

# Transformation of Food Systems in Central and Eastern European Countries

Dr hab. Marek Wigier, prof.  
Dr hab. Iwona Szczepaniak, prof.  
Dr Wioletta Wrzaszcz

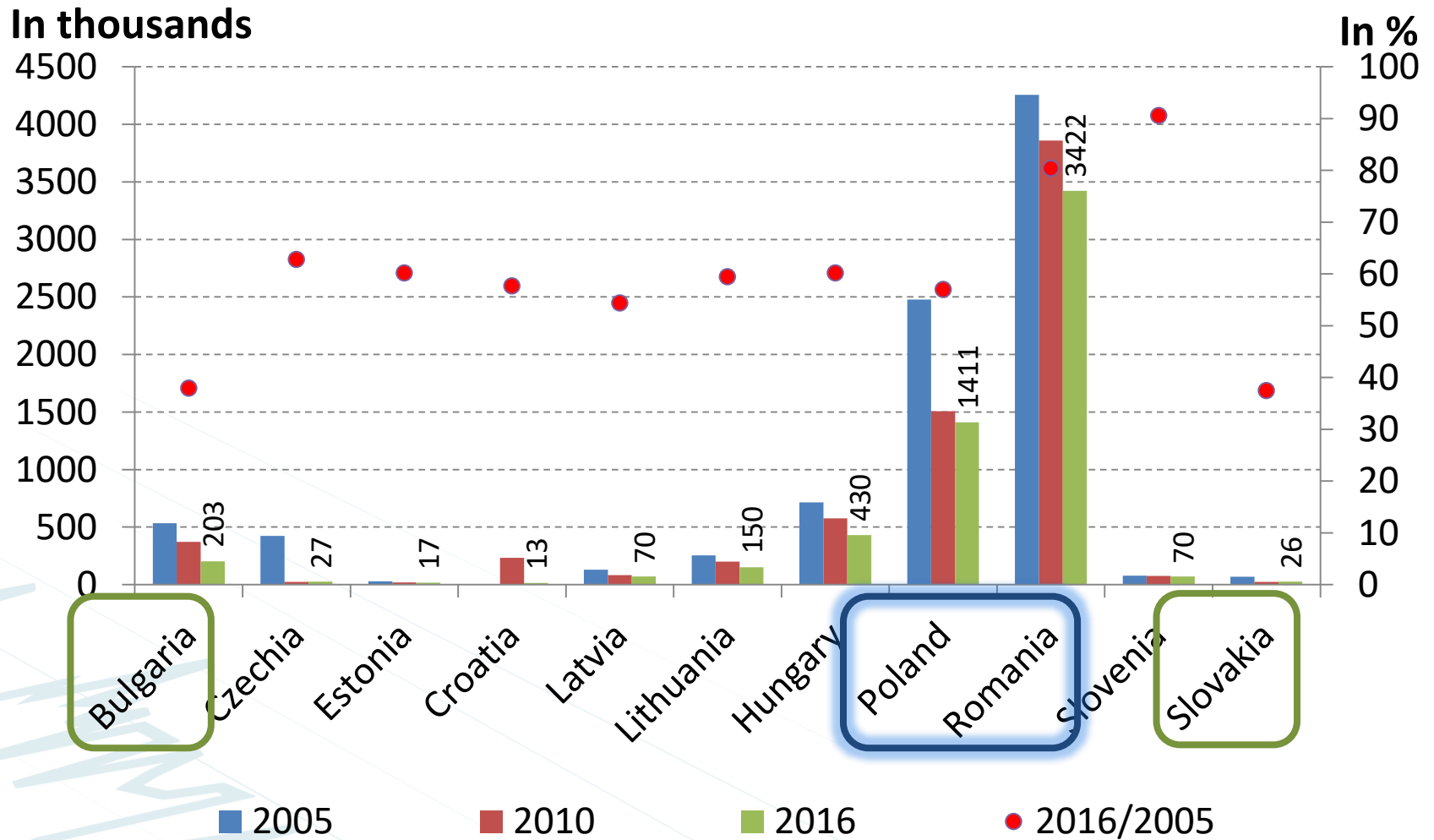
IAFE-NRI

# Agenda

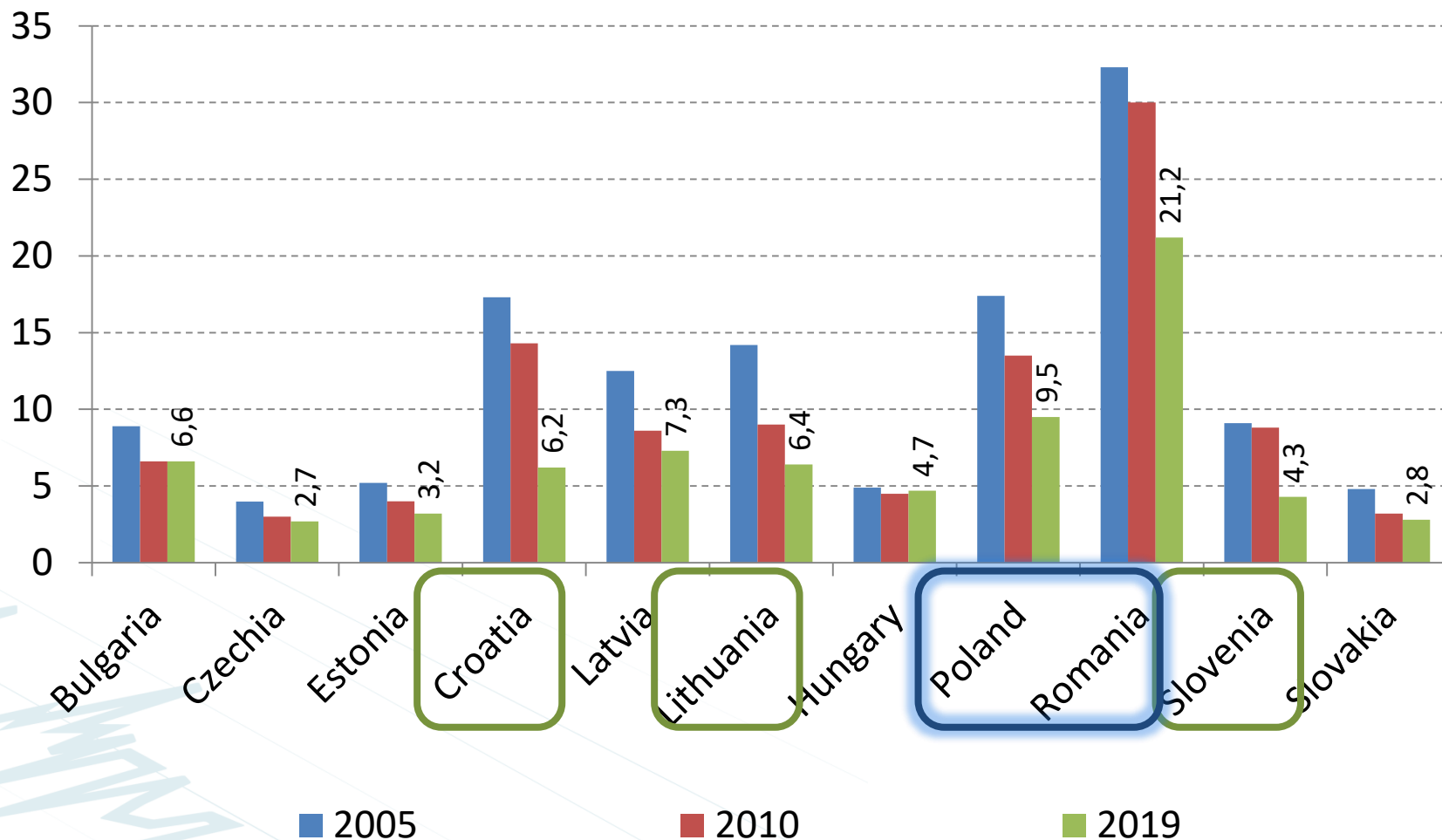
- Agriculture
- Food industry
- Agri-food trade

