

DEVELOPMENT OF POLISH FOREIGN TRADE IN AGRI-FOOD PRODUCTS AFTER POLAND'S ACCESSION TO THE EU

Maria Magdalena Grzelak, Elżbieta Roszko-Wójtowicz
University of Lodz

Abstract. Trends in foreign trade have a huge impact on the country's position in the international market. Poland's accession to the EU was a breakthrough for the Polish foreign trade. This paper analyses trends in the Polish foreign trade in agri-food products in the years 2004–2014, after joining the European Single Market (ESM) and adopting the rules of Common Agricultural Policy (CAP). Since 2004, export growth rate in Polish agri-food products has been faster than the import one and Poland turned from an agricultural net importer to a net exporter. In the paper the value and the balance of trade in agri-food products were analysed. Further, the geographical structure of Poland's foreign trade broken-down into different groups of countries was discussed. The analysis showed that agricultural and food sector improved a lot using the opportunities offered by the accession to the EU. Development of the Polish agricultural trade proves that international competitiveness of Polish agriculture in the years 2004–2014 improved.

Key words: foreign trade, competitiveness of Polish agri-food products, CAP

INTRODUCTION

Polish integration with EU structures was preceded with several years of economic and legal preparations. They were groundbreaking events as they transformed the rules of national economy as well as led to the creation of a new social and economic quality [Bałtowski and Miszewski 2007]. First and foremost, the changes resulted from implementing by Poland new regulations in the field of economic policy, including agriculture and trade, opening the market and consequently accepting the free flow of people, goods,

Corresponding author: Elżbieta Roszko-Wójtowicz, University of Lodz, Faculty of Economics and Sociology, Department of Economic and Social Statistics, Rewolucji 1905 r. 41, 90-214 Łódź, Poland, e-mail: eroszko33@gmail.com

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services and capital. On the one hand, Poland has become a large and important market outlet for EU products that, at the same time, presented a strong competition and threat for domestic production [Firlej 2008, Duczkowska-Malysz and Szymecka 2009, Urban et al. 2010]. On the other hand, Poland benefited from direct foreign investment, structural funds, policy coherence and Common Agricultural Policy (CAP), which led to economical upgrade [Rowiński and Bułkowska 2012].

The period of preparation for Poland's integration with EU structures and then full EU membership was the time of dramatic changes in Polish foreign trade. The most distinctive and positive feature of the total Polish trade transformation was Polish foreign trade exchange is agri-food sector.

Agri-food products are one of few commodities that maintain a positive trade balance. Figures for impressive positive trade balance result from a faster growth of export over import. Poland has transformed from an importer, as it was the case up to 2002, into a food exporter and is constantly improving its importance on the global market.

The main objective of the article is evaluating foreign trade situation in agri-food section throughout the period of 2004–2014. It comprises two principles:

- Presenting the level, structure and changes in time in food and agriculture foreign trade sector.
- Discussing the underpinnings of the Polish foreign trade sector in food and agriculture products, with emphasis on size and meaning of export.

The direct inspiration for raising the subject is a common opinion that food is the basic Polish export commodity. For this reason, the government should give priority to actions aimed at boosting competitiveness and recognizability of Polish food abroad.

The article presents the situation of Polish agri-food trade while Poland's integration with European Union structures. Therefore, the main factors underlying development of agri-food foreign trade sector are shown, especially in the years 2004–2014. According to the data, export is an important element determining development of Poland's foreign trade in agri-food sector

Authors pointed to problems they considered crucial for the growth of Polish foreign trade in the agri-food sector basing on the analysis of statistical data, own experience, observations of Polish and European reality as well as literature studies.

The main source of empirical data were statistical data from Central Statistical Office (GUS), research outcomes by Institute of Agricultural and Food Economics – National Research Institute (IERiGŻ-PIB) and reports and reference materials from the Ministry of Agriculture and Rural Development (MRiRW) and Agricultural Market Agency (ARR).

AGRI-FOOD SECTOR – EUROPEAN TENDENCIES

In 2014, Poland became a fully-fledged member of EU structures. Joining the European Single Market (ESM) included adopting the rules of Common Agricultural Policy (CAP). European Union agriculture policy fulfills mainly the following objectives: [CAP post-2013..., 2015]: (i) providing sufficient food quantities for EU citizens; (ii) securing safe food; (iii) preventing farmers from excessive price fluctuation and market crisis; (iv) assistance to farmers, aimed at investment activity and modernization of farms;

(v) supporting properly functioning rural communities; (vi) creating new as well as maintaining existing jobs in the food sector; (vii) environmental protection and animal welfare standards.

