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THE CHARACTERISTIC OF POLISH AGRICULTURAL TRADE WITH THE EUROPEAN UNION (EU-15)

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ABSTRACT. The aim of the paper is to characterise Polish agricultural trade with the EU-15. Polish-EU agricultural trade balance was negative in 1994-2002 and the positive one in the amount of 200 M. EUR appeared in 2003. Fruit and vegetables, meat and its preparations are the main product groups in Polish-EU agri-food export and import. Among the EU countries, Germany is the main Poland's agricultural trade partner.

Key words: import, export, agricultural trade balance, European Union

Introduction

The agricultural products have always held an important position in Polish foreign trade structure. In the days of Poland's accession to the EU and economy globalization Polish agricultural products gain easier access to the foreign markets, including the EU market. The EU is and will remain the main Poland's agricultural trade partner. The aim of the paper is to characterise Polish agricultural trade with the EU-15.

Material and methods

The paper is based on Central Statistical Office (CSO) data and European Commission Reports "The agricultural situation in the European Union" (**The agricultural...** 1996-2003).

Because of the limited data access before 1994[1], the trade analysis was conducted in 1994-2002. This period seems to be sufficient to assess the main trends and changes in

[1]Caused by changes in foreign trade classification.

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Polish-EU agricultural trade. Poland's agri-food trade with the EU was analyzed by products and by countries. Agricultural export and import values, as well as agri-food trade balances were searched. The trade analysis was conducted using structure indicators.

Conditions of market access

Polish agri-food trade conditions are, in a crucial way, determined by international trade agreements. **Woś** (2000) indicated that the treaty regulations had had a greater influence on foreign trade than market tools.

Polish agricultural trade with the EU is regulated by Europe Agreement establishing an association between the European Communities and their member states, of the one part, and the Republic of Poland, of the other part, signed on 16th December 1991. The part of this agreement concerning trade is known as Interim Agreement. It came into force on 1st March 1992 (**Rowiński** and **Wigier** 1998). Free trade zone did not include agri-food trade. Agricultural sector was treated as an especially sensitive one in mutual business relations. Partial agricultural trade liberalization, consisted in exemption of some products but not entirely from duty, was established. Moreover, it was decided that preferential quotas would be applied to many products. After these quotas were exceeded, full duties would be imposed.

Other important aspects of Interim Agreement concerned:

– protective clauses, allowed both parts to use preventive measures in case of threat of serious disruption to market,

– opportunities of deviation, imposing new duties and increasing existing, both duties and import restrictions, if it would be required by agricultural policy of any side.

Agri-food trade liberalization had asymmetrical character – Poland gained greater access privileges than these granted the EU. Increase in mutual agri-food turnover was expected, meanwhile after Interim Agreement had come into force, Polish export to the EU lasted at the unchangeable level and import from the EU rose rapidly. Trade creation effect related only to two product groups, i.e. yogurts and cheeses. It can be supposed that preferential mechanisms granted Polish products were too poor.

28th September 2000 Poland and the EU signed the next agreement on agri-food trade liberalization (**Jastrzębska** 2000). It concerned about 800 products, in majority the insensitive ones[2]. It was decided to liquidate duties on both parts after 1st January 2001. Among others, oranges, bananas, coffee, olive oil and blackcurrants were exempted from duty. It was also decided about forming duty free quotas on pork, poultry, eggs, cheeses, tomatoes and their products and apples. These quotas grew by 10% year to year. It was aided Polish horse meat and live cattle with access to the EU market. According to the agreement on 28th September 2000 preferential quotas on sensitive products were imposed (cereals, dairy products, pork, poultry end eggs). Established quotas were predicted to increase by 10% in 2002.

Poland's accession to the customs union and the Common Market on 1st May 2004 means a radical change in Polish trade policy towards the EU member states. Following the "Free merchandise flow" rules means an exemption from:

[2]These are products which the EU impose duties less than 10% on.

– duties and other tariff barriers,
– quantitative restrictions,
– physical, technical and fiscal barriers.

