

PRZEMYSŁAW RATAJCZAK

AUTHORIZATION OF POLISH DAIRIES FOR TRADE IN EUROPEAN UNION ON GENERAL BACKGROUND OF SITUATION OF DAIRYING IN POLAND

*From Department of Food Management Economics
of The August Cieszkowski Agricultural University of Poznań*

ABSTRACT. Article presents condition of Polish creamery industry and degree of its fitting for requirements of common markets of European Union.

Key words: milk processing industry, creamery industry, largeness of production, foreign trade, directives of European Union

Introduction

Prospect of access of Poland to the European Union was simultaneously attractive and many fears evoking among Polish producers and processing plants of milk for several last years. Those fears mainly resulted from observation of the condition of milk farms as well as dairies, which was rather disappointing, and also adverse external conditions of milk sector's operations. Good analysis of situation in the Polish dairy industry in mid-90s of the last century was presented by **Krajewski** (1995). Among many barriers in development of the sector he mentions:

– dispersion of milk production, its high cost and lack of profitability, low quality of milk and strong seasonal character of its supply, difficulties in modernization of production subsequent to scarce amounts of financial funds on this purpose in rural farms,

– technological antiquatedness of dairies, their obsolete equipment and insufficient utilization of productive ability, and also lack of funds on equipment and technology modernization,

– breaking, existing earlier, associations between milk producers and dairy processing plants, as well as strong competition among dairies on local markets causing mutual destruction of markets of individual enterprises.

The purpose of the present work was to make analysis of Polish dairying's state of preparation for operation on markets of other states of the European Union half a year after approaching the organization, i.e. at the end of 2004. Investigative material is based on the data included in publications of Institute of Agricultural and Food Economics (Instytutu Ekonomiki Rolnictwa i Gospodarki Żywnościowej) and on internet page of General Veterinary Inspectorate (Główny Inspektorat Weterynarii).

Process of improving form of Polish dairying

Existing in Poland, considerable disintegration of creamery industry was a factor making difficult correction of financial, technical and market status of enterprises. Falling demand on milk and preserves in the 90s and considerable growth of creamery products import in this period did not promote reparation operations as well. Government considerably limited assistance (in the form of grants) for milk producers simultaneously.

Threat for existence of many processing plants and milk farms related to them became stimulus for taking operations for improvement of the situation. Structure of ownership of milk processing plants played important role in this case. In majority, they have form of cooperative teaming up milk producers. In difficult situation, wanting to help dairies, for a long period of time farmers accepted low prices in purchasing of milk, which allowed assigning financial funds for essential modernization works. In many cases farmers – co-operative members supplied cooperative's funds by contributing additional participation, accelerating reparation operations this way. Investments of foreign subjects, such as: Gervais Danone, Hochland, Raisio Group, Bongrain and Celia, and also famous producer of ice cream – Schoeller, accompanied investments of national producers. Some of decayed co-operative dairies were privatized, not necessarily with participation of foreign firms, which was connected with escalation of fund by new owners.

Important assistance was assumption of Polish creamery industry by Pre-Approaching Program of Assistance SAPARD, which had at disposal amounts approximated for 1 billion PLN in years 2001-2006 for support of development of processing plants and more than 0.6 billion PLN for support of development of milk producing farms (comp. **Stepulak et al.** 2000). Sector is supported by government also, through Restructuring and Modernization of Dairying Government Program. Besides, there were taken operations for affirmation of proper quality and health safety of milk and its preserves. In July 2002 minister of agriculture issued decree "in case of detailed veterinary conditions required at gaining, processing, storage and transport of milk and milky preserves" (**Rozporządzenie...** 2002) being almost equivalent of the Union Directive 92/46 (**Dyrektywa...** 1992). After accession of Poland to the European Union, on 1st May 2004, regulations of the Directive in our country are gradually becoming obligatory, from which small defections are admissible in transitional period till 2006.

On 20 April 2004, the Polish Parliament accepted act "on organization of market of milk and milky preserves" (**Ustawa...** 2004), among others, imposing on enterprises buying up milk, duty of enrolment for register led by President of Agency of Rural Market and defining other duties of in this. Registration allows controlling of the amounts produced and bought up milk, and also follow the whole way of milk between rural

farm of producer and recipients, that promotes oversight of maintenance of proper quality and sanitation. Act, intended to quantitative regulation of market of milk, was amended in March 2005 (*Ustawa...* 2005), which allowed to specify its regulations.

External elements of regulation of milk market in Poland are, so called national amounts of milk, calculated by the European Union and defining for its individual membership countries quantities of milk, which can be object of business trade in wholesale purchasing (wholesale amount) and in sale by producers directly to clients (amount of direct sale). National amount admitted for Poland fluctuate around 9 M. t (was kept at that level in the economic year 2004/05 and will be kept in 2005/06, then it will grow to near 9.4 M. t in each year from 2006/07 to 2014/15. In that period sum of national amounts of all EU countries aggregate from near 137.3 M. t to near 139.5 M. t). National amounts of milk (but especially proportions of their distribution between states – EU members) cause objection of milk producers and milk processors and they were object of intensive negotiations between Poland and EU.

