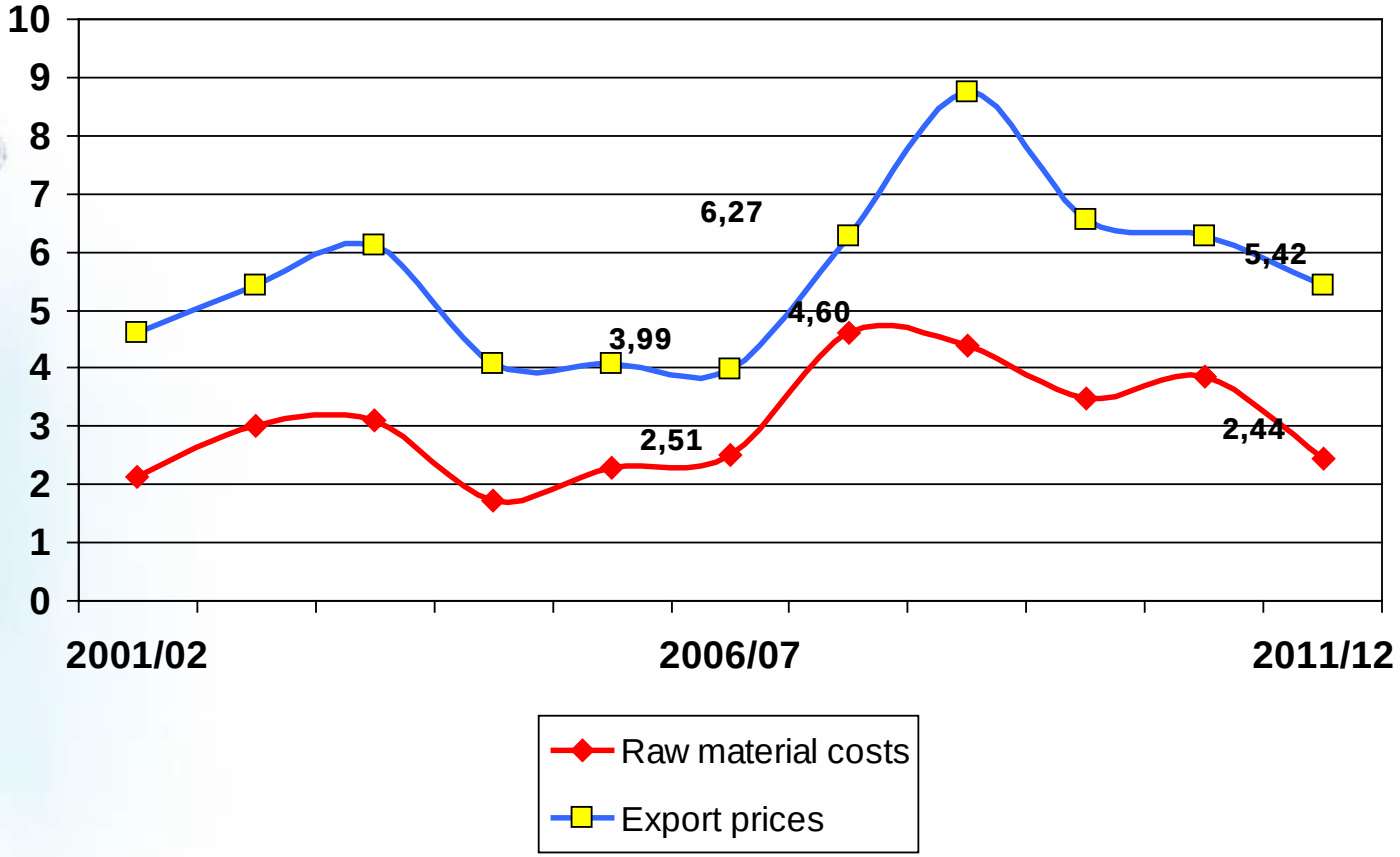
Differences in raw material costs and export prices of frozen raspberries (zł/kg)



