



Agri-food sector as a part of bioeconomy in sectoral strategies in Poland

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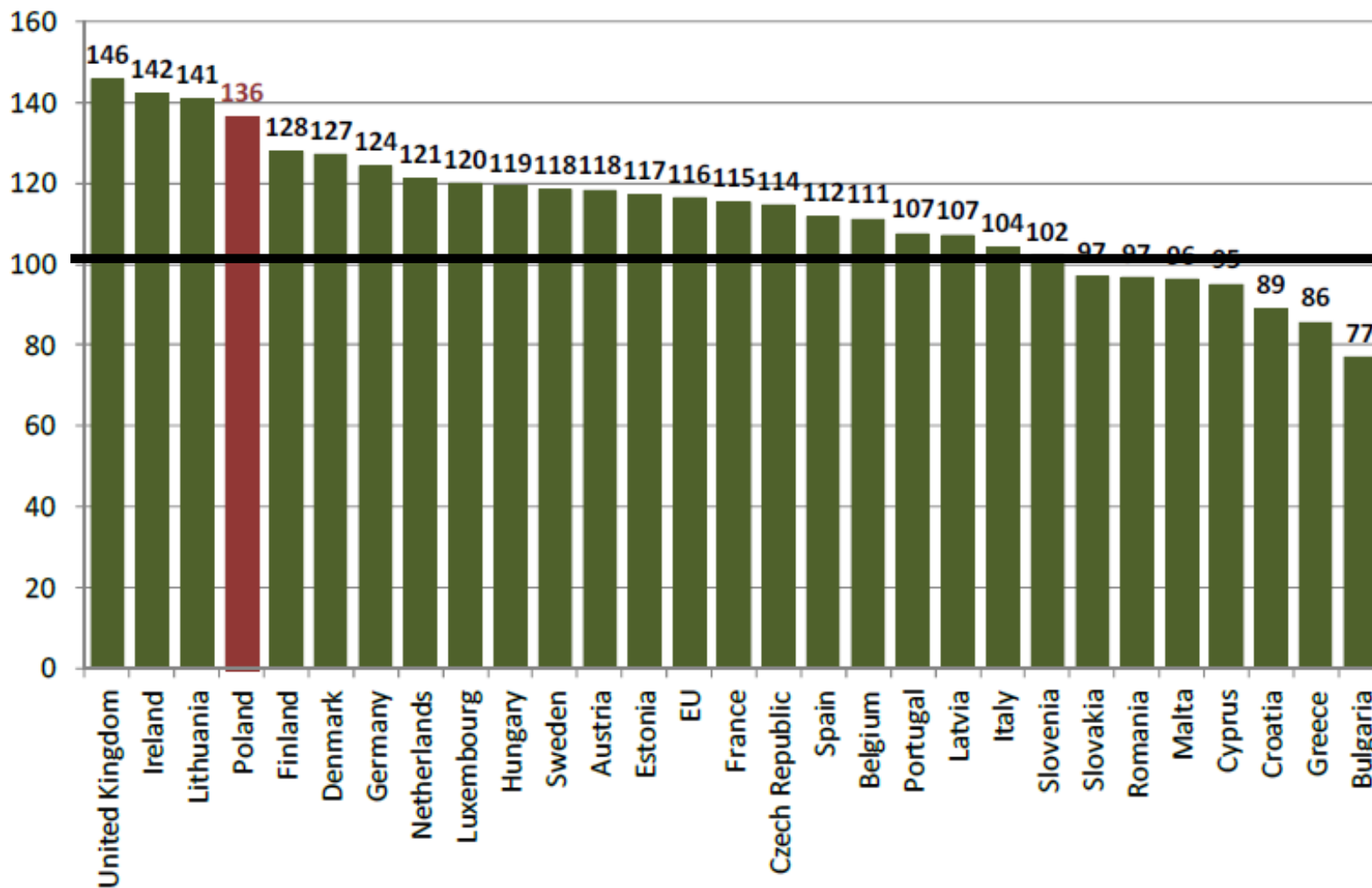
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Few words on Polish agri-food system