# Agriculture

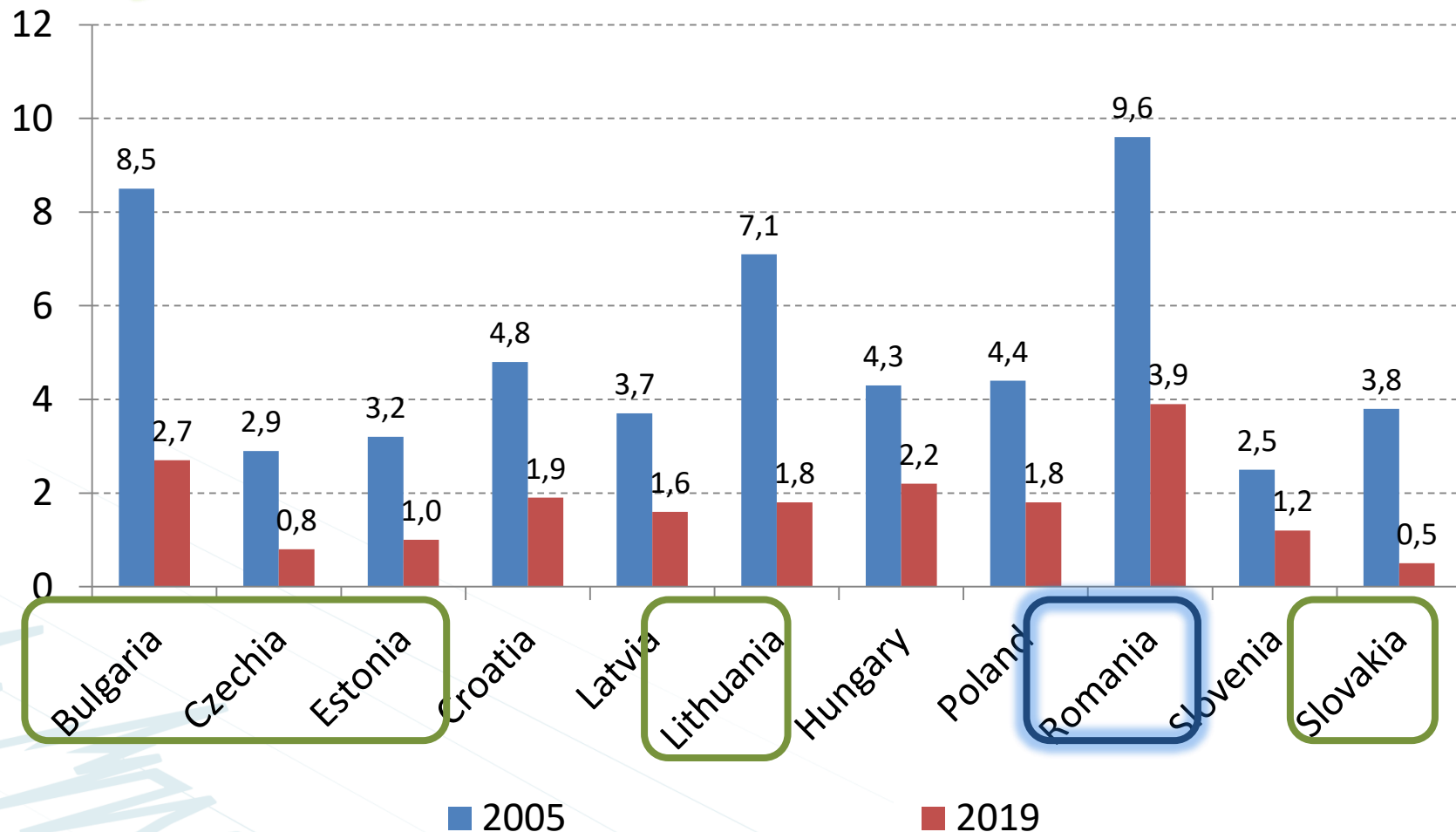
# Number of farms (in thousands) and relation 2016/2005 (in %)



