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CHANGES IN POLISH FOREIGN TRADE IN AGRI-FOOD PRODUCTS UNDER ACCESSION TO THE EUROPEAN UNION

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ABSTRACT. The aim of the paper is to assess main trends and changes in commodity structure of Polish agri-food trade in 2003-2006. Joining in the Common Market and adopting the Common Trade Policy rules caused the significant growth of Polish agri-food trade values and improvement in the positive trade balance. Taking into account loss or reduction of some cost advantages, as well as liberalization of world agricultural trade, next years can be much more difficult for Polish exporters. The highest export potential applies to trade in animal origin products. Considering commodity structure of Polish agri-food trade, it should be said that processed products dominate both in export and in import.

Key words: foreign trade, export, import, agri-food products

Introduction

The agri-food products have always held an important position in Polish foreign trade structure. Agri-food trade plays a vital role in development of Polish agriculture and the whole economy. Suitably developed and export-oriented production is one of the sources of import financing, and gives a chance of gaining the high possible advantages of dealing on the world market. As far as surplus production is concerned, export contributes to capacity utilization more efficiently, as well as causes a growth of employment and investments. Import's role is to supply goods, which are not produced in Poland or enrich the market offer[1]. Competing with domestic production, import can give incentives to simplification and modernization of production, quality improvement and production cost saving[2].

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[1] Considering goods availability, it is possible to distinguish indispensable (exclusive) import and complementary (substitution) one.
[2] Comp. **Buszowski** (1986), **Adamowicz** (1988), **Niemczyk** (1994).

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Together with world trade liberalization process, becoming Polish agri-food sector more and more open, and Poland's accession to the European Union, some dynamic changes in Polish agri-food trade were observed. They resulted from existing trade rules, as well as internal and external macroeconomic conditions. Hence, the aim of the paper is to assess main trends and changes in commodity structure of Polish agri-food trade in 2003-2006.

Material and methods

The analysis carried out in this paper is based on data from Central Statistical Office (CSO) and Foundation of Assistance Programs for Agriculture (Foreign Agricultural Markets Monitoring Unit). Some methods of descriptive analysis, supported by tabular and pictorial data presentation, were used in the paper.

Agri-food trade values and trade balance

Some constant improvement of Polish agri-food trade results was observed in 2003-2006. In 2003 export value increased almost by 16%, comparing with 2002, and reached 4.0 billion euro, while import value amounted to 3.6 billion euro (Table 1). As a result, positive trade balance in the amount of 447 million euro was noticed for the first time in last ten years. (Table 1, Fig. 1). The rise in export was determined by the prospect of

Table 1

Polish foreign trade in 2003-2006 (million euro) (on the basis of: Obroty... 2003-2005 and Polski handel... 2006-2007)
Obroty polskiego handlu zagranicznego w latach 2003-2006 (mln euro) (na podstawie: Obroty... 2003-2005 i Polski handel... 2006-2007)

Specification Wyszczególnienie	2003	2004	2005	2006	2004	2005	2006
	million euro mln euro				previous year = 100 rok poprzedni = 100		
Total trade – Handel ogółem							
Export – Eksport	47 526.4	59 698.0	71 393.8	87 500.0	125.6	119.6	122.6
Import – Import	60 353.8	71 354.3	80 643.8	100 000.0	118.2	113.0	124.0
Trade balance Saldo	–12 827.4	–11 656.3	–9 250.0	–12 500.0	90.9	79.4	135.1
Agri-food trade – Handel rolno-spożywczy							
Export – Eksport	4 003.3	5 223.0	7 072.2	8 522.9	130.5	135.4	120.5
Import – Import	3 556.5	4 369.7	5 444.0	6 429.3	122.9	124.6	118.1
Trade balance Saldo	446.8	853.3	1 628.2	2 093.6	191.0	190.8	128.6