Agriculture policy is the most elaborate and most expensive policy of the European Union. Common Agriculture Policy expenses in the EU in 2013 reached 59,640 EUR [CAP post-2013..., 2015], which makes 39% of the total EU expenditure. Despite the decreasing tendency, spending on agriculture still absorbs most of EU budget [CAP post-2013..., 2015]. Currently, agriculture in developed countries generates only from 1 to 4% of GDP. The share of agricultural gross value added in GDP reached 1.6% in 2013 in well-developed countries, and its share in employment is estimated at 2–6% (average value for well-developed countries was 3.5% in 2012 (WorldBank database). Nevertheless, agriculture receives wide interest from public opinion and governments. This results from an obvious fact that agriculture provides the most important good, which is food.

Gross value added at basic prices in EU agriculture reached 158,742 million EUR in 2014, being over 2% lower than in 2013, and 1.1% higher than in 2012 (Eurostat, Economic Accounts for Agriculture). Over the analysed period, the value of agricultural production at basic prices in UE, is growing in most member states. Production value at basic price of agricultural goods output¹ in 2014 was 373 billion EUR (at current prices) and at the same time was by 21.4% higher than in 2004. The only exception were Greece and Croatia which saw decreases.

It is mainly the new member states that observed the biggest growth in agricultural production value in the EU in comparison to 2004, take Latvia (71.5%), Estonia (68.2%), Lithuania (61%), Poland (53.2%) for example, but also the UK (51.3%).

THE MEANING OF AGRI-FOOD SECTOR FOR POLISH FOREIGN TRADE

The value of trade exchange of Polish agri-food sector abroad has been constantly growing since the moment of Poland's accession to the EU. There was a dynamic growth of turnover both in export and import. The value of export was growing by 4.1%, and of import by 3.9% on average every year. Throughout the analysed period of 2004–2014, Polish trade exchange with other countries can be recognized by a growing share of agri-food goods value in the total value of foreign trade (Fig. 1). Simultaneously, the meaning of agri-food sector for the Polish foreign trade has been growing.

In the year of Poland's EU accession, agri-food export made 8.8% of the total Polish export. The share was growing over the next years reaching its top rate of 13.2% in 2013. Similar tendencies could be observed in import, however, it is worth noticing that the total share of agri-food products in import was much lower than in export. In comparison, the share of agri-food products import in the total import value reached 6.2% in 2004, as opposed to 8.8% for export. The meaning of agri-food sector in Polish foreign trade in 2014 was similar to that of the record-beating value in 2013.

¹ Production value at current producer price of agricultural goods output in 2014 was equal to 369 billion EUR (see http://ec.europa.eu/agriculture/statistics/factsheets/pdf/eu_en.pdf).

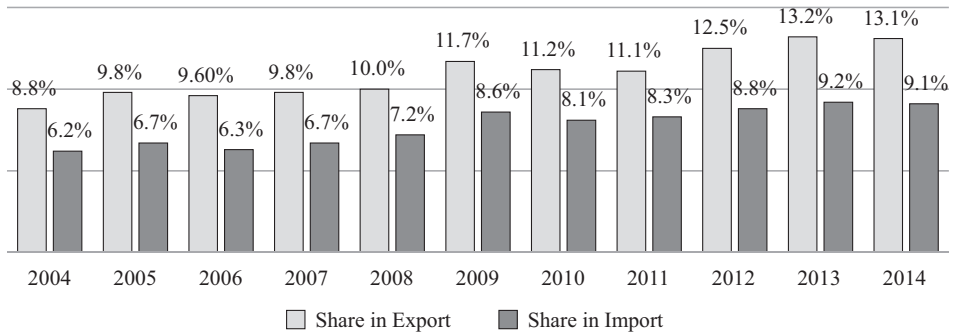


Fig. 1. Share of agri-food products in the total value of Polish export and import in the years 2004–2014

Source: Own analysis based on ARR (Agricultural Market Agency) data and *Agri-food foreign trade...* [2015].