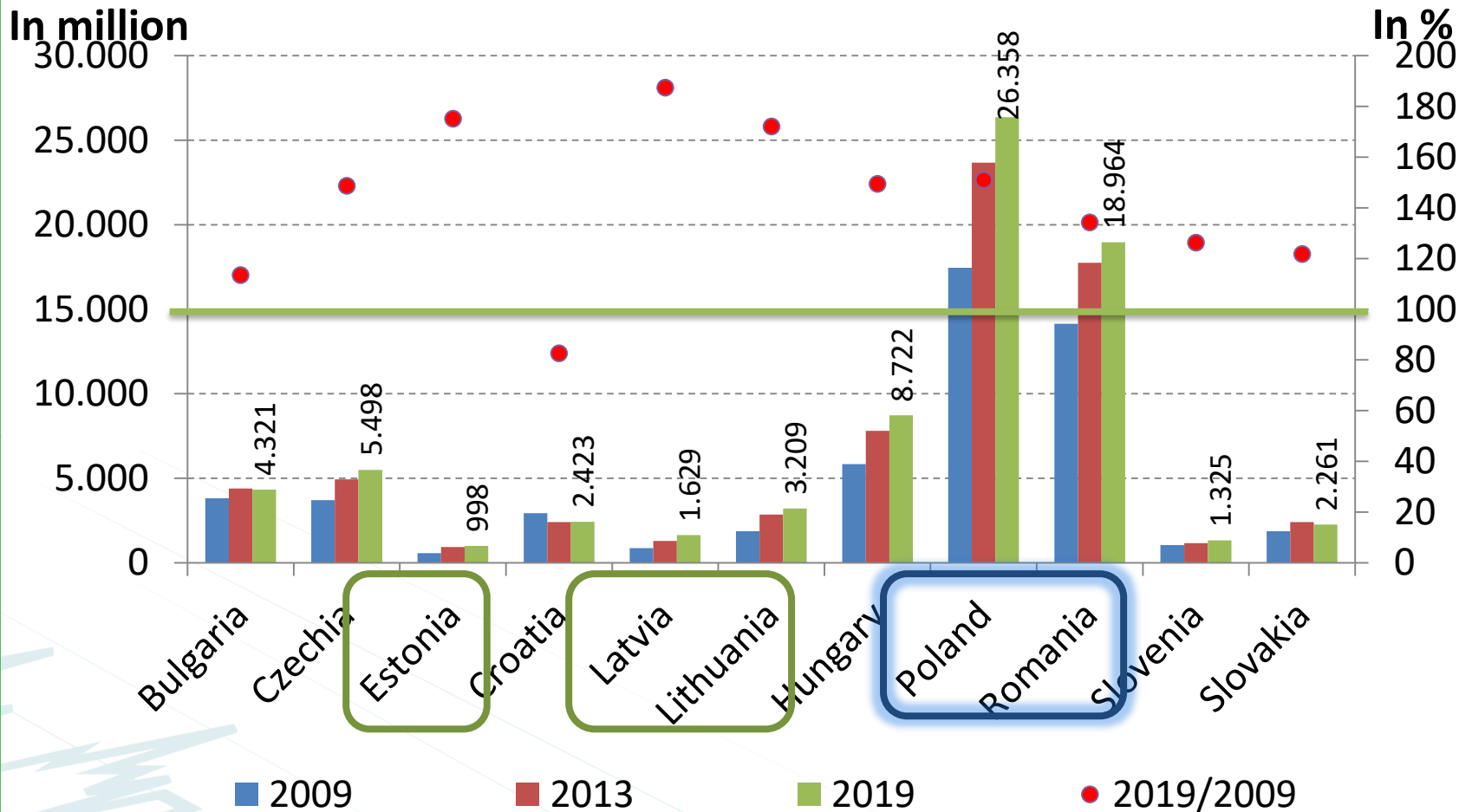
# Employment in agriculture as a share of total employment (in %)



# Contribution of agriculture to gross domestic product (in %)

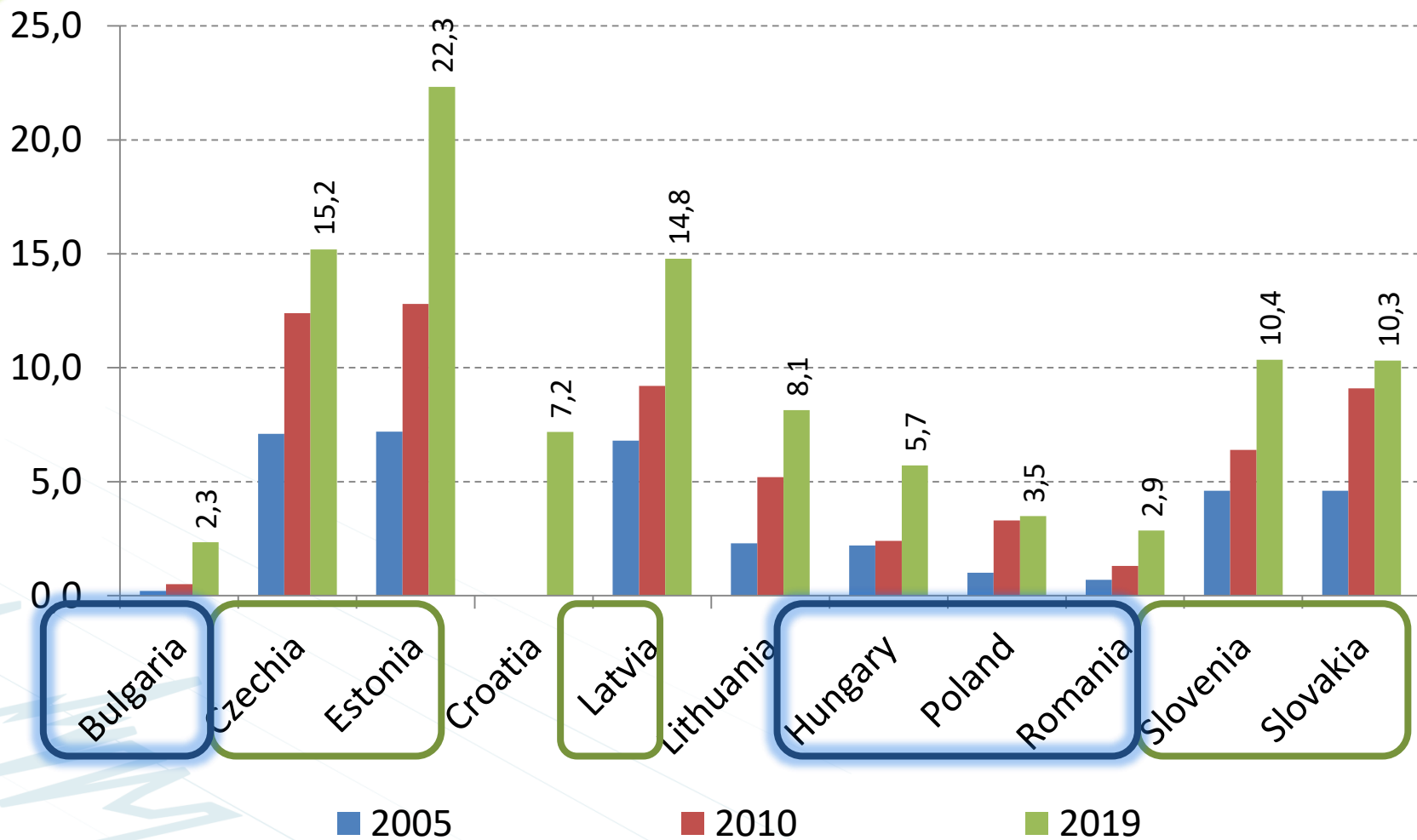


# Output of the agricultural industry - basic and producer prices (in EUR million ) and relation 2019/2009 (%)



Output of the agricultural industry is made up of the sum of the output of agricultural products, agricultural services and of the goods and services produced in inseparable non-agricultural secondary activities