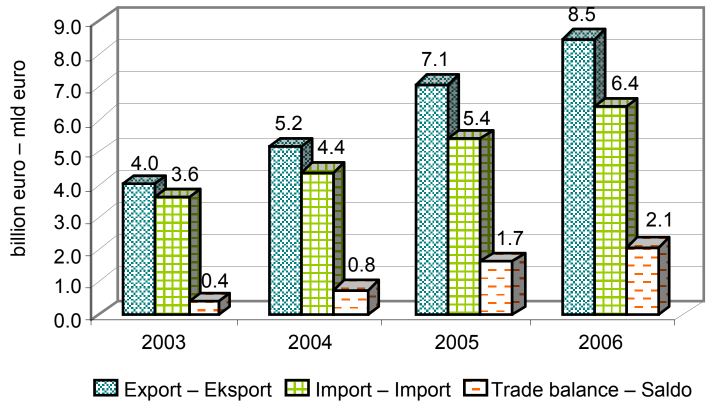

Fig. 1. Polish agri-food trade in 2003-2006 (billion euro) (on the basis of data from Table 1)
Ryc. 1. Polski handel zagraniczny produktami rolno-spożywczymi w latach 2003-2006 (mld euro) (na podstawie danych z tabeli 1)

upcoming accession to the European Union and growth of trade with this group of countries (Fig. 2)[3]. Moreover, increase in export was a consequence of favourable results of domestic agricultural production, i.e. some surplus in animal production and abundant crops in 2002 (Handel zagraniczny... 2004). It is worth stressing that export intensification was also caused by situation on foreign exchange market. In 2003 some constant depreciation of Polish zloty in relation to euro was registered. Because the significant part of Polish export and import was carried out with the countries from

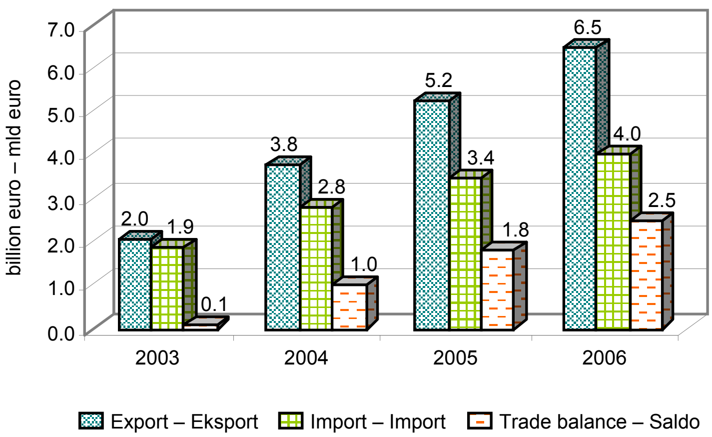

Fig. 2. Polish agri-food trade with the EU countries in 2003-2006 (billion euro) (on the basis of: Polski handel... 2006, 2007)
Ryc. 2. Polski handel zagraniczny produktami rolno-spożywczymi z krajami UE w latach 2003-2006 (mld euro) (na podstawie: Polski handel... 2006, 2007)

[3] In 2003 earnings from Polish agri-food export to the EU countries reached 2.0 billion euro, i.e. 21% more than in 2002.

Euro zone, export responded to depreciation of Polish currency rising quickly. Low inflation rate making foreign sale more profitable was an additional factor stimulating Polish export (Analiza... 2004).

In 2004-2005, increasing export growth rate, higher than import's one, made agri-food trade balance more and more positive. It reached 853 million euro in 2004 and 1.6 billion euro in 2005 (Table 1). Therefore, it can be noticed that this positive agri-food trade balance started to reduce total trade deficit (Table 1).

Rising demand for Polish agri-food products, especially on the EU market, was the most important factor determining the considerable increase in export value. Removal of trade barriers between Poland and the EU countries and gaining the free access to the Common Market resulted in growth of Polish agri-food export from 3.8 billion euro in 2004 to 6.5 billion euro in 2006[4] (Fig. 2). Experts from Institute of Agricultural and Food Economics indicate that favourable export results were reached under better than expected preparation of Polish agri-food industry for the operation of the EU market. Exporters from Poland got to know rules applied to intra-EU trade (Handel zagraniczny... 2005), and what is more many agri-food companies gained authorization to sale on the EU market before the end of negotiated transitional periods (**Poczta** and **Hardt** 2005).

