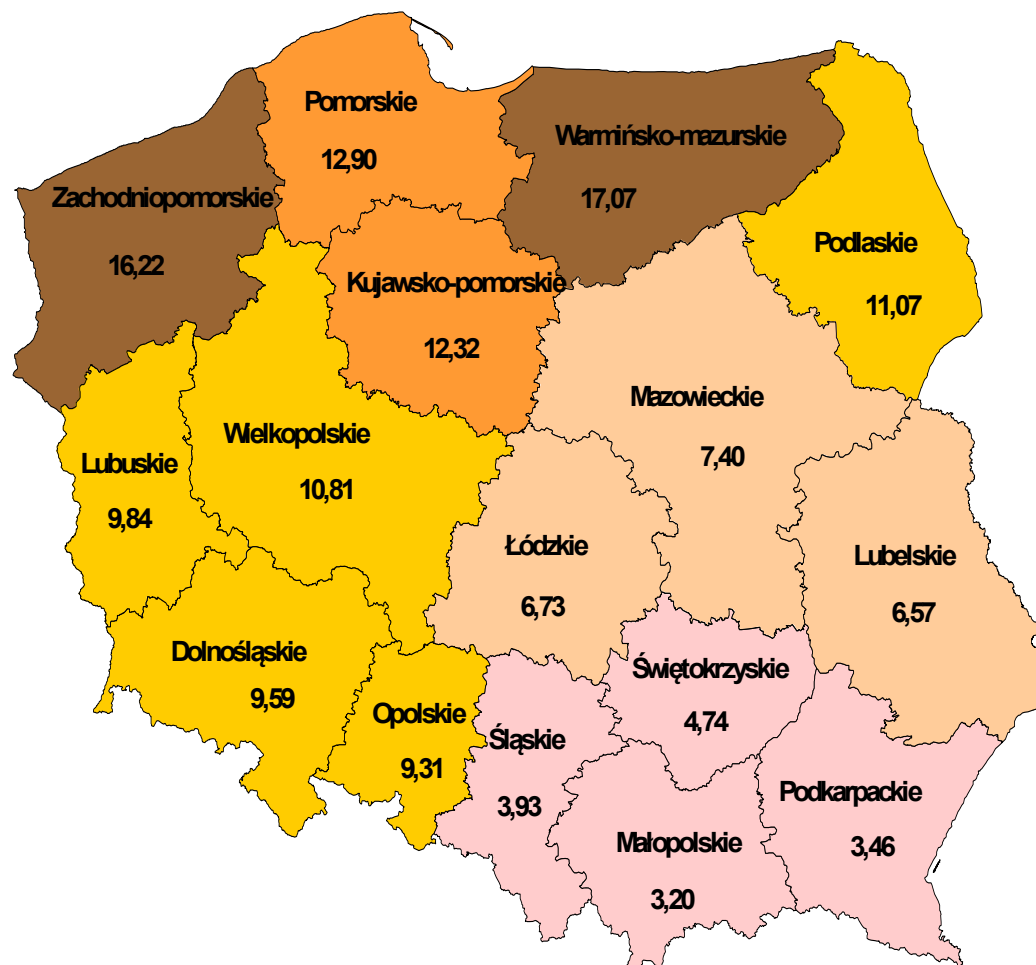




# **Polish agri-food sector: basic facts**

**Ministry of Agriculture and Rural  
Development**

# Avarage Farm Size of Family Farms



Avarage farm size .  
Poland – 10 ha  
UE-15 - 18,7 ha

# Key Data

- Population 38,5 mln inhabitants
- GDP per capita 10 098 EUR ( at current price)
- GDP per capita 17 172 EUR ( at Purchasing Power)
- Index of consumer prices 1,0 annual %
- Unemployment rate 10,7% of labour force
- Real GDP growth rate 1,3% 2013 (\* 3,4% )