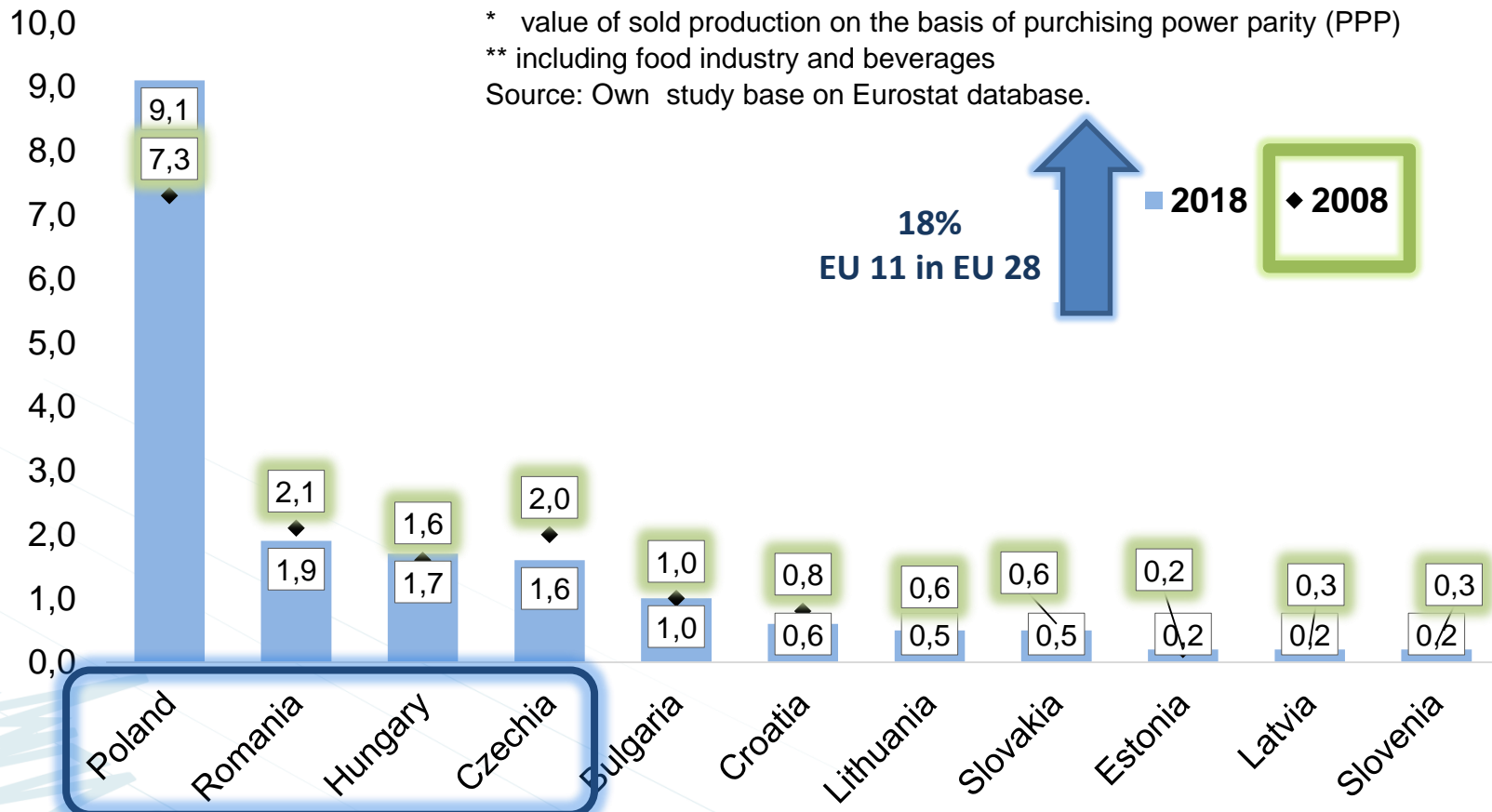
# Area under organic farming (Percentage of total utilised agricultural area)