Rising share of export to the countries with well-established market economy proves increasing competitive abilities of Polish agri-food sector on the foreign markets (**Wigier** 2003). It is worth stressing that before Poland's accession to the European Union this growth was held in spite of much higher level of agricultural market protection in the EU than in Poland. In the years preceding the EU enlargement producer Nominal Protection Coefficient (NPC)[5] amounted to 1.30-1.35 in the EU, in comparison with 1.14-1.21 in Poland (Agricultural... 2003). It allowed us to conclude that mutual removal of customs barriers will be more beneficial for Polish companies exported to the EU Member States than entities from the EU exported to the Polish market (**Rowiński** 2005).

In 2006 agri-food trade dynamics fell down, export value, as well as import one rose by about 20% comparing with 2005 and trade balance amounted to 2.0 billion euro (Table 1). As far as researchers from Foundation of Assistance Programs for Agriculture are concerned, in the nearest future some two-digit agri-food export growth rate can be expected, but the stimulus caused by Poland's accession to the EU is slowly expired Pierwszy Portal... 2006). The significant increase in agri-food export value in first two years of Poland's membership in the EU, especially in 2004, in a crucial way based on cost and price advantages. In the next years, export expansion can be much more difficult, because those advantages have been reduced or exhausted. It should be deduced that competition moves to quality area. Competing for consumers with the help of well-known brand, quality assurance or intensive marketing needs high expenditures and is

[4] It should be said that Poland's accession to the EU caused agri-food trade creation effect, as well as agri-food trade diversion effect. The first one means occurring new flows of trade between the EU Member States, while the second one consists in replacing Extra-EU import with Intra-EU one (**Kawecka-Wyrzykowska** 1999).

[5] Producer Nominal Protection Coefficient is an indicator of the nominal rate of protection for producers measuring the ratio between the average price received by producers (at farm gate), including payments per tonne of current output, and the border price (measured at farm gate level) (**Kulawik** 2004).

more difficult than taking advantage of lower costs and prices. Moreover, Polish farmers have to compete against producers from the other EU Member States, including the Czech Republic, Hungary, Romania and Bulgaria. It is worth stressing that they often have some competitive advantages, resulted from scale of production or natural resources, which can make some kinds of agricultural production in Poland uncompetitive (e.g. tobacco and tomatoes).

Commodity structure of Polish agri-food trade

Considering commodity structure of Polish agri-food trade, it should be said that processed products dominate both in export and in import. In 2003-2006 their export share reached almost 75%, while import one was lower and amounted to 55% (Fig. 3). The significant share of processed products in export should be recognized as profitable. It resulted from ongoing modernization in many branches of Polish food industry, which contributes to differentiation of market offer and high competitiveness of Polish foodstuffs, especially on the Common Market (**Rowiński** 2002, **Czyżewski** and **Sapa** 2003). Import share seems to be high, but it should be stressed that most products imported by Poland come from the other climatic zones and are complementary in relation to domestic production.