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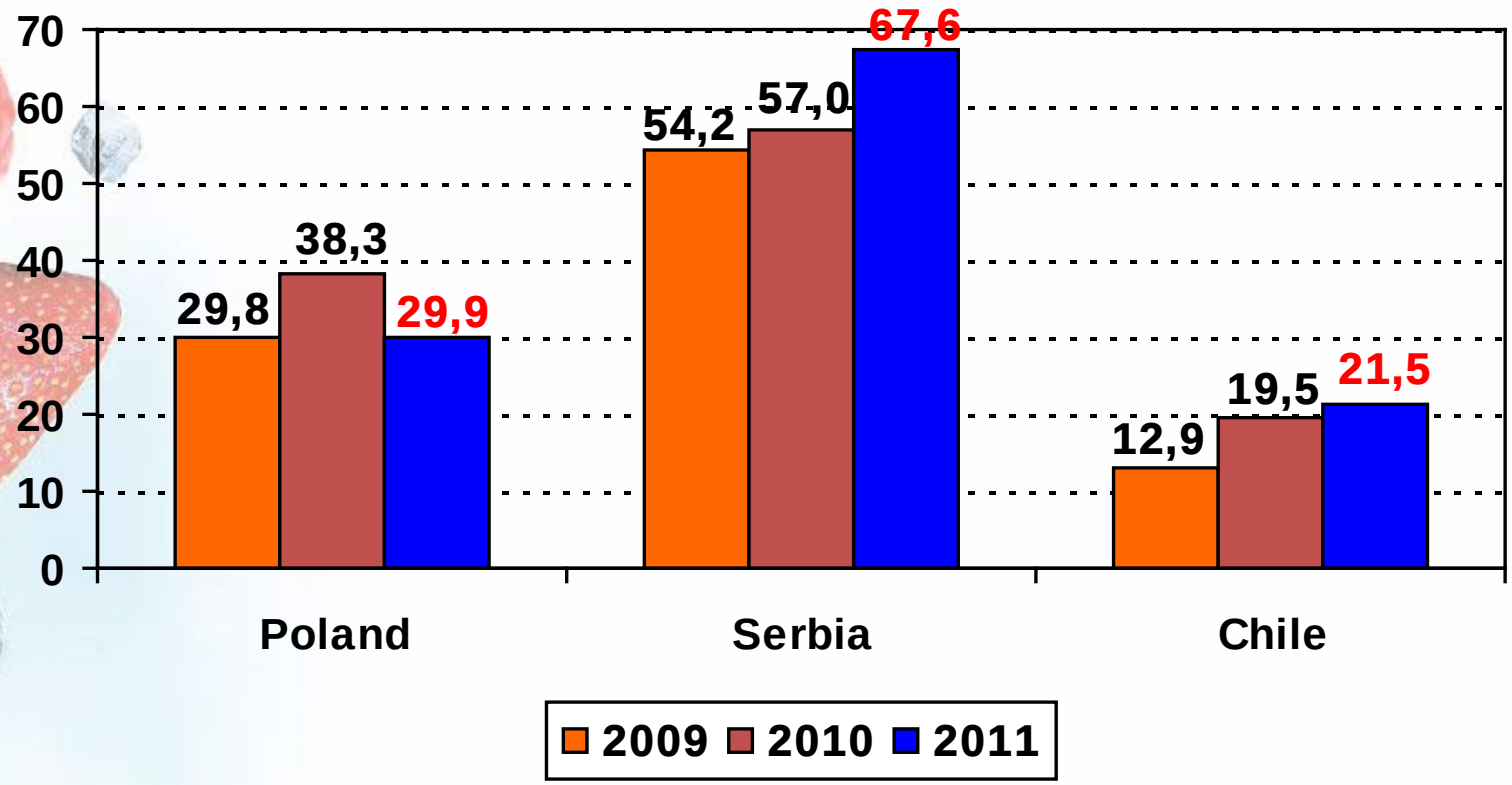
Imports of frozen raspberries from countries into the UE market