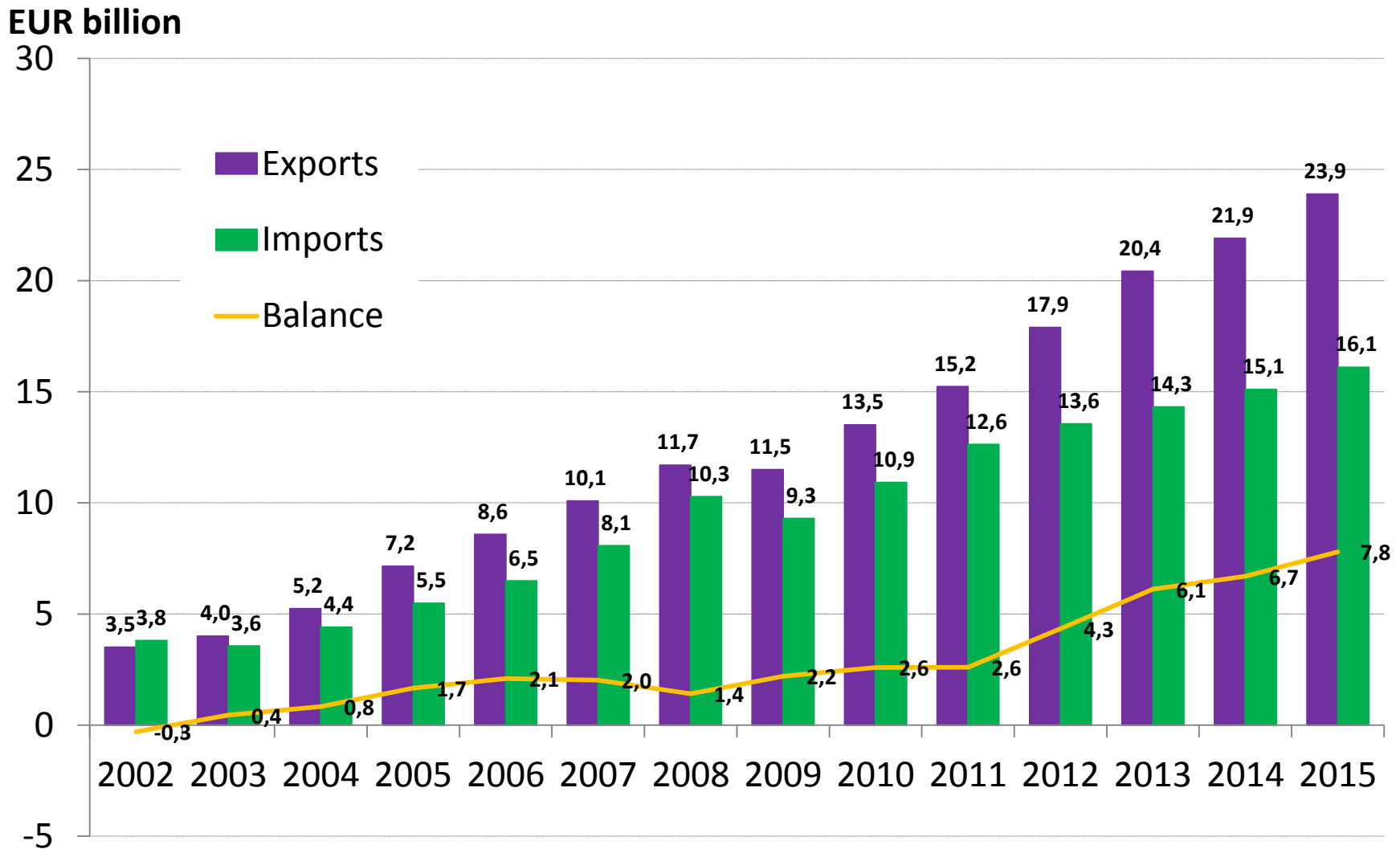
- performs well in terms of foreign trade balance
- net-export position, strong competition in food chains result in relatively low farm and retail food prices
- production (output/biomass) and competitive (trade) potential are hampered by farm fragmented structure and (increasingly) by environmental „concerns”
- bio-based raw materials prevail on export side – underutilized potential for bioeconomy development
- ... so, Poland seeks strategies to sustain development of the sector in globalized and climate constraint markets

Change in the value of agricultural output in the EU Member States in 2013 against 2005 (2005=100)