One cannot forget that agri-food sector is one of very few branches of Polish economy that has positive trade balance. Up to 2002, trade balance for Polish foreign trade in agri-food sector was negative. Positive trade balance was first recorded in 2003 and reached 0.5 billion EUR. Substantial growth of the balance results from a faster growth of export over import in agri-food sector (Fig. 2).

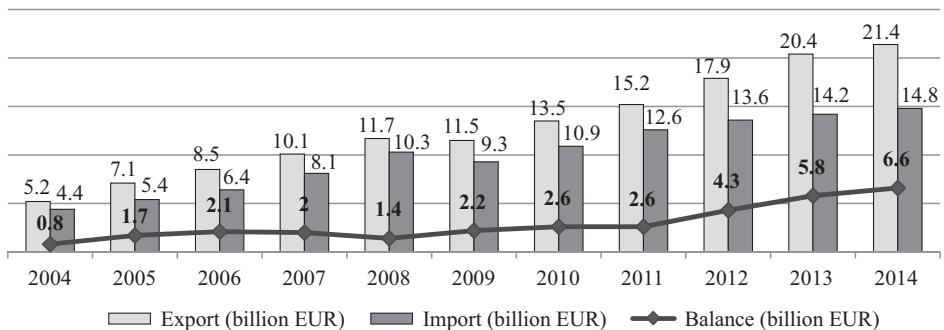


Fig. 2. Foreign trade of agri-food products in the years 2004–2014

Source: as for Figure 1.

As far as figures are concerned, the balance rose from 0.8 billion EUR in 2004 to the record level of 6.6 billion EUR in 2014. Dynamics of the balance growth is impressive because in the years 2004–2014 positive trade balance in agri-food goods was rising by 23% per year on average. The biggest balance growth came in 2005, which is one year after EU accession. In comparison to the former year, in 2005 the positive trade balance in agri-food goods went up by 113%, whereas in the following year the dynamics fell down to 24%. Unfortunately, in 2007 for the first time since entering the EU the dynamics of agri-food export was lower than figures for import. Positive trade balance in agri-food goods decreased from 2.1 to 2 billion EUR, though it still remained four times higher than before Poland's integration with the EU. The world financial crisis and resulting

economic crisis which appeared in several countries led to the decrease of positive trade balance in agri-food goods in 2009. The balance was 1.4 billion EUR in 2009 which meant a 30% decrease in comparison to the previous year. Fortunately, the problems appeared to be temporary since the following years saw a fast growth for the positive trade balance in agri-food goods (Fig. 1).

It should be emphasized, that the surplus in agri-food trade significantly reduces the Polish foreign trade deficit. In the analyzed period of 2004–2014 the value of trade in agri-food sector fell down more than four times and in case of import – it decreased three times. The positive changes brought about the surplus of trade in agri-food commodities, that reached unprecedented level of 6.6 billion EUR in 2014 as opposed to 5.8 billion EUR in 2013 (Fig. 2). Generally, in Polish foreign trade, for several years there has been a steady tendency for faster import rather than export growth. As a result, 2014 deficit grew to 2.45 billion PLN, which is an over 23% rise when compared to the previous year. Therefore, in 2014 positive trade balance in agri-food goods exceeded the total deficit value in trade almost three times.

Positive trade balance has also got a positive influence on the economic situation in agriculture and food industry due the fact that one third if the production is exported. Foreign agri-food trade is dominated by food products. In 2014 export in agri-food sector made 82% of the total export. The meaning of export for the development of Polish food industry is confirmed by more than double growth of its share in the sold food industry production. The index rose from 16.9% in 2004 to over 34% in 2014 (compare Fig. 3).

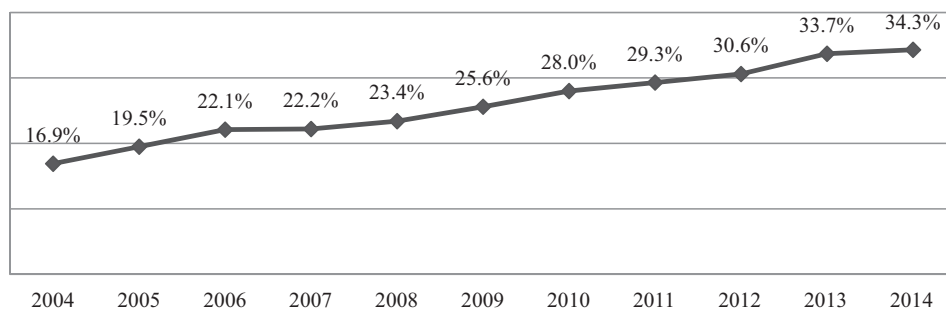


Fig. 3. Share of exports in the value of sold production of food industry in the years 2004–2014

Source: Own analysis based on Central Statistical Office database and Mroczek [2014].