Poland committed to adopt the European Communities acquis communautaire. In consequence, Poland committed to revoke trade and economic contracts with the third countries, if they broke the EU law. Poland's trade and economic contracts with the USA and Japan were renegotiated. Next, Poland will be the part of agreements on partnership and cooperation concluded between the EU and the Commonwealth of Independent States (**Kowalski** 2004).

The main trends in Polish agri-food trade

In 1993-1997, excluding the last year, constant and rapid growth of Polish agri-food import value was noticed. It almost doubled from 2.3 milliard USD in 1993 to 4 milliard USD in 1996 (Table 1). It was the highest agri-food import value in all analyzed period. In 1997 import value fell down nearly to 3.8 milliard USD. Agricultural import growth rate has been slower than total import one and resulted in systematic decreasing agri-food import share in total import (from 12% in 1993 to 8.9% in 1997).

At the same time, upward trend in Polish agricultural export was also observed. In 1997 Polish agri-food export reached the highest value in an analyzed decade – 3.3 milliard USD (Table 1). However, agri-food export growth rate has oscillated around total export one and finally agricultural export share in total export fluctuated slightly between 11.6-12.8%, without no clear upward or downward trend. Based on the agricultural import and export value, it can be concluded that Polish food economy became more open and scale of its relations with the world economy rose in the 1990's (**Rowiński** and **Wigier** 1998).

In 1998-2000 agri-food import and export value and their shares in total import or export fell down. Considerable improvement of Polish agricultural trade results was registered in 2001-2002. Comparing with 2000, import and export rose adequately by 459 M. USD and 762 M. USD. This way, the negative agri-food trade balance reached 290.6 M. USD in 2002, and it was the most favourable balance since 1994. In 2000 agri-food import and export share in total Polish import or export stabilized adequately at the 6.5% and 8% level.

Agricultural trade shares, values and balance of total agricultural trade with the European Union

The main consumers of Polish agricultural products have been the EU and the former USSR countries (Table 2). Polish agri-food export to these groups of countries amounted from 71% (2001) to 86% (1995-1996) of total Polish agri-food export. Poland's agricultural export to the EU has been rising since 1999 and it amounted to 1.6 milliard USD in 2002. The EU market share in total Polish agri-food export stabilized at the 50% level.

Table 1

Foreign trade value in 1993-2002 (M. USD) (on the basis of CSO data)
Wartość obrotów handlu zagranicznego w latach 1993-2002 (mln USD) (na podstawie danych GUS)

Specification Wyszczególnienie	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002
Total trade (M. USD) Handel ogółem (mln USD)										
Import	18 834.4	21 569.1	29 049.7	37 136.7	42 307.5	47 053.6	45 911.2	48 940.2	50 275.1	55 112.7
Export – Eksport	14 143.1	17 240.1	22 894.9	24 439.8	25 751.3	28 228.9	27 407.4	31 651.3	36 092.2	41 009.8
Balance – Saldo	–4 691.3	–4 329.0	–6 154.8	–12 696.9	–16 556.2	–18 824.7	–18 503.8	–17 288.9	–14 182.9	–14 102.9
Agricultural trade (M. USD) Handel rolno-spożywczy (mln USD)										
Import	2 255.7	2 410.9	2 987.0	3 989.1	3 766.6	3 866.0	3 250.6	3 117.1	3 331.7	3 575.7
Export – Eksport	1 646.0	2 084.4	2 510.7	2 757.0	3 297.3	3 123.0	2 548.3	2 523.0	2 913.2	3 285.1
Balance – Saldo	–609.7	–326.5	–476.3	–1 232.1	–469.3	–743.0	–702.3	–594.1	–418.5	–290.6
Agricultural trade share in total trade (%) Udział obrotów rolno-spożywczych w obrotach ogółem (%)										
Import	12.0	11.2	10.3	10.7	8.9	8.2	7.1	6.4	6.6	6.5
Export – Eksport	11.6	12.1	11.0	11.3	12.8	11.1	9.3	8.0	8.1	8.0
Balance – Saldo	13.0	7.5	7.7	9.7	2.8	3.9	3.8	3.4	3.0	2.1

Table 2

Polish agri-food trade geographic structure (%) (on the basis of CSO data)
Struktura geograficzna polskiego handlu zagranicznego produktami rolno-spożywczymi (%) (na podstawie danych GUS)