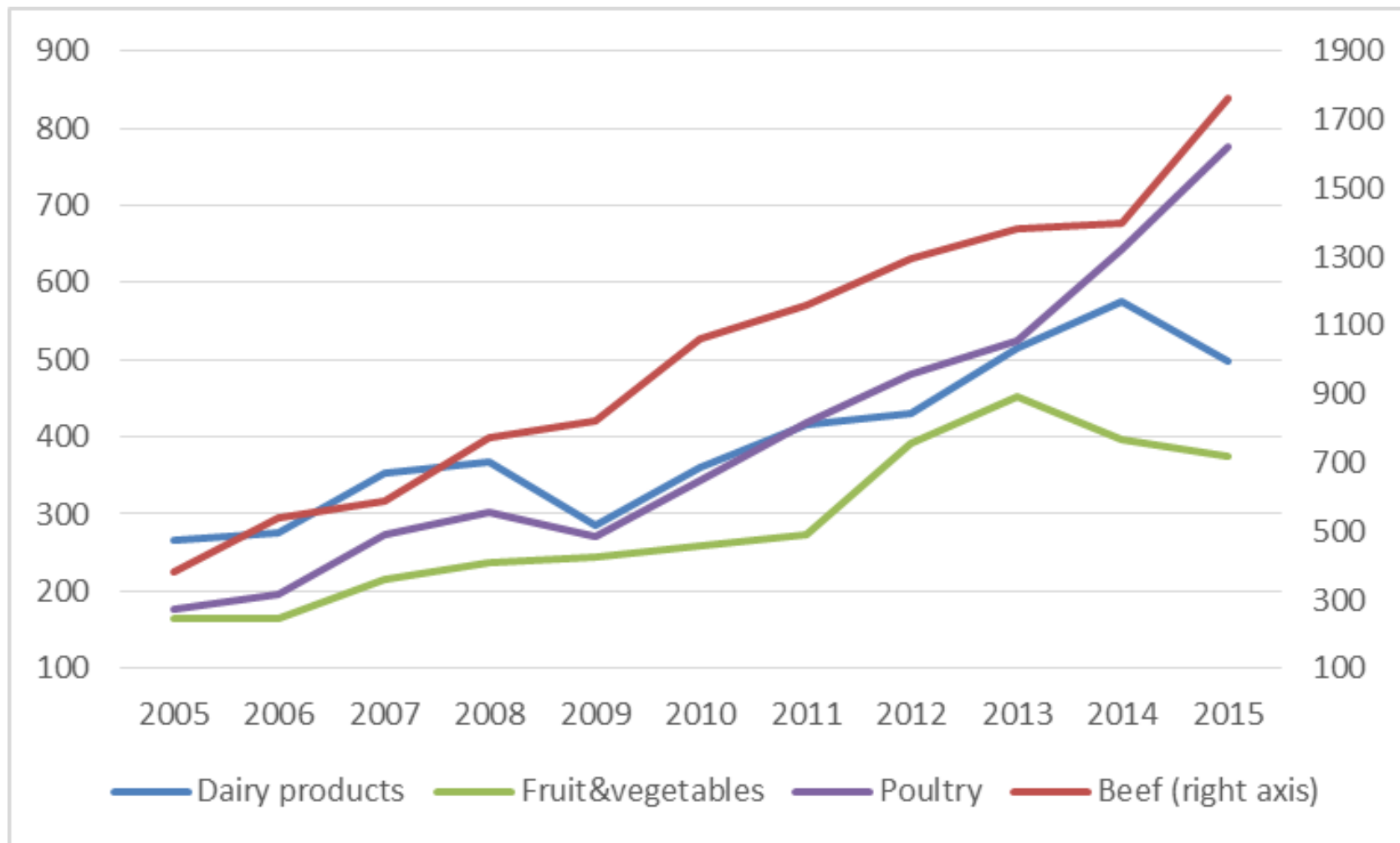
Source: Eurostat data: Economic accounts for agriculture – values at real prices [aact_eaa04] dated 29.07.2014.