Production of creamery articles in Poland and their international trade

Presented activities influence advantageously the creamery sector. Quality of fabricated milk products was gradually improved and their assortment was increased. Table 1 presents information of production size of selected creamery products in Poland.

Poland, in past as well as presently, is a significant producer of milk. Its participation in joint production of 25 European Union countries amounts to somewhat over 8%, which locates our country in leadership, right behind such states as: Germany, France and Great Britain.

Production of milk in Poland in years 2002-2004 was kept, with small fluctuations, at the level of approximately 12 M. t. Total size approximately of production in 10 countries of, the so-called, new Union, was formed in this period at level of approximately 22M. t, however global production of milk in 25 countries of present EU, in each year 2002 and 2004, amounted to 143.3 M. t, and it was a little higher in 2003, achieving 145.4 M. t. Information about production of milk was presented in Figure 1.

In spite of insignificant decrease of milk production in 2004, owing to limitation of expenditure of milk in farms change of structure of its utilization has followed, which is illustrated on Figure 2. A positive phenomenon was the fact that the extent of purchasing grew from somewhat over 7.4 M. t in 2002 to more than 7.5 M. t in next year and to almost 8.5 M. t in 2004. Participation of processing industry in distribution of national production of milk increased too, forming in next years at the level: 7.2 M. t in 2002, almost 7.4 M. t in 2003 and over 8.2 M. t in 2004. Those positive tendencies, which accompany, forced by processing plants, improvement of quality of milk supplied for dairies, allow having hope of further amelioration in the creamery industry.

However, it is worth noticing that the rate of foreign currency is a factor strongly affecting the form of the sector (especially Euro), because incomes from export of creamery products are an important component of many dairies incomes. So, fluctuations of rates of PLN can invert positive trends in development of milk processing industry periodically and in production of milk as well.

Table 1

Production of chosen creamery products in Poland in years 2002-2004 (Analizy... 2004)
Produkcja wybranych artykułów mleczarskich w Polsce w latach 2002-2004 (Analizy... 2004)

Product Produkt	2002	2003	2004* I-VI	2004 forecast szacunek
Drinking milk in general (M. l) Mleko płynne przetworzone ogółem (mln l)	1 849.3	1 992.3	985.4	2 130
Condensed milk and whey (thous. t) Mleko i serwatka zagęszczone (tys. t)	30.0	41.3	–	–
Whole milk powder (including milk for infants) (thous. t) Mleko w proszku pełne (łącznie z mlekiem dla niemowląt) (tys. t)	27.1	26.8	13.3	27
Skim milk powder (thous. t) Mleko w proszku odtuszczone (tys. t)	150.7	148.7	65.3	140
Ripened cheese (thous. t) Sery podpuszczkowe dojrzewające (tys. t)	183.4	195.2	107.7	215
Cottage cheese (thous. t) Sery twarogowe (tys. t)	185.2	186.5	144.6	293
Processed cheese (thous. t) Sery topione i smażone (tys. t)	49.0	61.9	29.5	65
Other cheese (thous. t) Sery pozostałe (tys. t)	35.7	70.5	–	–
Cream & sweet cream (M. l) Śmietana i śmietanka (mln l)	214.2	214.8	127.3	224
Butter (thous. t) Masło (tys. t)	153.9	167.0	80.0	175
Ice-cream (M. l) Lody (mln l)	174.2	181.1	–	185
Fermented milk** (M. l) Napoje mleczne** (mln l)	424.8	440.5	236.8	460
including yoghurts (M. l) w tym jogurty (mln l)	225.5	241.2	131.2	245
Casein (thous. t) Kazeina (tys. t)	5.3	3.4	0.0	0.06

*Data concern establishments employing 50 and more employees.

**Only from establishments of creamery industry.

*Dane dotyczą przedsiębiorstw zatrudniających 50 i więcej pracowników.

**Tylko z zakładów przemysłu mleczarskiego.

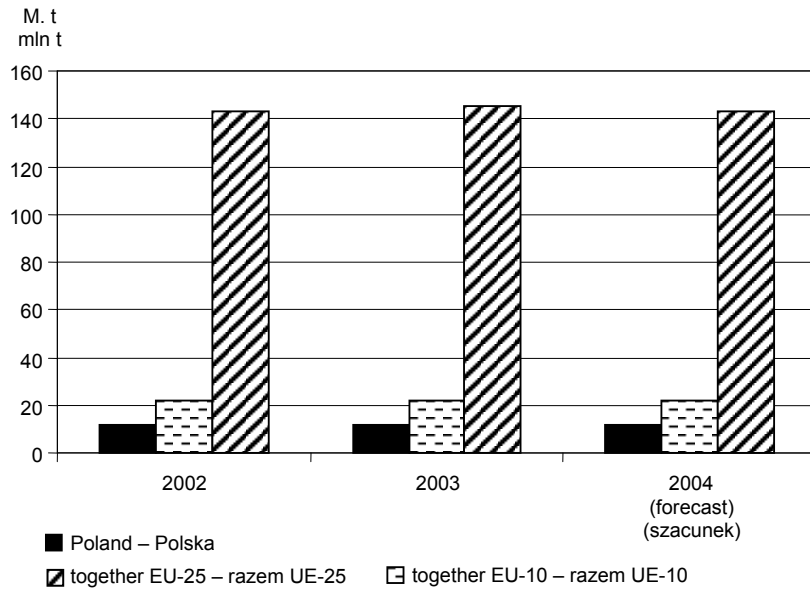


Fig. 1. Production of milk in European Union in years 2002-2004 (based on *Analizy...* 2004)

