European Commission

Directorate-General for Agriculture

Agricultural Situation in the Candidate Countries

Country Report
on
Poland

July 2002

Foreword

This report is one of a series of short reports aimed at providing key statistical and economic information on the agricultural situation in each Candidate Country.

The report has been prepared within the Directorate General for Agriculture by Clemens Fuchs and is based on the information available in May 2002. It is primarily based on statistical information available from Eurostat. Where necessary, use has also been made of data from the FAOSTAT database as well as from national statistics. The country experts participating in the Network of Independent Experts in the Central and Eastern European Candidate Countries (CEECs), set up by the European Commission in 2000 in order to obtain expertise and up-to-date information on agriculture in the Candidate Countries, have provided a significant part of the information contained in the report and valuable insights on the data. In particular, Waldemar Guba has contributed to this report.

The views expressed in the report do not necessarily correspond to those of the European Commission.

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Map 1: Poland

1 GENERAL OVERVIEW

Poland has a size of 312,685 km² and is the largest country of the CC-12. It would be the fifth largest member state by area in the EU-27, following France (543,980 km²), Spain (505,990 km²), Sweden (449,960 km²), Germany (357,030 km²) and Finland (338,150 km²). Poland area represents almost 30 % of the CC-12 surface and about 7 % of the EU-27 surface (Tab. 1).

Poland's population of 38 million is the largest of the twelve Candidate Countries. In an EU-27 it would represent the fifth biggest country by population after Germany (82 million), United Kingdom (59 million), Italy (58 million), France (56 million) and Spain (39 million).

The total gross domestic production (GDP) of Poland is about 36 % of that of all the CC-12 together and would amount to 3.6 % of EU-27. The GDP per capita reaches 38.7 % of the EU-15 average.

Table 1: Poland – Area, Population and GDP in 2000 compared with CC-12 and EU

	Area	Population	Density	GDP in PPS [(1)]		
	000 km²	End of period (million)	Inhabitant / km²	Bio € PPS	000 € per capita PPS	PPS/ capita % of EU-15
Poland	**312**	**38**	**124**	**336**	**8.7**	***38****
CC-12	1,088	106	97	929	8.8	*39**
EU-15	3,236	375	116	8,510	22.5	*100*
EU-27	4,324	481	111	9,439	19.6	*87**
Poland in % of CC-12	*28*	*36*	*127*	*36*	*98*	
Poland in % of EU-15	*9.7*	*10*	*106*	*4.0*	*38*	
Poland in % of EU-27	*7.2*	*8.0*	*111*	*3.6*	*44*	

(1): Purchasing Power Standard (Source: EUROSTAT), * = estimate
SOURCES: EUROSTAT, OECD, FAOSTAT, DG AGRI G2

2 ECONOMIC DEVELOPMENT

2.1 General Economy

The Polish economy experienced a severe recession in 1990 and 1991. In 1992 the decline came to an end, real GDP accelerated steadily, averaging an annual growth of 5.3 % in 1993-1995. The growth rate peaked at 7 % in 1995 and in 1997 real GDP increased by 6.8 %. For the following period the growth rate has been at a level of 4 % to 4.8 % until 2000 (Tab. Annex 1). The worsening global economic conditions, the slowing of growth in the EU and tight macroeconomic policies in Poland have led to a less positive outlook for 2001 and 2002. Poland has experienced a sharp slowdown in growth since the third quarter of 2000, and growth rate for 2001 is estimated at 1.1 %.[1]

The government debt will increase in 2001 to € 7,5 billion and it is feared to add up to € 23,5 billion in 2002, which would correspond to 12% of the GDP and miss the Maastrich criteria of 3 % by far.

[1] European Commission; Directorate General for Economic and Financial Affairs (2002). The European Commission Forecast for the Candidate Countries. Spring 2002.

The positive economic development after the consolidation in the early 1990s has led to a substantial increase of consumer's income. Today Poland's consumer income reaches about 38 % of the purchasing power of the EU average. This comparatively low income explains the relative large part of household expenditure on food. The food expenditure is with approximately 37 % about twice as high than in the average for the EU-15 with 17.4 %.

Economic growth and restructuring has led to a significant reduction of unemployment from 16,5 % in 1994 to 12 % in 1999. Due to the less favourable development of the general economic conditions, unemployment increased again to 18.2 % in 2001. Especially rural labour markets, which are malfunctioning, will be negatively affected by the slowing of economic growth.

2.2 Agriculture in the Economy

In the process of restructuring and economic development services, industrial and construction have gained importance, while the share of agriculture in GDP is declining. Its proportion is reduced from 8 % in 1990 to 2.9 % in 2000 (i.e. not very far from the EU-15 average which is 2.0 %).

Of a total area of 31 millions ha, Utilized Agricultural Area (UAA) represents 18.2 millionha or 58.3 % of the total. This is a relatively high share compared with the other CCs and EU Member States (EU-15 average is 40.6 % and EU-27 average would be 44 %). Arable land represents 76 % of UAA and pastures and meadows approximately 22 %. This share has remained relatively stable in the last 10 years. The agricultural area of Poland is 31 % of the CC-12 and will contribute to nearly 10% of the UAA of EU-27 (Tab. 2).

More than 2.6 million people work in agriculture, fishery and forestry, corresponding to 18.8 % of total civilian employment (EU-15 4.3 %). The Labour Force Survey as the most harmonised and reliable data source is used to analyse agricultural employment. It is accounting only active persons and show a decline of the share of employment in agriculture and forestry (i.e. from 22.1 % in 1996 to 18.8 % in 2000). After Romania (4.8 million) and before Italy (1.1 million) Poland will have the second highest employment in agriculture in the EU-27 and will contribute to 17.2 % of the agricultural labour force in the EU-27.

EU-15 is still the most important agricultural trade partner of Poland although the share has declined from about 60 % in the beginning of the 90's to nearly 40 % at the end of the 90's. In the year 1999 the bilateral trade between Poland and the EU-15 represented 45.5 % of Poland's agricultural exports and 47.7 % of agricultural imports of Poland. However, during this decade the importance of the trade with the CEECs increased. In sum, Poland trades about 59 % of its imports and 56 % of its exports with Western and Central Europe. This shows already a high integration taking into account the fact that agricultural trade underlies special conditions imposed by the Europe Agreement and the CEFTA agreement.

In the transition process the value of agricultural production declined until 1994 where it dropped to about 78 % of the 1989 to 1991 average. Since then agricultural production stabilised and reached a level of 88 % in the year 1999. While crop production shows a pattern of the fluctuations according to changes in annual crop yields, the animal production continually lost share of production until 1994 and increased its share to an equal level with crop production in the year 1999.

Table 2: The Role of the Agricultural Sector

	Utilised Agricultural Area 000 ha (2)	% of total area	Gross Value Added of Agriculture (1) million EUR	Share of Agriculture in GDP (%)	Agricultural Employment (1) 000	% of total employment	Food Expenditure % of total
Year	2000						1998
Poland	**18,220**	***58.3***	**4,965 d**	***2.9 ****	**2,698**	***18.8***	***36.9***
CC-12	58,808	*54.1*	18,552 *	*4.5*	8,950 *	*22.0*	*39.1*
EU-15	131,619	*40.6*	167,197	*2.0 **	6,767	*4.3*	*17.4* (3)
EU-27	190,427	*44.0*	185,748	*2.2*	15,717	*7.9*	*19.5*
Poland in % of CC-12	*31*		*26*		*30*		
Poland in % of EU-15	*13*		*3.0*		*39*		
Poland in % of EU-27	*9.6*		*2.7*		*17*		

(1): Including Forestry, Hunting and Fishing sector ; (2): Utilized Agricultural Area; (3) = 1997; * = estimate
SOURCES: EUROSTAT, DG ECFIN, OECD, FAOSTAT, DG AGRI G2

3 STRUCTURE OF FARMING

The data concerning farm structures in Poland relies on estimations based on the agricultural census carried out in 1996. In 2003 new data should be available based on the first agricultural census carried out with harmonised methodology. The data in this section, therefore, should be treated with care.

Total number of holdings is approximately two million with a high share of subsistence and semi-subsistence farming. Privatisation of state farms began in 1991 and in 1996 about 1,800 farms or only 0.1 % of total holdings were co-operative and public farms, which had a share of 10.5 % of total agricultural area in 1997.

Around 57 % of the individual holdings have less than 5 ha whereas only 8.5% have more than 15 ha (Tab. 3); the latter, however, representing 36 % of the total Utilised Agricultural Area (UAA). Average farm size of individual farms is 7.2 ha, compared to an average of 19 ha in the EU.

Table 3: Individual farms by size classes, 1990-2000

Category	1990		1995	1996	1997	1998	2000	*2000 in %*
Number of holdings by size classes (000 holdings)								
	2,137.5		2,047.6	2,041.4	2,008.3	1,989.2	1,880.9	*100*
1 to 2 hectares	378.3		428.8	462.2	439.2	449.4	448.2	*23.8*
2 to 5 hectares	750.8		690.3	667.6	691.0	676.5	613.6	*32.6*
5 to 10 hectares	636.3		545.2	520.8	503.1	491.2	447.7	*23.8*
10 to 15 hectares	242		219.5	217.2	206.2	202.8	185.7	*9.9*
15 hectares and more	130.1		163.8	173.6	168.8	170.3	185.7	*9.9*
Agricultural area by farm size classes (000 hectares)								
	13,399		13,819	14,259	13,936	13,756	13,510	*100*
1 to 2 hectares	563		618	650	630	643	644	*4.8*
2 to 5 hectares	2,504		2,275	2,199	2,263	2,206	1,987	*14.7*
5 to 10 hectares	4,622		3,865	3,713	3,575	3,497	3,182	*23.6*
10 to 15 hectares	2,996		2,655	2,631	2,499	2,450	2,246	*16.6*
15 hectares and more	2,713		4,405	5,065	4,968	4,959	5,449	*40.3*

Source: Rocznik Statystyczny Rolnictwa 2001. GUS. Warszawa

Poland's farm structure is characterised by two main features:

Firstly, four fifths of agricultural land was not put into collective farms during socialist time and therefore did not need to be privatised. The remaining 20% were owned by the state. Soon after transition the Agricultural Property Agency (APA) has begun to administer and gradually privatise the state owned area. By the end of 1999 about 4.5 millionha were taken over by APA of which it sold slightly less than 20%; mainly to newly established individual farms. Another two thirds of this area are leased based on long-term contracts, a small share of it is cultivated by state farms and some other part is used for miscellaneous purposes. Due to several factors including worsening economic conditions privatisation is not yet completed but basically all land is farmed privately.

Secondly, the farm structure differs significantly on a regional basis. In the northern and western part farm structure is dominated by large enterprises while the other regions are characterised by small-scale farming. The adjustments of the 1990s did not alter substantially the average size of individual farms of about 7.2 ha. However, behind this aggregate figure some different developments took place. Those individual farms which cultivate between 2 and 15 ha declined in number; especially those in size class 5 to 10 ha (by more than 20 %). The smallest size class (1 to 2 ha) and the largest one (15 ha and more) benefited from this fall in number by roughly 20 % and 30 %, respectively. The developments confirm an increasing duality of small-scale semi-subsistence farms on one side and market oriented farms on the other side. Especially the increase of numbers of smallest farms indicates the few employment alternatives available to farmers and the lack of social security the rural population has to face.

More than 90 % of the agricultural land is owned privately; of which 83% by individual farms. Members of co-operatives own only a tiny share. Around 5 % to 6 % is owned by other legal entities like stock holding companies etc.

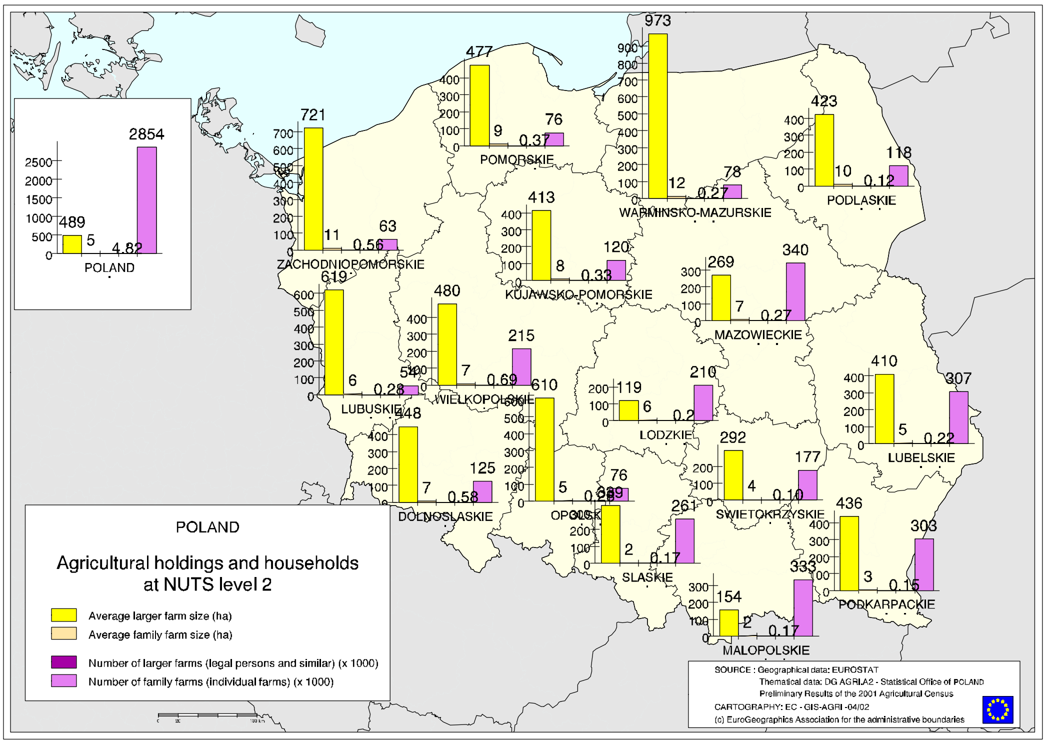
Quite a few farms are operated by foreigners though these persons are not allowed to own the land. Mostly 200 of those holdings are operated as individual farms and about 140 by stock companies with foreign shareholders. These foreign farms have an average of several hundred hectares in size.

Farm structure will continue to adjust in Poland. The pace of adjustment depends on several factors such as the availability of off-farm job alternatives - especially in rural areas - and the economic conditions. It is obvious that the nearly 2 million individual farms face intense restructuring in the future, especially after accession. In 1996, only 11% of the operators among all individual farms earned their income exclusively and 30% mainly from farming. The remaining ones received most the earnings from other engagements. About half of all individual farms do not have a commercial orientation.

