



Ministry of Agriculture and Rural Development
Republic of Poland



*Poland
tastes good*

Polish beef sector

Export to Japan and Hong Kong

Magdalena Rowińska

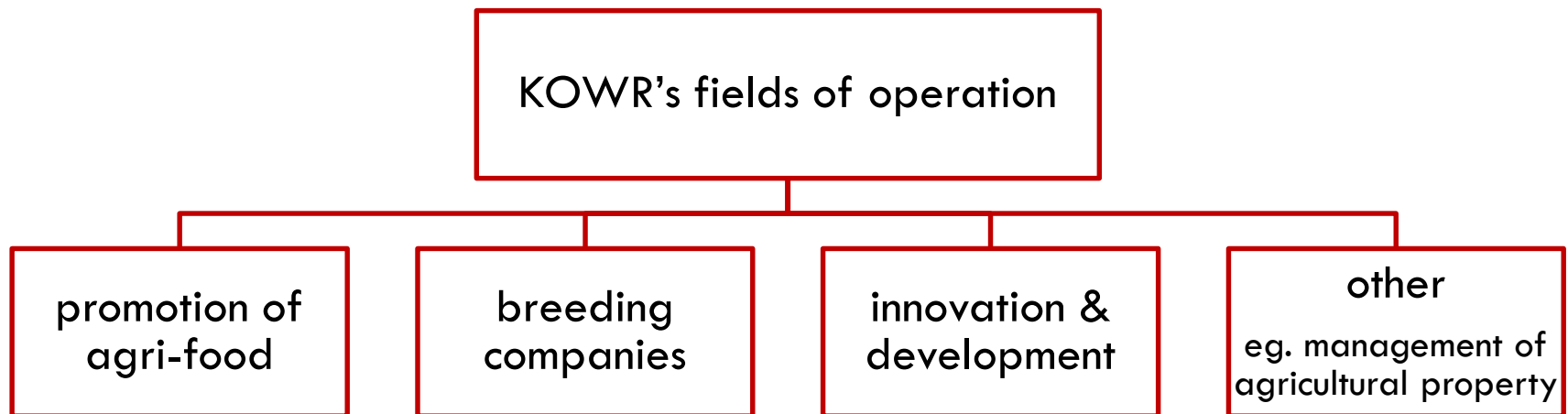
Acting Director

Export Support Department



National Support Centre for Agriculture (KOWR)

The **National Support Centre for Agriculture (KOWR)** is a Polish governmental agency, supervised by the Minister of Agriculture and Rural Development.



KOWR's promotional activities

The KOWR is the main institution implementing **promotion measures** in the agri-food sector in Poland.

Our goal is to support Polish producers and exporters of food and to build a positive image and brand awareness of Polish food abroad under the 'POLAND TASTES GOOD' brand.



Poland
tastes good

The 'POLAND TASTES GOOD' brand is a guarantee of **taste** and a synonym for Polish food products of the **highest quality**, as well as a response to the growing demand for healthy food, produced in accordance with the **natural environment**, based on **traditional** technologies and production methods.

Your partner in connecting to Polish agri-food business

The KOWR focuses on **facilitating cooperation** between entities of the agri-food sector by organizing:

- **Polish stands and trade missions** during major food exhibitions in Europe, Asia, the Middle East and Africa
- **Trade missions to Poland** for foreign importers, distributors and representatives of retail chains
- Online and live **business-to-business meetings (B2B)/ pitching sessions**

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tastes good*



KOWR's support for Polish companies exporting food products to Japan and Hong Kong

The KOWR supports Polish exporters interested in exporting to Japan and Hong Kong by organizing:

- stands and trade missions during major food exhibitions in Japan: **FOODEX JAPAN** (8-11 March, 2022; 7-10 March 2023, **5-8 March 2024**)
- information webinar on the agri-food market in Japan (22 February, 2022) with participation of ca. 100 exporting companies
- stands and trade missions during major food exhibition in Hong Kong: **HKTDC FOOD EXPO** (15-17 August, 2019)



Information and promotion programmes on Japanese and Hong Kong markets

- **„EU beef on Asian markets”**- a two-year programme aimed to promote beef (fresh, chilled and frozen) in Japan and Hong Kong. The main goal of the programme is to increase visibility of beef from the EU and to increase its exports into Japan and Hong Kong. The programme has been started in 2022.
- **„Poultry with a European passport”** - a two-year programme implemented in the markets of China, Hong Kong and Japan. The programme aims at increase in the awareness of the values of poultry meat from Europe, which will result in growth in demand for high-quality poultry meat coming to Asia “with a European passport”. The programme has been started in 2020.