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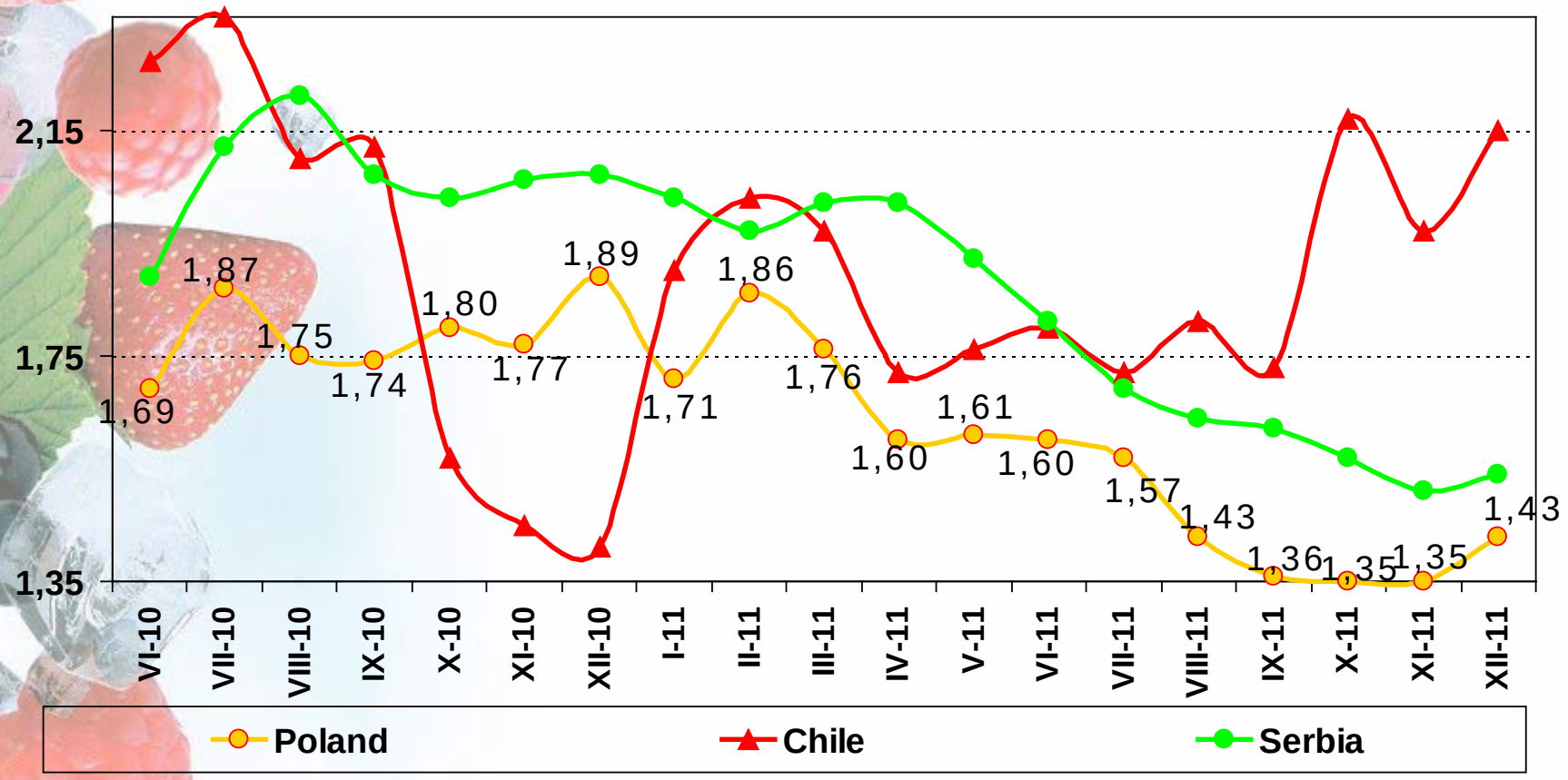
Monthly export prices of frozen imported raspberries to the UE market (€/kg)



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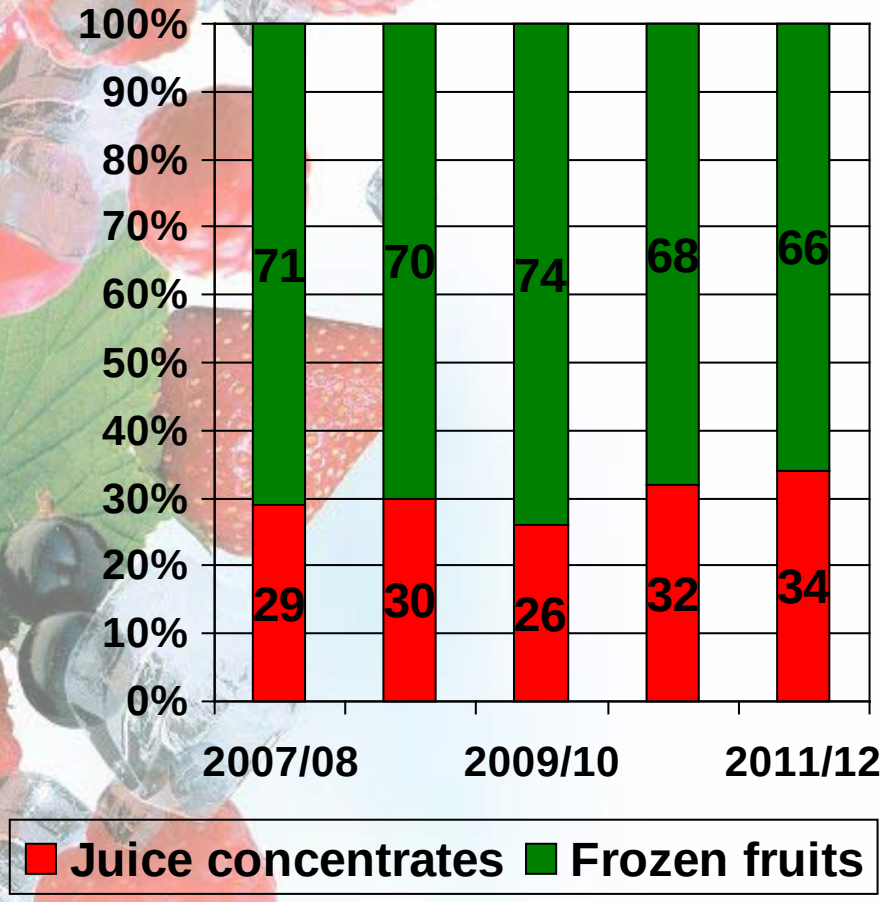
The structure of using raspberries in production of frozen fruits and juice concentrates