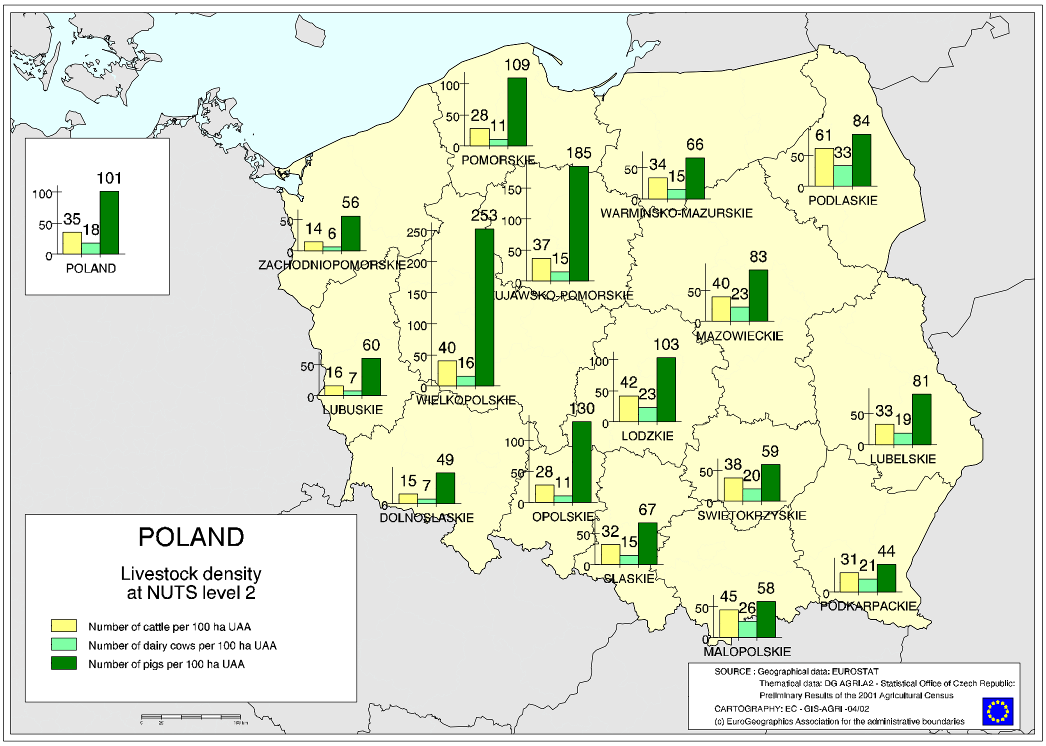
Since a large share of Polish farmers is above 50 years old many of the farms may be given up after these persons cease to operate them. This allows other farms to enlarge in size and perhaps pass the minimum acreage needed for efficient farming.

Regional differences in the farm structure and in the livestock density (animals per 100 ha) can be seen on the following two maps.

Map 2: Regional Farm Structure in Poland



Map 3: Regional Livestock Density in Poland



4 VALUE OF AGRICULTURAL PRODUCTION, PRICE RELATIONS AND FARM INCOME

4.1 Value of Agricultural Production

The agricultural production declined the last decade by about 12 % relative to 1990. Agricultural production amounted to 12.1 Bio € in 1998 and decreased to 10.6 Bio € in 1999 (Tab. 4). Poland agricultural output represents about 35 % of that of the CC-12.

Table 4: Agricultural Production in Poland

	1998		1999	
	in million€	*in %*	in million€	*in %*
Agricultural output	12191.15	*100*	10651.25	*100*
Crop output	6292.48	*51.6*	5494.21	*51.6*
Animal output	5653.73	*46.4*	4898.62	*46.0*
Services	244.93	*2.0*	258.41	*2.4*

Source: Eurostat

Most important products, measured as value of agricultural output in the years 1998 and 1999, are cereals (18.0 %), vegetables (7.4 %), potatoes (6.9 %), fruits (6.3 %). For animal production milk accounts for 13.6 %, pork for 18.7 % and eggs and poultry together for 8.8 % of agricultural output (Tab. 5).

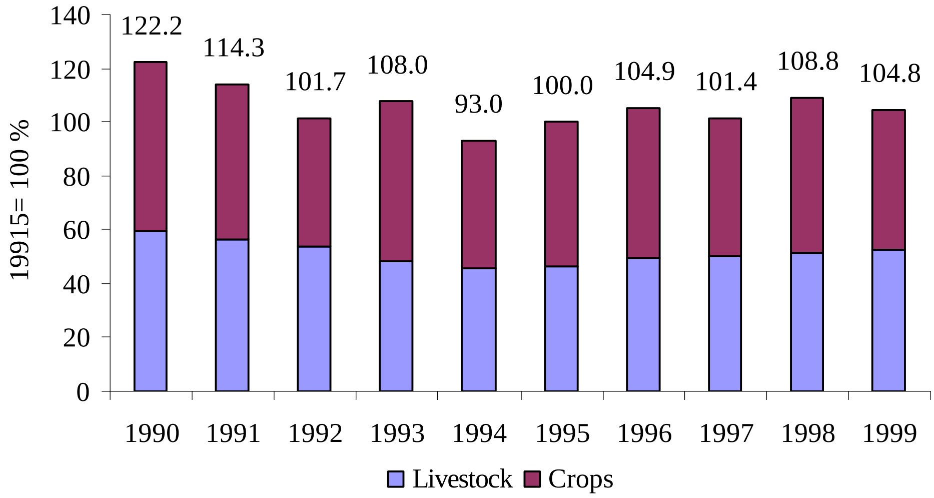
Table 5: Share of the Average Value of Production (1998-1999)

Products	in % of total
Cereals	18.0
• *Wheat*	*8.0*
• *Barley*	*2.3*
• *Maize*	*0.4*
• *Oat*	*2.8*
• *Rye*	*3.0*
• *Other cereals*	*1.4*
Rapeseeds	1.8
Sugar	2.9
Vegetables	7.4
Potatoes	6.9
Fruits	6.3
Milk	13.6
Beef	4.3
Pork	18.7
Eggs	3.4
Poultry	5.4
Sheep meat	0.1

Source: Eurostat

Agricultural production declined until 1994 where it dropped from 122 % in 1990 to 93 % of the 1995 base of 100 %. Since then agricultural production is fluctuating with ups and downs but stabilised and reached 104.8 % in 1999 (Fig. 1). Agricultural production has shifted towards crop production, while animal production has lost importance in between times. The labour intensive part of livestock production, i.e. milk and beef production still is restructuring and is losing importance compared to pork and poultry production.

Figure 1: Development of Agricultural Production (1995=100 %) and Share of Crop and Livestock Production (1990 -1999)



Source: FAO and Eurostat

4.2 Current Economic Conditions and Factor Income

Over the last couple of years the ratio between intermediate consumption and value of gross agricultural output remained rather constant implying that there was no significant change in the intensity of agriculture. Gains in productivity were not strong enough to make up for the worsening terms of trade. The level of productivity is much lower than that of the EU. The main reason for the low productivity is over-employment, which has rather social than economic reasons.

Polish agriculture has a relatively low endowment with capital both in quantitative terms as well as in terms of quality of technical equipment. Since capital is relatively expensive, it is substituted by land and labour. To a degree this explains the low productivity of both these two production factors. Despite the efforts to stabilise agricultural markets, which discouraged investments and technological change, farm profitability shows a continuing downward trend.

According to national statistics, agricultural incomes over the period 1990-2000 went through a dramatic decline. Modest improvement in incomes in 1993 and 1995 had not substantially improved the situation. The sharpest decline was observed in 1991 and may be attributed to adjustment of largely distorted price relations in agriculture, especially very low input prices as well as the economy-wide changes in relative prices manifested, for example, by the real appreciation of the exchange rate. However, even excluding this factor and taking 1990 as a base for comparison, agricultural income fell by over 60 % from 1990 to 2000 (Tab. 6).

Table 6: Agricultural income per ha of farmland in Poland

	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
1990=100	100	53	47	52	48	58	54	46	37	31	36
1991=100		100	89	99	90	109	102	86	69	58	67

Source: IERiGZ, Wyniki Rachunkowosci Rolnej Gospodarstw Indywidualnych 2000, pp 9. and own calculations. Real incomes are derived from nominal values using CPI index. The IERiGZ farm data is based on sample of about 1300 farms with bookkeeping and these farms are viewed as being better than average.

From 1998 to 1999 “Total Agricultural Output” and “Net Value Added at Basic Prices” continued declining; in the case of Net Value Added (NVA) from nearly 4 Bill € to about 3 Bill € (Tab. 7). The NVA per ha reached a level of 222 €/ha in 1998 and decreased to 170 €/ha in 1999. Compared with the EU-15 NVA average of 833 €/ha (1998) and 807 €/ha (1999) Poland reaches only 26.7 % (1998) or 21.1 % (1999) of the EU-15 NVA level. Furthermore, with respect to farm income, it has to be considered that on average the “Polish family farm” is only one third of the EU-15 average farm size; therefore income disparities ought to be much greater per farm or per work unit. The income measured as Net Value Added (NVA) per active employed person (according to the Labour Force Survey) in Poland reaches only 8.2 % (1998) or 6.7 % (1999) of the comparable EU-15 level.

Table 7: Economic Accounts for Agriculture (million EUR)

Poland	1998	1999	2000
Total Agricultural Output	12,479	10,882	n.a.
Intermediate Consumption	7,300	6,624	n.a.
Gross Value Added at Basic Prices	5,178	4,258	n.a.
Net Value Added (NVA) at Basic Prices	4,046	3,102	n.a.
Poland: NVA/ha	*222 €/ha*	*170 €/ha*	n.a.
EU-15: Net Value Added (NVA) at Basic Prices in Mill€	109,642	106,218	109,497
EU-15: NVA/ha	*833 €/ha*	*807 €/ha*	*832 €/ha*

Source: Eurostat

An analysis of the origin of agricultural households’ income reveals that farming is the most important source (72 %). This is followed by social benefits which make up another 20% of income. Self- and off-farm employment constitute only a fraction of agricultural household income (Tab. 8).

Table 8: Source of Income of Agricultural Household in Poland (2000)

Specification	%
Income from a private farm in agriculture	72,2
Income from self-employment	1,6
Income from hired work	0,1
Income from social security benefits, including:	19,7
• Retirement pay	*10,7*
• Pension	*7,2*
Income from other social benefits	3,1
Other income	3,4

Source: GUS (2001) Statistical Yearbook

Outflow of labour to other sectors is one of the most important conditions and can be expected only if opportunity costs of rural labour will increase due to increasing off-farm income opportunities.

4.3 Development of Terms of Trade and Agricultural Product Prices

Overall the terms of trade for agriculture have deteriorated in Poland since the start of transition i.e. since 1990 (Tab. 9), despite a certain period of recovery in the mid-1990s.

Table 9: Development of Input Prices, Output Prices and Terms of Trade for Agriculture in Poland, (1990 = 100)

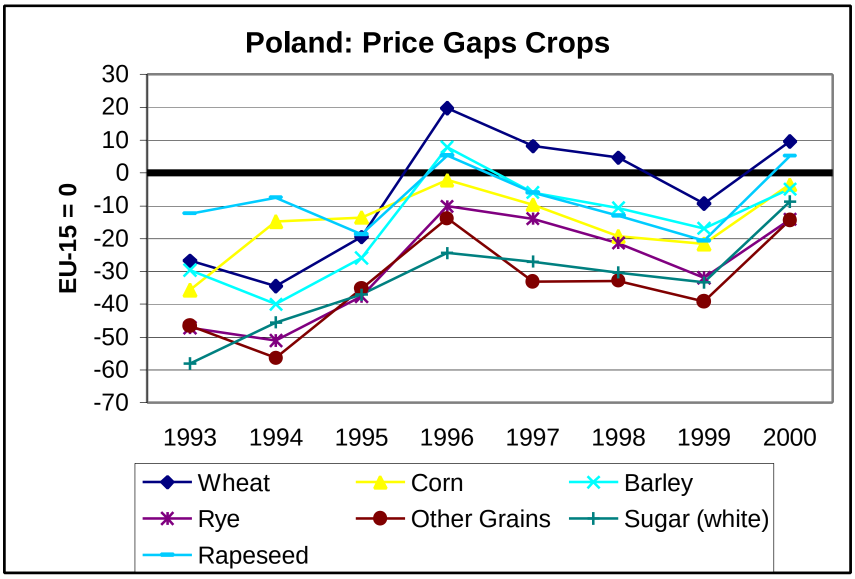
	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Input prices	100	178	240	327	410	512	617	705	772	828	922
Output prices	100	129	207	274	376	478	553	605	606	595	683
Terms of trade	100	73	86	84	92	93	90	86	79	72	74

Source: GUS (2001) Statistical Yearbook

The big bang liberalisation in Poland caused agricultural prices to drop dramatically in the early 1990s. Prices, however, stabilised and increased for most of the sectors.

In 1996 cereal and oilseed prices benefited from exceptionally high world market prices which lifted wheat, barley and maize prices to the level of EU-15 producer prices. Prices for rye and for other grains (oats) remained at levels at about 10 % below average EU prices (Fig. 2). From 1997 onwards, crop prices decreased and fell below EU levels. However, in 2000 prices increased again after a bad harvest and aligned to EU levels. Even price gaps for rye and other grains were lowered to 15 %. Like 1996 but for different reasons, 2000 represents an exceptional year in terms of price developments. On average the greatest price gaps exist for sugar (-30 %), rye (–20 to –30 %) and other grains (-20 to –35 %). Only the price for wheat has almost consistently been above EU levels since 1996.

Figure 2:



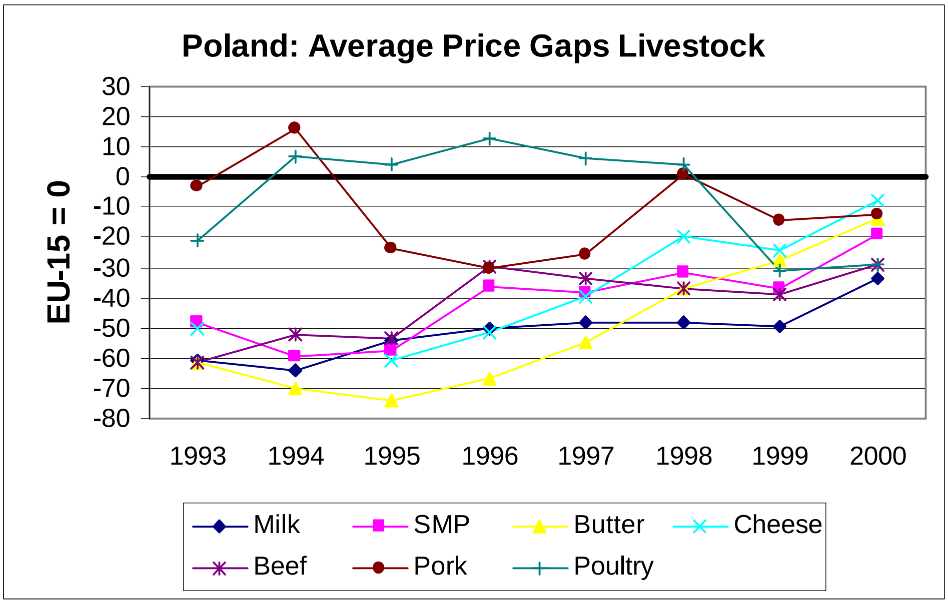
Beef prices in Poland have declined compared to those in the EU. The price gaps increased from 30 % in 1996 to 40 % in 1999. The primary cause of the price gap in the beef sector is the difference in price support between the two markets. While in Poland beef is the least supported product, in the EU it still enjoys high market price support. The decline in price of beef in Poland is associated with the decrease in domestic consumption and the corresponding downsizing of the domestic herd size. However, a part of these price gaps can be explained by quality differences due to the ongoing reduction of the dairy cow herd in Poland.