Poland

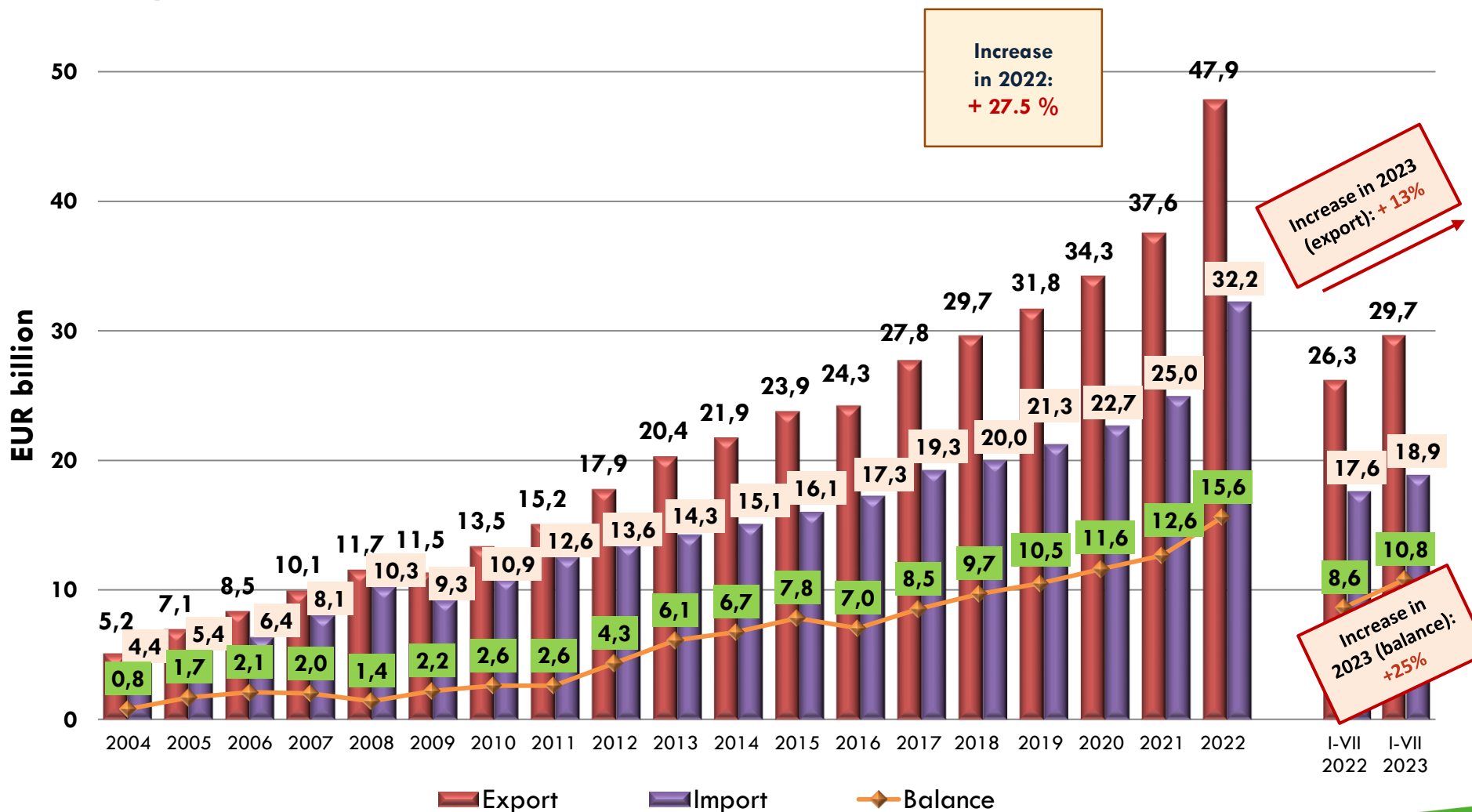
one of the biggest Member States
of the European Union
and agricultural heart of Europe

Poland and Polish food sector in the European Union

- **2nd** in the EU – number of agricultural holdings
- **2nd** in the EU - positive food trade balance in the EU
- **5th** in the EU – share of population living in rural areas (40%, 15 million people)
- **5th** in the EU – value of agricultural production
- **5th** food producer in the EU
- **7th** food exporter in EU
- **Ca. 17.6 thousand companies and 458 thousand people** working in the Polish food sector
- Sales value – **14% of GDP**