Since 2004, over half the growth of food industry production has been located in foreign markets, therefore, but for export growth being a positive effect of EU accession and competitiveness, Polish food industry production would not be 48%, but only 24%. A deeper analysis of production and economic situation of food industry lets us draw a conclusion that Polish food industry turned out to be a success in EU market. One should bear in mind that Poland's integration with the EU enforced intense innovative processes in Polish enterprises. Food industry faced serious challenges related to EU norms in terms of not only product quality but also production processes. Adaptation processes in food industry were especially intense a few years before integration with

the EU, right after accession. The transformations contributed to starting up magnificent enterprises functioning in many food industry branches [Grzelak 2011].

On the basis of the data, one should not only analyse the rate of changes in export but it is also worth taking an attempt at pointing to reasons for a dynamic agri-food export growth and the resulting improvement in trade balance during Poland's EU membership. The issues shall be discussed in the next paragraph.

ANALYSIS OF EXPORT OF AGRI-FOOD PRODUCTS IN THE YEARS 2004–2014

During the analysed period of 2004–2014, agri-food export value reached a record level of 21.4 billion EUR in 2014, and a year after Poland's accession it levelled off at 5.2 billion EUR. In the years 2004–2014, average yearly rate for export growth was 15%. The biggest growth dynamics was recorded in 2005, when agri-food export rose by nearly 37%.

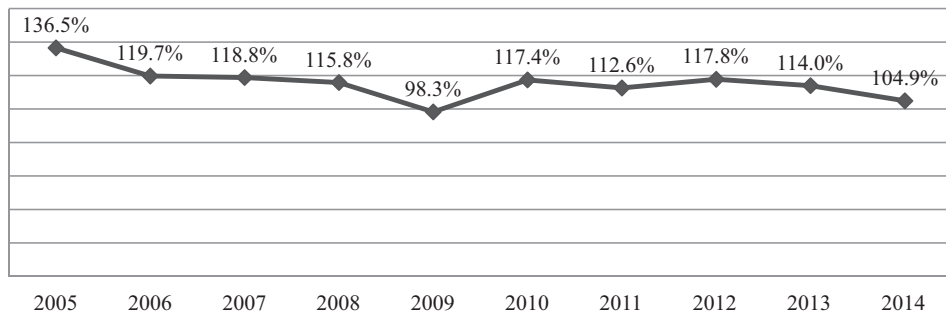


Fig. 4. Export dynamics of agri-food products in the years 2004–2014 (previous year = 100 in value terms)

Source: Own analysis based on the ARR (Agricultural Market Agency) data and *Agri-food foreign trade...* [2015].

Dynamic export growth is closely related to accelerated liberalisation of trade with the EU. Integration with the EU meant a new situation for the Polish foreign trade, especially in agri-food products. In case of industrial products, the scale of changes was smaller because free trade zone in non-agricultural products has been existing only since 1 January 2002. When it comes to customs protection in agri-food trade, as well as trade size monitoring by means of value quota, it expired on the first day of membership.

Accession entailed removal of tariffs on agri-food products between Poland and other EU countries, and in case of trade with non-EU countries, EU customs duty tariff was in force [Analysis of production... 2006]. Substantial export growth of agri-food from the first years of EU membership was also determined by preparation for integration in meat, dairy, poultry and fishery industries which turned out better than expected. Enterprises representing the four branches did not gain unlimited access to EU markets on 1 May 2004 as a matter of course. Only companies that respected EU sanitary and veterinary

standards were able to export. On accession day it turned out that, contrary to previous estimations, the conditions are met by so many firms that they are able to satisfy other countries needs providing them with our products. Also international chain stores operating in the Polish market, with their distribution channels in many countries, must have contributed to export growth [Chechelski 2007].