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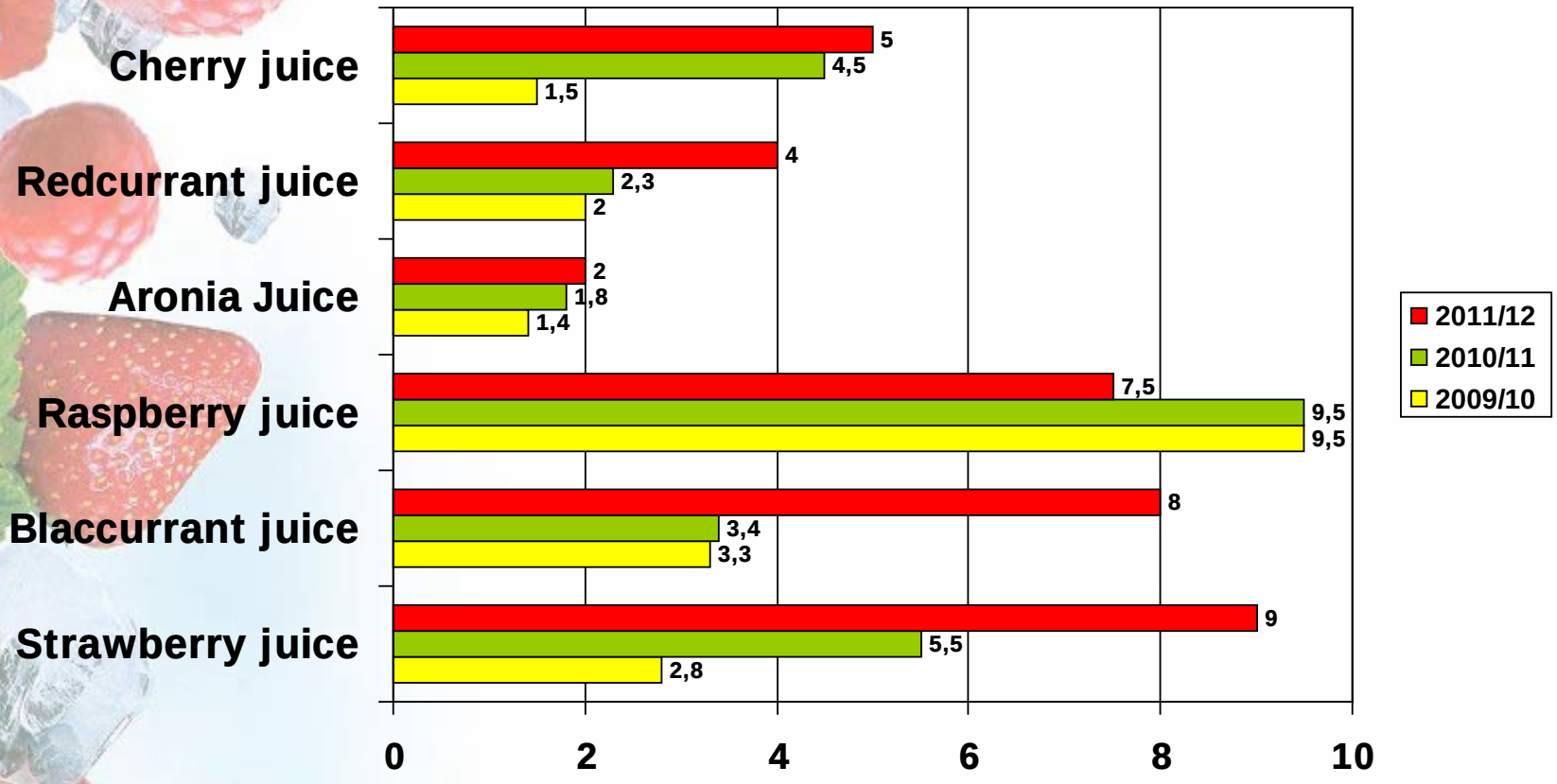
Export prices of concentrated fruit juices (€/kg)