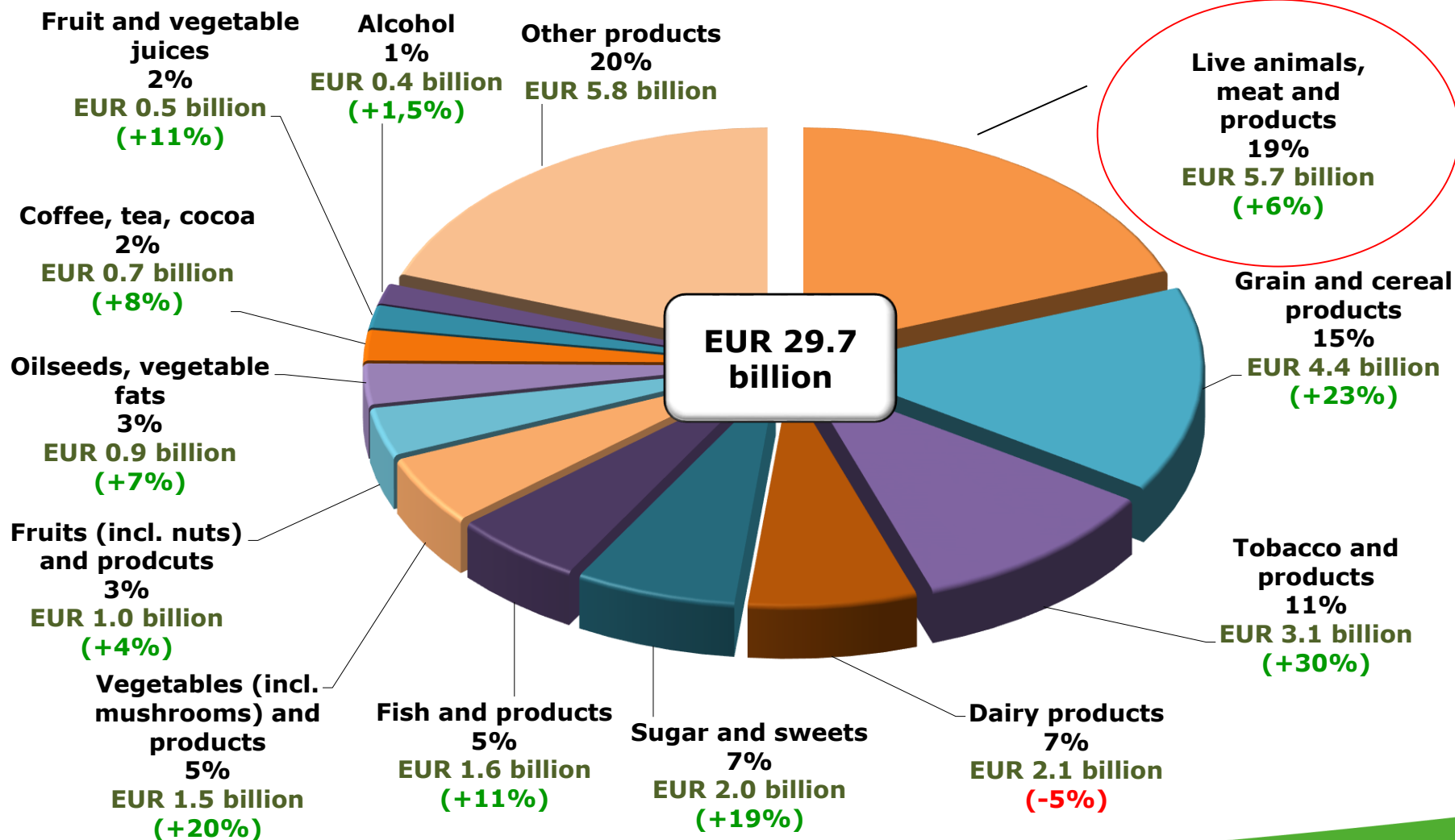


Polish foreign trade in agri-food products

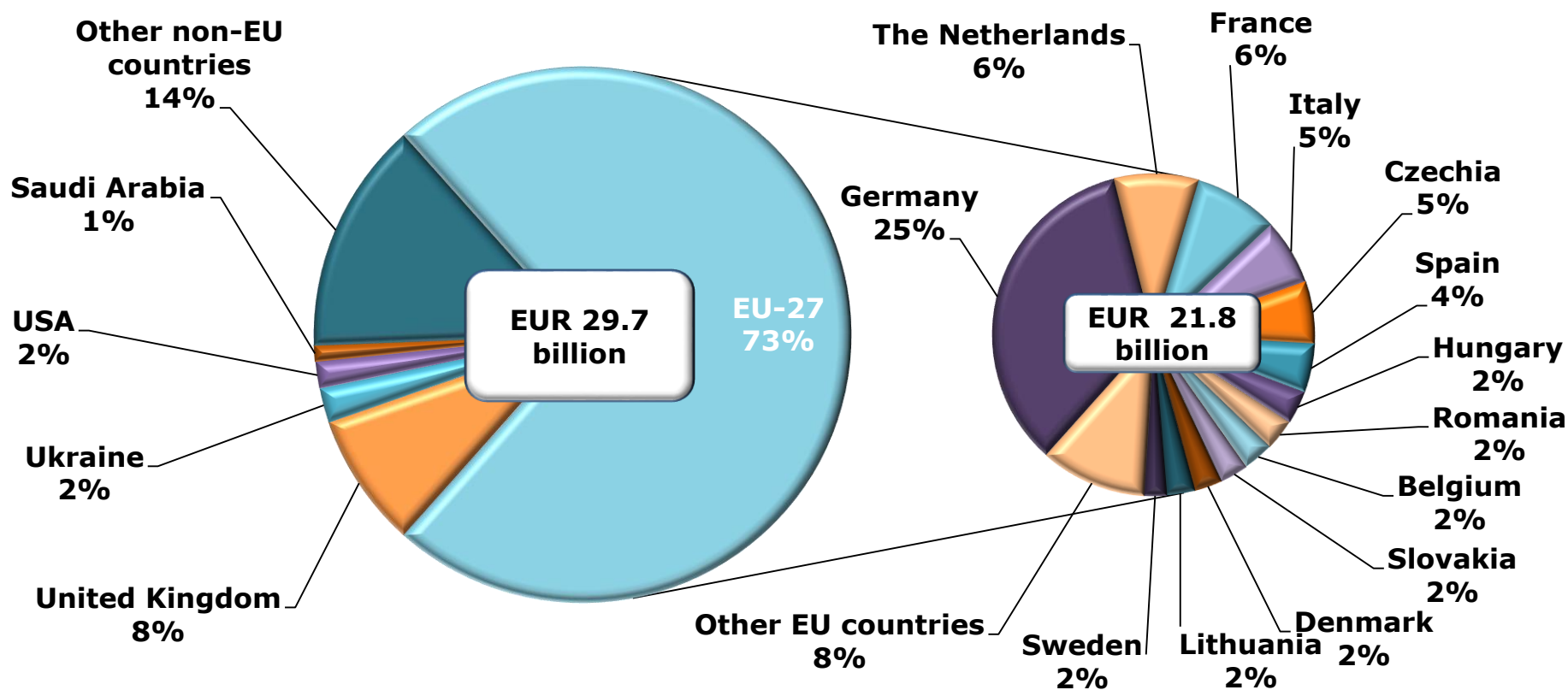


Source: the KOWR's elaboration based on the data of the Polish Ministry of