# Food industry

# Share of the EU-11 countries in the value of sold production\* of the food industry\*\* in the EU-28 (%)

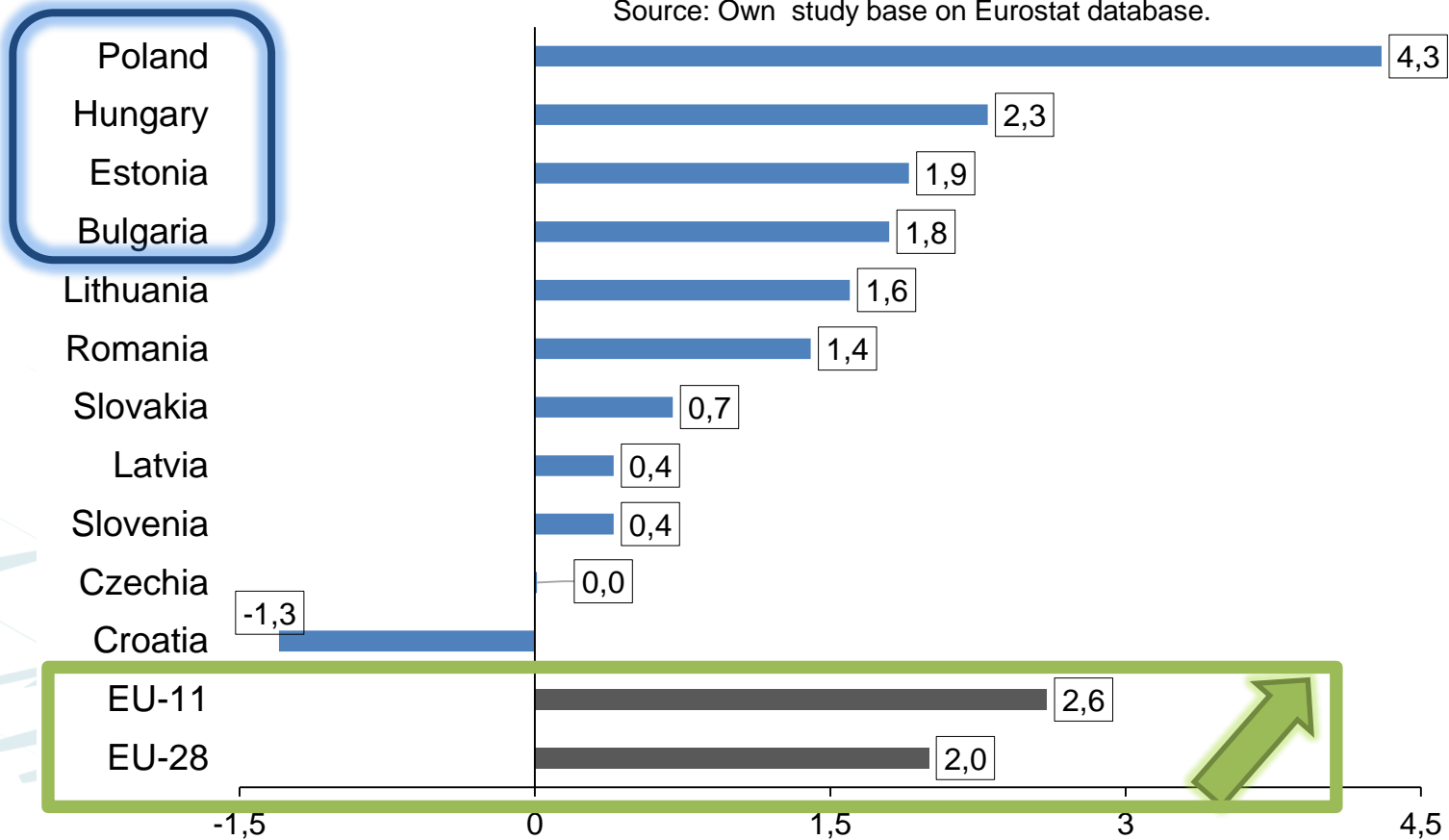


# Average annual growth rate of the value of sold production\* of the food industry\*\* in selected EU-11 countries in 2009-2018 (in percent annually)

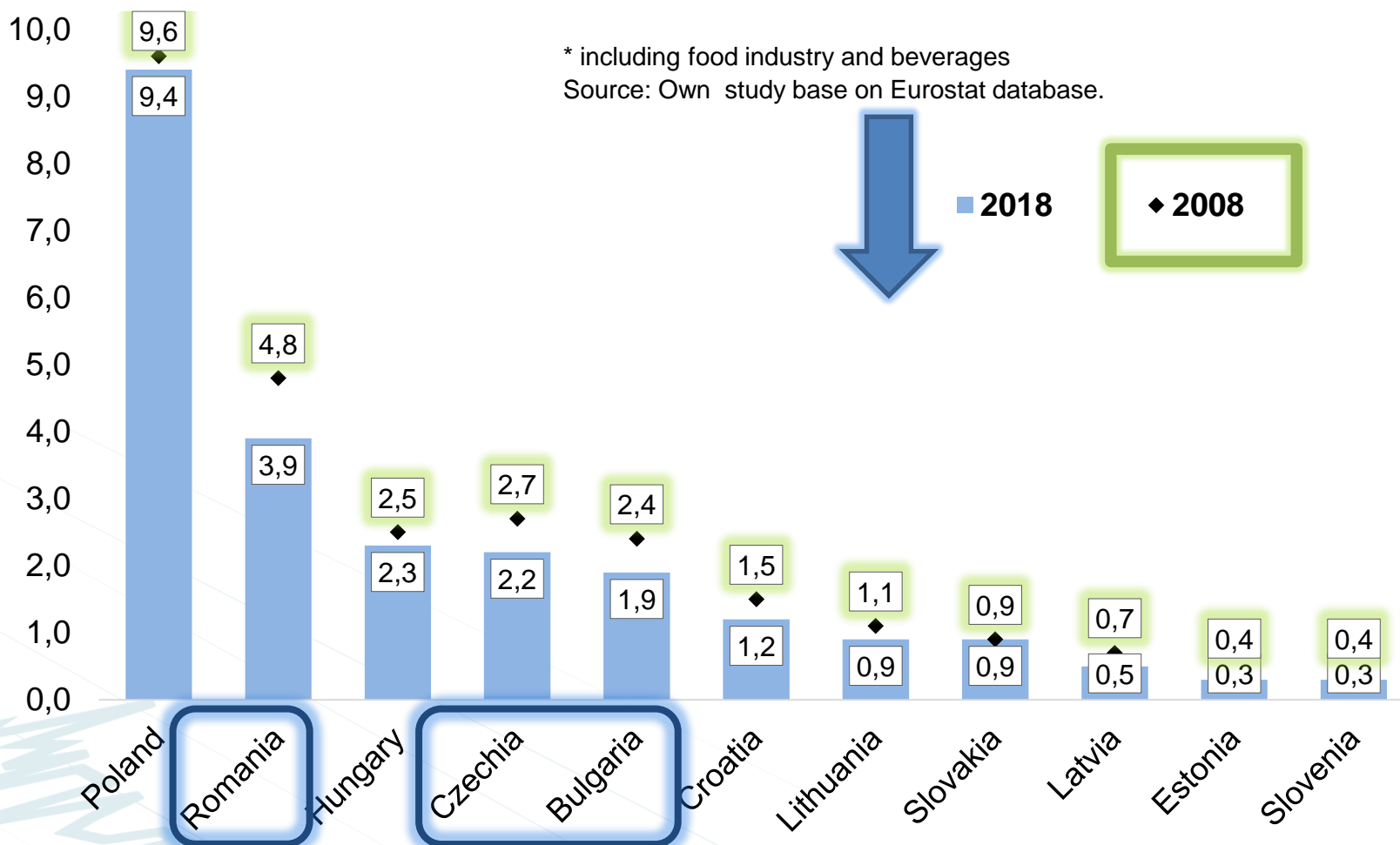
\* value of sold production on the basis of purchasing power parity (PPP)