Ryc. 1. Produkcja mleka w Unii Europejskiej w latach 2002-2004 (na podstawie *Analizy...* 2004)

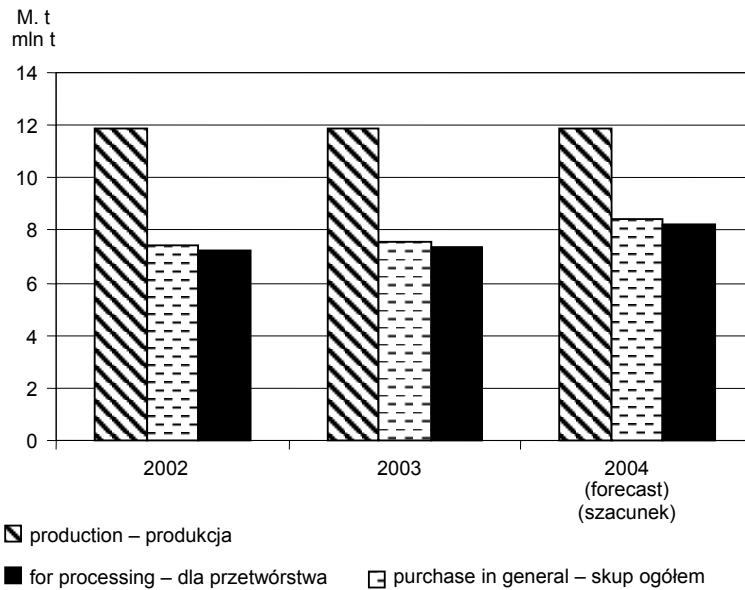


Fig. 2. Production and purchasing of milk in Poland in years 2002-2004 (based on *Analizy...* 2004)

Ryc. 2. Produkcja i skup mleka w Polsce w latach 2002-2004 (na podstawie *Analizy...* 2004)

Table 2

Production of basic creamery products in Poland and in European Union (thous. t)
(on the basis of: Analizy... 2004)

Produkcja podstawowych wyrobów mleczarskich w Polsce i w Unii Europejskiej (tys. t)
(na podstawie: Analizy... 2004)

Product Produkt	European Union Unia Europejska		Poland Polska		Poland/EU (%) Polska/UE (%)	
	2002	2003	2002	2003	2002	2003
Drinking milk Mleko płynne	29 406	29 625	1 905	2 052	6.5	6.9
Butter – Masło	1 706	1 724	154	167	9.0	9.7
Cheese – Sery	6 513	6 569	453	514	7.0	7.8
Whole milk powder Mleko w proszku pełne	859	869	27	27	3.1	3.1
Skim milk powder Mleko w proszku odłuszczone	1 083	1 057	151	149	13.9	14.1

Information production size of chosen creamery products in the European Union and Poland was presented in Table 2. It is possible to conclude from it that Poland is an important producer of this group of products, especially skimmed milk powder and butter, but also cheese and milk.

As already said, an important part of many dairies activity is export of their products. Figure 3 presents balance of foreign trade turn of creamery products. Presented on it data

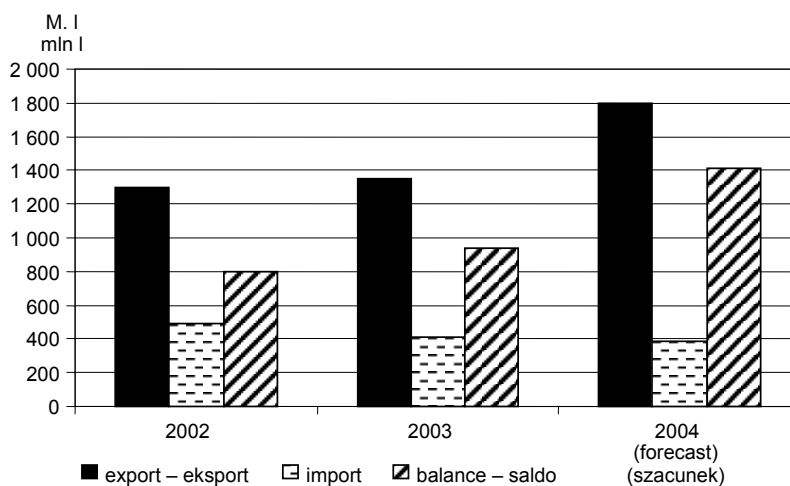


Fig. 3. Foreign trade of Polish creamery products turnover in equivalent of milk (based on *Analizy... 2004*)

Ryc. 3. Obroty handlu zagranicznego wyrobami mleczarskimi w ekwiwalencie mleka (na podstawie *Analizy... 2004*)

data indicates that in recent years export was constantly and faster growing, and import was simultaneously decreasing as a result of Poland becoming a more important exporter of milk products. Positive balance of these products' foreign trade (in conversion to milk equivalent) was increasing in next years from 800 M. l in 2002 to over 1400 M. l in 2004. However, this trend can be a little decreasing because of the first months of current year drop of export profitability which followed, as a result of reinforcement of zloty exchange rate in comparison to the last year.