Finance (2023 – preliminary data)

Commodity structure of Polish agri-food exports in January – July 2023



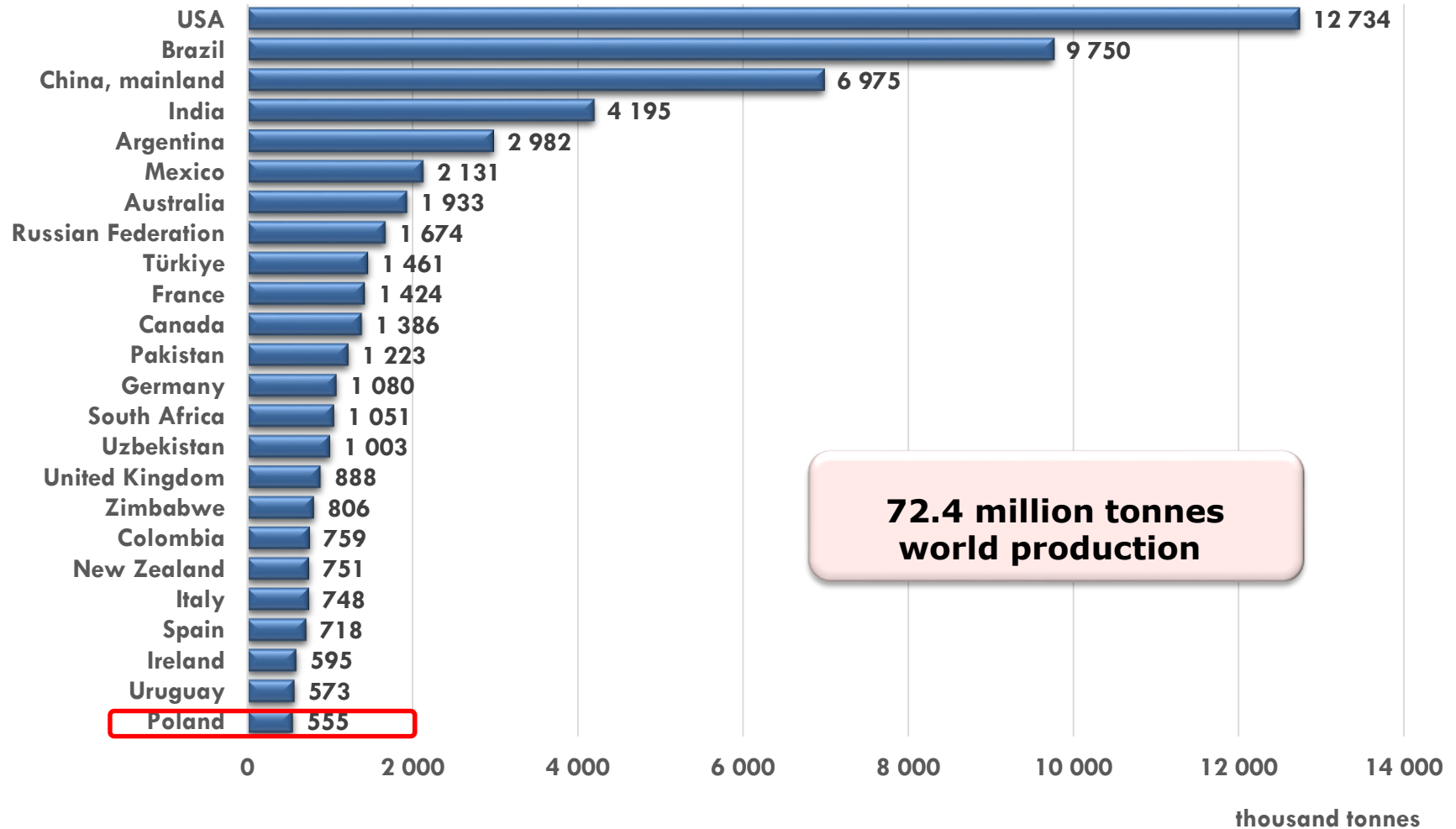
of Polish agri-food exports in January – July 2023