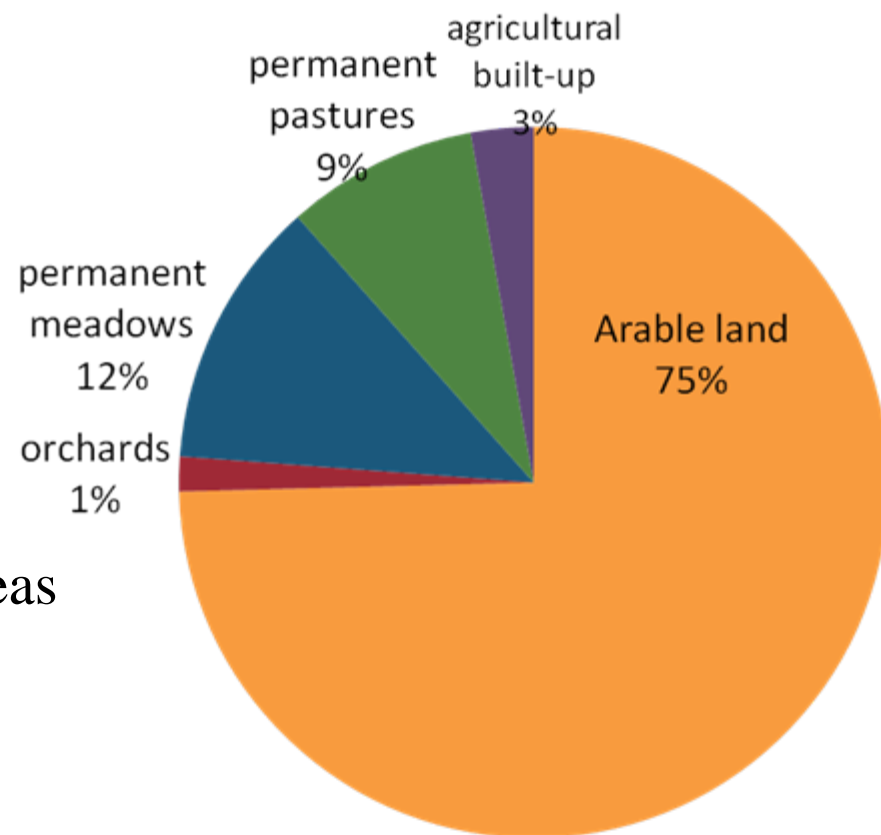
# Agricultural Sector

- GVA as % of total 3,5%
- Agriculture of total employment 12,6 %
- Agricultural goods output 21 billion euro
  - ▣ **50% crop output**
  - ▣ **50% animal output**

# Key facts about Polish agriculture

- Large variety of natural and environmental conditions
- Agricultural land **60%** of total country area
- **88%** of agricultural land utilized by individual farmers
- 2nd in the EU-27 (after Romania) in terms of number of agricultural holdings
- 40% of population live in rural areas (14,9 million)

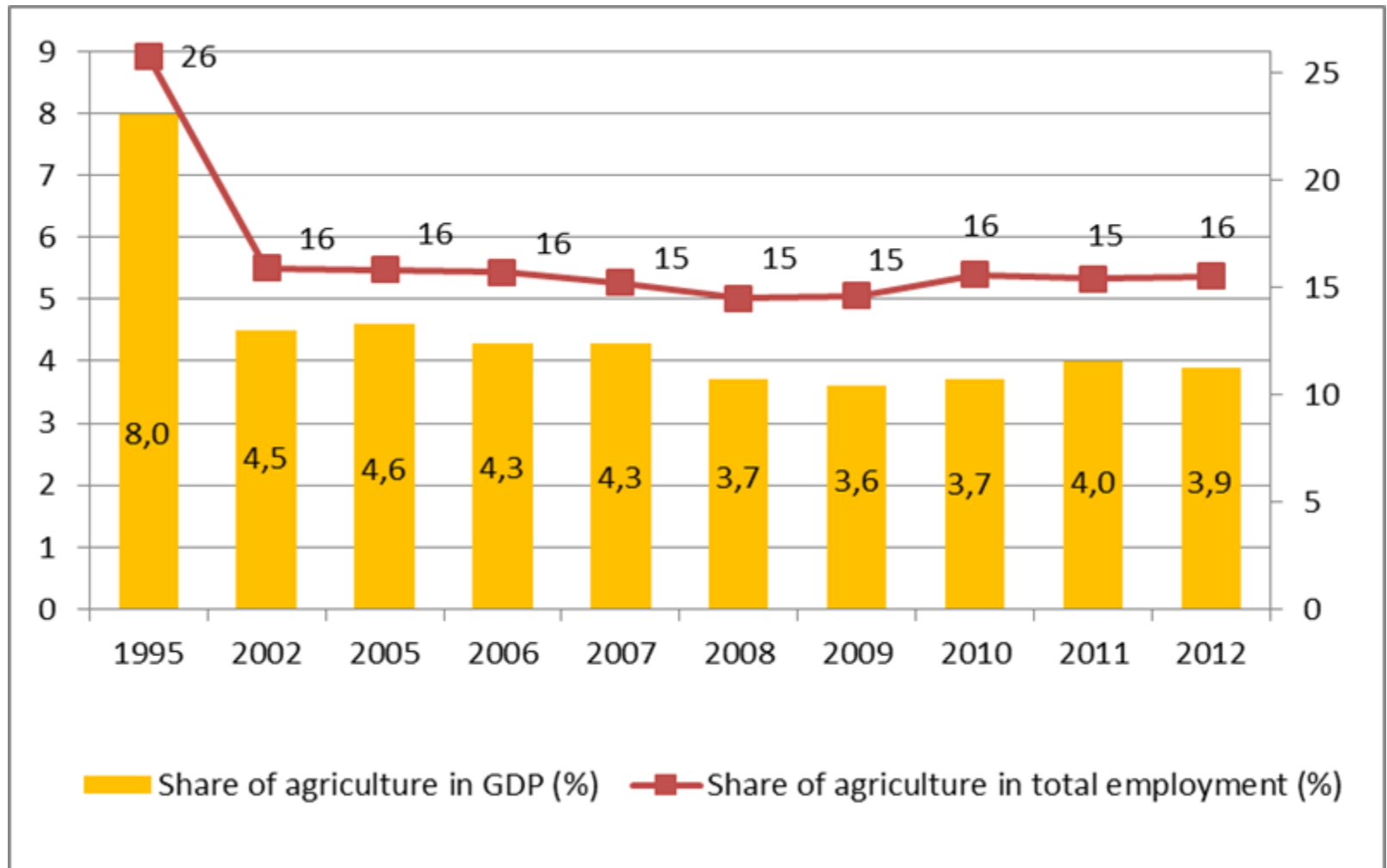
**Agriculture potential:  
18,8 million ha of agricultural land**