Group of countries Grupa krajów	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002
Export – Eksport										
European Union Unia Europejska	58.3	56.4	54.5	47.4	38.8	42.9	50.1	51.0	50.0	48.9
EFTA		1.5	1.4	1.1	0.9	1.1	1.1	1.2	1.4	1.1
CEFTA	3.1	2.4	2.8	2.9	4.9	8.1	11.1	12.5	12.1	12.2
Former USSR countries Kraje byłego ZSRR		28.3	31.6	38.6	44.2	36.4	26.0	23.9	20.9	19.7
Developing countries Kraje rozwijające się	6.7	6.2	6.0	6.2	7.1	8.4	12.5	11.9	14.2	11.8
Import										
European Union Unia Europejska	50.2	52.0	48.8	46.9	45.9	48.0	49.6	52.0	53.7	53.2
EFTA		2.9	3.4	3.2	3.9	3.8	4.6	4.5	5.2	4.1
CEFTA	4.1	3.6	8.0	6.7	7.7	8.5	8.9	11.3	9.7	9.7
Former USSR countries Kraje byłego ZSRR		4.1	3.6	4.2	2.3	3.0	2.3	3.4	3.4	2.7
Developing countries Kraje rozwijające się	21.3	30.5	29.6	29.2	32.0	29.7	32.6	26.2	25.0	25.4

As far as agricultural import is concerned, total share of the EU and the former USSR countries has been lower and ran at the 53% level, from that 50% have been purchased from the EU countries. In 2002 Polish agri-food import from the EU reached 1.9 milliard USD. The EU countries consider Poland as raw material base, on the one hand, and an important outlet for food surpluses, on the other hand. This results in significant share of the EU in Polish agri-food both export and import.

Polish-EU agricultural trade balance has been negative since 1993 (Fig. 1). It was often considered to be a result of unfavorable decisions of Europe Agreement. After Interim Agreement had come into force, bilateral trade intensification and high positive

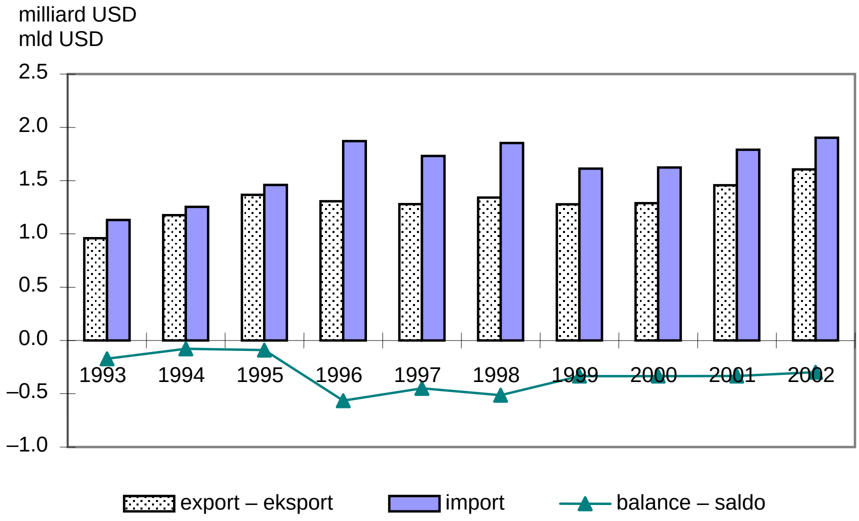

Fig. 1. Polish agri-food trade value and balance in 1993-2002 (on the basis of CSO data)
Ryc. 1. Wartość i saldo obrotów handlu zagranicznego produktami rolno-spożywczymi w Polsce w latach 1993-2002 (na podstawie danych GUS)

trade balance were expected. Especially because Poland generated positive agricultural trade balance before 1993 and gained greater preferences than these granted the EU. Meanwhile, simultaneous rise in import and export stabilization was noticed and positive trade balance evolved into the negative one. However, this was not caused by implementing Interim Agreement. Increase in import did not resulted from granted preferences. Poland reduced duties almost exclusively on products coming from other climatic zones. Therefore, complementary products, which do not really threaten Polish agriculture, gained easier access to Polish market. Hence, preferences resulted in shift effect not in trade creation effect. The main reasons for rise in agricultural import from the EU were:

– rising demand for agri-food products, which are not produced in Poland or their production is insufficient,

– temporary shortage of staple agri-food products produced in Poland (first of all cereals and rapeseed),

– food purchases from the EU countries, mainly fresh fruit and vegetables, produced in Poland only seasonally,

– import of products, which are not produced in Poland and not included in Europe Agreement, on general terms,

– reexport of some products came from other climatic zones to Poland (**Rowiński** and **Wigier** 1998).

Lack of export supply was the most important reason for stagnation of export to the EU. Polish farmers resigned from sheep raising for export to Italy and France, as well as fodder leguminous plants export, recognizing them unprofitable. Moreover, considering crop failure, Poland became importer of rapeseed.

The negative trade balance resulted also from high level of the EU market protection making access to the market impossible. Making attempts at granted preferences reducing by the EU was the next reason. It concerned especially some berry fruits. Deterioration of agricultural trade balance with the EU could also be caused by:

– unfavourable climatic conditions making Poland temporary import some products, which were traditionally exported to the EU,

– rising production costs resulted in decrease in agricultural products competitiveness,

– lack of Polish exporters organizing, who competing against each other weaken their bargain position towards well organized EU importers,

– lack of proper export promotion and marketing system, inappropriate export financial system, undeveloped both credit and export insurance system.

According to Ministry of Agriculture data, Polish agri-food export to the EU rose by 44% in 2003 and the negative agricultural trade balance amounted to almost 300 M. EUR in 2002 evolved into the positive one in the amount of 200 M. EUR (**Oktaba** and **Bielecki** 2004). It is estimated that Polish agricultural export to the EU will double in the next two or three years, as a result of lifting duties, minimum prices, quotas and other trade barriers.

Polish agri-food trade commodity structure

Fruit and vegetables are the main plant origin product group in Polish agri-food export to the European Union (Table 3). Their export value increased almost by 67% during all analyzed period[3]. It should be stressed that in some seasons Polish fruit export overcame 60% of total Polish fruit production. Polish competitiveness of this product group is determined by high consumer values and relatively low prices. Among exported fruits dominate soft fruits, e.g. strawberries, currants and raspberries. It is interesting that Poland dominating in fruit export is at the same time relatively important fruit importer. However fruit imported by Poland come from the other climatic zones, so they do not threaten Polish producers interests and, what is more, enrich market offer.

The value of sugar export is characterised by high dynamics and important fluctuations depending on sugar beets crops. The lower price than on precisely regulated European Union market is a big advantage of Polish sugar.

[3]All numerical data in this paper are own calculations on the basis of CSO data and **The agricultural...** (1996-2003).

Table 3

Polish-EU agricultural trade commodity structure (M. USD) (The agricultural... 1996-2003)
Struktura towarowa handlu zagranicznego produktami rolno-spożywczymi Polski z UE (mln USD) (The agricultural... 1996-2003)

Specification Wyszczególnienie	1994	1995	1996	1997	1998	1999	2000	2001	2002
1	2	3	4	5	6	7	8	9	10
Import (M. USD) – Import (mln USD)									
Live animals Zwierzęta żywe	25.0	25.8	31.1	34.7	33.4	26.8	31.0	28.1	36.9
Meat and meat preparations Mięso i przetwory mięsne	179.0	109.2	85.6	80.3	87.4	48.1	59.2	45.8	88.4
Dairy products and eggs Produkty mleczne i jaja	48.8	42.1	35.4	51.9	71.3	75.7	48.4	26.2	28.5
Cereals and preparations of cereals Zboża i przetwory zbożowe	57.6	64.2	397.6	187.2	111.3	110.1	171.0	155.1	122.5
Fruits and vegetables Owoce i warzywa	235.5	300.4	299.3	335.1	369.5	352.5	390.6	420.3	429.8
Sugar and honey Cukier i miód	43.7	120.5	64.8	50.1	42.0	37.4	39.5	41.6	43.4
Oilseeds and oleaginous fruits Nasiona i owoce oleistych	9.6	12.6	80.8	33.7	64.6	42.7	35.1	42.6	49.5
Fats and oils Oleje i tłuszcze	99.8	112.9	112.6	120.3	167.4	117.0	95.7	118.6	155.3
Total agricultural products Produkty rolno-spożywcze ogółem	1 389.3	1 771.2	2 056.7	1 949.1	1 981.0	1 723.2	1 767.4	1 834.7	2 027.0

Table 3 – cont.