On Figure 4 is presented information concerning assortment structure of Polish dairy products foreign trade in the period of January – June 2003 and 2004. It is possible to ascertain on this base, that predominant and approximately constant parts of these products export are milk powder (about 35%) and cheese (about 30%). Export of milk drinks is formed at a nearly constant level of 5.5%. There were small changes in export of casein, which has rather considerable participation in general pool of product (about 9-11%).

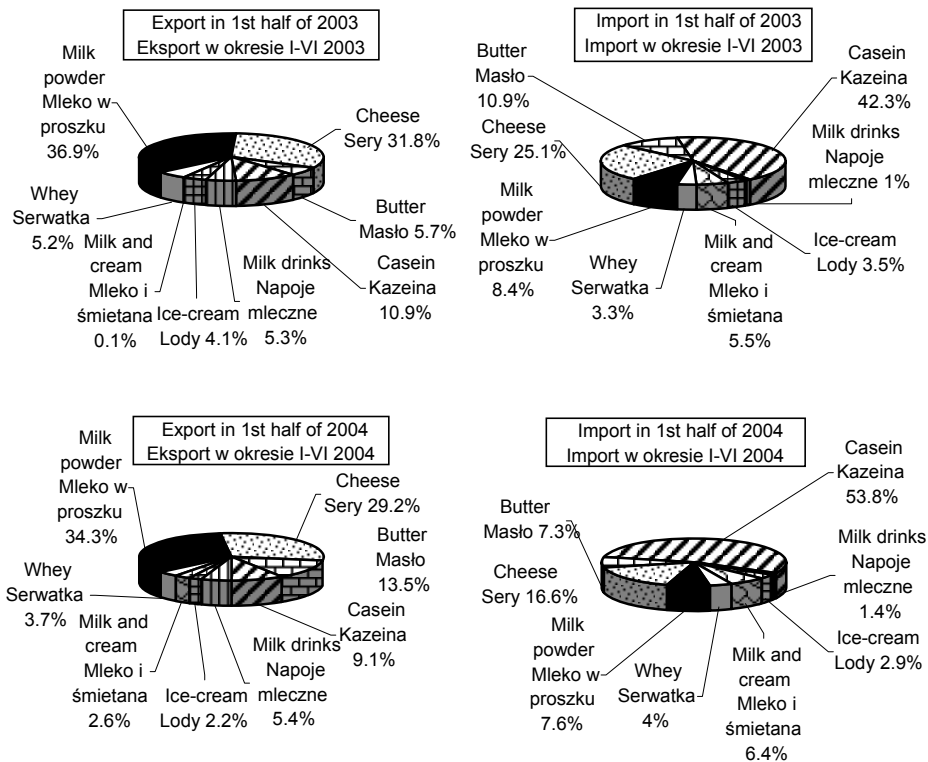


Fig. 4. Freight structure of Polish creamery products foreign trade (based on *Analizy...* 2004)
 Ryc. 4. Struktura towarowa polskiego handlu zagranicznego wyrobami mleczarskimi (na podstawie *Analizy...* 2004)

It is interesting that a considerable enlargement of participation of butter export in first half of 2004 took place in comparison to similar period of 2003, and also milk and cream, related surely with widest opening of the Union market in the year of our acces-

sion and with lower level of milk products prices in Poland. In the structure of dairy products import to Poland, there was noticed predominant proportion of casein, which grew up from over 40% in the first half of 2003 to almost 55% in the same period of 2004. Remembering that, in height of turn measured in equivalent of milk (Fig. 3), export was in 2003 over triple, and in 2004 quadruple bigger than import, it is possible to ascertain, that casein imported to Poland was reexported, which allowed profit from advantageous difference of prices (this product is imported from CIS countries, where its prices are lower than in West Europe, where we export it). In the discussed period participation in import cheese (from 25.1% to 16.6%) and butter (from 10.9% to 7.3%) was constantly reducing.

Figure 5 presents geographical structure of Polish export and import of dairy products. In years 2003-2004 geographical structure of dairy products export from Poland was distinctly changed. In 2004 target of nearly half of these products export were so-called old European Union countries, while in the previous year their participation in import from Poland was 50% half as small. At the constant level of less than 9% was fixed proportion of export to Commonwealth of Independent States, somewhat decreased participation in export to countries, which accessed the European Union in May 2004.