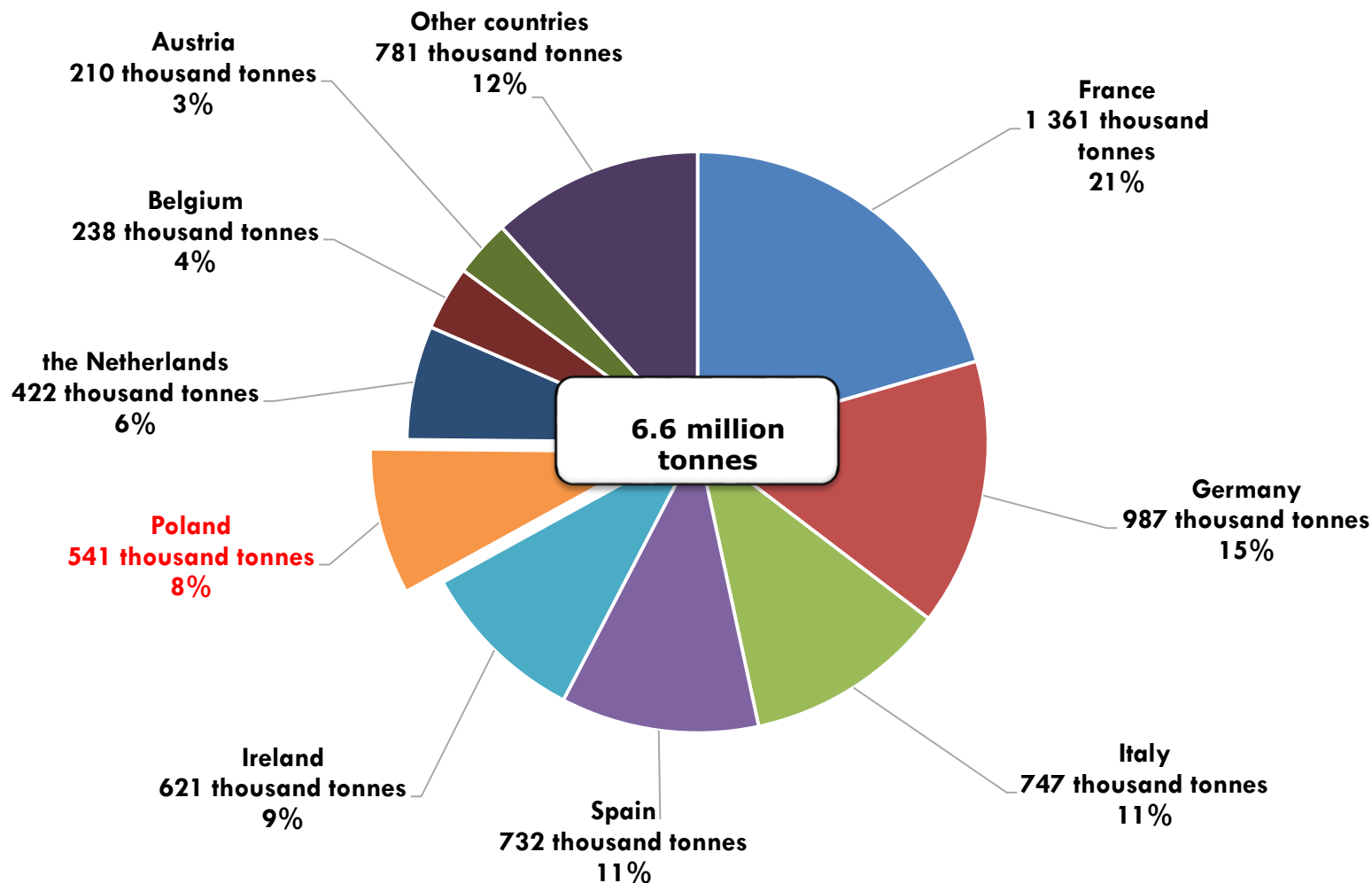


Beef market in Poland

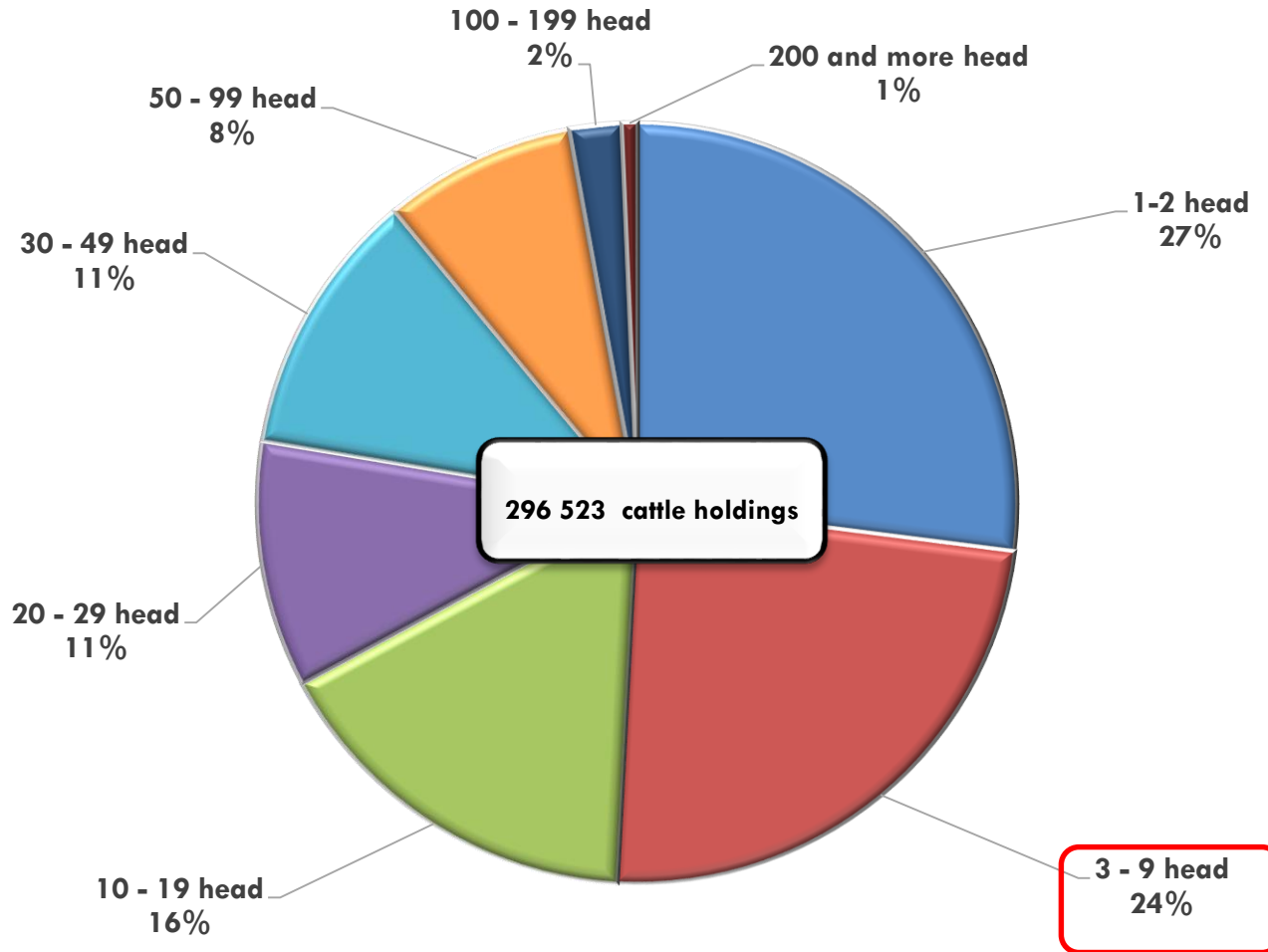