It must be emphasized that after Poland's EU accession there was a dynamic export of highly processed food products, i.e. products with high added value. There was a high growth of export rate of highly processed products in bakeries, confectionary, fishery and meat industry. Trade liberalisation and opportunities to import cheaper products for domestic food industry boosted export of high processed food products substantially. Production and export of beer, cigarettes and preserved fish would not be possible without increased import of malt, fish or unprocessed tobacco [Analysis of production... 2007].

Analysis of changes carried out in the years 2004–2014 pointed that there was a decrease in agri-food export value by 1.3% only in 2009 (when compared with the previous year), which partly resulted from the world economic crisis. Fortunately, it was a unique situation and next year in 2010 export regained growth tendency, with a substantial growth value at 17%. Interestingly, agri-food export was rising over the next years although its dynamics decreased in 2013 and 2014 (compare Fig. 4). Research by Institute of Agricultural and Food Economics shows that agri-food export outcome is influenced by economic and political circumstances in the world, especially Europe [Foreign trade in agri-food products... 2015]. The main factors determining the situation are: currency changes, especially dollar appreciation, a dramatic fall of oil prices, Ukraine conflict and resulting limitations in trade with Russia, unstable situation in the Near East and euro zone insecurity.

Similarly to previous years, commodity structure of Polish agri-food export in 2014 was dominated by livestock, meat, preserved meat, fruit, vegetables and other preserves. In comparison to 2013, there was a rise in cereals (seeds and processed cereals), dairy products, tobacco and tobacco products. At the same time the share of fruit, vegetables, processed fruit and vegetables, but also meat (including livestock) and confectionary products, fell down (Fig. 5).

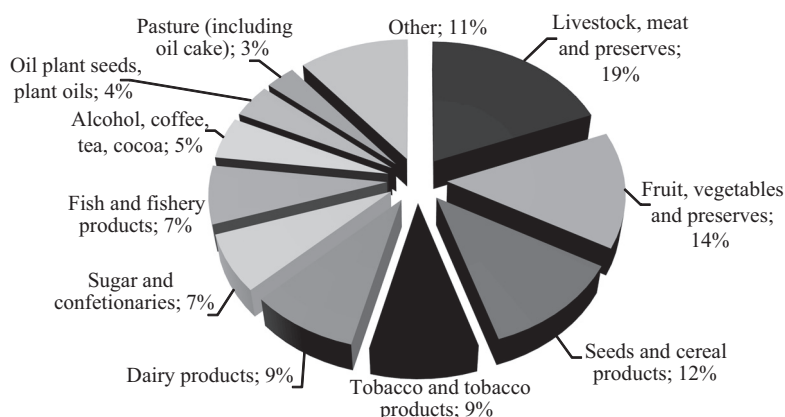


Fig. 5. Commodity structure of Polish export in agri-food products in 2014

Source: Foreign trade in agri-food commodities... [2015].

Analysing geographical structure, one draws a conclusion that EU was the most important outlet market for Polish agri-food over the period of 2004–2014. In 2004, EU-15 countries only had a 57% share in the Polish agri-food export, whereas a year before the accession it was 51%. Next years of the period brought further growth of the meaning of EU market, which, to a large extent, was a consequence of EU expansion. In 2013, 73% of agri-food export was sold to EU member states, and in 2014 – 79% (Table). Participation level of new member states (EU-13) in Polish agri-food export is constantly growing.

Table. Geographical structure of Polish foreign trade in agri-food products in 2004 and 2014

Group of countries	2004		2014 ^b		2004 = 100
	M EUR	%	M EUR	%	
Export					
EU	3 781.8	72.1	16 877	79.1	446.3
– with UE-15	2 988.2	57.0	12 574	58.9	420.8
– with UE-12 (UE-13) ^a	793.6	15.1	4 303	20.2	542.2
WNP	684.8	13.1	1 685.2	7.9	246.1
NAFTA	194.6	3.7	364.1	1.7	187.1
EFTA	59.7	1.1	176.3	0.8	295.3
Other countries	521.2	9.9	2 245	10.5	430.8
Total	5 242.2	100.0	21 348	100.0	407.2
Import					
EU	2 763.8	62.7	10 217	69.1	369.7
– with UE-15	2 395.9	54.4	8 770	59.3	366.0
– with UE-12 (UE-13) ^a	367.9	8.3	1 447	9.8	393.4
WNP	91.0	2.1	593	4.0	652.1
NAFTA	110.0	2.5	315	2.1	286.8
EFTA	177.8	4.0	744	5.0	418.2
Other countries	1 263.8	28.7	2923	19.8	231.2
Total	4 406.5	100.0	14 792	100.0	335.7
Balance					
EU	1 018.0	–	6 660.0	–	654.2
– with UE-15	592.3	–	3 804.0	–	642.2
– with UE-12 (UE-13) ^a	425.7	–	2 855.9	–	670.9
WNP	593.8	–	1 091.8	–	183.9
NAFTA	84.6	–	48.6	–	57.5
EFTA	–118.1	–	–567.3	–	480.4
Other countries	–742.6	–	–677.3	–	91.2
Total	835.7	–	6 555.8	–	784.5