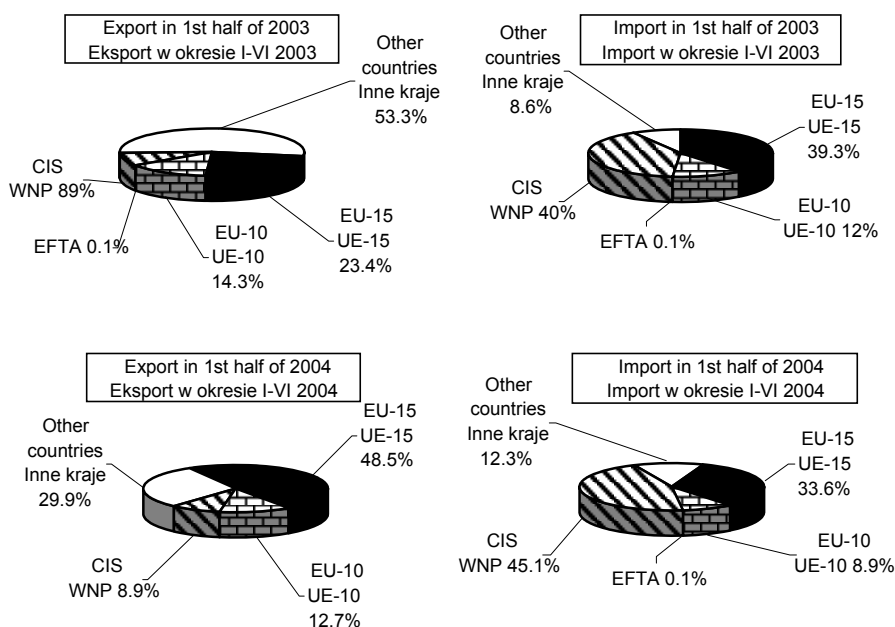


Fig. 5. Geographic structure of Polish creamery products foreign trade (based on *Analizy... 2004*)

Ryc. 5. Struktura geograficzna polskiego handlu zagranicznego wyrobami mleczarskimi (na podstawie *Analizy... 2004*)

Distinctly decreased importance of other countries. In the first half of 2003 they had predominant position in structure of dairy products export from Poland, with participation greater than 50%. In the next year their proportion became reduced to less than 30%.

Somewhat smaller changes are occurring in structure of dairy products import to Poland. Predominant position have countries belonging to Commonwealth of Independent States with participation of 40-45%, a little less was imported to Poland from 15 countries of “old” Union (35-40%). Dairy products import from the so-called new Union has participation of about 10%. The same proportion has import from other countries.

Adaptation of Polish creamery plants for standards of the European Union

Polish accession to the European Union allowed Polish producers of dairy products to gain admittance to common market. However, it is conditioned by compliance by them with sanitary, veterinary and technical requirements of the European Union.

The basic document qualifying terms of obtaining authorizations for milk products trade in the European Union is, above mentioned, Council Directive 92/46/EEC of June the 16 1992 defining the health rules for the production and placing on the market of raw milk, heat-treated milk and milk-based products (**Dyrektywa... 1992**). Range of activities controlled by regulations of the directive is presented in Figure 6. Directive

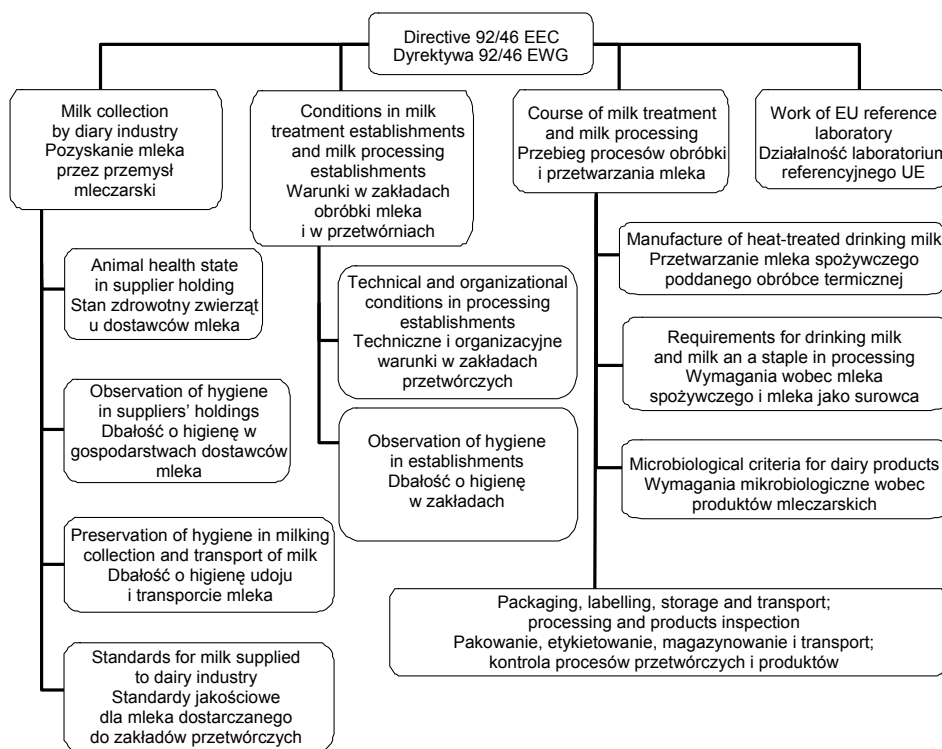


Fig. 6. Activities regulated by regulations of Council Directive 92/46/EEC (**Dyrektywa... 1992**)
Ryc. 6. Działania objęte przepisami Dyrektywy Rady 92/46 EWG (**Dyrektywa... 1992**)

includes its range of obligation all the chain of supply of creamery products, beginning from health of cows (or other milk animals), through sanitation in rural farms and in processing plants, up to packaging, labelling and transport of products and also laboratory inspection over quality of milk and milk products. Supervision of compliance by milk producers and manufacturers of milk with requirements of directive in Poland has been charged to General Veterinary Inspectorate.