The largest beef producers in the world in 2021



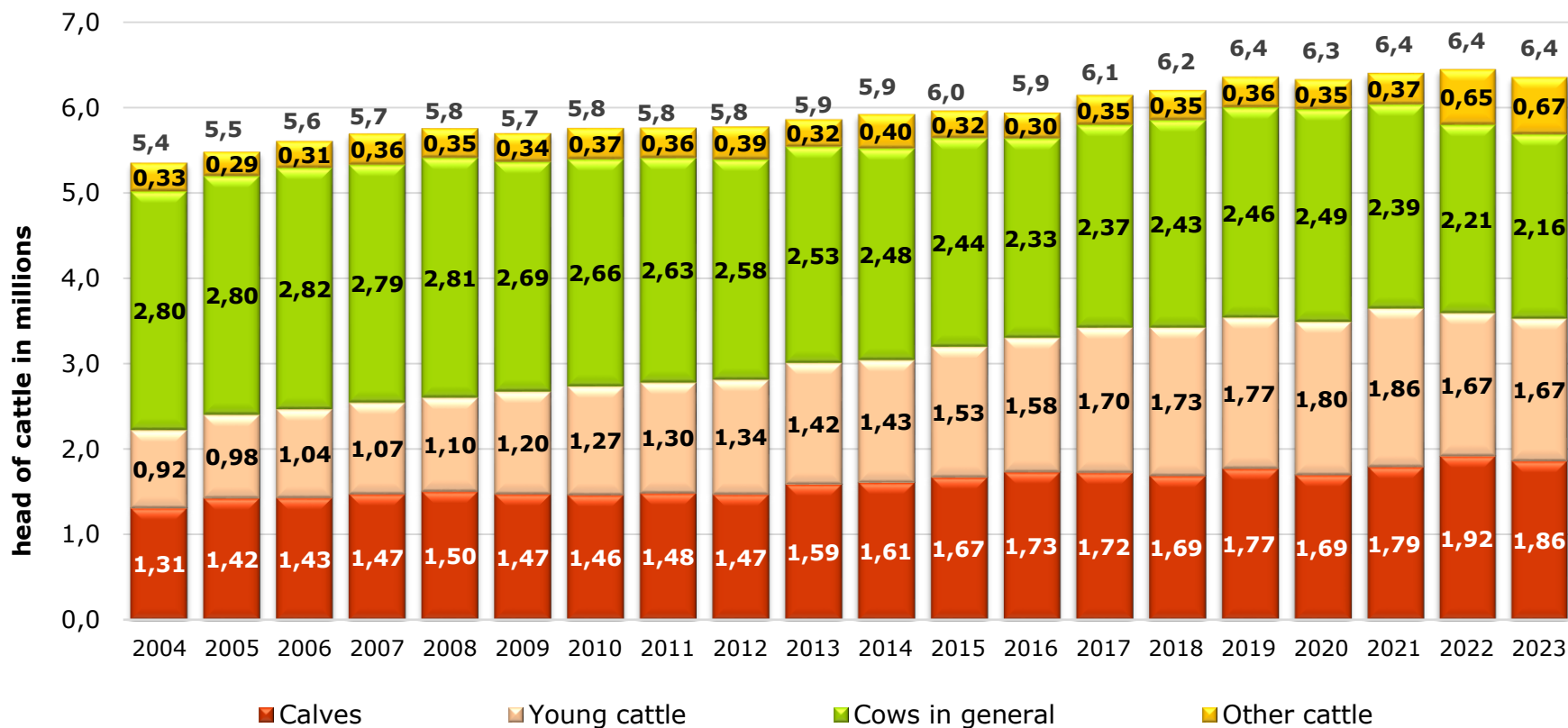
The largest beef producers in the EU-27 in 2022