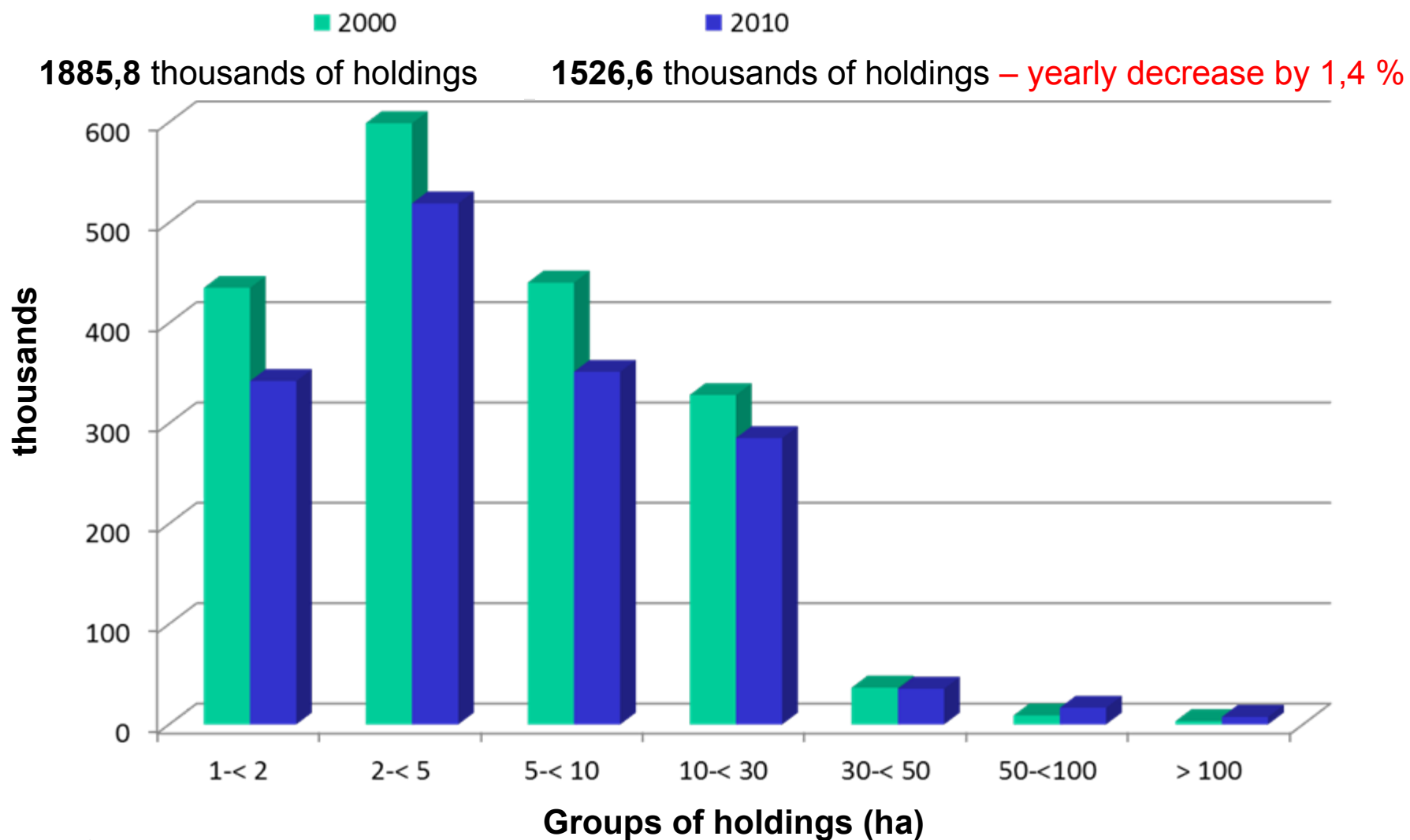
**Agricultural land use in Poland (2011)**