^a – for 2014, EU-13, ^b – for 2014 first data.

Source: *Polish foreign trade in agri-food products...* [2005] and FAMMU/FAPA, Warsaw 2006; *Polish foreign trade in agri-food products...* [2014], <https://bip.minrol.gov.pl/Informacje-Branzowe/Handel-zagraniczny-artykulami-rolno-spozywczymi/POLSKI-HANDEL-ZAGRANICZNY-ARTYKULAMI-ROLNO-SPOZYWCZYMI-w-2014-r>.

Germany is the biggest consumer of Polish agri-food products among EU countries. Poland exports there such goods as fish, preserves, poultry meat, seeds and cereal products. In 2014 export to Germany was 2% higher than previous year and reached 4.8 billion EUR, with Germany's share in Poland's export value of agri-food products, just like in 2013, being 23%.

Polish agri-food products situation in EU market being significant and relatively steady, one could be worried about the Russian market which is important for our economy due to its size, geographical location and large economic potential.

Russian embargo on import of Polish agri-food commodities introduced in November 2005 presented a threat to a few branches, especially fruit farming, horticulture and meat industry. Absence from the Russian market caused by temporary bans may turn out dangerous because the empty slot after Polish exporters is being taken over by other EU members and it will not be easy to regain the market share later in time.

Throughout the whole research period, there was a rise in export to all country groups considered for analysis. However, last year brought a sharp decrease in the market share of the Commonwealth of Independent States which was only 8% as opposed to 11% in 2013. In comparison, 13% of the total agri-food export value went to the Commonwealth of Independent States in 2004. Lower sales to the Commonwealth of Independent States is first and foremost a consequence of Russian embargo on import of selected agri-food products that was implemented in 2014. This time, the ban affected all EU countries not just Poland, as it was the case before.

Total value of agri-food products exported from Poland to Russia in 2014 was 882 million EUR and it was 30% lower than previous year. Value of export to Ukraine decreased by 22% to 357 million EUR. Next, the value of export to Belarus was 7% lower than in 2013 and reached 273 million EUR. On the whole, agri-food export to Commonwealth of Independent States in 2014 was 1.7 billion EUR as opposed to 2.2 billion EUR previous year, therefore, a fall by 23% was recorded. Positive changes were also recorded in case of export to the so called other countries (from beyond EU and Commonwealth of Independent States). Export to the countries in 2014 was 2.8 billion EUR which meant a 25% growth in comparison to the previous year. Analogically, the share of those countries in the total value of Polish export in agri-food products grew by 2–13% [*Foreign trade in agri-food products...* 2015].

It is hard to agree with opinions that loss of the Russian market is not a serious problem because exporters are finding new markets. One may not forget impressive and not fully used production potential of Polish agriculture and food industry. In these circumstances it is essential to use all export opportunities, not only in agri-food sector but also in the whole economy. In case of limited possibilities of growth of demand on agri-food products in EU developed countries, Russian citizens' wide interest in Polish products offers a chance of export growth. Interestingly enough, despite modernisation of domestic agri-food sector, Russia is not able to provide for local consumption needs. Further factors having a positive influence on winning the Russian market are prices that remain lower than in western Europe and location near Kaliningrad Oblast [Batyk 2014].

CONCLUSIONS

First years of EU membership were a period of extremely rapid growth of Poland's foreign trade turnover in agri-food products. Poland turned from an agricultural net importer to a major net exporter. Demanding adaptation processes (including privatization with foreign capital) and progress made during preparation period for EU integration, made it possible to use comparative advantage on the day of opening EU market as well as in further years.