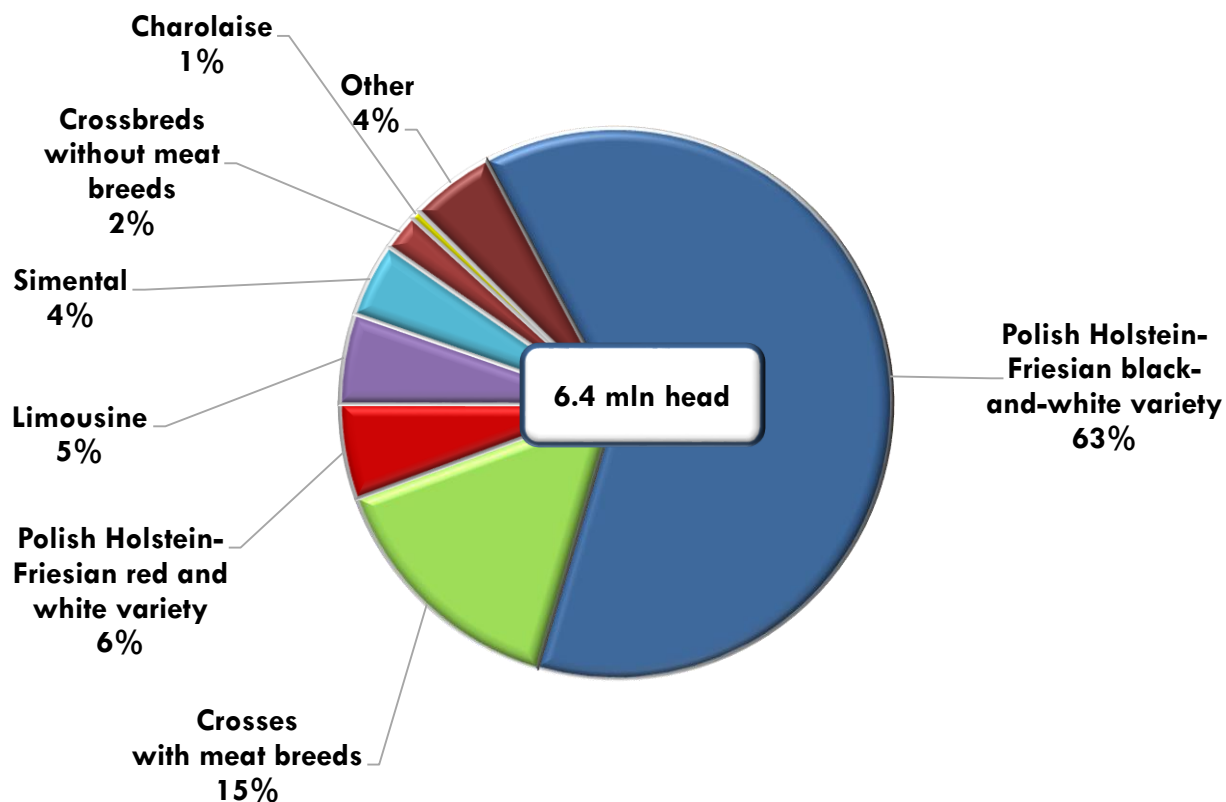
Cattle farms in Poland according to the farming scale in 2022



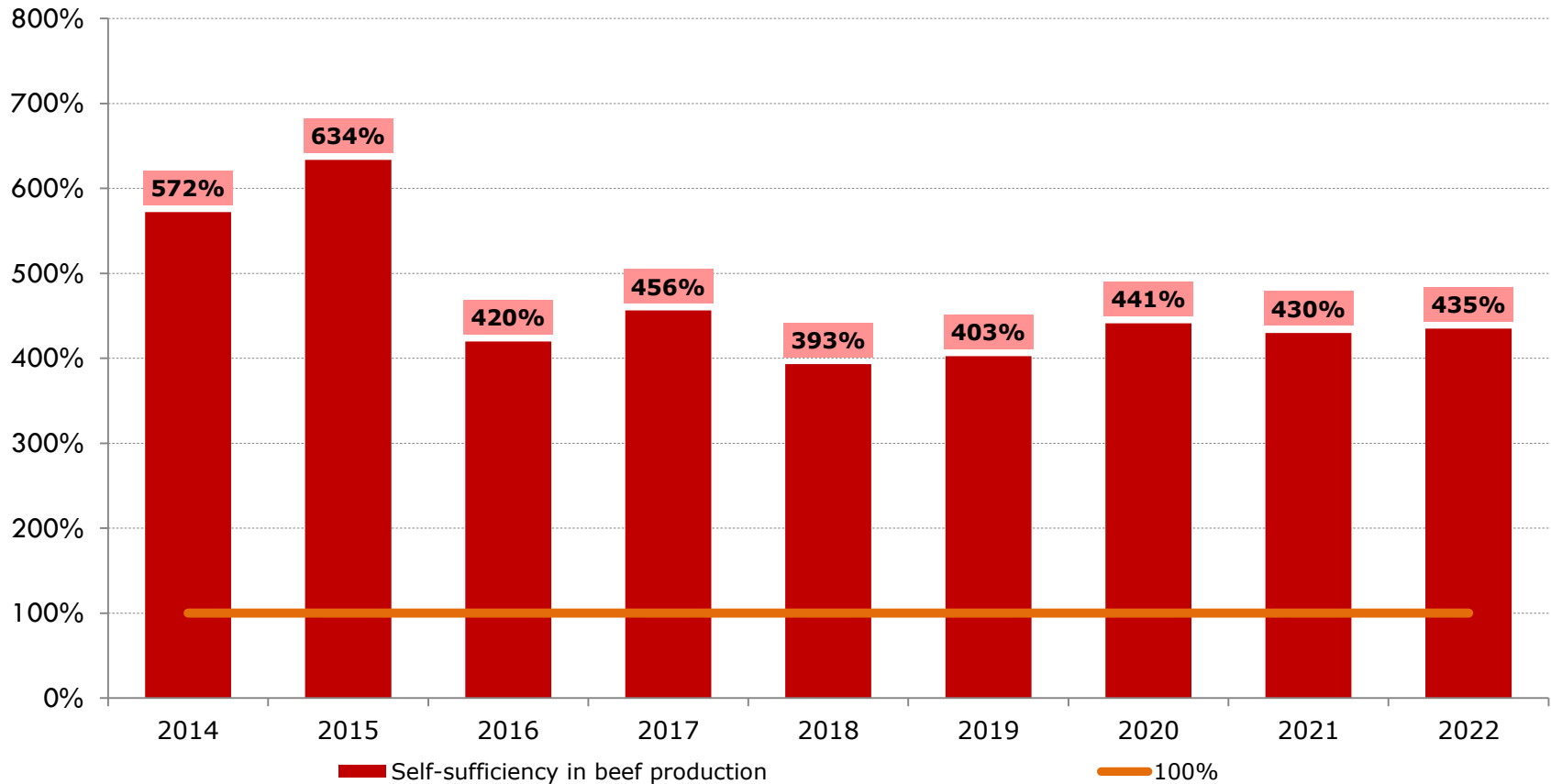
Cattle stock in Poland (as of June 2023)