# Polish agriculture share in GDP & total employment

Agri employment EU27 average = 5,6%



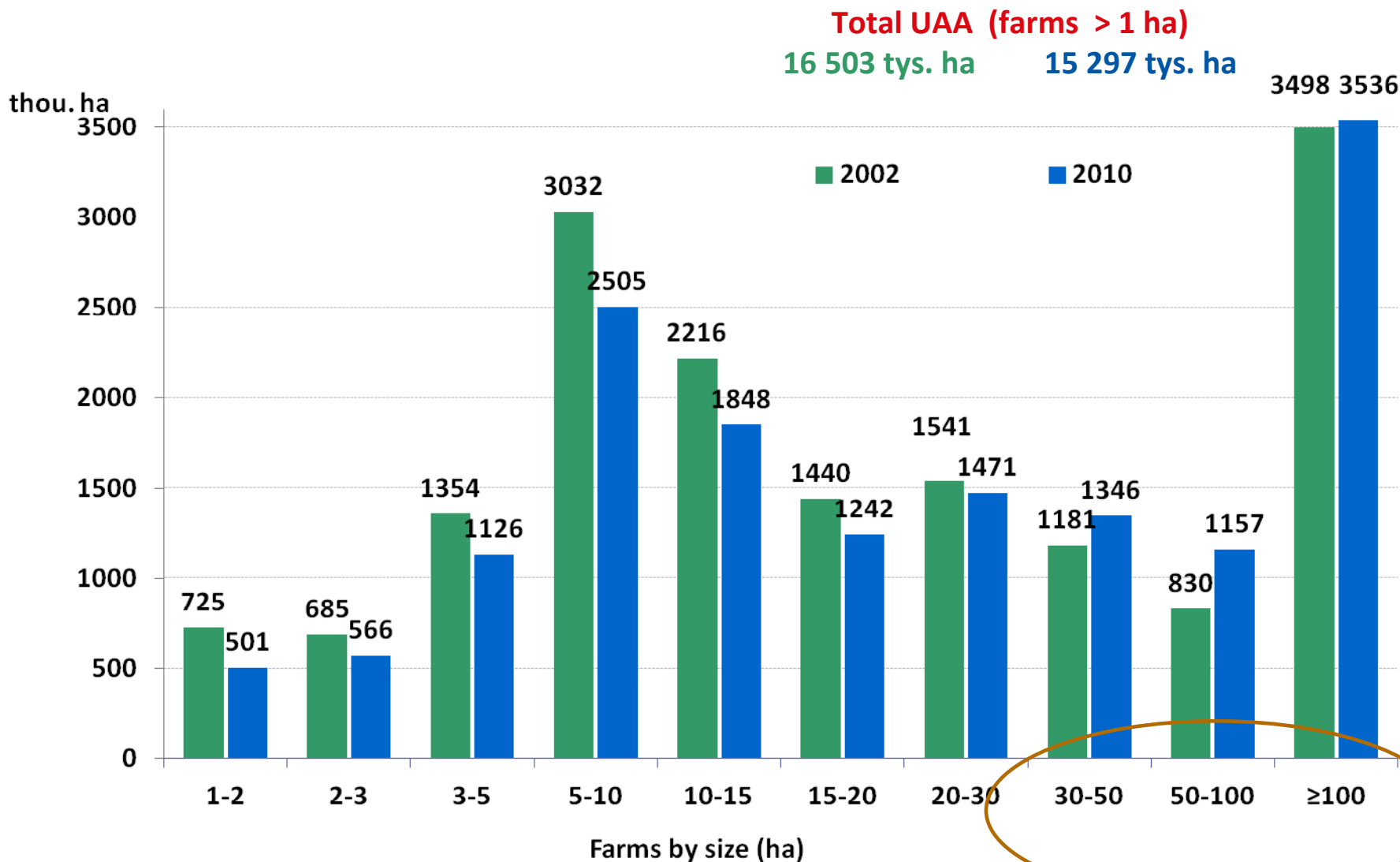
# Changes in the number of agricultural holdings\*



\* Refers to holdings above 1 ha

Source: Presentation of dr Jerzy Kopiński, IUNG PIB: Summary meeting on the IUNG's research programme 2014, and Central Statistical Office.