\*\* including food industry and beverages

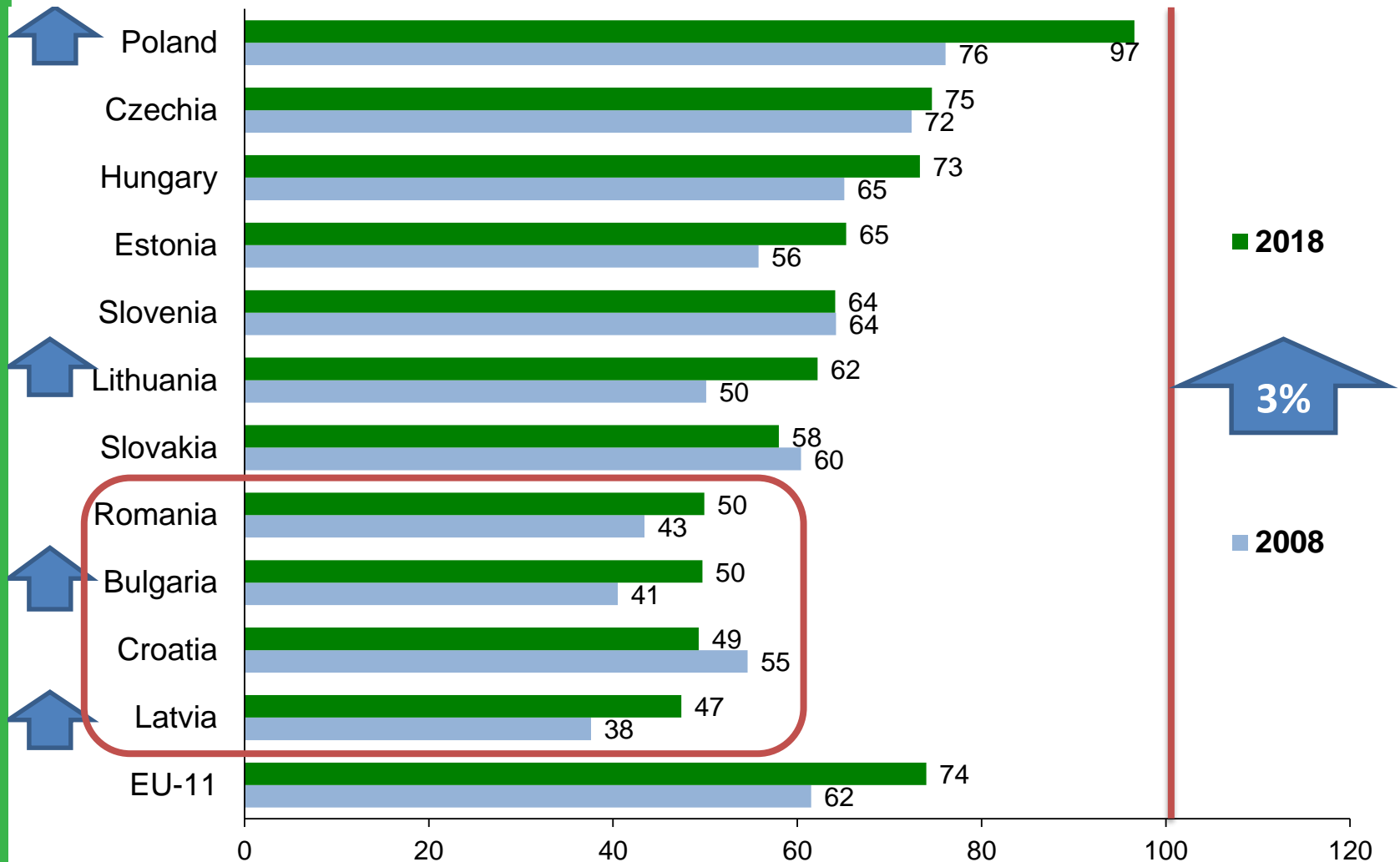
Source: Own study base on Eurostat database.