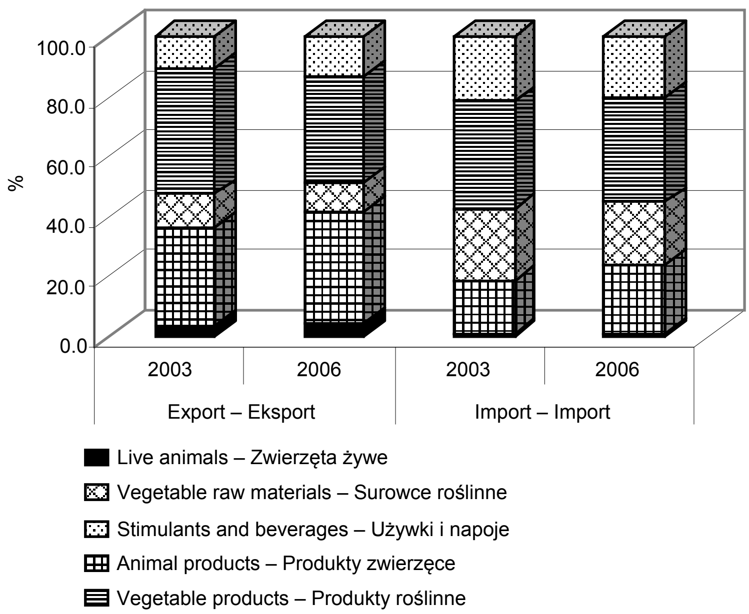

Fig. 3. Commodity structure of Polish agri-food trade by the processing stage of products in 2003 and 2006 (%) (on the basis of: Polski handel... 2006, 2007)
Ryc. 3. Struktura towarowa polskiego handlu zagranicznego produktami rolno-spożywczymi według stopnia przetworzenia produktów w latach 2003 i 2006 (%) (na podstawie: Polski handel... 2006, 2007)

In the analysed period, vegetable origin products hold an advantage over animal ones both in export and in import. However, it should be indicated that in spite of rise in plant products export value (Table 2), decrease in export share of this product group from 53% in 2003 to 45% in 2006 was noticed. Importance of this product line fell down slightly also in import (Fig. 3). Due to growth of trade in meat, especially pork and beef, as well as dairy products (Table 2), animal origin products consolidated their position in Polish foreign trade. In 2006 their export overcame 40% of total Polish agri-food export, while import reached almost a quarter of agri-food import (Fig. 3).

Table 2

Polish agri-food trade values in 2003 and 2006 (million euro) (on the basis of: Polski handel... 2006, 2007)
Obroty polskiego handlu zagranicznego produktami rolno-spożywczymi w latach 2003 i 2006 (mln euro) (na podstawie: Polski handel... 2006, 2007)

Products Produkty	Export Eksport		Import Import		Trade balance Saldo	
	2003	2006	2003	2006	2003	2006
1	2	3	4	5	6	7
I. Animal origin products (A-D) I. Produkty pochodzenia zwierzęcego (A-D)	1 454.8	3 534.8	660.3	1 522.3	794.5	2 012.5
A. Live animals – Zwierzęta żywe	151.1	346.8	38.6	83.7	112.5	263.1
Horses – Konie	37.3	35.0	3.6	2.6	33.7	32.4
Cattle – Bydło	96.0	210.1	8.1	16.0	87.9	194.1
Sheep – Owce	5.1	5.5	0.2	0.0	4.9	5.5
Others – Inne	12.7	96.2	26.7	65.1	–14.0	31.1
B. Processed products Produkty przetworzone	924.9	2 372.3	170.8	579.9	754.1	1 792.4
Red meat and offal Mięso czerwone i podroby	269.9	810.8	76.5	328.7	193.4	482.1
Poultry meat and offal Mięso drobiowe i podroby	213.7	420.3	17.2	54.0	196.5	366.3
Meat preparations Przetwory mięsne	97.8	191.3	9.0	25.0	88.8	166.3
Animal fats Tłuszcze zwierzęce	16.8	33.5	17.7	32.2	–0.9	1.3
Milk, cream and ice cream Mleko, śmietana i lody	190.2	551.7	22.9	68.8	167.3	482.9
Butter – Masło	19.0	45.3	9.1	15.2	9.9	30.1
Cheese and curds Sery i twarogi	117.5	319.4	18.4	56.0	99.1	263.4
C. Fish, crustaceans and fish products Ryby, skorupiaki i przetwory rybne	262.9	623.0	326.3	659.8	–63.4	–36.8

Table 2 – cont.