# Farms in Poland – farm area in farm size categories

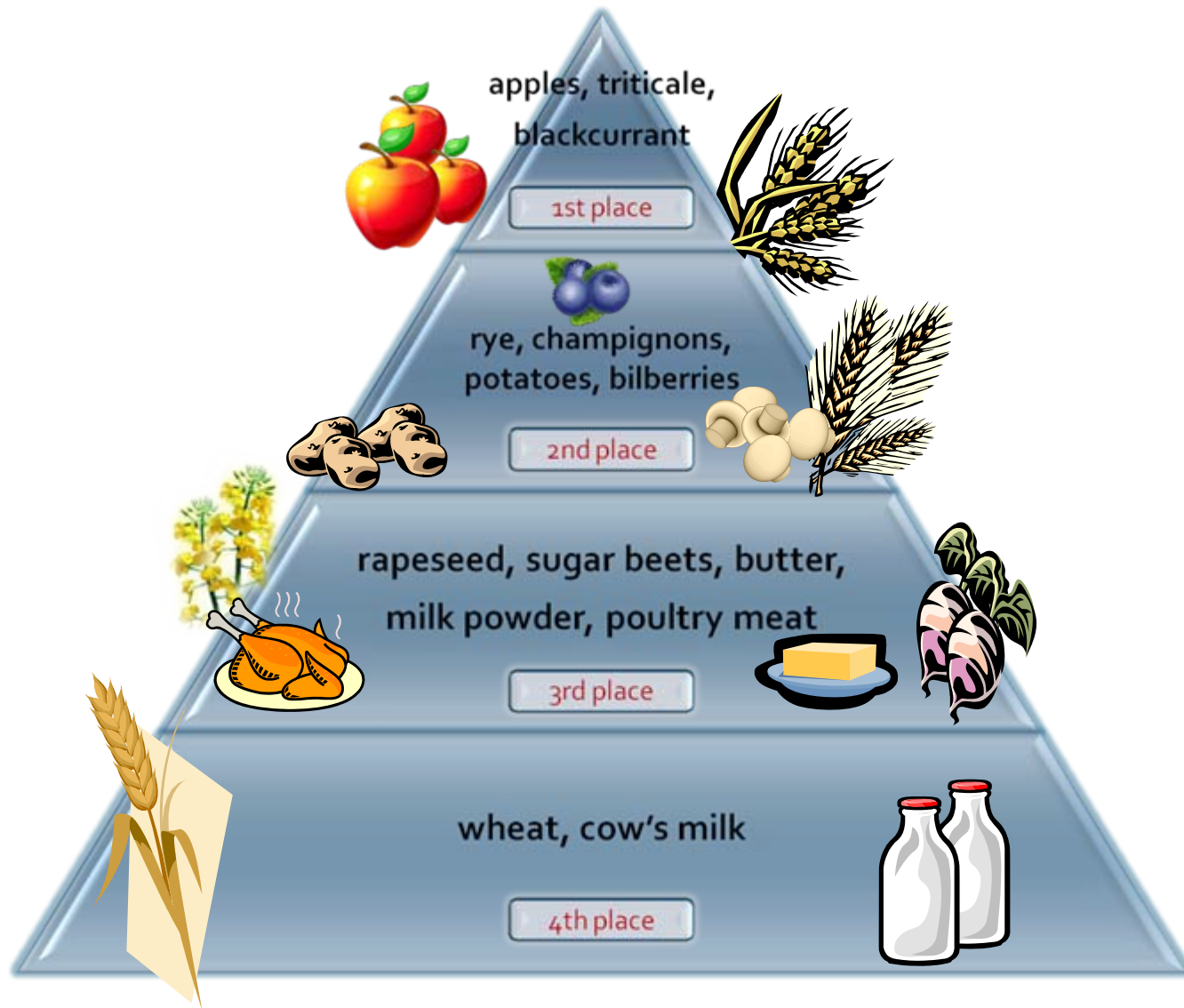


Source: Central Statistical Office

2010 → 39,5%



# Production - place of Poland in the EU

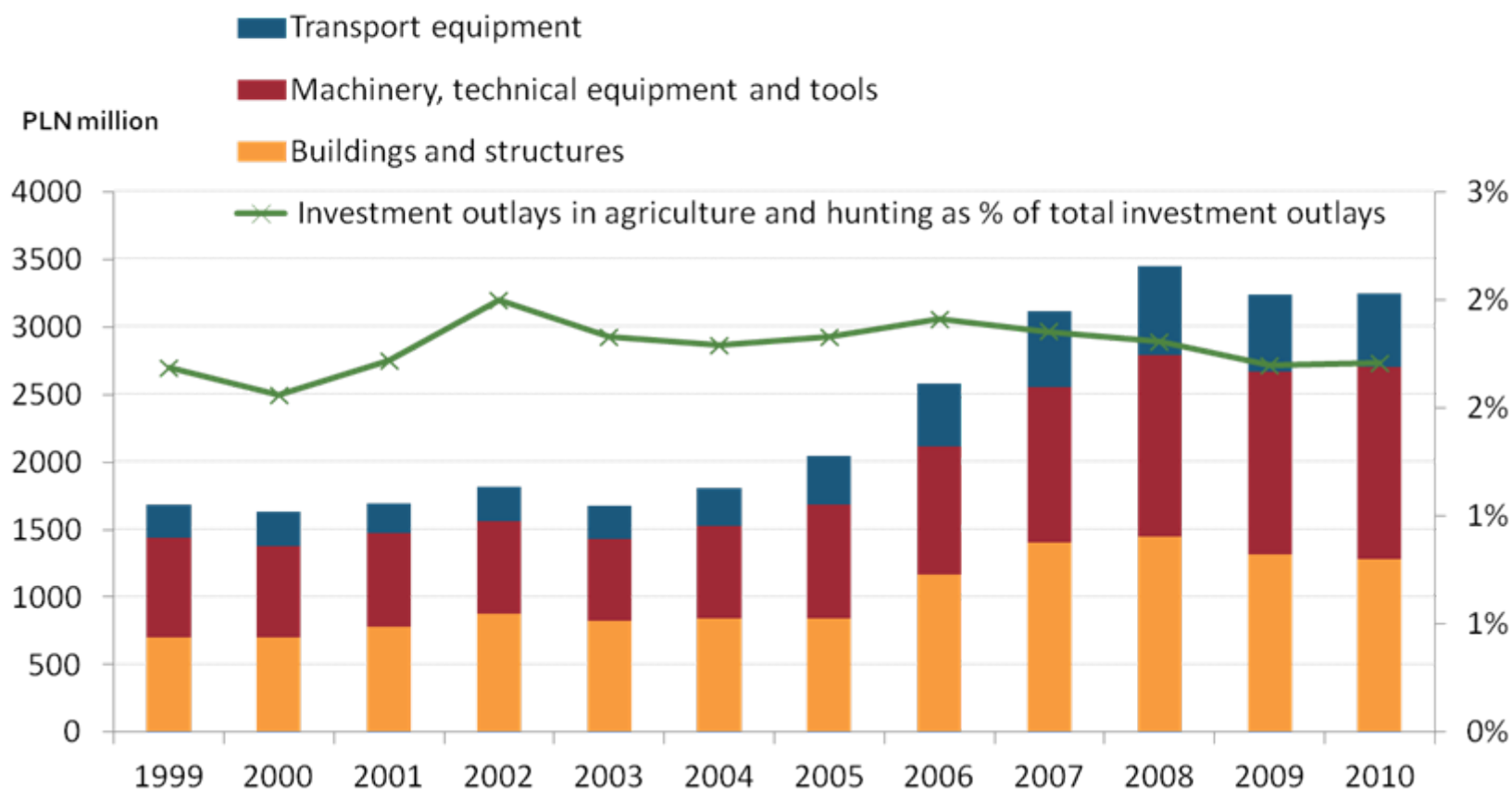


# Impact of the EU accession on Polish farm sector

- Accelerated many positive changes (e.g. living conditions in rural areas)
- Enhanced **restructuring** and modernization of the sector (investment recovery)
- **Competitive advantages revealed** (land and labour resources, competitive conditions)
- **Implementation** of a new series of veterinary, sanitary, phytosanitary and environmental protection rules & regulations
- Some **problems remain** (e.g. unfavorable agrarian structure, hidden unemployment)

# Investment outlays in Polish agriculture

Investment outlays in agriculture and hunting in Poland  
(current prices)