The average quality of beef and pork meat in Poland is still substantially below average EU levels. Livestock prices in Poland represent average prices across all qualities and are compared to EU prices of the high quality segment (R3 prices, E carcasses). The comparison should therefore be treated with care. The price gaps for beef should be significantly lower and prices for pork should be consistently at or above EU levels, if adjusted for quality.

Pork prices have fluctuated at levels between +20 % and –30 % around the EU price (Fig. 3). First estimates of high quality pork carcasses show them consistently above EU levels. Chicken prices are above EU prices and only recently dropped below this level in 1999. The increase of quality requirements might lead to an increase of prices for pork and poultry in Poland as costs of production grow. This might lead to additional adjustment pressures during integration into the EU.

The prices for dairy products have increased substantially since 1996. While SMP prices stagnated at levels around 30 to 35 % lower than EU prices, butter and cheese prices have continuously aligned to EU levels, but remain at around 20 % lower than in the EU. The quality argument applies less for butter and SMP than for cheese.

Figure 3:



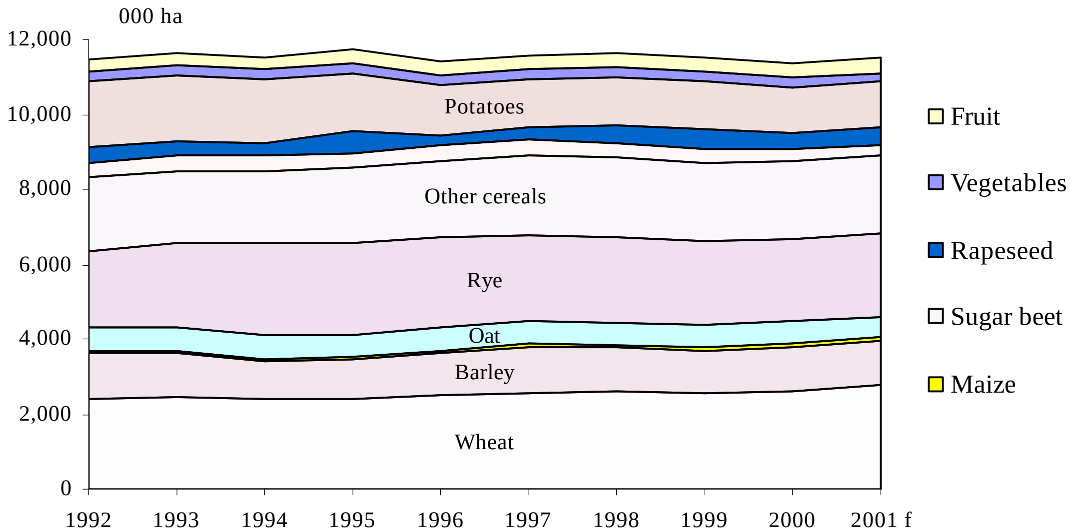
5 AGRICULTURAL PRODUCTION

5.1 Crop Production

Currently, cereals use nearly half of the agricultural area of 18.4 million ha. The area used for cereals has increased from approximately 45 % in 1992 to 48 % in 1999. The rye area of 2.2 million ha represents 86 % of the total rye area in the CC-12 together. Another 2 million ha or 24 % of cereals area is used mostly for triticale, which is a close substitute in the production of rye, and may be switched to rye, if market conditions for rye improve due to accession. Poland, therefore, has a vast potential for rye production in an enlarged Union and could possible grow more rye than Germany, the main rye producing country in the EU-15.

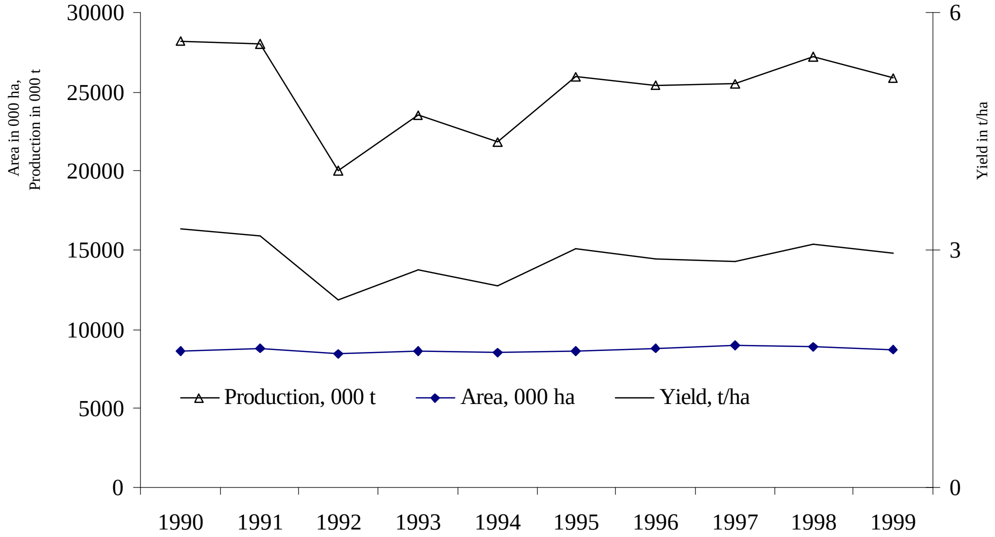
Other important crops are oilseeds, mainly rapeseeds, with 0.5 million ha or 3 % of UAA, sugar beets with 0.4 million ha or 2 % of the UAA and potatoes with 1.2 million ha UAA . Potato area has been significantly reduced by one third between 1990 and 1999 (Fig. 4).

Figure 4: Crop Area in Poland



While cereals area has been stable during the last decade the output varied responding to the yield level. Transitional effects had let the cereal yields dropped to 2.4 t/ha in 1992. They recovered until 1995 to 3 t/ha and have fluctuated around that level since then (Figure 5). The average cereal yield in Poland is much lower than in the EU-15, where it reached 5.7 t/ha in 2000. The lower yields in Poland are due to the relatively high proportions of poor, sandy soils and due to the low level of inputs, especially in regions with a small-scale farm structure. Not less important factors explaining the lower level of inputs in Poland include: (i) high market instability and downward trend in farm profitability which have been experienced during economic transition (ii) long-lasting differences in the general and product specific support to farm production between the two markets (affecting both technological change and input intensity).

Figure 5: Cereal Production, Area and Yield in Poland



Despite a slight upward trend of yields in Poland, the gap to average EU yields is still wide and has not significantly narrowed. Cereal yields in Poland reached 53 % of that of the EU-15 in the period of 1992 to 2001 (Fig. 6). Individual crop yields for maize, soft wheat, barley, oats and rye are at levels of 45 to 80 % of comparable levels in the EU-15 (Fig. 7). Still a potential of yield increases exists, which is however linked to the use of advanced varieties, increased use of inputs and availability of capital, and the restructuring of farms.

Figure 6: Cereal Yields in Poland relative to the EU-15

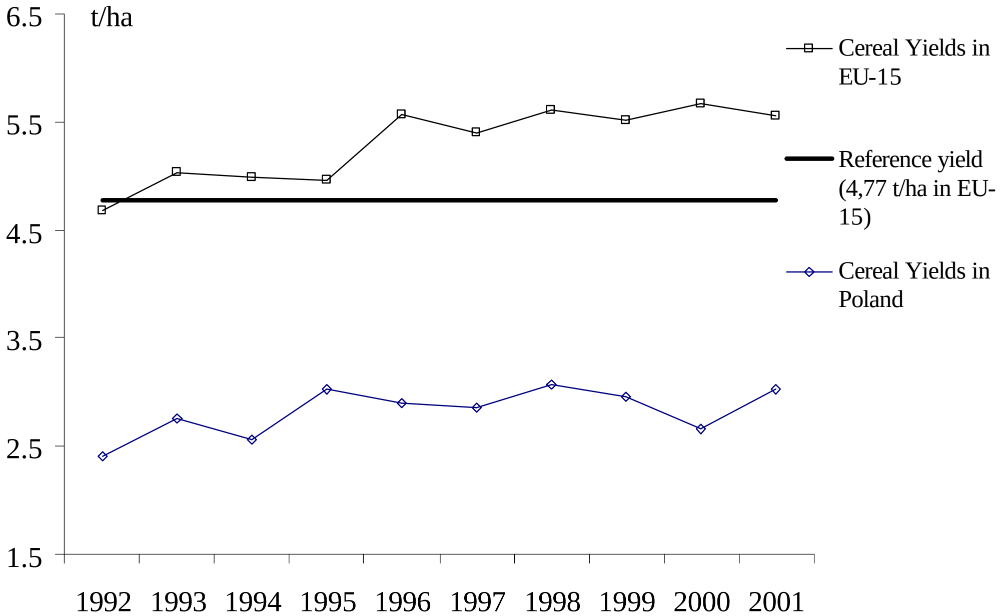


Figure 7: Individual Cereal Yields in Poland - Compared to EU-15 (EU-15 = 100 %)

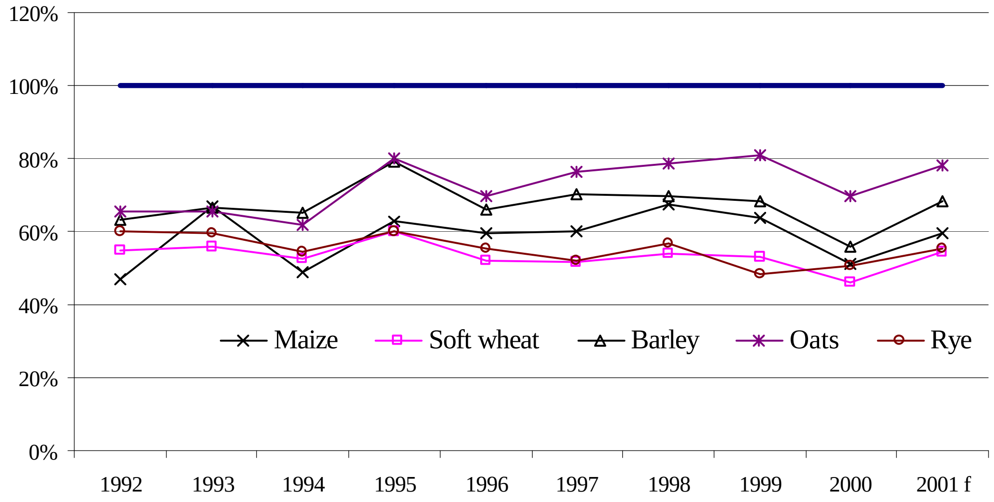


Figure 8 shows the development of cereal and oilseed yields, production and use in Poland. Additional information about the share of value of the product group or the individual product is given. Also the share of the production as a percentage of overall production in the CC-12, the comparison to EU-15 and the calculated share of the EU-27 region is shown. Figure 9 gives the same kind of information for other crops and Figure 11 for animal products.

The sharp decline of agricultural production in Poland at the beginning of the 1990s led to a decline of self-sufficiency for cereals. At the end of the 90's the self-sufficiency reached for crops a level of 93 % for cereals, 128 % for rapeseeds, 115 % for potatoes and 132 % for sugar (Tab. 10). Under current policy conditions self-sufficiency is forecasted to increase for most crops.

Table 10: Self-sufficiency in Crop Production (%)

	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000 *	2001 f
Cereals	93	102	101	84	100	91	96	97	94	96	93	87	98
Wheat	84	98	98	84	97	89	97	96	89	99	94	85	100
Barley	91	105	104	79	101	78	89	92	96	88	86	77	90
Maize	31	88	80	19	49	41	41	44	42	53	58	50	60
Rye	106	106	103	81	106	96	96	98	104	99	95	93	103
Oats	102	95	106	100	104	100	99	102	105	100	102	100	100
Other	103	106	103	105	105	102	105	109	98	101	96	96	100
Rapeseed	200	145	150	126	111	110	171	51	69	115	128	94	105
Potatoes	120	125	122	114	124	113	112	122	113	119	115	114	113

Source: DG AGRI

Figure 8: Cereal and Oilseed Yields, Production and Use in Poland

Value in % of Agri. Output (1998-1999)

CC and EU share of production (1998-2000)