# Share of EU-11 countries in employment in the food industry\* EU-28 (in %)

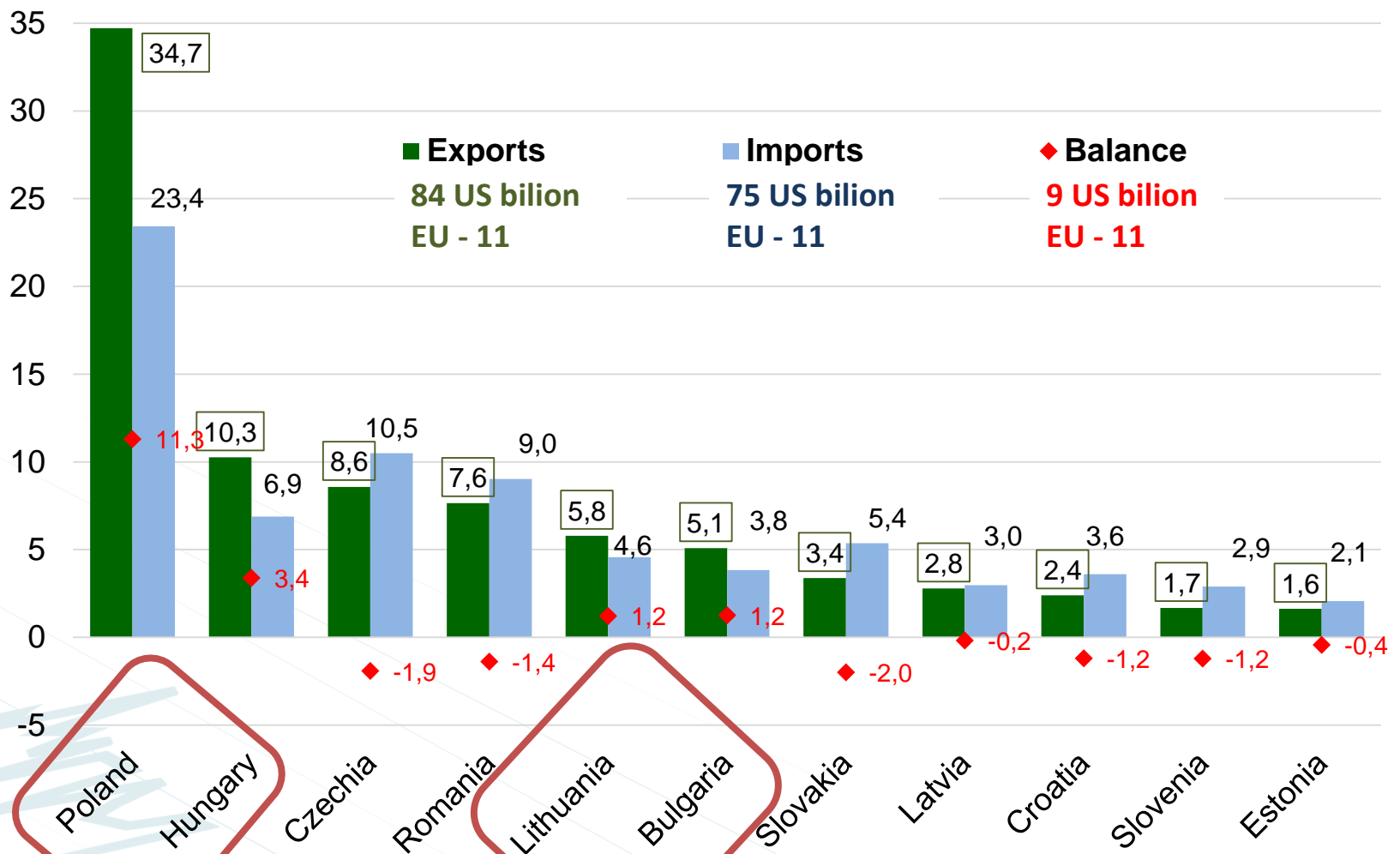


# Labour productivity in the food industry\* of selected EU-11 countries (EU-28 = 100)

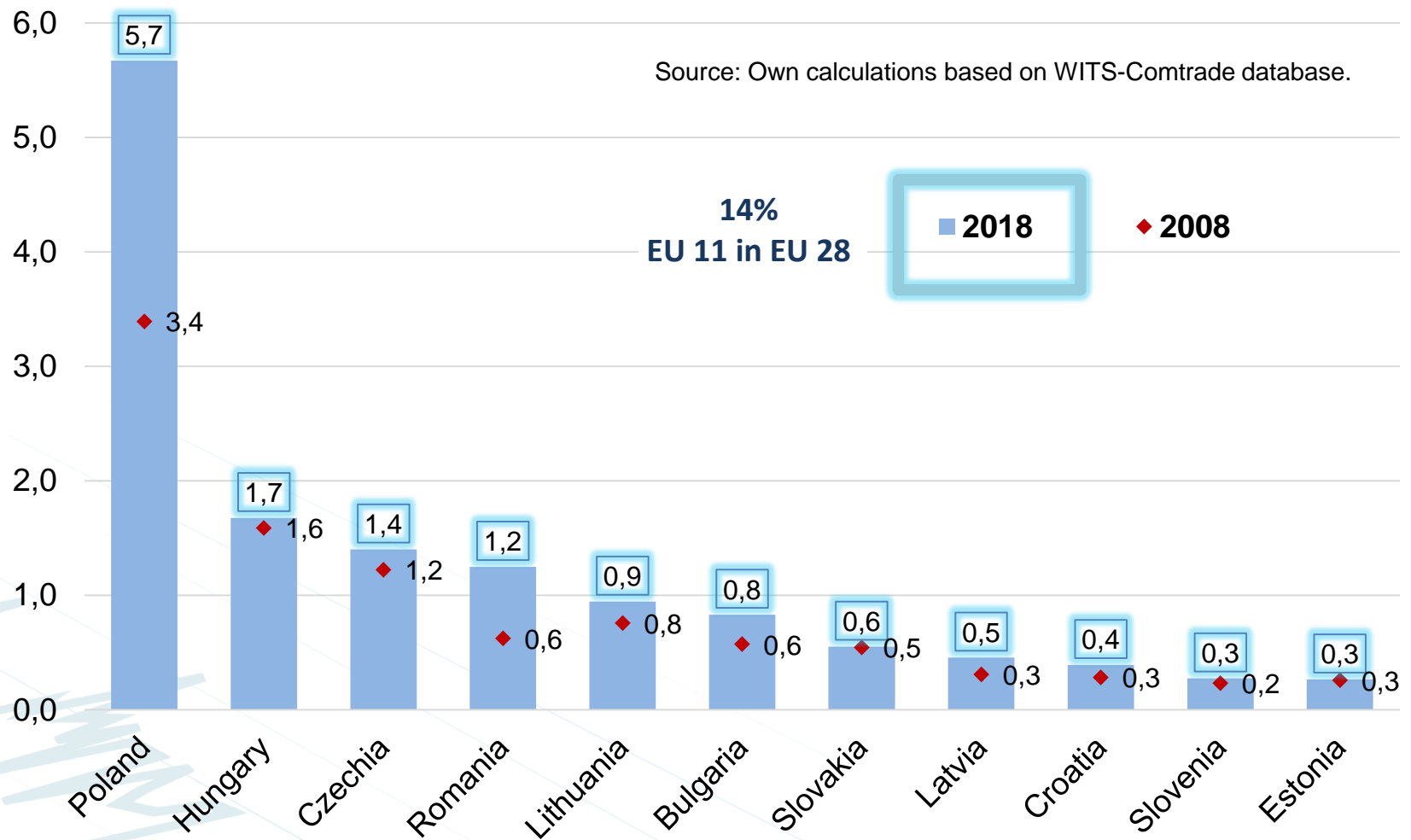


# Agri-food trade

# Foreign trade in agri-food products of the EU-11 countries in 2018 (in US billion)

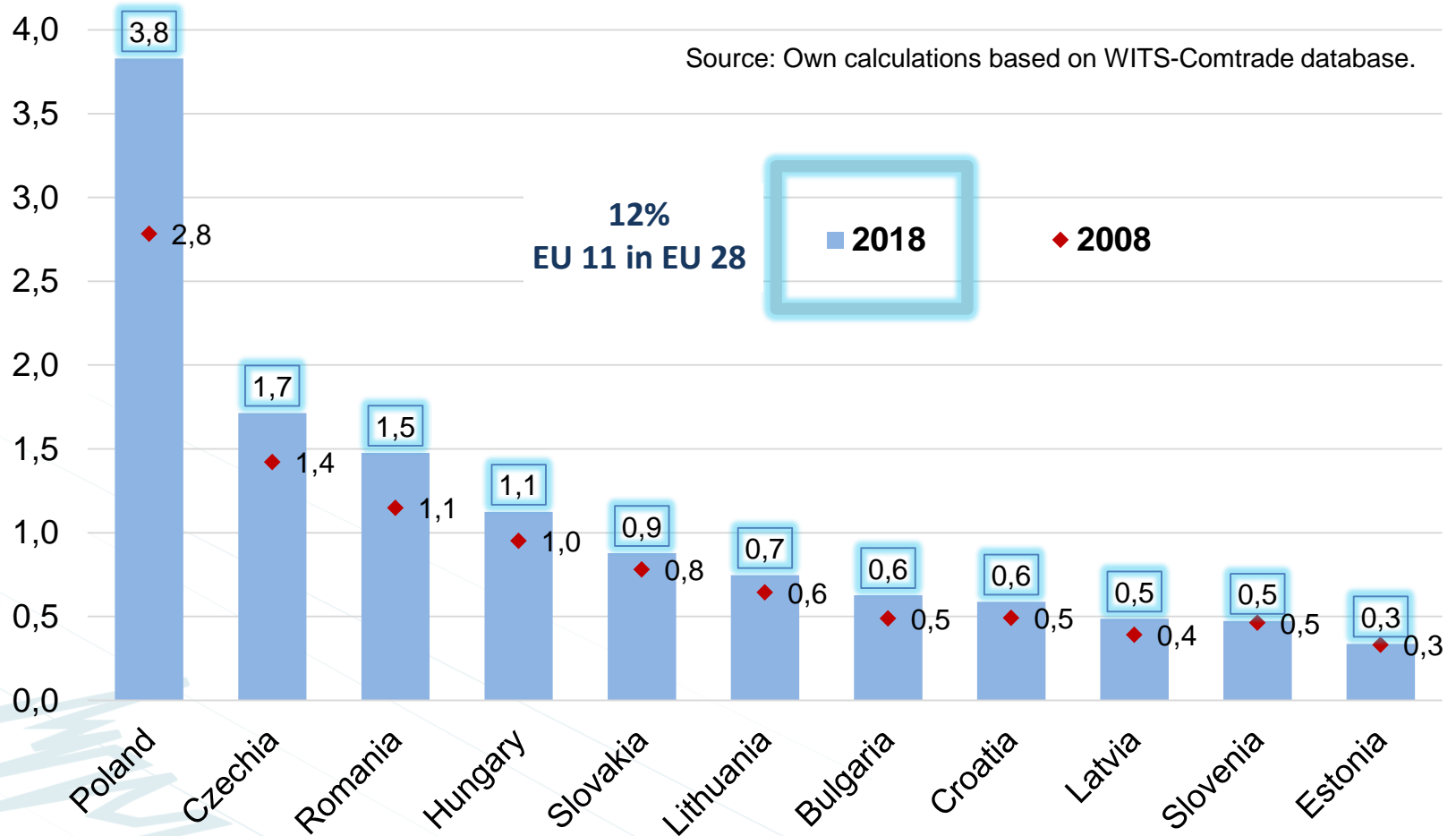


# Share of the EU-11 countries in the agri-food export of the EU-28 (in %)





# Share of the EU-11 countries in agri-food import of the EU-28 (in %)



# Commodity structure of the agri-food export of the EU-11 countries (in %)

CN chapter	Bulgaria	Croatia	Czechia	Estonia	Hungary	Latvia	Lithuania	Poland	Romania	Slovakia	Slovenia
Live animals	1.1	4.8	4.6	1.9	4.2	2.0	1.6	0.4	5.8	6.1	4.3
Meat	4.5	4.2	2.6	4.0	11.5	3.2	4.6	17.3	4.1	4.6	7.7
Fish	0.8	8.3	1.8	8.0	0.3	5.1	9.3	5.3	0.3	0.2	0.7
Dairy products	4.4	3.7	10.8	13.8	5.2	10.9	10.8	8.3	3.1	10.1	12.4
Vegetables	2.8	1.4	1.4	2.2	3.1	3.4	4.6	3.8	1.5	1.3	2.3
Fruit and nuts	2.6	1.9	1.9	1.8	1.3	3.3	3.9	3.8	1.0	3.0	5.0
Coffee, tea and spices	2.1	1.0	2.3	1.4	0.6	1.8	1.1	1.7	0.4	5.2	2.9
Cereals	24.1	9.3	6.7	7.7	13.4	15.3	8.5	2.8	33.3	9.8	3.7
Products of the milling industry	1.1	1.1	2.0	0.7	1.3	2.0	2.9	1.1	0.2	4.4	0.9
Oil seeds and oleaginous fruits	13.5	6.5	4.2	1.6	6.5	3.2	2.7	1.1	18.5	8.3	3.6