Proper operations had been started in our country long before the official accession to the European Union. In 2000 inspectors of veterinary services performed classification of dairy establishments, including each of them for one category of four, depending on necessity and possibility of adaptation of conducted activities conditions. Dairies, which already then had complied with requirements included in the Union regulations, had been granted "A" category. Establishments having a chance to adapt to these requirements in the future were divided into two categories: "B1" – including dairies capable of complying with EU requirements till the day of Polish accession, and "B2" – dairies, which could comply with them, but under the stipulation that adaptable period were to be elongated with some transitional period. In group of establishments included for "C" category were placed the dairies, in which failures in quality and production conditions defined them as completely impossible to adapt to EU requirements. According to **Kozłowski** (2002), in December 2001 in Poland there were 30 establishments in "A" category, 186 – in "B1" category, 139 – in "B2" category and 46 establishments in "C" category. Therefore, 401 dairies were submitted to categorization. This number distinctly confirms high degree of disintegration of Polish creamery industry.

Authors of the present work carried analysis of Polish dairies authorizations to introduction of their products to trade on EU market, obtained by establishments till the end of December 2004. In general, 216 creamery factories obtained these authorizations. Information about authorized dairies were supplemented with data about dairies, which gained possibility of adaptation to Council Directive 92/46/EEC (**Dyrektywa...** 1992) in transitional period. In the day of Polish accession to European Union, i.e. May 1, 2004, on the list of dairies in transitional period for structural adaptation were 144 establishments, among them 111 were cooperatives. In the case of four plants this transitional period ended in October 30, 2004, but till the end of this year authorizations were obtained by only two of them. Besides, from among dairies from the list, authorizations gained one, with transitional period elapsing in the end of January, 2005. Among above mentioned three establishments there were two cooperatives and one unlimited partnership. Remaining dairies have transitional periods passing away in deadlines from the end of January, 2005 to the end of December, 2006 and in period of research no plant obtained authorizations. Table 3 includes information of numerical force, distribution and ownership structure of creamery plants. Analysing the data it is noticeable, that in some provinces (dolnośląskie, kujawsko-pomorskie, łódzkie, mazowieckie, opolskie, podlaskie, warmińsko-mazurskie) process of dairies adaptation to requirements of Directive is considerably advanced, while in other provinces (lubuskie, małopolskie, świętokrzyskie, zachodniopomorskie) there still remains much to be done. Secondly, the process of adaptation is usually realized less efficiently in creamery cooperatives than in dairies with other ownership (surely it results partially from the fact, that in Poland non-cooperative creamery plants are in great part new establishments, so there were proper requirements taken into consideration while creating them). Information included in the Table also shows, that the adaptation process will not cause important decrease of disintegration of dairying production potential.

Table 3

Number of Polish dairies authorized to trade their products on European Union market and being in transitional adaptation period (state for end of 2004)
(on the data from General Veterinary Inspectorate)

Liczba mleczarni w Polsce uprawnionych do wprowadzania produktów na rynek Unii Europejskiej i będących w przejściowym okresie dostosowawczym (stan na koniec 2004 roku)
(na podstawie danych Głównego Inspektoratu Weterynarii)

Province Województwo	Authorized establishments Zakłady uprawnione				Establishments in transitional period Zakłady w okresie przejściowym				Altogether authorized and awaiting Razem uprawnione i oczekujące
	in general ogółem	co- opera- tives spół- dzielnie	compa- nies spółki	others inne	in general ogółem	co- opera- tives spół- dzielnie	compa- nies spółki	others inne	
Dolnośląskie	13	7	4	2	7	7	–	–	20
Kujawsko- pomorskie	17	6	4	7	7	4	2	1	24
Lubelskie	11	9	1	1	10	9	–	1	21
Lubuskie	3	1	2	0	7	5	1	1	10
Łódzkie	21	12	4	5	10	8	1	1	31
Małopolskie	9	4	2	3	15	10	2	3	24
Mazowieckie	29	10	16	3	9	7	2	–	38
Opolskie	16	6	7	3	3	2	1	–	19
Podkarpackie	8	3	4	1	4	4	–	–	12
Podlaskie	15	10	5	0	4	4	–	–	19
Pomorskie	9	6	3	0	4	2	–	2	13
Śląskie	8	3	4	1	16	14	1	1	24
Świętokrzyskie	3	2	1	0	8	8	–	–	11
Warmińsko- mazurskie	14	6	5	3	7	6	1	–	21
Wielkopolskie	36	19	12	5	23	15	3	5	59
Zachodniopo- morskie	4	2	2	0	7	5	1	1	11
In general Ogółem	216	106	76	34	141	110	15	16	357

Figures 7, 8, 9 are an illustration of geographical distribution of creamery establishments. They present, in turn: general distribution of dairies in individual provinces, and also according to ownership and production capacity. Most of them are in provinces: wielkopolskie – 36, mazowieckie – 29 and łódzkie – 21. Whereas the fewest in provinces: lubuskie – 3, świętokrzyskie – also 3 and zachodniopomorskie – 4. It's noticeable, that predominate provinces from north-east, central and south-west Poland. It more or less covers with geographic distribution of rural farms being largest milk producers, though not quite. For example, production of milk achieves highest level in north-east and center of the country, meanwhile most of all processing plants are in central, west and south-west Poland. Therefore, possibilities of alleviating of raw-milk requirements are discriminated, which is reflected in prices of milk differentiation.