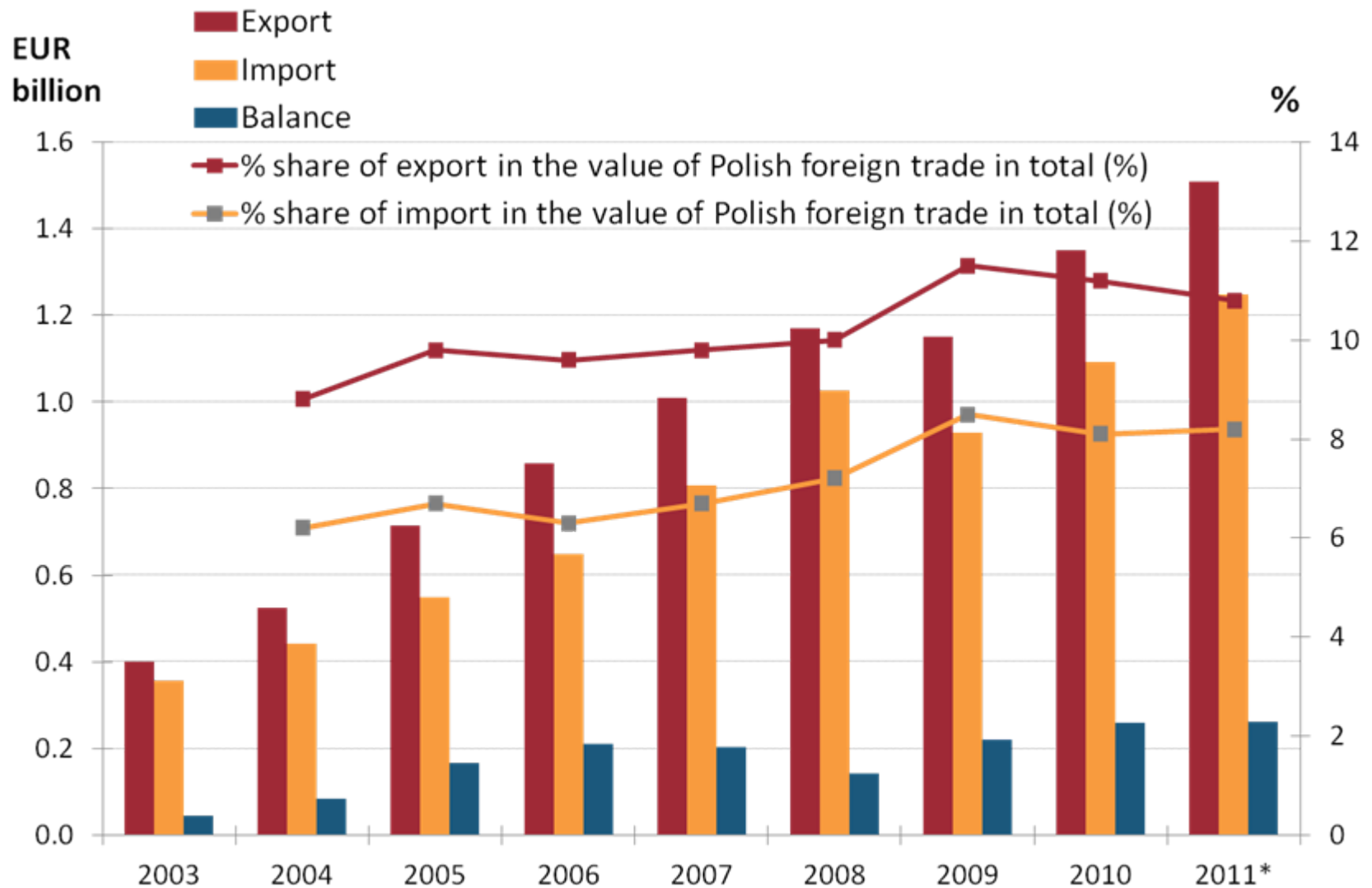
## Poland's entry to the EU...

- revealed competitive advantages of food processing industry
- opened new opportunities for the food sector (450 million EU consumers)
- accelerated modernization & concentration processes in the industry