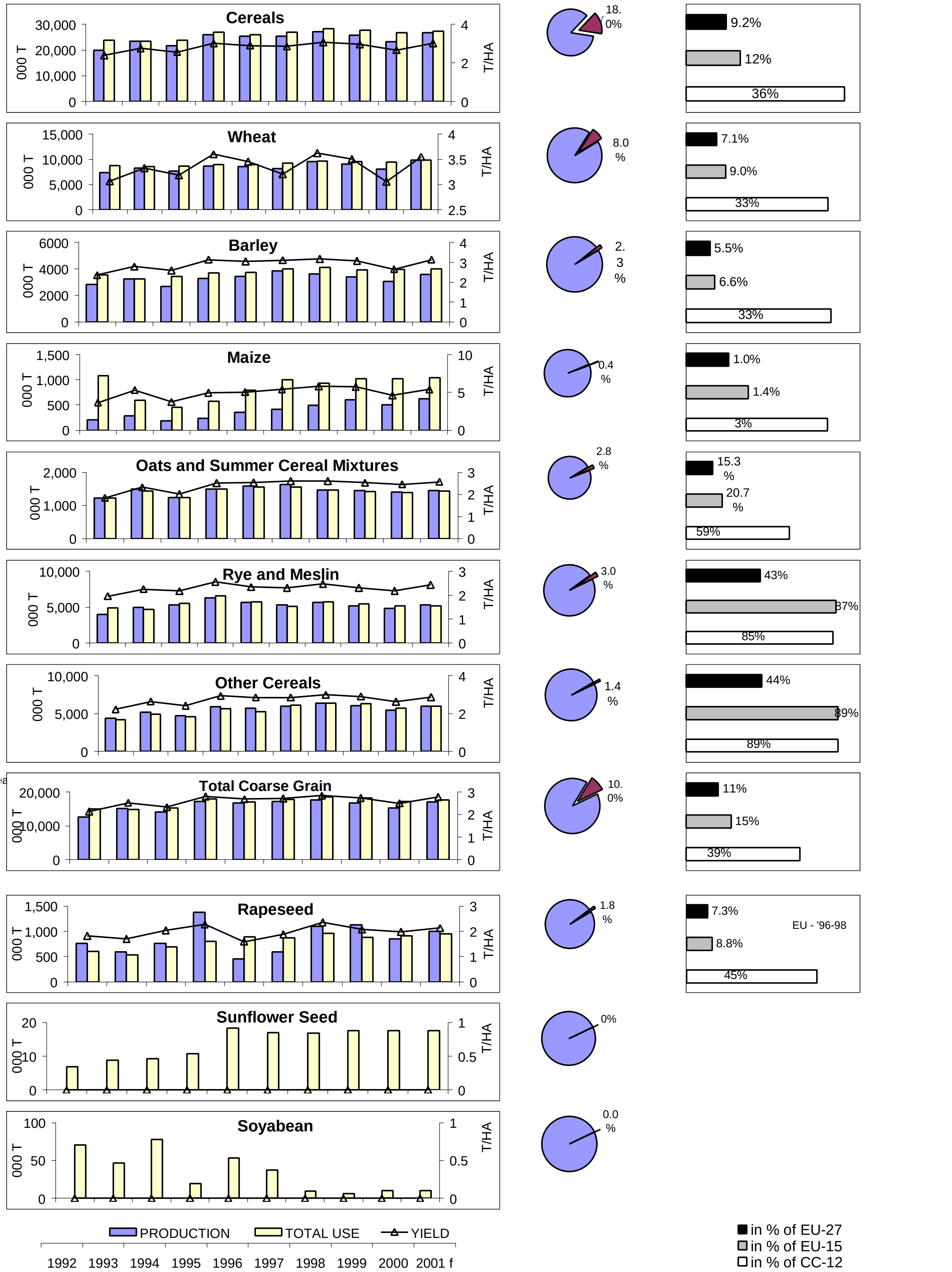
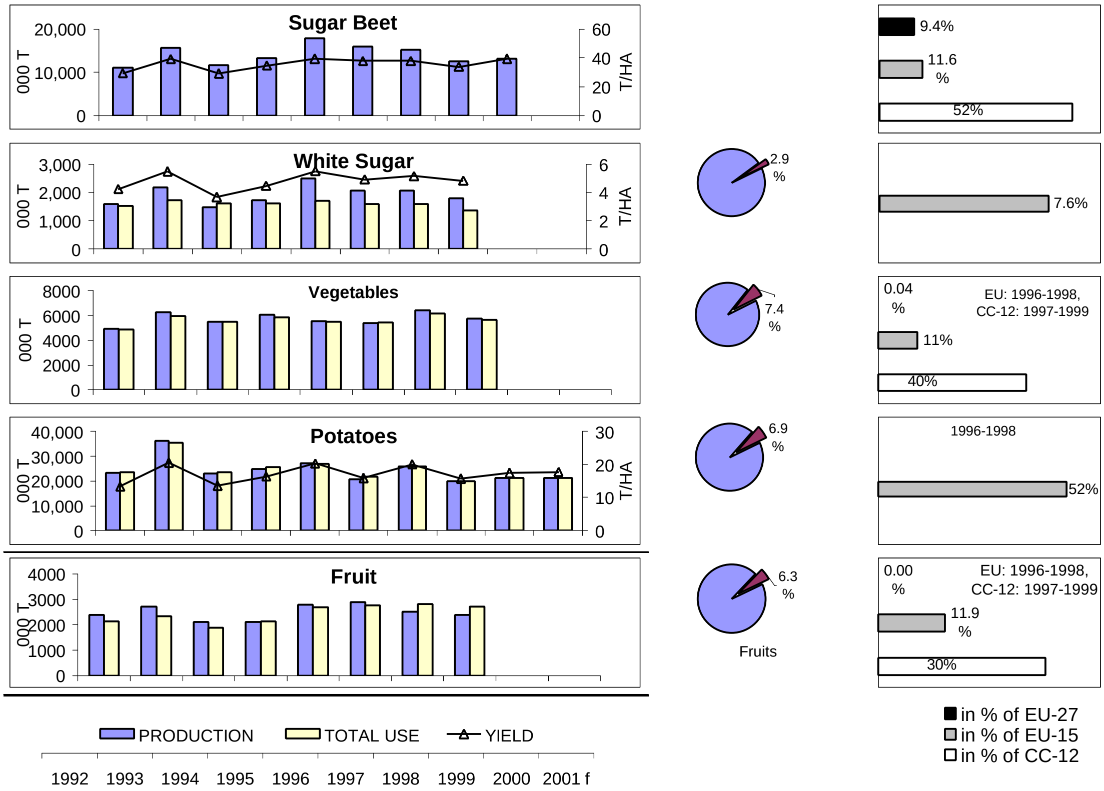


Figure 9: Production and Use of other Crops in Poland

Value in % of Agri. Output (1998-1999)

CC and EU share of production (1998-2000)



5.2 Livestock Production

About 77.6 % of all farms represent traditional mixed farms, which keep livestock with a low degree of specialisation in animal production. About two third of all farms with livestock, rear at least two types of animals. This pattern is shaped by two major forces: *The first one* is generally a low level of specialisation in Polish farming attributable to:i) low intensity of production technologies and ii) unstable price relations and risks on markets. These factors promote diverse product structure of farm output of commercial farms. *The other important* factor is high share of subsistence and semi-subsistence farms. They diversify production trying to adjust final output to on-farm consumption needs and limited direct sales. Herds are generally very small, however, one needs to remember that the smallest herds belong to subsistence farming. Minimum efficient size of herds i.e. a size that enables commercial farms to meet all technological requirements tends to be much higher.

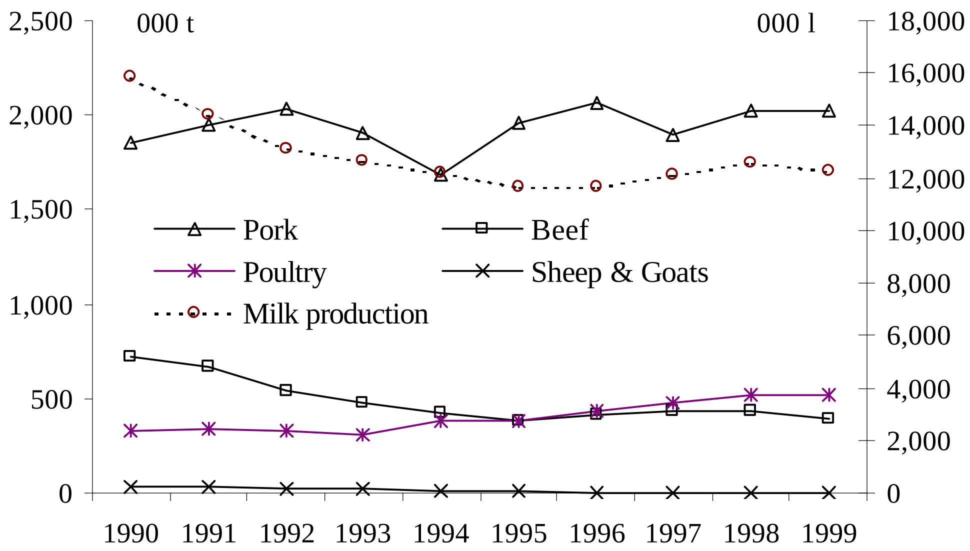
In the transition process the livestock production has developed differently: In the period of 1990 to 2000 the number of dairy cows declined by 35 %. In the same period the milk production has declined by 27.5 % as the effect of declining cow herd was partially compensated by increasing milk yields. In 2000 the milk yields have reached a level of 3,772 kg per cow and year which is 36 % below EU-15 average of 5,707 kg per cow.

The agricultural census of 1996 shows that 61.5 % of the farms keep cows and 68.4 % of the holdings had 1 to 2 cows. More stringent legal quality requirements for farm milk introduced in 1999 resulted in the decline the number of producers selling to dairy's to about 450 thousand in mid 2000, while the share of milk meeting EU standards increased from 8 % in 1997 to 60 % in the end of 2001.

As there is little specialised beef production in Poland, beef production is tightly linked with milk production and follows the herd size of dairy cows. Beef and veal meat production has declined by 53 % in last decade (1990 to 2000). A sharp decline in sheep stocks and sheep meat production was observed in the same period.

The most important meat product in Poland is pork. The pork production is relatively stabilised, benefiting from direct interventions, and seams to follow a cycle as it already works in the EU or at world market level. The poultry meat production increased by 65 % in 10 years and is now even higher than the beef meat production. Again, like pork, poultry production benefits from increasing markets as well as favourable polices (Fig. 10).

Figure 10: Livestock and Milk Production in Poland



In 2000 self-sufficiency for livestock production was 115 % for beef and 103 % for milk. Self-sufficiency for pig and poultry was about 105 % in 2000 (Tab. 11). The forecast shows a further increase of production of the latter two meat types, outpacing the increase of consumption.

Table 11: Self-sufficiency in Animal Production in %

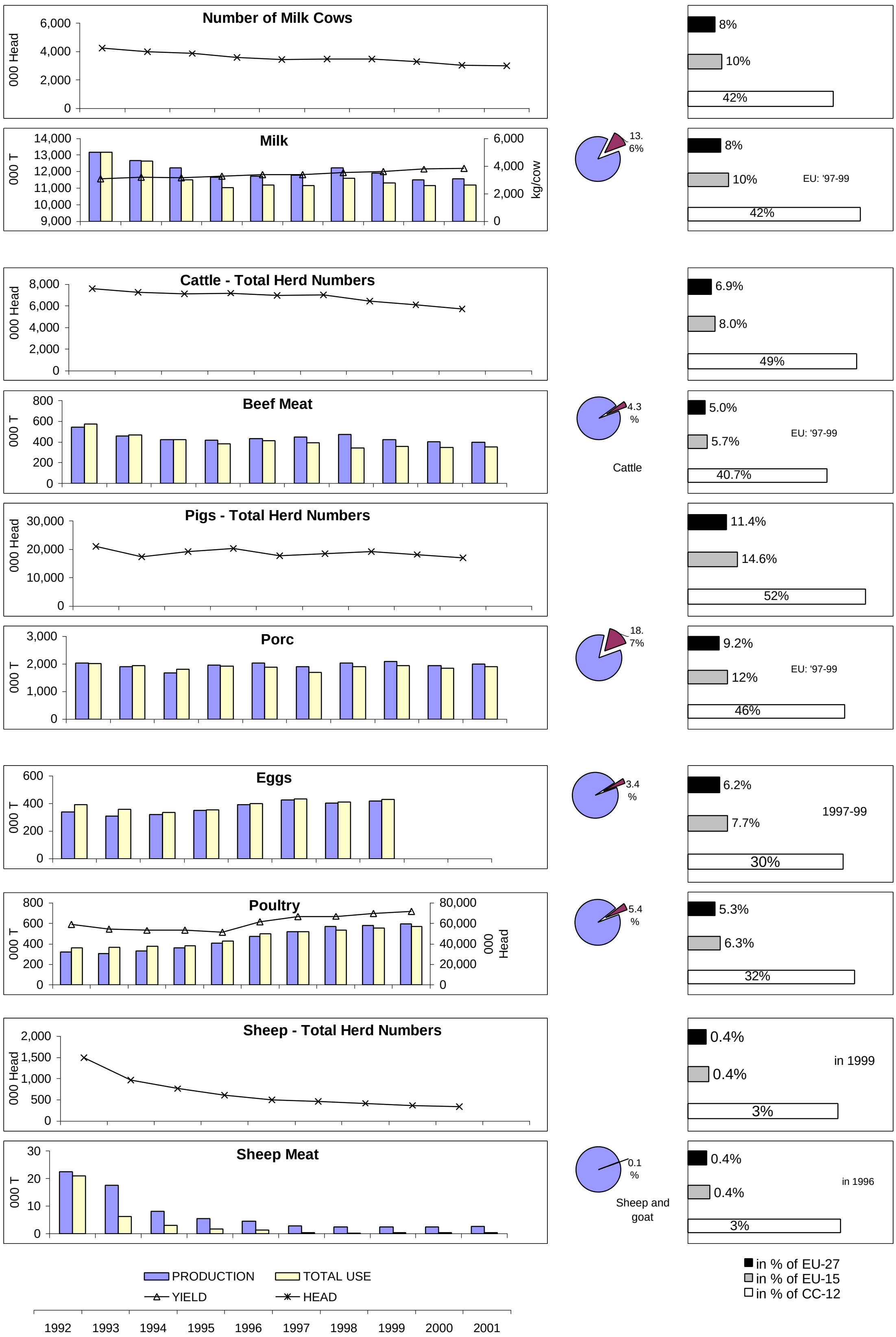
	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000 *	2001 f
Beef	110	117	107	95	97	100	109	105	114	137	118	115	114
Milk	100	105	100	100	100	106	106	105	106	106	104	103	103
Pigs	101	102	97	101	98	93	103	107	113	107	108	105	106
Poultry	106	105	100	88	84	88	95	96	95	100	107	105	104

Source: DG AGRI

Figure 11: Livestock Production and Use in Poland

Value in % of Agri. Output (1998-1999)

CC and EU share of production (1998-2000)



6 FOOD INDUSTRY

Agri-food is an important industrial sector in Poland. Production is rapidly increasing and investment in the sector has doubled in 1993-95. The food industry features Poland's biggest companies; ninety agri-food enterprises are amongst the top 500 Polish companies, most in public ownership. The privatisation programme is due to be completed within the next three years. The sector is one of the most dynamic of Polish industry, attracting considerable interest through FDI.

6.1 Role and Structure of the Food Industry

The Polish food industry in 1998 accounted for 4.1 % of GDP and 14.8 % of manufacturing GVA; it accounted for 5.3 % of national employment and 15.4 % of employment in the manufacturing sector (Tab. 12). The ‘Other foods’ and meat processing branches are the two dominant sectors (accounting for two-thirds of all food industry employment), while dairy, beverages and tobacco are also important in output terms.