Among 106 creamery cooperatives, owning EU authorizations, most of them – 19 are localized in wielkopolskie province. In this province, and also in łódzkie province cooperatives have distinct numerical superiority over other ownership forms. It is characteristic that the mazowieckie province is the only province in which considerably predominate dairies in the form of companies.



Fig. 7. Distribution in Polish of dairies entitled their products to European Union market (based on data from General Veterinary Inspectorate)

Ryc. 7. Rozmieszczenie zakładów mleczarskich uprawnionych do wprowadzania swych produktów na rynek Unii Europejskiej (na podstawie danych Głównego Inspektoratu Weterynarii)



Fig. 8. Distribution of entitled dairies in Poland according to ownership: a – co-operatives (106), b – companies (76), c – others (34) (based on data from General Veterinary Inspectorate)

Ryc. 8. Rozmieszczenie uprawnionych zakładów mleczarskich w zależności od ich formy własnościowo-prawnej: a – spółdzielnie (106), b – spółki (76), c – inne (34) (na podstawie danych Głównego Inspektoratu Weterynarii)

Figure 9, which takes into consideration production capacity of creamery establishments, indicates that a considerable majority of them are relatively small dairies. Plants included in first partition of production capacity (below 500 thous. l of milk processed within a day) quantitatively prevail in all provinces. It additionally confirms the opinion about disintegration of Polish milk processing industry. Dairies belonging to partition of highest production capacity are situated in only five provinces.

Creamery establishments obtain authorizations from General Veterinary Inspectorate separately for each of their products, which they are going to export to common market of the European Union. Table 4 presents information about numerical force of dairies, which gained authorizations for introduction on to the European Union market individual groups of milky products or for conducting some kind of activities.

As it appears from the Table, leading establishments producing two, most basic in Polish diet, groups of milky products – drinking milk and cottage cheese. Also considerable is numerical force of dairies authorized to production of other, culinary important creamery products – butter, cream and sweet cream, and also fermented milk, especially popular among children and young people.



Fig. 9. Distribution of entitled dairies in Poland according to production capacity: a – < 500 000 l a day (192), b – 500 000–2 000 000 l a day (18), c – > 2 000 000 l a day (6) (based on data from General Veterinary Inspectorate)

Ryc. 9. Rozmieszczenie zakładów mleczarskich w zależności od ich zdolności produkcyjnej: a – < 500 000 l na dobę (192), b – 500 000–2 000 000 l na dobę (18), c – 2 000 000 l na dobę (6) (na podstawie danych Głównego Inspektoratu Weterynarii)

Degree of specialization of Polish dairies is presented in Figure 10. Diagram placed on it presents numerical force of Polish creamery establishments depending on the number of obtained authorizations for export on EU market.

Most of all establishments – 59, obtained authorization for export of one assortment of products. 33 establishments have two authorizations. The same number of dairies obtained seven authorizations. More than 10 establishments have three-six authorizations. Comparable amount of factories gained six authorizations. The leader in respect of quantity of obtained authorizations is one establishment which has 21. So, individual dairies are, as a rule, rather specialized, at the same time specialization of many establishments is limited in production of most basic dairy products.

Recapitulating the considerations carried out in the present work, it is possible to ascertain, that Polish dairy sector, in spite of substantial technical and organizational lateness and low degree of concentration of production, manages well in conditions of the Union market. Every two of three establishments obtained authorizations for trade on EU market, and it is possible to guess, that big part of dairies enjoying transitional

Table 4

Number of establishments in Poland authorized to trade individual groups of creamery products on European Union market (state for end of 2004) (on data from General Veterinary Inspectorate)

Liczba zakładów w Polsce uprawnionych do wprowadzania poszczególnych grup produktów mleczarskich na rynek Unii Europejskiej (stan na koniec 2004 roku) (na podstawie danych Głównego Inspektoratu Weterynarii)

Product or kind of activity Produkt lub rodzaj działalności	Product or activity code Kod produktu lub działalności	Number of authorized establishments Liczba uprawnionych zakładów
1	2	3
Cottage cheese Sery twarogowe niedojrzewające	04	113
Drinking milk Mleko spożywcze	01	107
Cream Śmietana	10	94
Fermented milk Napoje mleczne fermentowane	02	91
Butter Masło	08	88
Sweet cream Śmietanka	11	87
Ripened cheese Sery podpuszczkowe dojrzewające	03	69
Milk powder Mleko w proszku	06	46
Processed cheese Sery topione	05	41
Transport and purchasing of raw milk Zbieranie i transport mleka surowego	24	40
Milk deserts Desery mleczne	15	30
Mixtures of butter and vegetable oils Tłuszcze do smarowania (masło + tłuszcz roślinny)	09	21
Whey or butter milk powder Serwatka lub maślanka w proszku	16	18
Milk based ice-cream Lody na bazie mleka	20	17
Whole milk protein concentrates Koncentraty i białkowe mieszanki mleczne	17	11
Condensed milk Mleko zagęszczane	07	10

Table 4 – cont.