1	2	3	4	5	6	7
D. The other animal origin products Pozostałe produkty pochodzenia zwierzęcego	115.9	192.7	124.6	198.9	–8.7	–6.2
II. Vegetable origin products (E-G) II. Produkty pochodzenia roślinnego (E-G)	2 130.5	3 858.4	2 118.7	3 592.6	11.8	265.8
E. Raw materials Surowce	453.0	807.3	842.8	1 336.7	–389.8	–529.4
Cereals – Zboże	64.7	150.6	106.4	190.0	–41.7	–39.4
Oilseeds – Nasiona oleistych	3.2	40.6	57.4	103.5	–54.2	–62.9
Potatoes – Ziemniaki świeże	11.2	1.8	6.8	31.6	4.4	–29.8
Fresh fruit – Owoce świeże	135.0	211.6	489.5	683.5	–354.5	–471.9
Fresh vegetables Warzywa świeże	181.8	333.7	89.8	172.6	92.0	161.1
Flowers – Kwiaty	57.1	69.0	92.9	155.5	–35.8	–86.5
F. Processed products Produkty przetworzone	1 626.6	2 968.0	1 181.9	2 115.1	444.7	852.9
Vegetable oils and fats Oleje i tłuszcze roślinne	16.9	166.4	212.3	338.1	–195.4	–171.7
Milling industry products Produkty przemiału zbóż	11.1	18.2	31.3	50.4	–20.2	–32.2
Sugar and molasses Cukier i melasa	113.1	263.5	29.8	109.9	83.3	153.6
Confectionery Wyroby cukiernicze	430.8	938.3	175.2	412.2	255.6	526.1
Fruit preparations Przetwory z owoców	559.0	787.2	130.6	302.3	428.4	484.9
Vegetable preparations Przetwory z warzyw	304.5	411.2	69.1	135.3	235.4	275.9
Others – Inne	191.2	383.2	533.6	766.9	–342.4	–383.7
G. The other vegetable origin products Pozostałe produkty pochodzenia roślinnego	50.9	83.1	94.0	140.8	–43.1	–57.7
III. Stimulants and beverages III. Używki i napoje	418.0	1 129.7	777.5	1 314.4	–359.5	–184.7
Total (I + II + III) Ogółem (I + II + III)	4 003.3	8 522.9	3 556.5	6 429.3	446.8	2 093.6

Fruit, vegetables and their preparations are a dominating plant origin product group in Polish agri-food trade. Their export value increased almost by 50%, from 1.2 billion euro in 2003 to 1.7 billion euro in 2006. At the same time import amounted to 1.3 billion euro, that is 70% more than in 2003 (Table 2). First of all, rise in export of this product group was determined by relatively low prices of raw materials and costs of production[6] and rising efficiency of horticultural sector. This growing efficiency is reflected in constant concentration of production, improvement in sales offer and adjustment to the conditions for the operation of the enlarged EU market, especially within the food safety requirements. Moreover, slow shrinkage of raw material base in the EU-15 countries and shift the industrial capacities in fruit and vegetable industry to Poland caused increase in export (**Nosecka** 2004 b).

As far as **Ciechomski** (2002) is concerned, change in food habits, assuming growth of fruit and vegetables consumption, stimulates trade development as well. High consumer values, the nearness of the main outlets, long-time trade contracts and finally complementarity of production structure in Poland and its trade partners also make trade values bigger and bigger[7].

Beside fruit, vegetables and their preparations, sugar and confectionery hold an important position in Polish agri-food trade, especially in export. In 2006, relatively low exchange rate of Polish zloty in relation to euro, supremely high sugar prices in first three months, opportunity to put in an export bid without limits, and the beginning of the intervention buying had the most significant influence on sugar trade results. It should be expected that EU sugar market reform on 1st July 2006 and World Trade Organisation decision forced the European Union not to exceed subsidized sugar quotas[8], as well as simultaneous decrease in sugar production[9], compulsory reduction of sugar production quotas and subsidized export potential from intervention buying can considerably reduce Polish export in the next years.

Considering plant origin products, a significant value of vegetable oils and fats import is noteworthy (Table 2). It is mainly determined by structure of domestic production of oilseeds. In Poland, only rapeseed is produced in large quantities, therefore sunflower, soybean, peanuts and the others, as well as their preparations are usually imported.

Among animal origin products, live animals, especially cattle, meat and meat preparations are the main product groups in Polish agri-food export (Table 2). Beside the European integration, lack of self-sufficiency in meat in new Member States determined the dynamic growth of intra-EU trade in meat. **Baer-Nawrocka** (2005) proves that regarding total meat production, excluding Poland, self-sufficiency was achieved only by Hungary. Moreover, export was stimulated by large and modernized production

[6] For example, in Germany fruit and vegetable prices received by producers are by about 20-40% higher than in Poland, while prices of fruit and vegetable preparations exceed Polish ones by 12-40%. The biggest differences in prices apply to frozen fruit and vegetables, as well as concentrated juices. Poland has not got any competitive advantages only in production and processing of tomatoes (**Nosecka** 2004 a).