1	2	3	4	5	6	7	8	9	10
Export (M. USD) – Eksport (mln USD)									
Live animals Zwierzęta żywe	185.6	174.1	177.6	161.6	159.9	136.1	100.9	95.8	101.0
Meat and meat preparations Mięso i przetwory mięsne	132.3	157.5	162.2	142.9	158.1	153.0	160.9	190.0	208.9
Dairy products and eggs Produkty mleczne i jaja	23.0	37.0	48.0	54.7	34.2	42.2	32.0	70.3	71.2
Cereals and preparations of cereals Zboża i przetwory zbożowe	2.9	7.8	6.6	4.2	5.7	13.6	16.5	25.5	55.8
Fruits and vegetables Owoce i warzywa	375.3	489.6	462.1	492.9	524.2	518.7	531.0	585.7	626.0
Sugar and honey Cukier i miód	22.2	47.7	63.0	65.8	42.9	37.7	32.8	39.1	54.9
Oilseeds and oleaginous fruits Nasiona i owoce oleistych	3.1	65.4	16.3	1.9	40.9	30.3	21.2	37.4	23.2
Fats and oils Oleje i tłuszcze	10.5	15.2	14.9	13.7	9.2	14.2	5.0	3.0	2.7
Total agricultural products Produkty rolno-spożywcze ogółem	1 316.4	1 634.0	1 490.2	1 491.0	1 172.8	1 153.3	1 135.7	1 320.9	1 459.9

Concerning cereals Poland is net importer. The most significant rise in import was registered in 1996, when it amounted to 397.6 M. USD (19.3% of total Polish agricultural import). This was caused by two main reasons: crop failure and intensified cereals demand for live animals and meat production.

Over 20 times increase in oilseeds and oleaginous fruits export in 1995 was determined by sharp growth in rapeseed export. Rapeseed has been dominating in export of oilseeds and oleaginous fruits. This year, about 360 thous. t of rapeseed were sold abroad. This was caused by 80% production growth comparing to 1994 (**Gaziński** and **Rutkowska-Rock** 1999). It is worth stressing that next year a dynamic export decrease and import rise was registered. In 1996 import reached the highest in analysed years value of 80.8 M. USD. This significant change was related with relatively high prices of Polish rapeseed in this year.

Because of high brand competition in fats and oils in the European Union, Poland is still net importer of these products. The negative trade balance in cereals and fats and oils during the analysed period is alarming.

In terms of animal origin product groups in Polish agri-food export structure dominate meat and meat preparations. Their share had been constantly growing up in 1994--2002 and in 2002 reached the level of over 14% of total agri-food export. Bigger and bigger part of total Polish production of meat has been exported. The most important increase in export concerned pork (in 1993 0.7% domestic production was exported, while in 1997 this share rose to 14.5% and further it stabilised at 10% level). The import share of this product group had been decreasing till 2001. Comparing with 1994, in 2001 the meat and meat preparations import sum decreased over three times.

Live animals are the second relatively important animal orgin product group in Polish agri-food export structure. Although its share has been decreasing in all the analysed period, it is still high comparing with other products groups (6.9% of total Polish agri-food export), what gives Poland a possition of net exporter. Growing export share of meat and meat preparations, and at the same time decreasing export share of live animals may suggest that Poland exports more and more proceeded meat, which is a good direction to develop Polish agricultural trade and improve trade balance.