1	2	3
Whey concentrates Koncentrat serwatki	22	10
Soft cheese type of mozzarella Ser typu mozzarella	14	9
Storage (ripening) and rebaggage of milk products Konfekcjonowanie i przechowywanie (dojrzewanie) produktów mlecznych	26	6
Casein and caseinates Kazeina spożywcza i kazeiniany	12	5
Milk not intended for human consumption Mleko nie przeznaczone do konsumpcji przez ludzi	23	4
Butter oil Bezwodny tłuszcz mleczny	13	3
Infant food and dietary food Produkty mleczne specjalnego przeznaczenia	25	3
Cheese powder Proszek serowy	18	2
Yoghurt powder Proszek jogurtowy	19	2
Ice-cakes Torty i ciasta lodowe	21	1

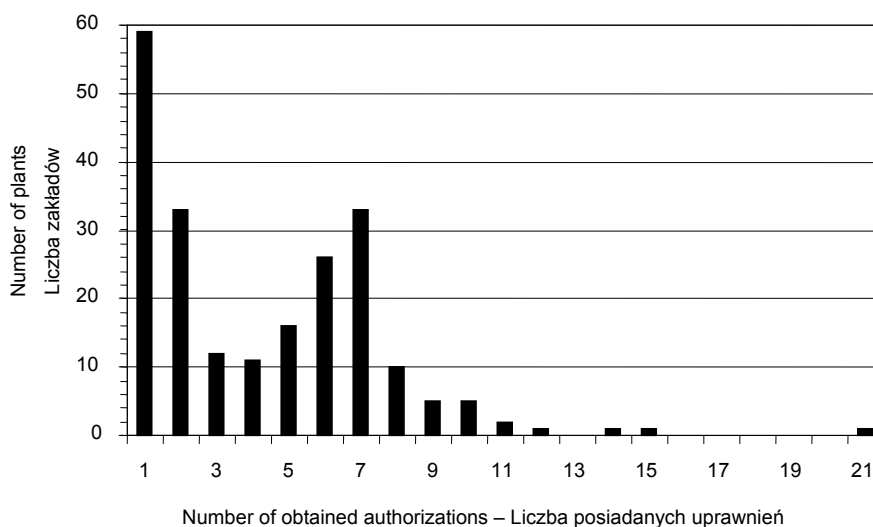


Fig. 10. Numerical force of creamery establishments in Poland according to number of obtained authorizations (based on data from General Veterinary Inspectorate)
Ryc. 10. Liczebność zakładów mleczarskich w Polsce w zależności od liczby posiadanych uprawnień (na podstawie danych Głównego Inspektoratu Weterynarii)

adjusting periods will join this group too. Dairies, which will fail to gain the Union authorizations, will be surely closed down. However, it is necessary to hope that liquidations will be often proceeded through take-overs by other creamery establishments, which will contribute to growth of concentration degree and thereby to reinforcement of the sector.

Conclusions

1. Polish creamery industry is strongly fragmented, which is a factor hindering the competition on the European Union market. Establishments are very numerous, and production capacities of most of them are, in comparison with leading world dairies, at the level of medium and small plants.

2. However, processing of milk in Poland is developing, which confirms growing rate of purchasing of milk for processing purposes relatively to its size of production.

3. Among states of the European Union, Poland is a significant producer of milky products. Participation of our country in the case of basic creamery products groups amounts to (according to assortment) between 5% and 15%.

4. Poland is a net exporter of creamery products. Cheese and skimmed milk powder predominate in export and casein, which is reexported by our country, predominates in import.

5. The biggest volume of milky products is exported to 15 states of "old" European Union, and main suppliers in import of these products are CIS countries.

6. About 1/3 of Polish dairies have not managed to obtain authorizations for leading their products into common market before the day of the accession of Poland to the European Union.

7. Most of the establishments possessing such authorizations operate in provinces from south-west, central and north-east parts of Poland, which does not correlate completely with geographic distribution of milk production.

8. Dynamism of technical and organizational solutions adaptation in creamery cooperatives is lower, than in case of dairy sector establishments with other form of ownership.

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UPRAWNIENIA POLSKICH ZAKŁADÓW MLECZARSKICH DO HANDLU W UNII EUROPEJSKIEJ NA TLE OGÓLNEJ SYTUACJI MLECZARSTWA W POLSCE

S t r e s z c z e n i e

W pracy przedstawiono wyniki analizy stanu polskiego przemysłu mleczarskiego pod kątem jego przystosowania do wymogów prowadzenia działalności na rynku Unii Europejskiej. Scharakteryzowano relację produkcji mleka i podstawowych produktów mleczarskich w Polsce i w UE. Dokonano charakterystyki struktury towarowej i geograficznej zagranicznych obrotów handlowych Polski wyrobami z mleka. Przedstawiono liczbę i rozmieszczenie mleczarni posiadających uprawnienia do wprowadzania swoich produktów na obszar innych państw Unii Europejskiej oraz scharakteryzowano te uprawnienia w ujęciu przedmiotowym.