Foreign trade figures in agri-food sector in 2004–2014 reflect the competitiveness of Polish food products in the EU and world market. Initially, its source was price and cost advantage on the one hand, and the quality of Polish products appreciated by foreign consumers on the other hand.

A characteristic feature of Polish foreign trade in agri-food products over the period of Polish integration with the EU is fast-growing positive trade balance. High surplus in foreign trade in agri-food products has a significant meaning for improvement of Poland's trade balance. In 2014, the surplus covered over 73% deficit in trade in other sectors. However, for the last two years of the analysed period of 2004–2014, one may notice a major decrease in export dynamics growth. The main factors influencing food export in a negative way are Ukraine crisis and Russian embargo. Eastern crisis forces Polish exporters to search new markets. It's essential and yet possible to restructure trade orientation from the Commonwealth of Independent States to developed and developing countries. Ministry of Agriculture sees a chance of diversification in developing trade relations with The Far East, especially China.

The debate lets us draw a conclusion of a positive change in commodity structure of agri-food export over the analysed period. There is a growth of share of highly processed food, which sets the ground for manufacturers to take more advantage of gross value added. It also supports promoting Polish agri-food sector in some, especially distant, markets which is more difficult when exporting agriculture or semi-finished products.

In the circumstances of a slowing down domestic demand for agri-food products, development opportunities for this direction depend first and foremost on its competitiveness in the world food market. Price and cost advantage of agri-food sector decreasing, the meaning of innovativeness as a factor determining competitiveness is increasing. Combined with maintaining high quality of products, it should set goals for maintaining Poland's strong position in foreign food markets.

Some people claim that food might become our national specialty. If so, growth in this sector should receive more support from national policy, science and economic environment. Boosting marketing and promotion activity are a significant support trend for the sector.

Presented article is a first analysis resulting from a deeper research into changes in competitiveness of Polish food producers in international markets. Evaluation of foreign trade situation in agri-food sector over the years 2004–2014, carried out by means of analysis of foreign trade figures in agri-food products for the purpose of the paper, gives

the base for further investigation. Agri-food sector competitiveness stands for an ability to place products in foreign markets. The objective of competitiveness analyses presented in further articles will be pointing to branch differences of the investigated sector. Evaluation of competitiveness of Polish food producers will be carried out by selected competitiveness determinants, i.e. export orientation of production, revealed comparative advantage Balassa index (RCA) and Lafay index (LFI), trade coverage index (TC), as well as estimation of Poland's position in EU agri-food export.

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ROZWÓJ POLSKIEGO HANDLU ZAGRANICZNEGO PRODUKTAMI ROLNO-SPOŻYWCZYMI PO AKCESJI POLSKI DO UE

Streszczenie. Pozycja kraju na rynku międzynarodowym zależy od zmian, jakie zachodzą w jego handlu zagranicznym. Akcesja Polski do UE była przełomowym wydarzeniem dla polskiego handlu zagranicznego. Celem artykułu jest ocena zmian w polskim handlu zagranicznym produktami rolno-spożywczymi w latach 2004–2014, zatem od momentu włączenia Polski do jednolitego rynku europejskiego (JRE) i przyjęcia zasad wspólnej polityki rolnej (WPR). Od 2004 roku stopa wzrostu polskiego eksportu produktów rolno-spożywczych wzrasta szybciej niż importu, a Polska przeobraziła się z importera netto w eksportera netto produktów rolno-spożywczych. W artykule, analizie poddano wartość i saldo obrotów produktami rolno-spożywczymi. Ponadto, omówione zostały tendencje w handlu zagranicznym produktami rolno-spożywczymi w Polsce w latach 2004–2014 z uwzględnieniem poszczególnych grup państw. Przeprowadzona analiza wykazała, że Polski sektor rolno-spożywczy uległ znacznym przeobrażeniom od momentu przystąpienia Polski do struktur unijnych, tym samym wykorzystał szanse płynące z akcesji do UE. Rozwój polskiego handlu produktami rolnymi i spożywczymi potwierdza wzrost konkurencyjności polskiego rolnictwa na arenie międzynarodowej w latach 2004–2014.

Słowa kluczowe: handel zagraniczny, konkurencyjność polskich produktów rolno-spożywczych, WPR

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