Dairy products and eggs have also held an important position in trade of animal origin product groups. Dairy products trade is characterised by strong internal rotation. Excluding years 1999-2000, a dynamic growth of cheese and curds export had place, while in 1996-2000 butter export decreased almost five times. This situation was caused by imposed an embargo on import of dairy products from Poland at the end of 1997. In consequence, great part of Polish dairies lost possibility of their products export as they do not meet European Union quality standards (**Jastrzębska** 2000). Access to the European Union market is difficult, but regarding the size of the sector, economic importance, natural conditions, human resources and capital investments Polish dairy industry has a great developmental potential (**Przepióra** et **al.** 2000).

Live animals and animal origin products were the only product group[4] which generated positive trade balance in all analysed period. Its production and trade development is from this point of view justified.

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[4]According to PCN Classification, which joins live animals, meat and meat preparations, dairy products, eggs and the others.

Polish agricultural trade with the main European Union partners

Among the EU countries, Germany is the main Poland's agricultural trade partner (Table 4). In 1995-2002, 46% of total agri-food export to the EU have been sold to Germany. At the same time Polish import from this country has amounted to 29% of total agricultural import from the EU. The next consumers of Polish agri-food products have been the Netherlands and Italy, where Poland has sold about 25% of total export to the EU. Beside Germany, Poland has imported the most of agricultural origin products from the Netherlands (about 19.5% of total import from the EU), Spain (9.5%), Italy, France and Denmark (8%). Lively trade in agricultural products with Great Britain has been also observed.

Poland has generated the negative agricultural trade balance with the most of the EU countries – the worst with Spain and the Netherlands. During all analyzed period, the trade balance has been positive only in trade with Germany and it has been constantly rising since 1998. This year, a positive and growing year to year trade balance with Great Britain has appeared. A positive agri-food trade balance has been also generated in trade with Austria, Finland (since 1997), Sweden (since 1998) and Italy (before 2000). However, the last one has been systematically falling down and finally it evolved into the negative one. First of all, Italy is consumer of Polish horses, cattle and horse meat. The negative trade balance was a consequence of decrease in cattle export in 2001. Polish live horses export also fell down by 30% in an analyzed period. The main products imported from Italy have been grapes, peaches, kiwi fruits, wine and tobacco.

Fruit and nuts, apple juice, frozen strawberries and cherries, meat and poultry offal, prepared and preserved fish have held the most important position in Poland's agricultural export to Germany. In import, cakes and ground grains of oil plants, chocolate and other confectionery, rye and animal or vegetable oils and fats have had the most significant value.

Soft fruits: strawberries, currants and cherries, cheeses and curds, skimmed dried milk, vegetables and mushrooms have been dominating products in export to the Netherlands. In Polish import from the Netherland, cakes and ground grains of oil plants, vegetable oils, flowers and other ornamental plants have held an important position.

Conclusions

1. Agricultural trade shares in Polish foreign trade structure has been significant in all analyzed period. In 2000, agri-food import and export share in total Polish import or export stabilized adequately at the 6.5% and 8% level.

2. The EU countries consider Poland as raw material base, on the one hand, and an important outlet for food surpluses, on the other hand. This results in significant share of the EU in Polish agri-food both export and import.

3. Polish-EU agricultural trade balance has been negative in 1994-2002. Contrary to popular belief, it was not a result of unfavourable decisions of Europe Agreement. The positive trade balance in the amount of 200 M. EUR has appeared in 2003.

4. It is estimated that Polish agricultural export to the EU will double in the next two or three years, as a result of lifting duties, minimum prices, quotas and other trade barriers.

Table 4

Polish agricultural trade with the EU countries (M. USD) and particular countries share in agricultural export to the EU and import from the EU (%) (on the basis of CSO data)
Obroty handlu zagranicznego produktami rolno-spożywczymi Polski z krajami UE (mln USD) oraz udział poszczególnych krajów w eksporcie do UE i imporcie z UE (%) (na podstawie danych GUS)