Table 12: Structure of the Polish food industry (% of food industry total)

1997	Shares %		Total growth 1993-97 %		
	Output	Employment	Output (local currency)	Output (Euro)	Employment
Meat	21.8	22.9	204.5	73.9	-11.0
Fish	1.9	2.6	256.3	103.5	7.4
Fruit & veg	5.6	8.3	177.5	58.5	12.8
Oils	2.5	1.0	132.5	32.8	-9.1
Dairy	12.7	12.3	183.0	61.7	-7.7
Grain mill	4.6	3.9	210.7	77.5	2.6
Animal feeds	n.a.	n.a.	n.a.	n.a.	n.a.
Other foods	23.4	40.0	263.9	107.8	6.4
Beverages	16.5	6.5	119.7	25.5	4.9
Tobacco	10.9	2.4	428.9	202.1	0.8
Total food	100.0	100.0	205.0	74.2	5.9

6.2 Recent Performance of the Food Industry

The food industry has shown rapid growth in Poland with industry output (in nominal terms) growing at an average annual rate of 10 % p.a. in the period 1992-1998 and total employment growing as well. The rate of expansion was slower valued in Euros but nonetheless impressive. The major source of growth was the increase in the share of more processed, higher value added products especially in the ‘Other foods’ sector. Meat and dairy processing as well as vegetable oil refining have not grown as rapidly and employment has fallen in these sectors. Overall industry profitability increased over the 1993-1997 period, although profitability remains low and was adversely affected by the Russian crisis after 1998.

6.3 Ownership Structure

Privatisation is well advanced in Poland and in 2000 the public sector accounted for only about 10 % of the food processing sector, mainly in sugar beet processing and spirit distilling. Privatisation was carried out in various ways: (a) about 15 % of the more dynamic companies were converted into stock companies and sold to private investors, (b) a further 15 % of the more troublesome companies were transferred to National Investment Funds who were supposed to work with them on rehabilitation or liquidation programmes, (c) about 40% of companies were sold with preferences to workers, and (d) the remaining 30 % of mainly small and medium sized companies were sold on the free market through a tender process.

The initial years of transformation were marked by the emergence of thousands of small scale processing enterprises. However, in recent years, a clear tendency to concentration of food processing in larger industrial enterprises has emerged. Despite this tendency, the degree of concentration in the industry remains low relative to EU standards.

The food sector has successfully attracted FDI equivalent to 24.2 % of all FDI in the manufacturing sector and 11.5 % of total FDI to the end of 1999. Most FDI went into the brewing, sugar and oilseed processing industries. In other branches, FDI concentrated on the production of more processed higher value added products (e.g. in the dairy sector). The predominant form of FDI was the take-over of privatised domestic firms.

6.4 Conclusions

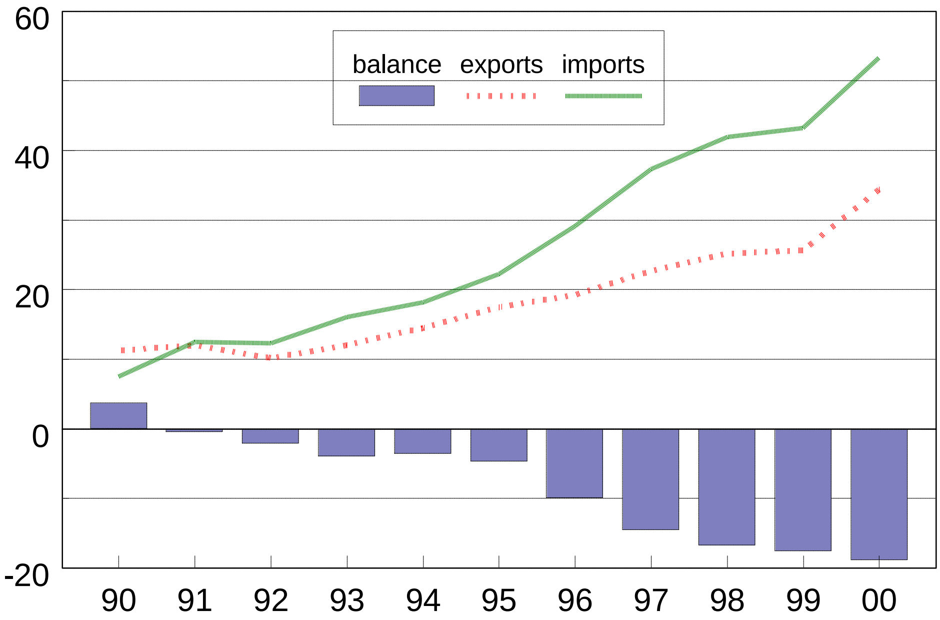
The Polish agro-food chain is characterised by relatively dynamic changes in structure and technology. New investments in processing, wholesale and retail activities, many of which are FDI based, has contributed to improvement in the quality of food products, and the quality and efficiency of retail services. Milk and meat are the most sensitive sectors, which need to obtain special export permits to the EU. Not many companies are as yet allowed to export. There are 151 meat plants and 29 dairies with licence to sell at least one product on the Common Market of EU. This is 4.14 % of the total of 3,650 meat plants and 7.4 % of all dairies. However, in terms of sales they constitute much more significant market share.

7 TRADE

7.1 General Trade

Poland’s trade balances has shown a significant deterioration since the early 1990s and trade deficits add up to around 19 Bio € in 2000. The value of Polish trade has increased every year since 1992. Between 1992 and 1998 the imports grow by 3.4 times, while in exports increased 2.5 times (Fig. 12). The Russian crisis, which affected an important traditional market for Poland’s trade has led to a gradual reorientation of trade flows towards other regions, in particular to Western and Central Europe.

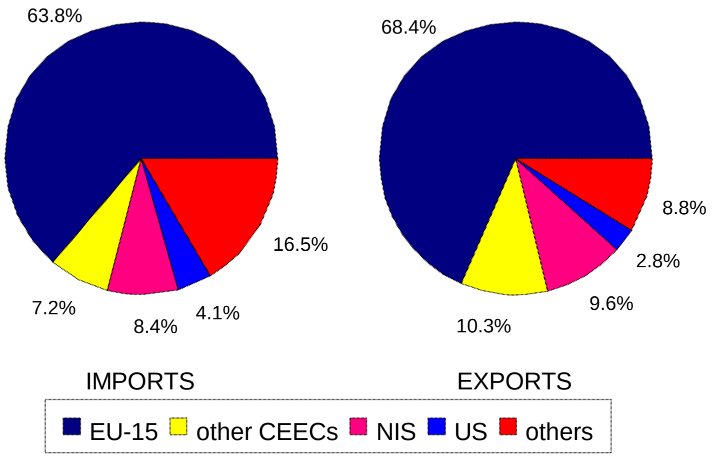
Figure 12: Development of Total Trade in Poland (billion €)



Source: Eurostat

Poland has increasingly integrated into the European economy. The most important trading partners comprising 72 % of all exports and 78 % of all imports are the EU-15 and the CEECs. While the EU-15 represents the major trading partner both for imports and exports, the CEECs have been an increasingly important partner (Fig. 13).

Figure 13: Share of Trade Partners (average 1997-2000)



Source: Eurostat

7.2 Agricultural Trade

The trade of agricultural products has a share of 8.0 % of total exports (EU-15: 6.2 %) and 6.7 % of total imports (EU-15: 5.7 %) in 2000 (Tab.13).

Table 13: Trade of Agricultural Products in 2000

	% of total exports	% of total imports
Poland	***8.0***	***6.7***
EU-15	*6.2*	*5.7*

All Agricultural Products - less fish and fish products but incl. UR products.

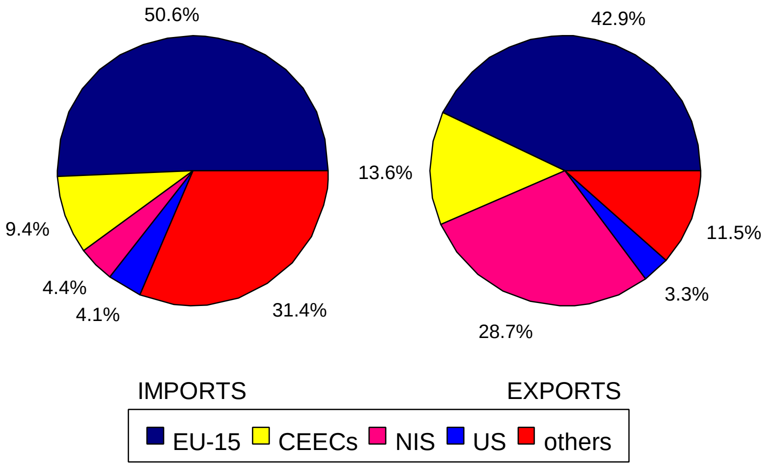
The most important products with a share of more than 5 % of imports or of exports are show in Tab. 14 as an average of the years 1997 to 2000. On the import side "fruits" (11.6 % of total agricultural imports) and "residues and waste from the food industries; prepared animal fodder" (10.5 %) are of most importance while exports leaded also by "fruits" (12.0 % of total agricultural exports) followed by "preparations of vegetables, fruits, nuts" (8.6 %) and "meat and edible meat offal" (8.5 %).

Table 14: Share of most important products or products group on agricultural trade (average 1997 – 2000)

Products	**Imports in %** (total agricultural imports = 100)	**Exports in %** (total agricultural exports = 100)
Animal products	**9.5**	**24.5**
• Meat and edible meat offal	3.0	8.5
• Products of milk, eggs, honey	2.5	8.4
Vegetable products	**35.6**	**25.8**
• Vegetables	3.1	6.5
• Fruits	11.6	12.0
• Coffee, tea, maté and spices	8.2	2.5
• Cereals and rice	5.6	0.6
Prepared foodstuffs	**37.7**	**45.1**
• Fats and oils	6.1	1.9
• Preparations of meat, of fish	0.3	7.7
• Sugar and sugar confectionery	1.8	7.7
• Cocoa and cocoa preparations	4.3	5.6
• Preparations of vegetables, fruits, nuts	4.2	8.6
• Miscellaneous edible preparations	6.4	5.6
• Residues and waste from the food industries; prepared animal fodder	10.5	2.0
• Tobacco	5.0	1.9

A similar pattern of trade flows like in the general trade has taken place in agricultural trade. The major trading partners are again the EU and the CEECs, though less important than for the Polish trade in general (Fig.14). About 59 % of Poland's agri-food imports come from the Western and Central Europe, while approximately 57 % of Polish agri-food exports went to this destination. In area of agri-food exports, Central Europe is an increasingly important trading partner. In the area of trade with processed commodities integration of Polish food industries in the Western and Central European area is quite advanced. About 70 % of exports and 77 % of imports in processed commodities are conducted with this region. However, half of the Polish exports of processed commodities went to the CEECs, while only 15 % of the imports come from that region.

Figure 14: Share of Agricultural Trade Partners (average 1997-2000)

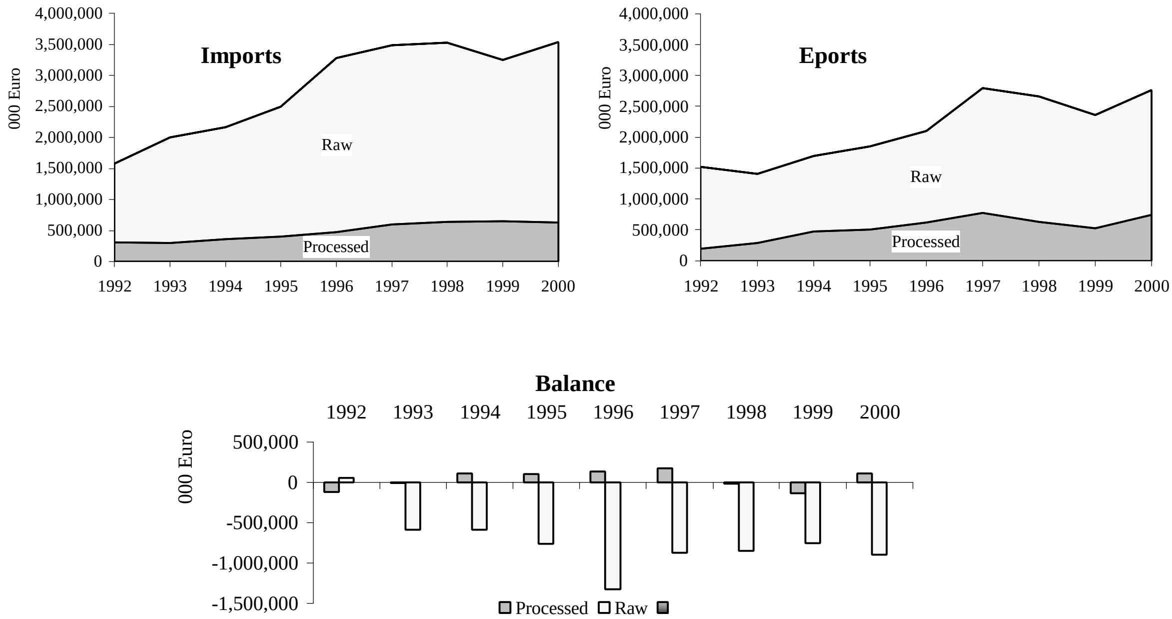


Source: Eurostat

The agricultural trade in total and with the EU-15 in particular has an increasing tendency in the last decade (Fig. 15). Due to the financial crisis in Russia the trade especially with the eastwards laying neighbours suffered. Total imports have more than doubled (times 2.2) between 1992 and 2000, while exports increased only 1.8 times. Promising is especially the increasing export of processed agricultural products in total, which improved times 3.8 between 1992 and 2000 (Fig. 15). Also in the trade with EU-15 the trade in the years between 1992 to 2000 tends to import more raw products (times 2.4) and to export more processed products (times 2.7) (Tab.15).

Despite this integration, the trade balance of Polish Agro-food trade worsened similar to the development of total trade. In 2000 the balance of agricultural trade amounted to a deficit of 770 Mill. EUR. The main deficit was created in trade with the EU-15 both for processed as well as for raw products. Statistics show a positive balance in trade with the CEECs and the FSU, especially in the area of processed commodities.

Figure 15: Poland's Total Agricultural Trade (000 ECU)



Source: Eurostat

Table 15: Poland's Agricultural Trade with EU-15 (million€)

	1992	1993	1994	1995	1996	1997	1998	1999	2000	*2000/ 1992*
Imports										
Total agricultural products	890	1100	1129	1219	1563	1653	1764	1647	1923	*2.2*
Raw products	643	863	841	914	1225	1261	1327	1216	1529	*2.4*
Processed products	247	237	288	305	338	392	437	431	394	*1.6*
Exports										
Total agricultural products	940	881	941	989	981	1076	1107	1081	1272	*1.4*
Raw products	836	776	822	850	828	893	937	895	989	*1.2*
Processed products	103	105	119	139	153	183	170	186	283	*2.7*
Balance										
Total agricultural products	50	-219	-188	-230	-582	-577	-657	-566	-651	
Raw products	194	-87	-19	-64	-397	-367	-390	-321	-540	
Processed products	-144	-131	-169	-166	-185	-209	-266	-245	-111	

Source: Eurostat

8 Agricultural Policy and Budget

Since 2001 market and price policies, particularly for cereals and for pork meat, have been characterised by a high level of interventions. Prices for cereals and pork meat reached and even exceeded levels of prices of net importing EU Member States. Since early 2002 large cereal stocks have led to increasing pressure on domestic markets. Cereal and pork prices could be expected to further decline in the coming months. The opening of the wheat import quota agreed under Double Zero was suspended.