Źródło: KUPS

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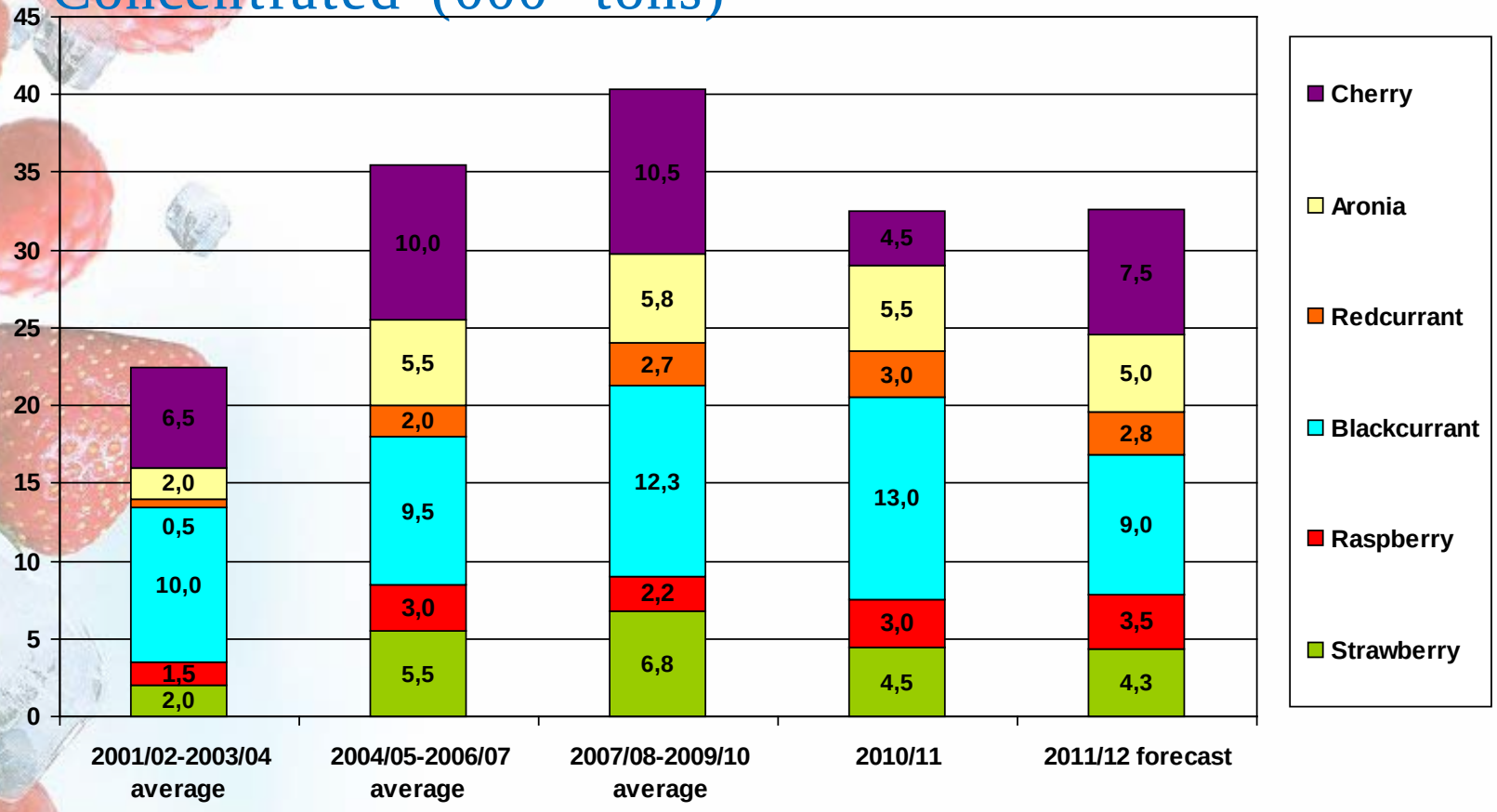
Polish production of Red fruits Juice Concentrated (000 ‘ tons)



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Summary

Strong points

- Relatively low costs of cultivation
- Relatively low cost of plantation establishment
- A long period of harvest
- Recognition of customers
- Health benefits valued by customers

Weak points

- Decreasing number of allowed pesticides
- Growing problem with finding pickers
- Lack of variety for mechanical harvesting

Thank you for your attention

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