Specification Wyszczególnienie	1995		1996		1997		1998		1999		2000		2001		2002	
	M. – mln USD	%	M. – mln USD	%	M. – mln USD	%	M. – mln USD	%	M. – mln USD	%	M. – mln USD	%	M. – mln USD	%	M. – mln USD	%
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Austria																
Export Eksport	40.2	2.9	44.3	3.4	34.7	2.7	39.3	2.9	40.8	3.2	39.7	3.1	45.6	3.1	39.6	2.5
Import Import	19.2	1.3	30.4	1.6	29.5	1.7	32.7	1.8	32.6	2.0	33.8	2.1	30.3	1.7	32.4	1.7
Balance Saldo	21.0		13.9		5.2		6.6		8.2		5.9		15.3		7.2	
Belgium Belgia																
Export Eksport	58.4	4.3	64.8	5.0	58.9	4.6	56.8	4.2	52.8	4.1	47.7	3.7	56.8	3.9	42.6	2.7
Import Import	50.8	3.5	40.2	2.1	58.9	3.4	72.3	3.9	61.2	3.8	65.3	4.0	89.5	5.0	132.0	6.9
Balance Saldo	7.6		24.6		0.0		–15.5		–8.4		–17.6		–32.7		–89.4	
Denmark Dania																
Export Eksport	71.9	5.3	65.3	5.0	73.8	5.8	63.6	4.7	65.6	5.1	66.3	5.2	79.9	5.5	78.1	4.9

Table 4 – cont.

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Import Import	106.3	7.3	168.0	9.0	145.3	8.4	153.8	8.3	106.4	6.6	121.1	7.5	104.3	5.8	122.3	6.4
Balance Saldo	–34.4		–102.7		–71.5		–90.2		–40.8		–54.8		–24.4		–44.2	
Finland Finlandia																
Export Eksport	9.9	0.7	15.4	1.2	13.2	1.0	19.9	1.5	11.6	0.9	10.2	0.8	10.8	0.7	12.6	0.8
Import Import	20.4	1.4	15.5	0.8	5.0	0.3	3.2	0.2	4.8	0.3	3.4	0.2	3.3	0.2	4.9	0.3
Balance Saldo	–10.5		–0.1		8.2		16.7		6.8		6.8		7.5		7.7	
France Francja																
Export Eksport	65.1	4.8	67.2	5.1	71.5	5.6	73.3	5.5	83.9	6.6	79.0	6.1	94.8	6.5	85.3	5.3
Import Import	104.1	7.1	195.6	10.5	150.7	8.7	129.3	7.0	114.8	7.1	112.5	6.9	126.1	7.0	147.2	7.7
Balance Saldo	–39.0		–128.4		–79.2		–56.0		–30.9		–33.5		–31.3		–61.9	
Greece Grecja																
Export Eksport	1.6	0.1	0.8	0.1	1.7	0.1	5.4	0.4	4.1	0.3	4.3	0.3	4.0	0.3	10.1	0.6

Table 4 – cont.

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Import Import	41.1	2.8	36.4	1.9	43.6	2.5	54.5	2.9	60.6	3.8	56.3	3.5	73.5	4.1	75.6	4.0
Balance Saldo	–39.5		–35.6		–41.9		–49.1		–56.5		–52.0		–69.5		–65.5	
Spain Hiszpania																
Export Eksport	9.9	0.7	12.2	0.9	11.0	0.9	10.7	0.8	10.7	0.8	9.3	0.7	13.7	0.9	21.7	1.4
Import Import	89.8	6.2	102.0	5.4	130.0	7.5	190.2	10.3	187.3	11.6	198.6	12.2	242.1	13.5	271.7	14.3
Balance Saldo	–79.9		–89.8		–119.0		–179.5		–176.6		–189.3		–228.4		–250.0	
Netherlands Holandia																
Export Eksport	232.1	17.0	169.6	13.0	162.0	12.7	168.4	12.6	160.4	12.6	163.4	12.7	179.2	12.3	189.5	11.8
Import Import	350.3	24.0	312.1	16.7	321.0	18.6	353.3	19.0	301.2	18.7	305.2	18.8	365.7	20.4	369.1	19.4
Balance Saldo	–118.2		–142.5		–159.0		–184.9		–140.8		–141.8		–186.5		–179.6	
Ireland Irlandia																
Export Eksport	3.3	0.2	6.9	0.5	8.3	0.6	5.5	0.4	5.5	0.4	3.9	0.3	9.1	0.6	12.2	0.8

Table 4 – cont.

