Polish agri-food sector: basic facts

Ministry of Agriculture and Rural Development
Average farm size of family farms in selected regions of Poland:

- **Poland**: 10 ha
- **UE-15**: 18.7 ha

### Regions
- **Dolnośląskie**: 9.59
- **Kujawsko-pomorskie**: 12.32
- **Lubuskie**: 9.84
- **Lubelskie**: 6.73
- **Małopolskie**: 3.93
- **Mazowieckie**: 7.40
- **Opolskie**: 9.31
- **Podkarpackie**: 3.46
- **Podlaskie**: 11.07
- **Pomorskie**: 10.81
- **Świętokrzyskie**: 4.74
- **Śląskie**: 3.93
- **Warmińsko-mazurskie**: 17.07
- **Wielkopolskie**: 10.81
- **Zachodniopomorskie**: 16.22

The chart illustrates the average farm size in various regions, indicating the range of farm sizes in each area.
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)

Source: Central Statistical Office
Polish agriculture share in GDP & total employment

Agri employment EU27 average = 5.6%
Changes in the number of agricultural holdings*

1885.8 thousands of holdings  
1526.6 thousands of holdings – yearly decrease by 1.4 %

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

* Refers to holdings above 1 ha
Farms in Poland – farm area in farm size categories

Source: Central Statistical Office
Production - place of Poland in the EU

1st place: apples, triticale, blackcurrant

2nd place: rye, champignons, potatoes, bilberries

3rd place: rapeseed, sugar beets, butter, milk powder, poultry meat

4th place: wheat, cow’s milk
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)

Source: Central Statistical Office
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

Source: Institute of Agricultural and Food Economics-National Research Institute (IAFE-NRI), Ministry of Finance  2011* preliminary
Foreign trade in agri-food products

Balance of international trade in some agri-food products (EUR million)

- Meat & meat products: 1690
- Dairy products: 905
- Tobacco: 700
- Sugar & products: 488
- Other agri-food products: 220
- Cereals & products: 108
- Fruit & products: 63
- Vegetables & products: 18
- Livestock: -45
- Fish & products: -62
- Oil plants & products: -1050

Source: IAFE - NRI
Geographic structure of Poland’s agri-food export in 2010

Source: Ministry of Finance

* Austria, Belgium, Bulgaria, Cyprus, Denmark, Estonia, Finland, Greece, Spain, Ireland, Lithuania, Luxemburg, Latvia, Malta, Portugal, Romania, Slovenia, Sweden.
Support for rural development

Structure of RDP 2007-2013 in Poland

- Axis 1. Improving the competitiveness of the agricultural and forestry sector
- Axis 2. Improving the environment and the countryside
- Axis 3. Improving the quality of life in rural areas and encouraging diversification of the rural economy
- Leader
Dziękujemy za uwagę!

Ministerstwo Rolnictwa i Rozwoju Wsi
AGRICULTURE AND RURAL ECONOMY IN POLAND
Ministry of Agriculture and Rural Development

THANK YOU!

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