Poland's foreign trade in agri-food products

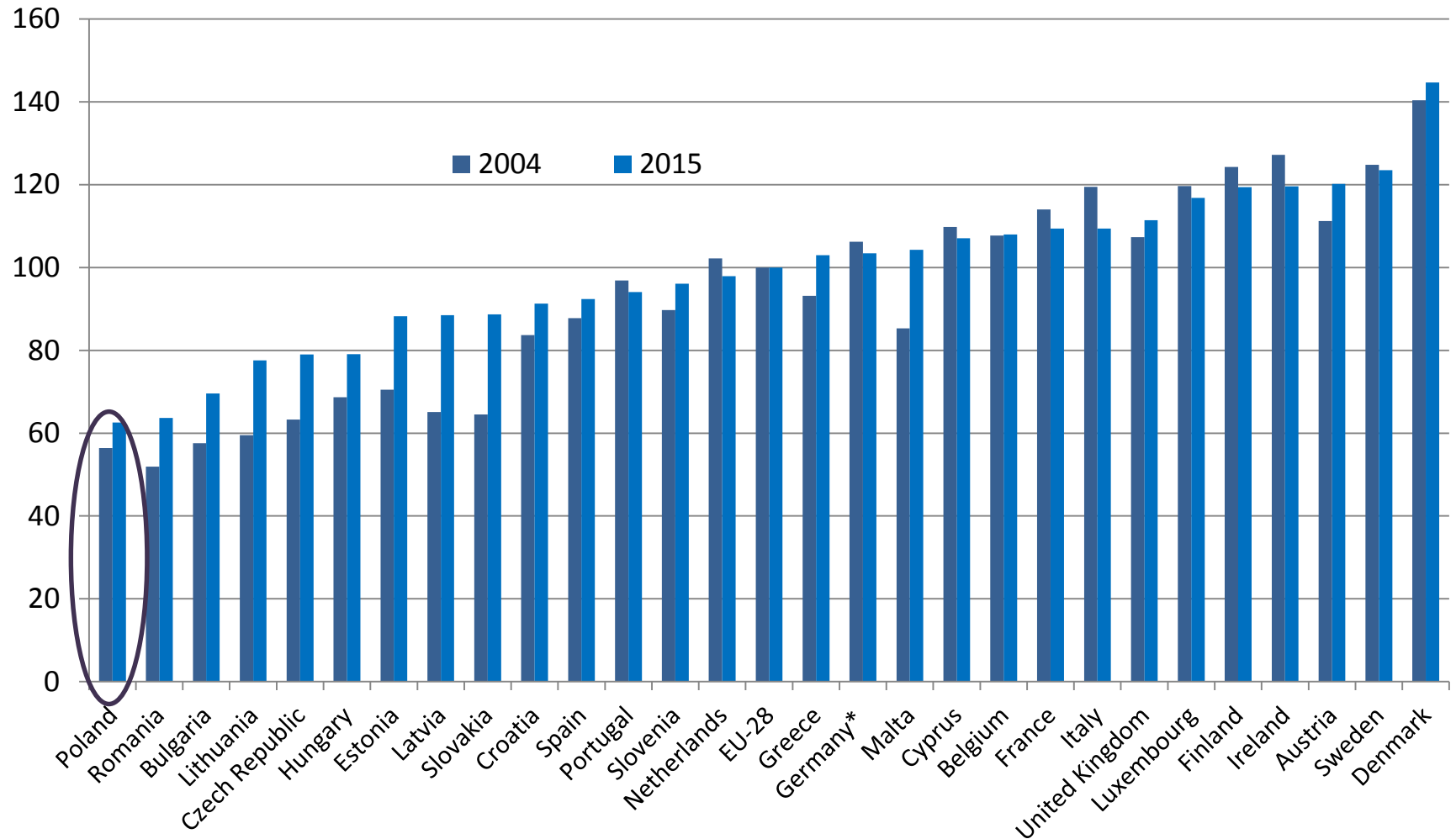


Source: based on Ministry of Finance data.

Changes in value of selected products exports (2003=100)