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Import Import	24.5	1.7	24.3	1.3	32.0	1.8	33.6	1.8	27.8	1.7	19.2	1.2	18.7	1.0	17.5	0.9
Balance Saldo	–21.2		–17.4		–23.7		–28.1		–22.3		–15.3		–9.6		–5.3	
Luxembourg Luksemburg																
Export Eksport	–		–		–		–		–		52.4	4.1	–		–	
Import Import	–		–		–		–		–		1.3	0.1	–		–	
Balance Saldo											51.1					
Germany Niemcy																
Export Eksport	588.2	43.0	588.8	45.1	599.8	46.9	615.4	45.9	573.2	44.9	587.0	45.6	645.3	44.3	775.0	48.3
Import Import	470.0	32.2	422.9	22.6	541.0	31.3	599.9	32.3	497.3	30.8	486.0	30.0	484.1	27.1	480.6	25.3
Balance Saldo	118.2		165.9		58.8		15.5		75.9		101.0		161.2		294.4	
Portugal Portugalia																
Export Eksport	–		1.0	0.1	1.8	0.1	1.5	0.1	1.2	0.1	0.9	0.1	0.8	0.1	2.4	0.1
Import Import	–		1.9	0.1	0.5	0.0	3.1	0.2	1.0	0.1	0.2	0.0	1.3	0.1	1.4	0.1

Table 4 – cont.

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Balance Saldo			–0.9		1.3		–1.6		0.2		0.7		–0.5		1.0	
Sweden Szwecja																
Export Eksport	35.6	2.6	42.1	3.2	31.4	2.5	41.2	3.1	35.7	2.8	35.8	2.8	36.9	2.5	49.3	3.1
Import Import	32.5	2.2	40.1	2.1	43.4	2.5	23.7	1.3	22.4	1.4	34.9	2.2	26.4	1.5	30.7	1.6
Balance Saldo	3.1		2.0		–12.0		17.5		13.3		0.9		10.5		18.6	
Great Britain Wielka Brytania																
Export Eksport	82.9	6.1	60.0	4.6	57.8	4.5	81.2	6.1	80.6	6.3	100.0	7.8	126.1	8.7	135.9	8.5
Import Import	64.9	4.4	103.5	5.5	94.6	5.5	70.8	3.8	48.8	3.0	47.1	2.9	50.7	2.8	54.6	2.9
Balance Saldo	18.0		–43.5		–36.8		10.4		31.8		52.9		75.4		81.3	
Italy Włochy																
Export Eksport	168.1	12.3	166.8	12.8	153.2	12.0	158.2	11.8	151.2	11.8	139.0	10.8	152.5	10.5	150.5	9.4
Import Import	84.7	5.8	133.9	7.2	134.3	7.8	134.5	7.3	149.3	9.3	138.1	8.5	173.7	9.7	163.0	8.6
Balance Saldo	83.4		32.9		18.9		23.7		1.9		0.9		–21.2		–12.5	

5. Fruit and vegetables, meat and its preparations are the main product groups in Polish-EU agri-food export and import.

6. Among the EU countries, Germany is the main Poland's agricultural trade partner. In 1995-2002, 46% of total agri-food export to the EU have been sold to Germany. At the same time Polish import from this country has amounted to 29% of total agricultural import from the EU.

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CHARAKTERYSTYKA POLSKIEGO HANDLU ZAGRANICZNEGO PRODUKTAMI ROLNO-SPOŻYWCZYMI Z UNIĄ EUROPEJSKĄ (UE-15)

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

Handel rolno-spożywczy tradycyjnie zajmował ważne miejsce w strukturze obrotów handlowych Polski. W dobie integracji Polski z Unią Europejską i globalizacji gospodarki jego rola staje się większa niż kiedykolwiek przedtem, a polskie produkty rolno-spożywcze zyskują łatwiejszy dostęp do rynków zagranicznych, w tym do rynku UE. UE była, jest i pozostanie głównym partnerem handlowym Polski, zarówno po stronie eksportu, jak i importu produktów rolno-spożywczych. W opracowaniu dokonano charakterystyki handlu zagranicznego produktami rolno-spożywczymi Polski z UE. Przeprowadzono analizę wartości obrotów oraz zbadano strukturę kierunkową i towarową handlu rolno-spożywczego.