[7] See: **Pawlak** (2005).

[8] Subsidized sugar quotas, agreed for the EU countries during the Uruguay Round, are 1.273 million tonne and/or 499 million euro per year and are settled at the end of the September each year.

[9] In 2006 sugar production in Poland reached 1.7 million tonne, comparing with 2.0 million tonne in previous years.

potential, both at the farms and meat industry level, and adjustment Polish entities to the EU standards (**Kaliszuk** et **al.** 2005). Taking into account rise in the price of Polish meat products after accession to the EU, it should be said that some psychological factors and regarding Poland as an area free of animal diseases were also very important for rise in export (**Kaliszuk** et **al.** 2005). Gaining the opportunities of applying subsidies encouraged export to the third countries as well.

Dairy products also hold an important position in Polish agri-food trade. Removal of trade barriers between Poland and the EU countries, high prices on the world market of dairy products[10] and improvement in veterinary conditions in milk production, as well as dairy industry made export bigger and bigger. On the basis of data from General Veterinary Inspectorate, it should be indicated that only 7 from almost 370 domestic dairy companies did not adjust to the EU standards and had to stop running a business before the end of 2006 (**Drewnowska** 2006). Decreasing demand for dairy products on the internal market (**Rowiński** 2005) and simultaneous growing one on the EU market made export development easier as well.

Summary

Joining in the Common Market and adopting the Common Trade Policy rules caused the significant growth of Polish agri-food trade values and improvement in the positive trade balance. On the one hand, intra-EU trade intensification proves that duties and the other trade barriers before Poland's accession to the European Union considerably restricted mutual agri-food trade, on the other hand – confirms that Polish producers and exporters prepared for new market conditions well and took advantage of lower costs and prices. Considering loss or reduction of some cost advantages, as well as liberalization of world agricultural trade and rising competition on the part of producers outside the European Union, next years can be much more difficult for Polish exporters. It should be stressed that agri-food export potential depends mainly on approval from food industry, trade and foreign consumers to Polish products. At present, this approval is mainly observed at the industry and trade level, but highly positive consumer opinions can result in the future growth of Polish export. The highest export potential applies to trade in animal origin products.

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ZMIANY W POLSKIM HANDLU ZAGRANICZNYM PRODUKTAMI ROLNO-SPOŻYWCZYMI W WARUNKACH INTEGRACJI Z UNIĄ EUROPEJSKĄ

Streszczenie

Wraz z postępującymi procesami liberalizacji wymiany handlowej, większą otwartością polskiej gospodarki żywnościowej na świat, a w ostatnich latach w aspekcie integracji Polski z UE, w handlu zagranicznym produktami rolno-spożywczymi zachodziły dynamiczne zmiany, wynikające z działania regulacji handlowych oraz wewnętrznych i zewnętrznych uwarunkowań makroekonomicznych. Stąd, celem artykułu jest wskazanie głównych tendencji i przeobrażeń w strukturze towarowej wymiany rolno-żywnościowej Polski w latach 2003-2006.

Włączenie Polski w obszar Jednolitego Rynku Europejskiego (JRE) i przyjęcie zasad Wspólnej Polityki Handlowej UE (WPH UE) wywołało efekt kreacji i przesunięcia handlu artykułami rolno-żywnościowymi oraz poprawę dodatniego salda bilansu handlowego. Trudniejsze dla polskich producentów i eksporterów mogą być lata późniejsze, kiedy zostaną zniwelowane generowane przez nich do tej pory na JRE przewagi kosztowo-cenowe, a w przypadku ewentualnej dalszej liberalizacji obrotów rolnych zwiększy się konkurencja ze strony producentów żywności spoza UE.

W polskim handlu rolno-spożywczym dominują wyroby przemysłu spożywczego. Szczególnie wysoki potencjał eksportowy można dostrzec w handlu produktami pochodzenia zwierzęcego.