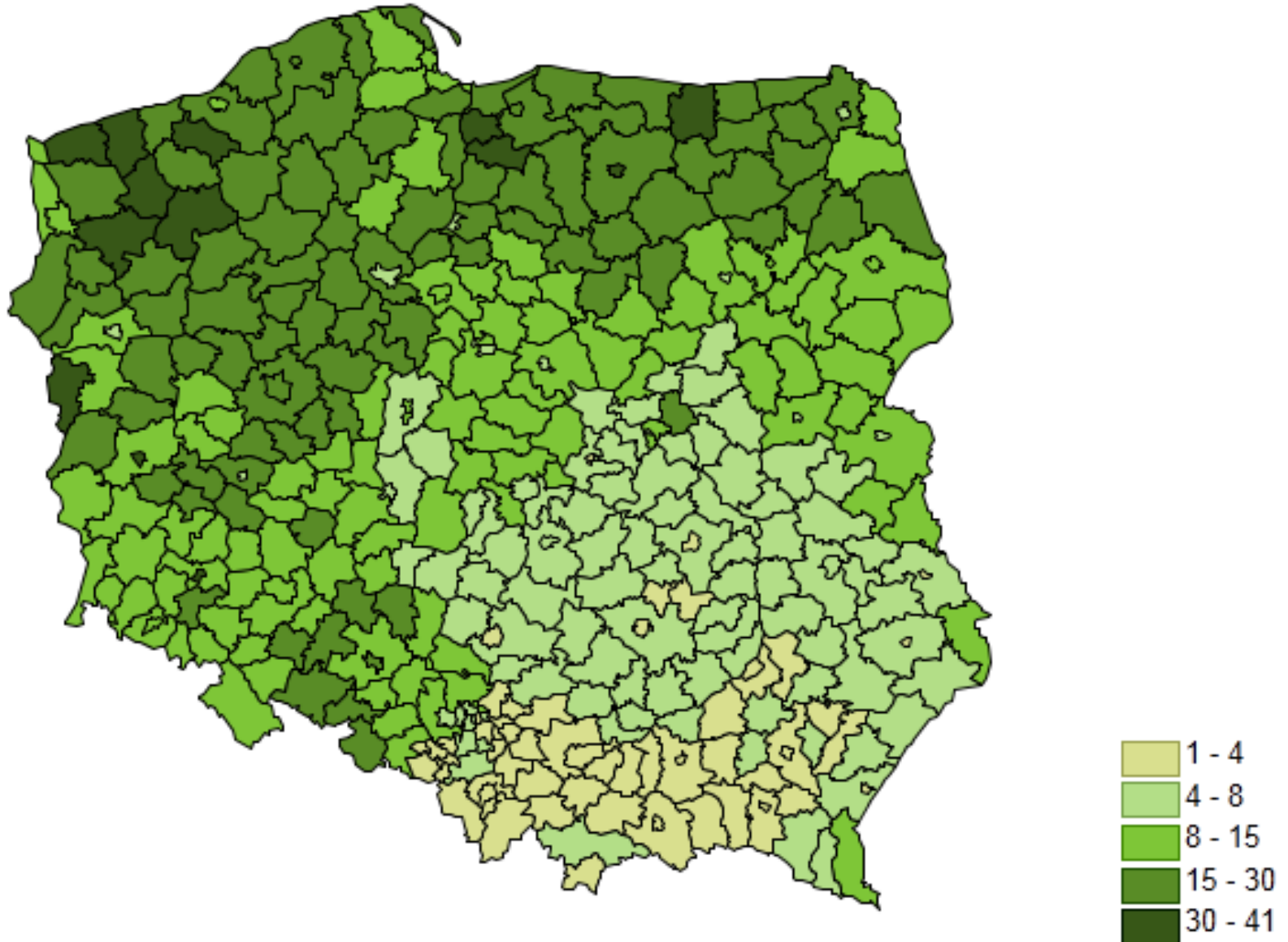


Food and non-alcoholic beverages consumer price level indices (EU28=100)



Source: EUROSTAT.

Dirersity of farm size in Poland – average area of agricultural holdings in poviats [ha]



Source: based on CSO data, Agricultural census 2010.

Challenges & deficiencies facing Polish agro-food sector

- external and internal economic pressures
- bargain position of farming in market chains
- public/consumer concerns and preferences
- acquisition of knowledge and innovation at farm level
- production and market risks
- productivity vs sustainability of farming
- regional concentration of farm production
- water resources and management
- demography of some of rural areas
- infrastructure in rural areas



System of integrated strategies in Poland

**Strategy for Responsible Development till 2020
(in the perspective till 2030) (SRD)** – adopted in 2017

- Strategy for Productivity
- Strategy for Human Capital Development
- Strategy for Social Capital Development
- Strategy for Efficient State
- National Strategy for Regional Development
- Strategy for Sustainable Development of Rural Areas, Agriculture and Fisheries**
- Strategy for Transport Development
- Polish Energy Policy
- Environmental State Policy



The Strategy for Responsible Development (perspective till 2030)

Main strategic choices relevant for agriculture and rural development:

- increase in social, economic and territorial cohesion.
- decrease in number of people in risk of poverty and social exclusion.
- „Sector of high quality food” among 10 strategic sectors to become future engines of Polish economy;
- „Polish food specialties” among 12 preselected branches to influence the future competitive position of Poland on global markets
- support for R+D+I will concentrate on 11 areas (smart specialisations) including „Innovative technologies, processes and products of agri-food and wood sector”.



Plan for rural areas (set of priority projects for agriculture)

- Increase **direct sales** of farm food products (short food supply chains)
- Development of **quality food** products
- „**Against the drought**” (improvement in soil fertility and water management)
- Development of agriculture policy **for mountain areas**
- Enhancing **sovereignty in feed** (including non-GMO feed)
- Agriculture for **ecology** – enhancing non-food utilisation of agriculture biomass (**inc. bioeconomy**)

To conclude ...

- Bioeconomy (part of the process) is expected to contribute to (i) economic diversification of rural areas, (ii) position of farming in value chains, (iii) sustainable development of the sector and economy
- New opportunities (technologies), new concerns (envi-clima-health) and interlinks are being incorporated in the process
- Products of research and innovation activity need not only to be applicable (in business) but also understood to all actors of the bioeconomy system (consumers, farmers, NGOs, policy-makers,...)



*Thank you
for your attention*

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