Fats and oils	7.6	3.5	4.4	8.5	6.2	0.8	1.6	1.4	3.5	2.9	1.6
Preparations of meat and fish	2.0	5.0	3.0	5.7	3.2	4.9	3.7	5.8	2.7	3.7	7.7
Sugars and sugar confectionery	2.2	4.3	4.1	0.7	2.4	0.6	2.1	2.4	0.7	6.7	1.9
Cocoa preparations	4.2	6.7	3.4	12.3	1.9	1.6	2.4	5.2	1.3	8.0	1.5
Preparations of cereals	6.0	7.4	8.0	6.5	2.9	3.9	4.2	8.1	2.9	4.6	5.5
Preparations of vegetables and fruits	3.2	2.1	2.1	1.8	6.4	1.9	1.8	4.7	1.0	2.3	1.0
Miscellaneous edible preparations	2.3	10.0	8.6	8.1	7.0	3.1	3.5	6.3	2.7	7.4	15.6
Beverages and spirits	3.5	7.5	8.5	11.3	8.0	26.6	7.5	3.1	2.3	6.0	8.8
Prepared animal fodder	6.2	3.3	8.4	1.3	10.2	3.8	5.2	4.3	3.4	3.4	10.9
Tobacco products	5.1	7.3	9.3	0.3	2.5	1.6	15.0	11.5	10.7	0.3	0.1
Other products	0.6	0.7	1.8	0.4	1.9	1.1	3.0	1.8	0.6	1.5	2.2

## Conclusions

- \* The presented results indicated, that the **potential of the agri-food sector of Bioest countries is diverse.**
- \* Indication of **uniform path of their development is not possible** due to countries' specificity, e.g. natural or production and economic conditions.
- \* Diversity should be considered as a **fundamental factor in strengthening the competitiveness** of Bioeast countries.
- \* **Strengthening regional ties** should be one of the key driver of *European Green Deal strategy* implementation.

**Thank you for your attention!**