The majority of agriculture-related budgetary expenditures in Poland is absorbed by the Agricultural Social Security Fund (KRUS), whose share in the years 1998 - 2001 approximated 80 % (Tab. 16). The remaining agricultural budget devoted to rural development, agricultural market measures and institutions varied between€ 706 million in 1999 and € 1,188 million in 2001. The agricultural budget (excluding KRUS) accounts for 2,34 % of the 2001 national budget compared to 2,89 % in 1996.

The sizeable increase in the agricultural budget over the years 1999 - 2001 reflects both the increase in nominal budgetary expenditure (i.e. in PLN terms) and exchange rate appreciation (PLN/€) in 2001. At the same time the structure of expenditure changed toward a higher share for rural development measures, mainly supported by ARMA's credit subsidies. In particular, in the years 2000 - 2002 further changes in the agricultural budget are underway towards achieving a higher profile for rural development actions, which is associated with the following:

- implementation of a Rural Development Programme financed from a World Bank loan, where around € 100 million have been allocated in 2000 and 2001 budgets (not included in the table),

- pending implementation of SAPARD, co-financing of which was foreseen already in the 2000 budget[2],
- harmonisation of the legal framework with the acquis and preparation for its implementation as part of the EU-accession process, which is expected to absorb still substantial amounts in 2002 and 2003 both due to institution building and implementation of new policy instruments(eg in 2002 an early retirement scheme is to be implemented). This process is seconded by the implementation of the PHARE programme (about € 35 million), in particular in form of twinning activties, supporting the building of administrative capacity and structures necessary for the management of rural development programmes funded by both Guarantee and Guidance funds after accession.

Table 16: Agricultural Budget (1996 – 2001)

		1996	1997	1998	1999	2000	2001
1. Progress in agriculture*	million €	253	274	256	125	116	104
2. ARMA**	million €	114	128	144	229	288	481
3. AMA***	million €	86	105	83	118	184	174
4. Other****	million €	394	428	409	234	293	430
Total (1-4)	million €	**847**	**935**	**892**	**706**	**880**	**1,188**
5. Agricultural Social Security Fund	million €	2,302	2,549	2,715	3,150	3,530	4,303
Total (1-5)	**million €**	**3,149**	**3,483**	**3,607**	**3,857**	**4,410**	**5,492**
1. Progress in agriculture*	in % of total	*8,0*	*7,9*	*7,1*	*3,3*	*2,6*	*1,9*
2. ARMA**	in % of total	*3,6*	*3,7*	*4,0*	*5,9*	*6,5*	*8,8*
3. AMA***	in % of total	*2,7*	*3,0*	*2,3*	*3,0*	*4,2*	*3,2*
4. Other****	in % of total	*12,5*	*12,3*	*11,4*	*6,1*	*6,6*	*7,8*
Total (1-4)	in % of total	*26,9*	*26,8*	*24,7*	*18,3*	*20,0*	*21,6*
5. Agricultural Social Security Fund	in % of total	*73,1*	*73,2*	*75,3*	*81,7*	*80,0*	*78,4*
Total (1-5)	**in % of total**	***100***	***100***	***100***	***100***	***100***	***100***

Source: IERiGZ, Analiza produkcyjno-ekonomicznej sytuacji rolnictwa i gospodarki zywnosciowej w 2000 roku - – various issuess, MARD, Informacja o projekcie budzetu na 2001, own calculations

Note: * - biological progress, extension services, plant protection veterinary services, other services

** - subsidies to credits channelled by ARMA, in agriculture, food processing and other investments in rural areas aimed at modernisation, job creation and infrastructure development

*** - market support and market stabilisation measures implemented by AMA

**** - agriculture related expenditures by local governments and other expenditures on rural development

9 ANNEXES

Annex 1: Development of Key Figures in Poland

Annex 2: Trade in Agricultural Products (Declaring Country: Poland)

[2] In the meantime all steps for the implementation of SAPARD have been taken with the Commission decision on the conferral of management of aid to Poland at the beginning of July 2002.

Annex 1: Development of Key Figures in Poland

	Unit	1994	1995	1996	1997	1998	1999	2000	2001 [e]	2002 [f]
(I) Main Economic Indicators										
GDP	% change	5.2	7	6	6.8	4.8	4.2	4.0	1.1 [1]	1.4 [1]
Industry + construction	% of total	38.3	38.9	37.5	37.3	36.3	35.9	36.2		
Services	% of total	54.9	54.1	56.1	57.2	59.0	61.1	60.5		
Agriculture, hunting + forestry	% of total	6.9	6.9	6.4	5.5	4.8	4.0	3.3		
Inflation	%	32.2	27.8	19.9	14.9	11.8	7.2	10.1	5.5 [1]	4.0 [1]
Unemployment	% of labour force *	16.5	15.2	14.3	11.5	10.0	12.0	16.0	18.2 [1]	19.9 [1]
Government deficit	% GDP				-4.3	-2.4	-2.1	-3.8 [1]	-5.6 [1]	-6.3 [1]
Trade balance	mio ECU	-483	-1258	-5739	-8661	-11450	-14142	-13350		
Trade balance	% of GDP	-0.6	-1.3	-5.1	-6.8	-8.1	-9.7	-8.4	-6.6 [1]	-6.9 [1]
Current account	mio ECU	802	653	-2571	-5065	-6156	-11716	-10843	-7500	
Current account balance	% of GDP	1.0	0.7	-2.3	-4.0	-4.4	-8.1	-6.3	-4.0 [1]	-4.3 [1]
PPS per capita	€ / capita	5600	6100	6600	7300	7800	8300	8900		
PPS as % of EU-15 (=100)	PPS / capita	:	34.6	35.7	37.6	38.4	39.0	39.5		
(II) Development of Employment and Production in Poland's Agriculture										
Agricultural Employment	1000	3515	3345	3309	3116	2926	2933	2698		
in % of total employment		24.0	22.6	22.1	20.5	19.1	19.1	18.8		
Agricultural Production	1995=100	93.0	100	104.9	101.4	108.8	104.8			
• Share of Crops	% total	50.8	53.9	53.2	50.9	52.7	50			
• Share of Livestock	% total	49.2	46.1	46.8	49.1	47.3	50			
(III) Agricultural Structures in Poland										
Utilised Agricultural Area	1000 ha	18450	18412	18275	18266	18229	18222	18220	18397	
in % of total area		59.0	58.9	58.4	58.4	58.3	58.3	58.3	58.8	
Number of Holdings, > 1 ha	1000		2047.6	2041.4	2008.3	1989.0		1880.9		
Average farm size	ha		6.7	6.9	6.9	6.9		7.2		

Source: EUROSTAT; [1] = European Commission; DG ECFIN (2002): The European Commission – Forecast for the Candidate Countries. Spring 2002. [e] = estimate, [f] = forecast

Annex 2: Trade in Agricultural Products; Declaring Country: Poland

(million EURO, average 1997-2000)

Average 1997 - 2000	IMPORTS						EXPORTS						Balance (Exp - Imp)					
Chapters of Customs Duties	World	EUR 15	other CEEC's	NIS	USA	Rest world	World	EUR 15	other CEEC's	NIS	USA	Rest world	World	EUR 15	other CEEC's	NIS	USA	Rest world
01 Live animals	37.4	30.7	4.8	0.1	0.7	1.2	151.4	117.9	6.6	1.7	0.3	24.9	114.0	87.3	1.8	1.6	-0.4	23.7
02 Meats and edible meat offal	103.9	61.6	11.1	0.2	19.1	12.0	224.6	119.5	20.3	71.1	0.1	13.7	120.6	57.9	9.1	70.9	-19.0	1.7
04 Dairy products, eggs, honey	87.7	57.5	12.8	9.3	0.6	7.5	221.7	44.4	23.0	32.3	9.9	112.1	134.0	-13.1	10.2	23.0	9.3	104.6
05 * Others products of animal origin	99.5	27.3	1.9	3.0	10.0	57.3	50.6	38.2	1.7	1.2	2.1	7.5	-48.8	10.9	-0.3	-1.8	-7.9	-49.8
Animal Products	**328.5**	**177.0**	**30.7**	**12.6**	**30.3**	**77.9**	**648.3**	**320.0**	**51.5**	**106.4**	**12.3**	**158.1**	**319.8**	**142.9**	**20.8**	**93.8**	**-18.0**	**80.2**
06 Plants and flowers	53.1	46.2	1.6	0.2	0.5	4.5	30.3	27.0	1.2	0.9	0.3	0.9	-22.8	-19.2	-0.4	0.6	-0.2	-3.7
07 Vegetables	105.4	78.3	9.3	0.6	0.9	16.3	173.1	116.2	24.6	24.9	0.4	7.0	67.6	37.8	15.3	24.3	-0.5	-9.3
08 Fruit	402.2	188.5	7.4	4.5	8.5	193.4	316.7	247.0	14.8	43.9	0.2	10.9	-85.5	58.6	7.4	39.4	-8.3	-182.5
09 Coffee, tea, maté and spices	283.9	22.3	4.9	0.3	0.4	256.0	64.9	12.3	16.5	35.1	0.2	0.7	-219.0	-9.9	11.7	34.7	-0.2	-255.3
10 Cereals and rice	193.0	72.0	56.8	8.3	6.8	49.2	16.0	1.3	3.7	1.6	0.9	8.5	-177.1	-70.7	-53.1	-6.7	-5.9	-40.7
11 Flours, malt, starches	59.9	28.0	30.6	0.1	0.2	0.9	20.2	3.6	1.2	9.1	4.0	2.3	-39.6	-24.4	-29.5	9.0	3.9	1.4
12 Oilseeds	107.3	44.8	19.9	2.5	5.9	34.2	56.1	32.0	4.0	3.9	0.4	15.8	-51.1	-12.7	-15.8	1.3	-5.5	-18.4
13 Gums, resins, juices	23.5	17.0	1.0	1.1	0.6	3.7	2.2	1.5	0.1	0.5	0.0	0.1	-21.2	-15.5	-0.9	-0.7	-0.6	-3.6
14 Vegetables plaiting mterials	1.6	0.2	0.1	0.0	0.0	1.3	3.1	3.1	0.0	0.0	0.0	0.0	1.5	2.9	-0.1	0.0	-0.0	-1.3
Vegetable products	**1,229.9**	**497.2**	**131.7**	**17.8**	**23.7**	**559.5**	**682.6**	**444.1**	**66.2**	**119.8**	**6.3**	**46.3**	**-547.3**	**-53.2**	**-65.5**	**102.0**	**-17.4**	**-513.2**
15 Fats and oils	**210.9**	**133.2**	**33.7**	**2.2**	**1.3**	**40.5**	**51.5**	**8.9**	**10.3**	**31.0**	**0.1**	**1.3**	**-159.4**	**-124.3**	**-23.4**	**28.8**	**-1.2**	**-39.2**
16 * Preparations of meats	11.4	4.2	5.3	0.1	0.0	1.8	203.2	22.9	2.7	150.4	24.7	2.5	191.8	18.7	-2.6	150.3	24.7	0.7
17 Sugars and sugar confectionery	61.3	48.2	8.1	0.3	1.1	3.6	204.0	37.0	25.5	114.6	6.0	21.0	142.7	-11.2	17.4	114.3	4.9	17.4
18 Cocoa and its preparations	147.6	65.3	5.9	0.1	0.2	76.1	149.0	31.9	36.0	65.3	3.3	12.6	1.4	-33.4	30.1	65.2	3.1	-63.6
19 * Preparations of cereals, flours	77.7	61.2	13.5	0.7	0.9	1.4	108.4	9.1	45.4	39.1	6.2	8.7	30.7	-52.2	31.9	38.4	5.3	7.3
20 Preparations of vegetables, food fruit	145.8	44.3	27.7	0.4	3.4	70.0	227.4	139.6	23.8	44.9	7.6	11.5	81.7	95.3	-3.8	44.4	4.2	-58.5
21 Preparations of various products	222.2	123.9	15.8	0.1	11.3	71.1	147.6	10.2	69.2	58.5	1.3	8.4	-74.6	-113.7	53.5	58.4	-10.0	-62.7
22 Beverages, spirits and vinegar	103.5	71.8	21.1	0.6	3.2	6.9	52.3	14.6	4.7	9.0	15.4	8.6	-51.2	-57.1	-16.4	8.4	12.2	1.7
23 * Residues and waste from food industries	362.6	290.8	16.0	1.5	10.8	43.5	52.6	40.4	6.1	2.2	0.1	3.8	-310.0	-250.4	-9.9	0.7	-10.7	-39.7
24 Tobaccos	171.0	36.5	2.1	0.1	36.1	96.2	49.5	13.2	14.4	14.6	0.0	7.3	-121.5	-23.3	12.3	14.5	-36.1	-88.9
Prepard foodstuffs; beverages;	**1,303.0**	**746.1**	**115.4**	**4.0**	**67.0**	**370.5**	**1,194.0**	**318.8**	**227.8**	**498.6**	**64.7**	**84.2**	**-109.0**	**-427.4**	**112.3**	**494.6**	**-2.3**	**-286.3**
Other agri. prod. (Uruguay Round)	**380.4**	**193.9**	**15.0**	**114.9**	**20.0**	**36.7**	**69.9**	**42.9**	**5.2**	**3.3**	**3.5**	**15.0**	**-310.5**	**-151.0**	**-9.8**	**-111.6**	**-16.5**	**-21.7**
Agri. products (Uruguay Round)	**3,452.7**	**1,747.6**	**326.4**	**151.4**	**142.3**	**1,085.1**	**2,646.4**	**1,134.6**	**360.9**	**759.1**	**86.9**	**304.9**	**-806.3**	**-612.9**	**34.5**	**607.7**	**-55.4**	**-780.2**
Total of all products	43,853	27,977	3,154	3,689	1,793	7,239	26,983	18,467	2,780	2,583	765	2,386	-16,871	-9,510	-374	-1,106	-1,028	-4,853
% Agri. products/All products	**7.9**	**6.2**	**10.3**	**4.1**	**7.9**	**15.0**	**9.8**	**6.1**	**13.0**	**29.4**	**11.3**	**12.8**	*	*	*	*	*	*

Source : Eurostat - Comext - Phare

Continuation: Trade in Agricultural Products; Declaring Country: Poland (million EURO, 2000)