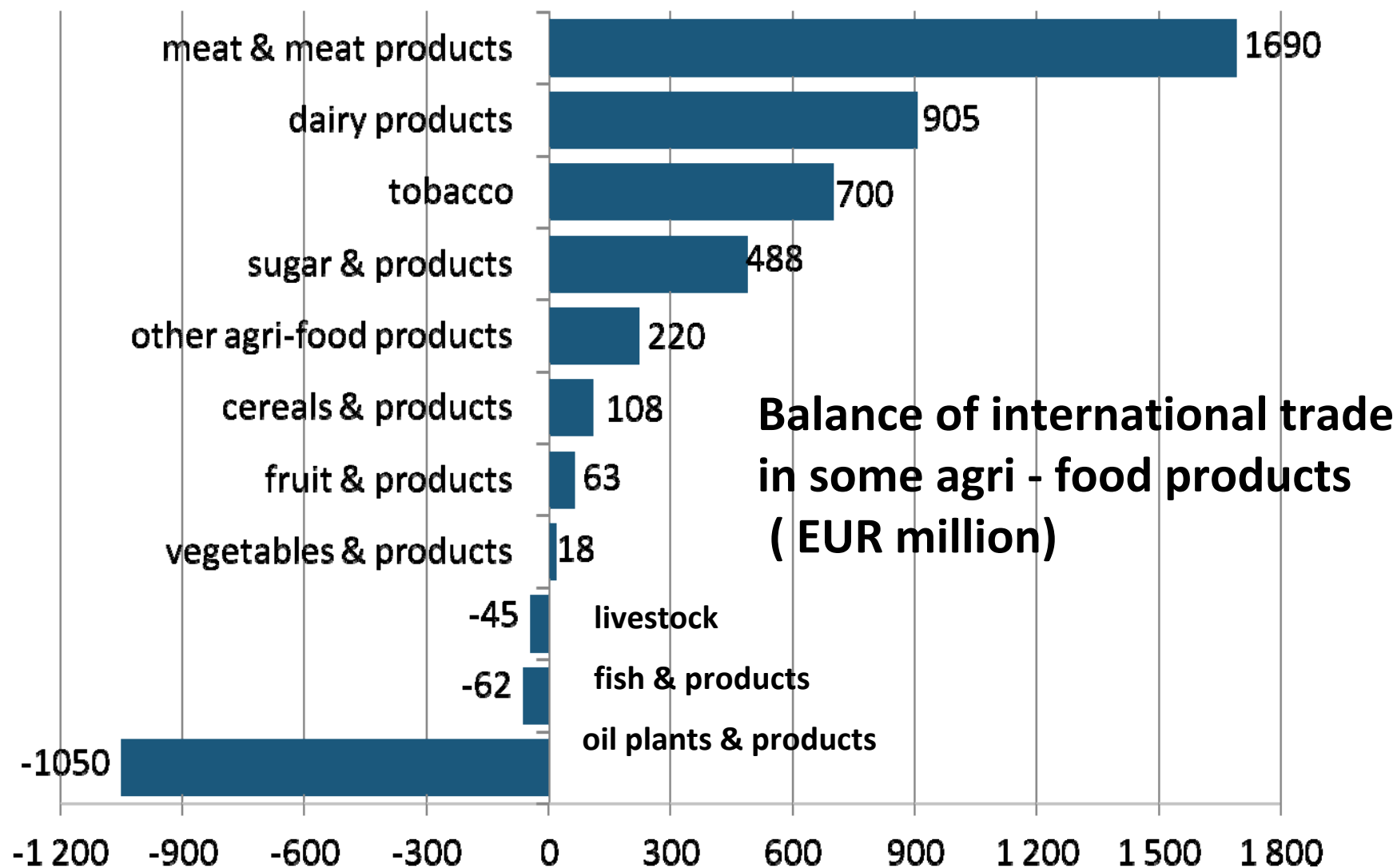
### **Most competitive sectors:**

meat, milk processing, fruits & vegetables, sugar, secondary cereal processing, tobacco production

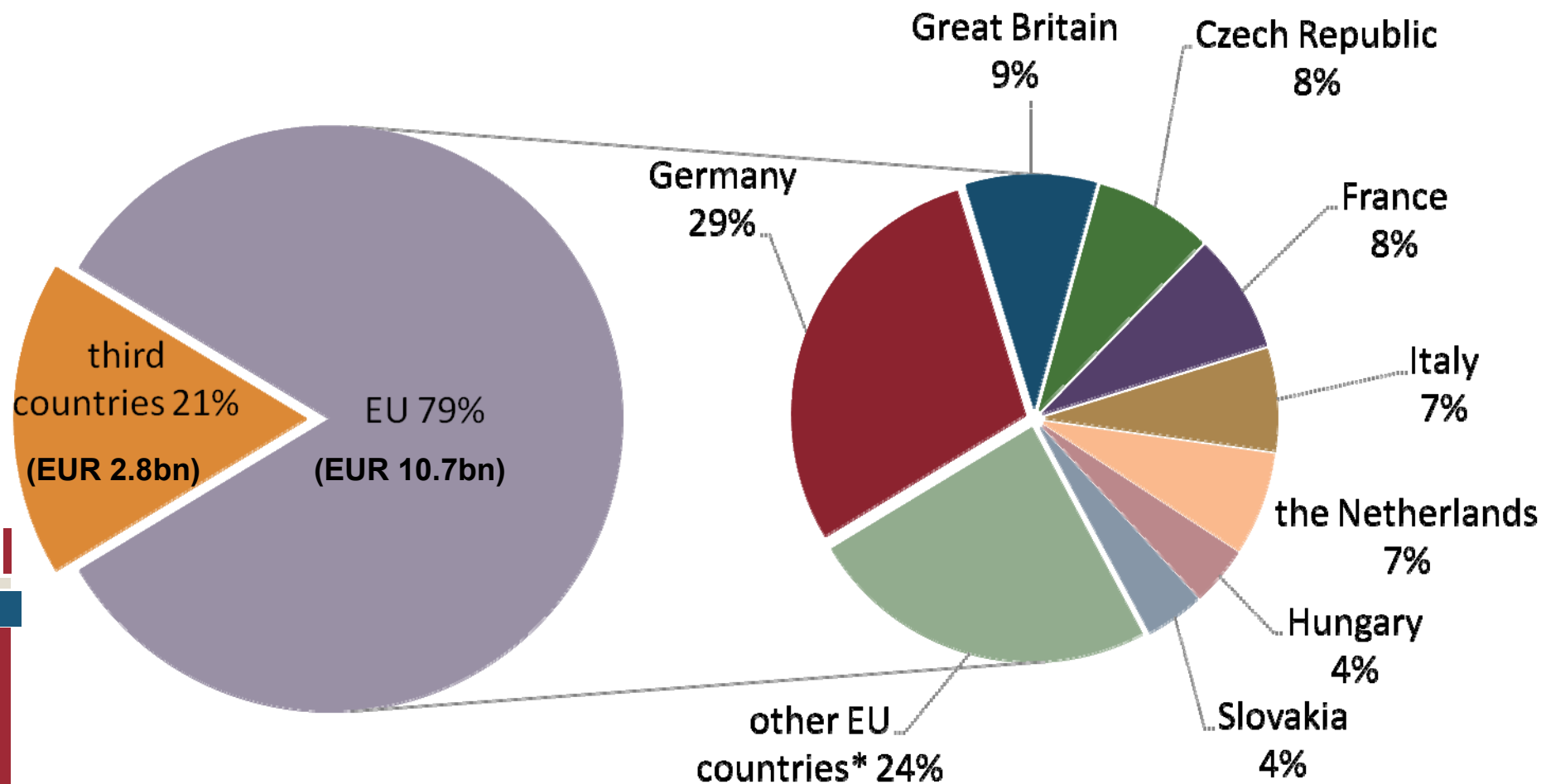
# Poland's foreign trade in agri-food products