2000	IMPORTS						EXPORTS						Balance (Exp - Imp)					
Chapters of Customs Duties	**World**	**EUR 15**	**other CEEC's**	**NIS**	**USA**	**Rest world**	**World**	**EUR 15**	**other CEEC's**	**NIS**	**USA**	**Rest world**	**World**	**EUR 15**	**other CEEC's**	**NIS**	**USA**	**Rest world**
01 Live animals	44.4	35.9	6.6	0.1	0.7	1.1	143.6	101.7	9.2	1.1	0.6	30.9	99.2	65.8	2.6	1.0	-0.1	29.8
02 Meats and edible meat offal	80.2	57.2	7.9	0.1	7.9	7.1	230.9	136.0	18.6	58.2	0.0	18.1	150.7	78.7	10.7	58.2	-7.8	11.0
04 Dairy products, eggs, honey	106.4	53.2	25.6	21.1	0.1	6.4	259.5	40.1	27.9	19.8	13.2	158.5	153.0	-13.1	2.3	-1.3	13.1	152.1
05 * Others products of animal origin	99.5	22.9	2.1	4.7	10.6	59.2	58.8	43.0	1.5	0.9	3.1	10.3	-40.6	20.1	-0.6	-3.8	-7.4	-48.9
Animal Products	**330.5**	**169.3**	**42.2**	**26.0**	**19.3**	**73.9**	**692.8**	**320.8**	**57.1**	**80.1**	**17.0**	**217.8**	**362.3**	**151.5**	**15.0**	**54.1**	**-2.3**	**143.9**
06 Plants and flowers	68.5	60.4	2.0	0.0	0.7	5.5	37.7	33.0	1.7	1.4	0.6	1.0	-30.9	-27.4	-0.3	1.3	-0.0	-4.4
07 Vegetables	121.6	91.1	11.1	0.8	0.7	18.0	196.2	132.9	40.2	14.0	0.7	8.3	74.6	41.8	29.1	13.2	0.1	-9.7
08 Fruit	462.5	246.1	7.8	8.4	9.1	191.1	343.7	275.5	18.8	37.2	0.3	11.9	-118.8	29.4	11.0	28.8	-8.8	-179.2
09 Coffee, tea, maté and spices	250.1	25.4	7.2	0.3	0.3	217.0	80.6	12.9	22.7	43.5	0.4	1.1	-169.5	-12.5	15.5	43.2	0.1	-215.9
10 Cereals and rice	254.7	125.5	70.3	0.9	2.0	56.1	3.4	1.8	0.6	0.6	0.0	0.3	-251.3	-123.6	-69.7	-0.3	-2.0	-55.7
11 Flours, malt, starches	75.8	19.3	54.1	0.0	0.2	2.2	27.3	4.9	1.7	8.7	9.0	3.1	-48.5	-14.4	-52.4	8.7	8.8	0.9
12 Oilseeds	92.4	31.4	21.8	1.5	4.8	32.9	38.9	27.5	5.3	4.6	0.4	1.2	-53.5	-3.9	-16.5	3.1	-4.5	-31.7
13 Gums, resins, juices	27.9	19.1	1.6	0.4	0.9	5.8	2.0	0.9	0.2	0.7	0.0	0.2	-25.9	-18.2	-1.4	0.3	-0.9	-5.6
14 Vegetables plaiting mterials	2.2	0.3	0.1	0.0	0.0	1.8	4.3	4.2	0.0	0.0	0.0	0.0	2.1	4.0	-0.1	0.0	-0.0	-1.8
Vegetable products	**1,355.8**	**618.5**	**175.9**	**12.4**	**18.6**	**530.4**	**734.1**	**493.6**	**91.2**	**110.8**	**11.4**	**27.1**	**-621.7**	**-124.9**	**-84.7**	**98.4**	**-7.3**	**-503.2**
15 Fats and oils	**183.0**	**120.0**	**22.5**	**4.0**	**0.9**	**35.7**	**38.9**	**5.8**	**11.2**	**20.9**	**0.1**	**0.9**	**-144.0**	**-114.2**	**-11.2**	**16.9**	**-0.8**	**-34.7**
16 * Preparations of meats	10.8	3.3	6.4	0.0	0.0	1.0	123.4	30.5	2.0	52.6	32.8	5.5	112.6	27.2	-4.4	52.6	32.8	4.5
17 Sugars and sugar confectionery	64.4	53.8	7.4	0.1	0.3	2.8	165.9	30.8	26.3	89.0	4.7	15.1	101.5	-23.1	18.8	89.0	4.4	12.3
18 Cocoa and its preparations	142.6	76.1	13.8	0.0	0.0	52.7	159.6	54.0	46.0	35.0	5.7	19.0	17.0	-22.1	32.2	35.0	5.7	-33.7
19 * Preparations of cereals, flours	82.7	66.8	13.8	0.7	0.3	1.1	111.5	16.0	64.3	13.9	4.8	12.4	28.9	-50.8	50.5	13.2	4.5	11.4
20 Preparations of vegetables, food fruit	158.3	43.8	29.3	0.3	2.4	82.5	290.3	189.5	34.6	37.4	11.1	17.7	132.1	145.7	5.3	37.1	8.7	-64.8
21 Preparations of various products	206.0	120.0	24.8	0.2	12.0	49.1	172.7	16.8	93.6	39.1	2.0	21.2	-33.3	-103.1	68.8	38.9	-10.0	-27.9
22 Beverages, spirits and vinegar	116.0	80.6	23.6	0.8	4.1	6.9	61.8	22.0	4.1	2.3	22.6	10.8	-54.2	-58.6	-19.5	1.6	18.5	3.9
23 * Residues and waste from food industries	377.5	319.1	33.3	3.6	3.4	18.1	50.4	38.9	5.8	1.5	0.0	4.2	-327.1	-280.2	-27.5	-2.1	-3.4	-13.9
24 Tobaccos	100.6	27.7	1.2	0.1	18.2	53.3	69.9	11.2	31.8	17.3	0.0	9.5	-30.7	-16.5	30.6	17.2	-18.2	-43.8
Prepard foodstuffs; beverages; tobacco	**1,258.8**	**791.1**	**153.7**	**5.7**	**40.7**	**267.5**	**1,205.5**	**409.7**	**308.5**	**288.1**	**83.7**	**115.4**	**-53.3**	**-381.4**	**154.8**	**282.4**	**43.0**	**-152.1**
Other agri. prod. (Uruguay Round)	**414.4**	**225.3**	**22.4**	**112.8**	**11.8**	**42.0**	**90.3**	**42.7**	**8.8**	**5.5**	**8.5**	**24.8**	**-324.1**	**-182.6**	**-13.7**	**-107.3**	**-3.3**	**-17.2**
Agri. products (Uruguay Round)	**3,542.5**	**1,924.2**	**416.7**	**160.9**	**91.3**	**949.4**	**2,761.6**	**1,272.5**	**476.9**	**505.5**	**120.6**	**386.1**	**-780.8**	**-651.6**	**60.2**	**344.5**	**29.4**	**-563.3**
Total of all products	53,085	32,459	4,139	5,861	2,370	8,256	34,373	24,018	3,832	2,292	1,092	3,139	-18,711	-8,441	-307	-3,568	-1,278	-5,117
% Agri. products/All products	**6.7**	**5.9**	**10.1**	**2.7**	**3.9**	**11.5**	**8.0**	**5.3**	**12.4**	**22.0**	**11.0**	**12.3**	*	*	*	*	*	*

Source : Eurostat - Comext - Phare

Continuation: Trade in Agricultural Products; Declaring Country: Poland (million EURO, 1999)

1999	IMPORTS						EXPORTS						Balance (Exp - Imp)					
Chapters of Customs Duties	World	EUR 15	other CEEC's	NIS	USA	Rest world	World	EUR 15	other CEEC's	NIS	USA	Rest world	World	EUR 15	other CEEC's	NIS	USA	Rest world
01 Live animals	30.2	26.0	2.8	0.1	0.7	0.7	149.2	114.9	7.3	0.3	0.1	26.7	119.0	88.9	4.5	0.2	-0.6	26.1
02 Meats and edible meat offal	72.9	40.1	18.5	0.1	5.7	8.4	210.0	112.6	15.3	65.6	0.1	16.3	137.1	72.5	-3.2	65.5	-5.6	7.9
04 Dairy products, eggs, honey	95.8	71.6	11.6	1.8	0.5	10.3	172.6	32.2	26.8	21.2	9.2	83.2	76.8	-39.4	15.2	19.4	8.8	72.9
05 * Others products of animal origin	93.3	17.4	1.4	2.9	10.5	61.2	45.2	34.4	1.9	1.4	1.3	6.2	-48.1	17.0	0.5	-1.4	-9.2	-55.0
Animal Products	**292.2**	**155.2**	**34.3**	**4.8**	**17.3**	**80.6**	**577.1**	**294.1**	**51.3**	**88.5**	**10.7**	**132.5**	**284.9**	**139.0**	**16.9**	**83.7**	**-6.6**	**51.9**
06 Plants and flowers	60.1	52.1	1.5	0.4	0.6	5.5	31.6	28.6	1.1	0.8	0.4	0.8	-28.4	-23.4	-0.4	0.4	-0.2	-4.7
07 Vegetables	96.7	71.4	8.4	0.7	0.8	15.4	185.8	125.3	26.3	26.3	0.4	7.4	89.1	53.9	18.0	25.7	-0.5	-8.0
08 Fruit	429.9	201.9	9.8	4.3	9.0	204.9	305.1	248.2	14.2	32.5	0.2	9.9	-124.8	46.3	4.4	28.3	-8.8	-195.0
09 Coffee, tea, maté and spices	267.6	18.5	10.6	0.2	0.6	237.7	66.1	6.1	18.3	40.9	0.3	0.5	-201.5	-12.4	7.7	40.6	-0.3	-237.1
10 Cereals and rice	112.4	24.0	40.1	2.4	4.9	41.0	34.6	2.2	0.8	2.2	0.0	29.4	-77.8	-21.8	-39.3	-0.2	-4.9	-11.6
11 Flours, malt, starches	55.9	29.5	25.6	0.1	0.2	0.6	22.9	2.8	1.2	11.1	5.4	2.4	-33.0	-26.7	-24.4	11.0	5.3	1.7
12 Oilseeds	84.6	33.3	14.7	1.2	3.1	32.4	91.9	28.8	4.1	3.5	0.5	55.1	7.3	-4.5	-10.6	2.3	-2.6	22.7
13 Gums, resins, juices	26.0	19.2	1.1	1.0	0.3	4.3	2.0	1.2	0.3	0.4	0.0	0.2	-23.9	-18.0	-0.8	-0.6	-0.3	-4.1
14 Vegetables plaiting mterials	1.8	0.2	0.1	0.0	0.0	1.4	3.4	3.3	0.0	0.0	0.0	0.0	1.6	3.1	-0.1	0.0	-0.0	-1.4
Vegetable products	**1,135.0**	**450.1**	**111.9**	**10.2**	**19.6**	**543.3**	**743.5**	**446.6**	**66.3**	**117.6**	**7.2**	**105.8**	**-391.5**	**-3.5**	**-45.6**	**107.4**	**-12.4**	**-437.5**
15 Fats and oils	**193.2**	**131.1**	**29.9**	**0.3**	**0.7**	**31.2**	**67.1**	**13.3**	**12.3**	**40.6**	**0.1**	**0.9**	**-126.1**	**-117.8**	**-17.6**	**40.2**	**-0.6**	**-30.4**
16 * Preparations of meats	7.6	3.2	3.9	0.0	0.0	0.4	115.3	23.3	3.6	60.6	26.0	1.8	107.7	20.1	-0.3	60.6	26.0	1.3
17 Sugars and sugar confectionery	52.7	44.1	4.3	0.0	1.0	3.3	145.3	30.2	27.0	66.0	3.5	18.5	92.6	-13.8	22.7	66.0	2.5	15.2
18 Cocoa and its preparations	138.1	62.5	4.9	0.0	0.0	70.7	103.0	26.4	33.1	25.9	3.3	14.3	-35.1	-36.0	28.1	25.9	3.3	-56.4
19 * Preparations of cereals, flours	88.0	73.6	11.5	0.7	1.0	1.3	85.1	10.8	48.6	11.7	4.8	9.1	-2.9	-62.7	37.1	11.0	3.8	7.8
20 Preparations of vegetables, food fruit	155.0	44.3	31.4	1.1	2.6	75.6	190.5	122.5	27.0	19.2	8.7	13.0	35.5	78.2	-4.4	18.1	6.1	-62.6
21 Preparations of various products	211.2	121.3	10.9	0.1	11.8	67.1	123.9	10.0	70.5	37.3	1.1	5.0	-87.3	-111.3	59.6	37.3	-10.7	-62.1
22 Beverages, spirits and vinegar	117.3	83.7	22.4	0.7	3.5	7.1	49.4	15.3	5.3	2.5	17.8	8.5	-68.0	-68.4	-17.1	1.8	14.3	1.4
23 * Residues and waste from food industries	292.5	249.0	14.5	0.2	4.6	24.0	51.4	39.4	7.1	1.2	0.0	3.6	-241.1	-209.6	-7.4	0.9	-4.6	-20.4
24 Tobaccos	229.8	41.9	2.5	0.2	37.9	147.4	46.1	10.9	16.6	16.7	0.0	2.0	-183.7	-31.0	14.1	16.5	-37.9	-145.4
Prepard foodstuffs; beverages; tobacco	**1,292.1**	**723.5**	**106.3**	**3.0**	**62.3**	**396.9**	**909.9**	**288.9**	**238.8**	**241.2**	**65.3**	**75.7**	**-382.2**	**-434.6**	**132.5**	**238.2**	**3.0**	**-321.2**
Other agri. prod. (Uruguay Round)	**334.2**	**187.4**	**18.1**	**87.7**	**11.5**	**29.5**	**67.1**	**38.7**	**6.2**	**3.3**	**1.8**	**17.1**	**-267.2**	**-148.7**	**-11.9**	**-84.5**	**-9.7**	**-12.4**
Agri. products (Uruguay Round)	**3,246.8**	**1,647.4**	**300.4**	**106.1**	**111.4**	**1,081.5**	**2,364.7**	**1,081.7**	**374.8**	**491.2**	**85.0**	**331.9**	**-882.1**	**-565.6**	**74.4**	**385.1**	**-26.4**	**-749.6**
Total of all products	43,051	27,966	3,119	3,103	1,551	7,312	25,670	18,090	2,780	1,713	711	2,377	-17,381	-9,876	-339	-1,390	-840	-4,936
% Agri. products/All products	**7.5**	**5.9**	**9.6**	**3.4**	**7.2**	**14.8**	**9.2**	**6.0**	**13.5**	**28.7**	**12.0**	**14.0**	*	*	*	*	*	*

Source : Eurostat - Comext - Phare

Continuation: Trade in Agricultural Products; Declaring Country: Poland (million EURO, 1998)