# Foreign trade in agri-food products

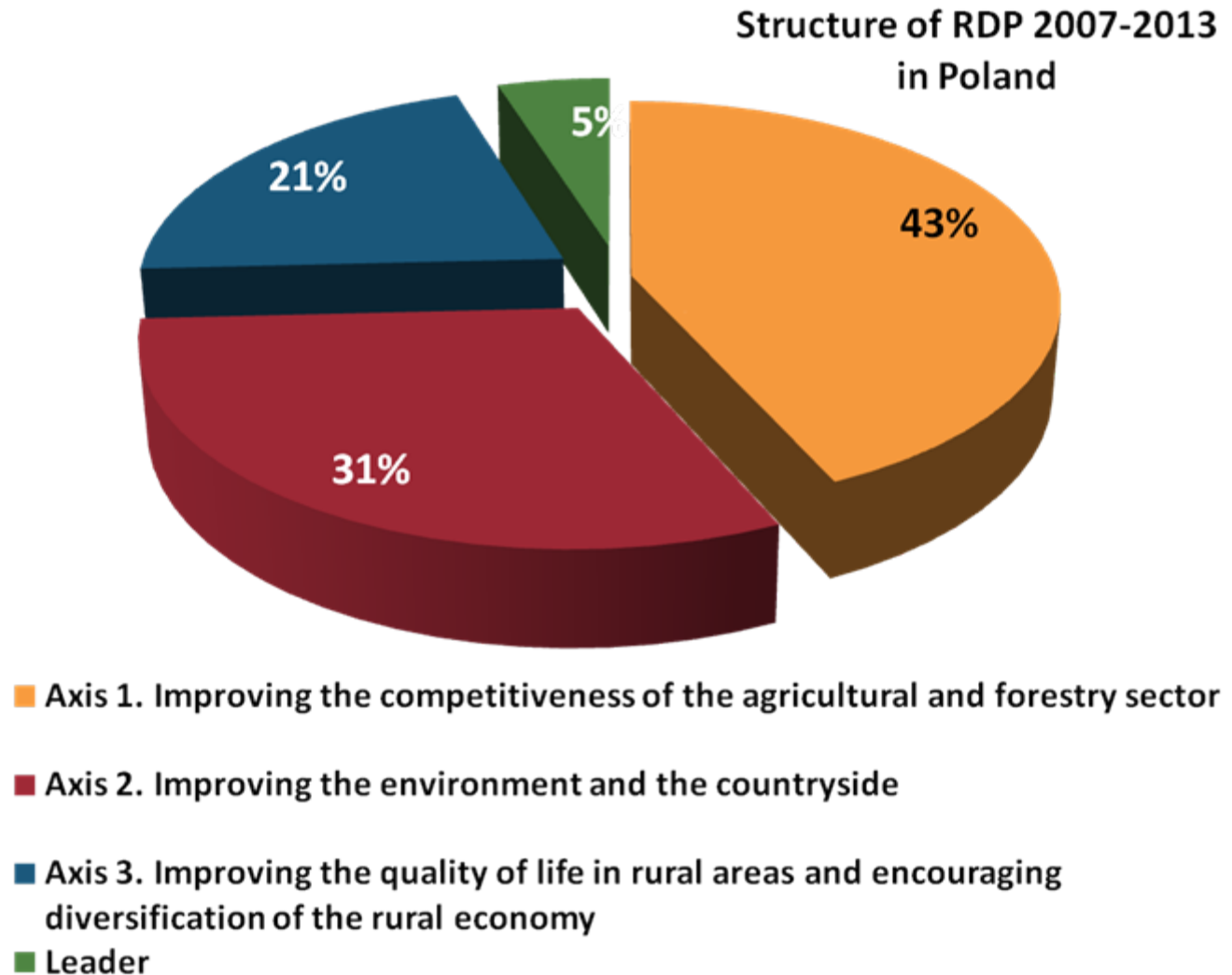


# Geographic structure of Poland's agri-food export in 2010



\* Austria, Belgium, Bulgaria, Cyprus, Denmark, Estonia, Finland, Greece, Spain, Ireland, Lithuania, Luxemburg, Latvia, Malta, Portugal, Romania, Slovenia, Sweden

# Support for rural development







**Dziękujemy za uwagę!**



**Ministerstwo Rolnictwa i Rozwoju Wsi**

THANK YOU!

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