1998	IMPORTS						EXPORTS						Balance (Exp - Imp)					
Chapters of Customs Duties	**World**	**EUR 15**	**other CEEC's**	**NIS**	**USA**	**Rest world**	**World**	**EUR 15**	**other CEEC's**	**NIS**	**USA**	**Rest world**	**World**	**EUR 15**	**other CEEC's**	**NIS**	**USA**	**Rest world**
01 Live animals	36.5	30.3	4.4	0.1	0.6	1.0	167.9	126.6	8.4	4.5	0.3	27.9	131.4	96.3	4.0	4.4	-0.3	26.9
02 Meats and edible meat offal	120.6	74.1	7.0	0.3	26.3	12.9	249.1	120.2	29.5	85.0	0.1	14.3	128.5	46.1	22.5	84.7	-26.2	1.4
04 Dairy products, eggs, honey	78.9	61.9	5.9	4.8	1.2	5.1	216.6	34.8	24.5	46.6	9.4	101.3	137.7	-27.1	18.6	41.8	8.2	96.2
05 * Others products of animal origin	101.5	29.7	3.1	2.0	9.2	57.5	44.2	33.0	2.3	1.3	1.9	5.8	-57.3	3.2	-0.8	-0.7	-7.3	-51.7
Animal Products	**337.4**	**196.0**	**20.4**	**7.3**	**37.3**	**76.4**	**677.7**	**314.6**	**64.7**	**137.4**	**11.7**	**149.3**	**340.3**	**118.6**	**44.3**	**130.2**	**-25.7**	**72.9**
06 Plants and flowers	47.8	40.9	1.8	0.4	0.4	4.4	28.6	25.9	1.2	0.8	0.1	0.6	-19.2	-14.9	-0.7	0.4	-0.2	-3.8
07 Vegetables	113.1	84.8	9.1	0.3	1.1	17.7	170.6	113.5	19.4	30.8	0.2	6.7	57.5	28.7	10.3	30.5	-1.0	-11.0
08 Fruit	402.7	185.4	6.8	3.3	8.5	198.7	341.5	263.4	14.6	51.5	0.1	11.7	-61.2	78.0	7.8	48.2	-8.3	-187.0
09 Coffee, tea, maté and spices	308.1	22.5	1.4	0.5	0.5	283.2	61.5	15.0	13.7	32.0	0.1	0.7	-246.6	-7.5	12.3	31.5	-0.3	-282.5
10 Cereals and rice	166.6	31.1	81.2	17.4	4.4	32.5	3.4	0.8	0.1	1.5	0.9	0.0	-163.2	-30.3	-81.0	-15.8	-3.5	-32.5
11 Flours, malt, starches	53.9	30.0	22.8	0.2	0.2	0.7	13.2	2.1	0.8	6.7	1.5	2.1	-40.7	-27.9	-22.0	6.5	1.4	1.4
12 Oilseeds	113.1	50.9	15.3	3.4	7.0	36.6	58.2	43.5	3.7	4.3	0.5	6.2	-54.9	-7.4	-11.6	0.9	-6.5	-30.4
13 Gums, resins, juices	21.5	16.6	0.7	0.9	0.7	2.6	4.1	3.6	0.1	0.4	0.0	0.1	-17.3	-13.0	-0.6	-0.5	-0.7	-2.5
14 Vegetables plaiting mterials	1.4	0.2	0.1	0.0	0.0	1.1	2.6	2.6	0.0	0.0	0.0	0.0	1.2	2.4	-0.1	0.0	-0.0	-1.0
Vegetable products	**1,228.1**	**462.4**	**139.2**	**26.3**	**22.6**	**577.5**	**683.7**	**470.4**	**53.7**	**128.0**	**3.4**	**28.2**	**-544.5**	**8.0**	**-85.6**	**101.7**	**-19.2**	**-549.3**
15 Fats and oils	**255.7**	**156.2**	**45.8**	**2.1**	**2.5**	**49.2**	**49.6**	**8.7**	**12.6**	**27.7**	**0.1**	**0.6**	**-206.1**	**-147.5**	**-33.3**	**25.6**	**-2.4**	**-48.6**
16 * Preparations of meats	7.1	3.0	3.1	0.2	0.0	0.8	264.7	23.6	3.9	213.7	21.9	1.6	257.5	20.6	0.8	213.5	21.9	0.8
17 Sugars and sugar confectionery	57.2	44.8	6.6	0.1	2.0	3.7	197.4	35.0	27.1	106.0	9.7	19.6	140.2	-9.8	20.5	106.0	7.6	15.9
18 Cocoa and its preparations	150.0	59.8	3.0	0.2	0.0	86.9	137.0	26.3	39.9	58.8	2.6	9.4	-13.0	-33.5	36.9	58.6	2.6	-77.6
19 * Preparations of cereals, flours	79.7	60.1	15.6	0.8	1.9	1.3	116.7	4.9	44.6	51.1	9.5	6.6	37.0	-55.2	28.9	50.3	7.6	5.3
20 Preparations of vegetables, food fruit	141.3	49.6	23.6	0.2	5.4	62.5	200.3	110.4	19.8	56.1	5.4	8.5	59.0	60.8	-3.8	56.0	0.0	-54.0
21 Preparations of various products	233.3	128.6	15.0	0.1	10.0	79.5	133.8	6.0	61.5	61.4	1.1	3.7	-99.5	-122.6	46.5	61.3	-8.9	-75.8
22 Beverages, spirits and vinegar	93.8	65.8	18.6	0.3	2.4	6.7	46.1	11.4	5.3	9.6	12.5	7.4	-47.7	-54.4	-13.3	9.3	10.1	0.7
23 * Residues and waste from food industries	394.9	323.1	8.1	0.3	19.6	43.7	50.0	37.6	6.1	2.0	0.0	4.3	-344.9	-285.5	-2.0	1.7	-19.6	-39.5
24 Tobaccos	176.1	35.5	2.3	0.1	41.7	96.6	39.9	14.0	8.2	13.3	0.1	4.4	-136.2	-21.5	5.9	13.2	-41.6	-92.1
Prepard foodstuffs; beverages; tobacco	**1,333.3**	**770.4**	**95.9**	**2.1**	**83.2**	**381.7**	**1,185.8**	**269.1**	**216.4**	**572.1**	**62.8**	**65.5**	**-147.5**	**-501.2**	**120.5**	**569.9**	**-20.4**	**-316.3**
Other agri. prod. (Uruguay Round)	**372.5**	**179.3**	**12.2**	**121.0**	**24.5**	**35.5**	**63.5**	**44.8**	**4.0**	**1.9**	**1.2**	**11.6**	**-309.0**	**-134.5**	**-8.3**	**-119.1**	**-23.3**	**-23.9**
Agri. products (Uruguay Round)	**3,527.1**	**1,764.4**	**313.6**	**158.8**	**170.0**	**1,120.3**	**2,660.3**	**1,107.6**	**351.2**	**867.1**	**79.1**	**255.1**	**-866.8**	**-656.7**	**37.7**	**708.3**	**-90.9**	**-865.2**
Total of all products	41,971	27,676	2,851	2,725	1,576	7,143	25,180	17,188	2,473	2,853	674	1,991	-16,791	-10,488	-378	128	-901	-5,152
% Agri. products/All products	**8.4**	**6.4**	**11.0**	**5.8**	**10.8**	**15.7**	**10.6**	**6.4**	**14.2**	**30.4**	**11.7**	**12.8**	*	*	*	*	*	*

Source : Eurostat - Comext - Phare

Continuation: Trade in Agricultural Products; Declaring Country: Poland (million EURO, 1997)

1997	IMPORTS						EXPORTS						Balance (Exp - Imp)					
Chapters of Customs Duties	**World**	**EUR 15**	**other CEEC's**	**NIS**	**USA**	**Rest world**	**World**	**EUR 15**	**other CEEC's**	**NIS**	**USA**	**Rest world**	**World**	**EUR 15**	**other CEEC's**	**NIS**	**USA**	**Rest world**
01 Live animals	38.5	30.4	5.5	0.1	0.6	1.9	145.0	128.4	1.4	1.1	0.1	14.1	106.6	98.0	-4.1	1.0	-0.5	12.2
02 Meats and edible meat offal	142.1	74.9	11.1	0.1	36.4	19.5	208.3	109.1	17.7	75.5	0.0	6.0	66.3	34.2	6.6	75.4	-36.4	-13.5
04 Dairy products, eggs, honey	69.6	43.2	8.1	9.7	0.5	8.2	238.0	70.5	12.8	41.8	7.7	105.2	168.4	27.3	4.7	32.1	7.2	97.1
05 * Others products of animal origin	103.6	39.4	1.2	2.4	9.5	51.1	54.2	42.5	1.0	1.2	2.0	7.6	-49.4	3.2	-0.2	-1.2	-7.6	-43.6
Animal Products	**353.7**	**187.8**	**25.9**	**12.3**	**47.1**	**80.8**	**645.6**	**350.5**	**32.9**	**119.5**	**9.8**	**132.9**	**291.8**	**162.8**	**7.0**	**107.2**	**-37.3**	**52.2**
06 Plants and flowers	36.1	31.3	1.2	0.2	0.5	2.8	23.1	20.4	0.9	0.7	0.0	1.1	-12.9	-10.9	-0.3	0.5	-0.5	-1.7
07 Vegetables	90.4	66.0	8.8	0.6	0.9	14.1	139.6	92.8	12.6	28.5	0.1	5.6	49.2	26.8	3.8	27.9	-0.8	-8.5
08 Fruit	313.7	120.4	5.2	1.9	7.5	178.8	276.6	200.9	11.4	54.2	0.1	10.0	-37.1	80.5	6.2	52.3	-7.3	-168.8
09 Coffee, tea, maté and spices	309.8	22.6	0.3	0.3	0.4	286.1	51.3	15.3	11.5	23.9	0.1	0.6	-258.5	-7.3	11.1	23.6	-0.4	-285.5
10 Cereals and rice	238.5	107.5	35.7	12.6	15.7	67.0	22.4	0.5	13.2	2.1	2.6	4.1	-216.0	-107.0	-22.5	-10.5	-13.1	-62.9
11 Flours, malt, starches	53.8	33.2	20.1	0.2	0.1	0.2	17.5	4.7	0.9	10.0	0.1	1.8	-36.2	-28.5	-19.2	9.8	-0.0	1.7
12 Oilseeds	139.0	63.4	27.7	4.1	8.6	35.1	35.6	28.4	3.0	3.0	0.3	0.8	-103.4	-35.0	-24.7	-1.1	-8.3	-34.3
13 Gums, resins, juices	18.5	13.2	0.7	2.3	0.4	2.0	0.8	0.3	0.1	0.4	0.0	0.1	-17.8	-12.9	-0.6	-2.0	-0.4	-1.9
14 Vegetables plaiting mterials	1.1	0.3	0.0	0.0	0.0	0.8	2.3	2.3	0.0	0.0	0.0	0.0	1.2	2.0	-0.0	0.0	-0.0	-0.8
Vegetable products	**1,200.8**	**457.9**	**99.7**	**22.1**	**34.1**	**586.8**	**569.3**	**365.6**	**53.6**	**122.7**	**3.4**	**24.0**	**-631.4**	**-92.3**	**-46.2**	**100.6**	**-30.8**	**-562.8**
15 Fats and oils	**211.5**	**125.6**	**36.5**	**2.4**	**1.2**	**45.8**	**50.3**	**7.8**	**5.0**	**34.8**	**0.0**	**2.6**	**-161.2**	**-117.8**	**-31.5**	**32.4**	**-1.2**	**-43.2**
16 * Preparations of meats	20.0	7.2	7.7	0.1	0.0	5.0	309.4	14.2	1.1	274.8	18.2	1.1	289.4	7.0	-6.6	274.7	18.2	-3.9
17 Sugars and sugar confectionery	71.0	49.8	14.3	1.2	1.2	4.5	307.6	51.8	21.7	197.3	6.0	30.7	236.5	2.0	7.4	196.1	4.9	26.2
18 Cocoa and its preparations	159.8	62.9	1.8	0.1	0.8	94.2	196.4	20.8	24.9	141.3	1.8	7.6	36.6	-42.1	23.1	141.3	0.9	-86.6
19 * Preparations of cereals, flours	60.5	44.5	13.0	0.9	0.3	1.8	120.5	4.5	24.0	79.6	5.7	6.6	60.0	-40.0	11.0	78.8	5.4	4.8
20 Preparations of vegetables, food fruit	128.5	39.6	26.3	0.2	3.2	59.2	228.6	135.9	14.0	66.8	5.3	6.6	100.1	96.4	-12.3	66.6	2.1	-52.6
21 Preparations of various products	238.3	125.7	12.3	0.1	11.4	88.8	159.9	7.9	51.3	96.2	0.8	3.7	-78.3	-117.8	39.0	96.2	-10.6	-85.1
22 Beverages, spirits and vinegar	86.7	57.0	19.7	0.5	2.7	6.8	51.8	9.9	4.0	21.5	8.7	7.6	-35.0	-47.1	-15.7	21.0	6.0	0.8
23 * Residues and waste from food industries	385.6	271.9	8.2	1.9	15.5	88.1	58.7	45.6	5.5	4.2	0.2	3.1	-326.9	-226.3	-2.7	2.3	-15.2	-85.0
24 Tobaccos	177.5	40.9	2.4	0.0	46.6	87.5	42.0	16.6	1.0	11.2	0.0	13.3	-135.5	-24.4	-1.5	11.1	-46.5	-74.2
Prepard foodstuffs; beverages; tobacco	**1,327.9**	**699.5**	**105.8**	**5.0**	**81.7**	**435.9**	**1,474.9**	**307.2**	**147.4**	**892.9**	**46.9**	**80.3**	**147.0**	**-392.2**	**41.6**	**888.0**	**-34.8**	**-355.6**
Other agri. prod. (Uruguay Round)	**400.6**	**183.7**	**7.1**	**137.9**	**32.2**	**39.8**	**58.9**	**45.5**	**1.8**	**2.5**	**2.6**	**6.5**	**-341.7**	**-138.2**	**-5.3**	**-135.4**	**-29.6**	**-33.3**
Agri. products (Uruguay Round)	**3,494.5**	**1,654.4**	**275.0**	**179.7**	**196.4**	**1,189.1**	**2,799.0**	**1,076.7**	**240.7**	**1,172.5**	**62.7**	**246.4**	**-695.5**	**-577.7**	**-34.3**	**992.8**	**-133.7**	**-942.7**
Total of all products	37,307	23,807	2,509	3,067	1,677	6,246	22,708	14,573	2,037	3,474	585	2,039	-14,599	-9,234	-472	406	-1,092	-4,207
% Agri. products/All products	**9.4**	**6.9**	**11.0**	**5.9**	**11.7**	**19.0**	**12.3**	**7.4**	**11.8**	**33.8**	**10.7**	**12.1**	*	*	*	*	*	*

Source : Eurostat - Comext - Phare