Percentage of individual breeds of beef and dairy cattle raised in Poland

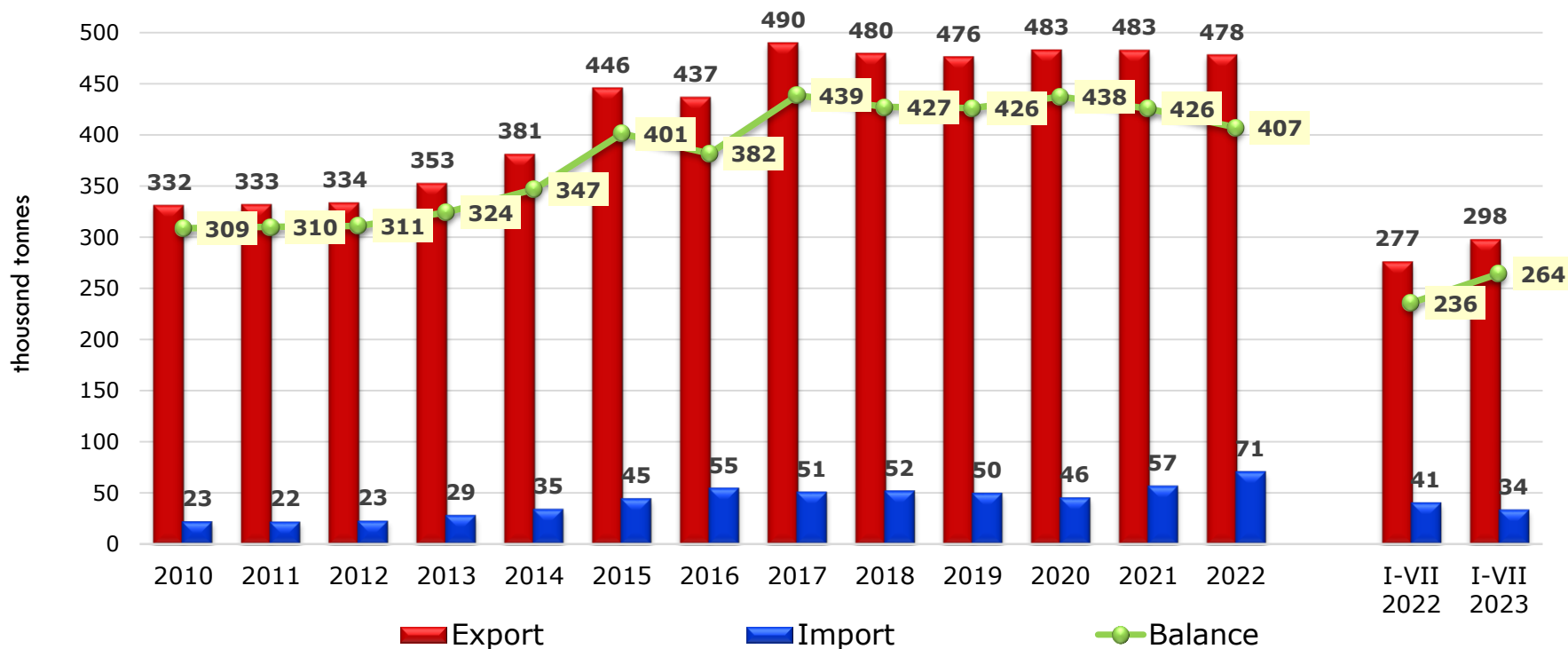


Poland's self-sufficiency in beef production



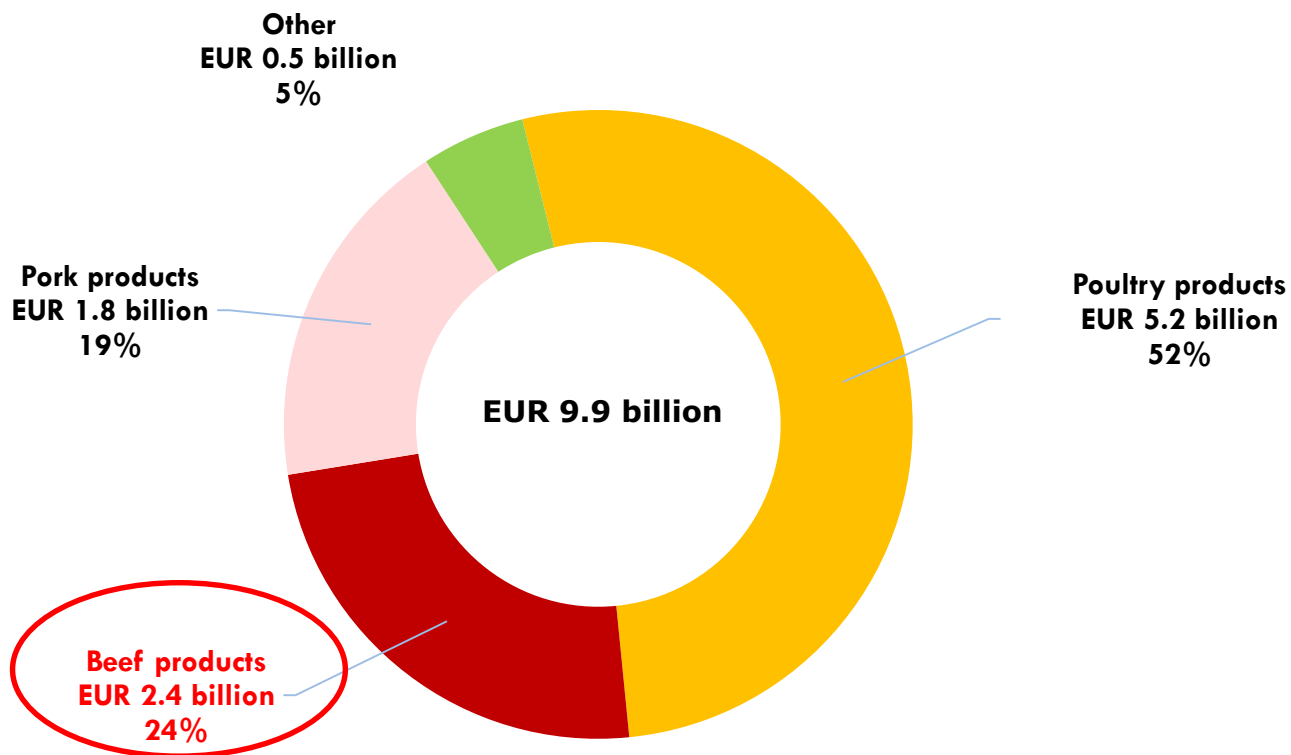
Source: compilation prepared by the KOWR on the basis of data from the Statistics Poland.

Foreign trade in beef and veal products (in carcass equivalent)



Source: compilation prepared by the KOWR on the basis of data from the Polish Ministry of Finance, preliminary data for 2022.

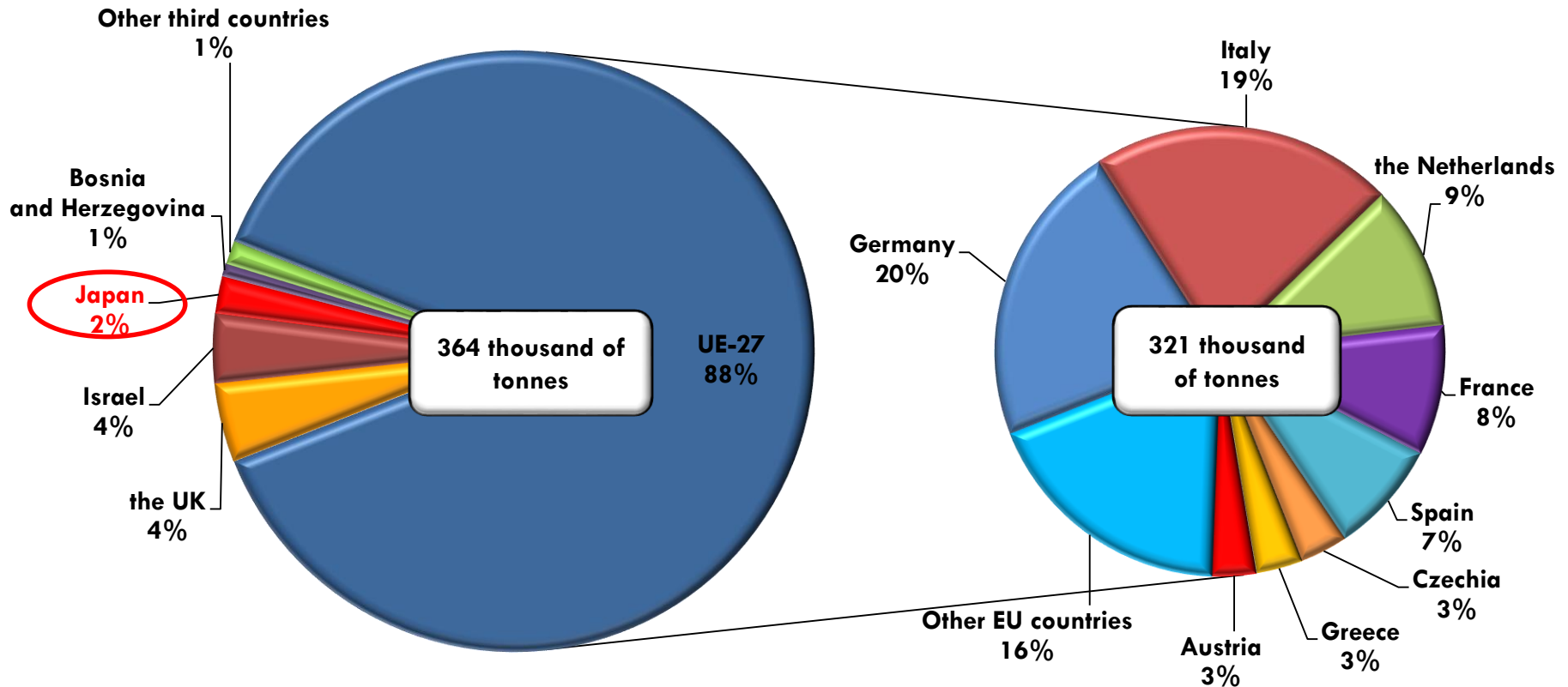
The value of exports of meat products* from Poland in 2022



* Including animal fats

Source: compilation prepared by the KOWR on the basis of data from the Statistics Poland and the Polish Ministry of Finance.

Geographical structure of beef* exports from Poland in 2022 (in product weight)

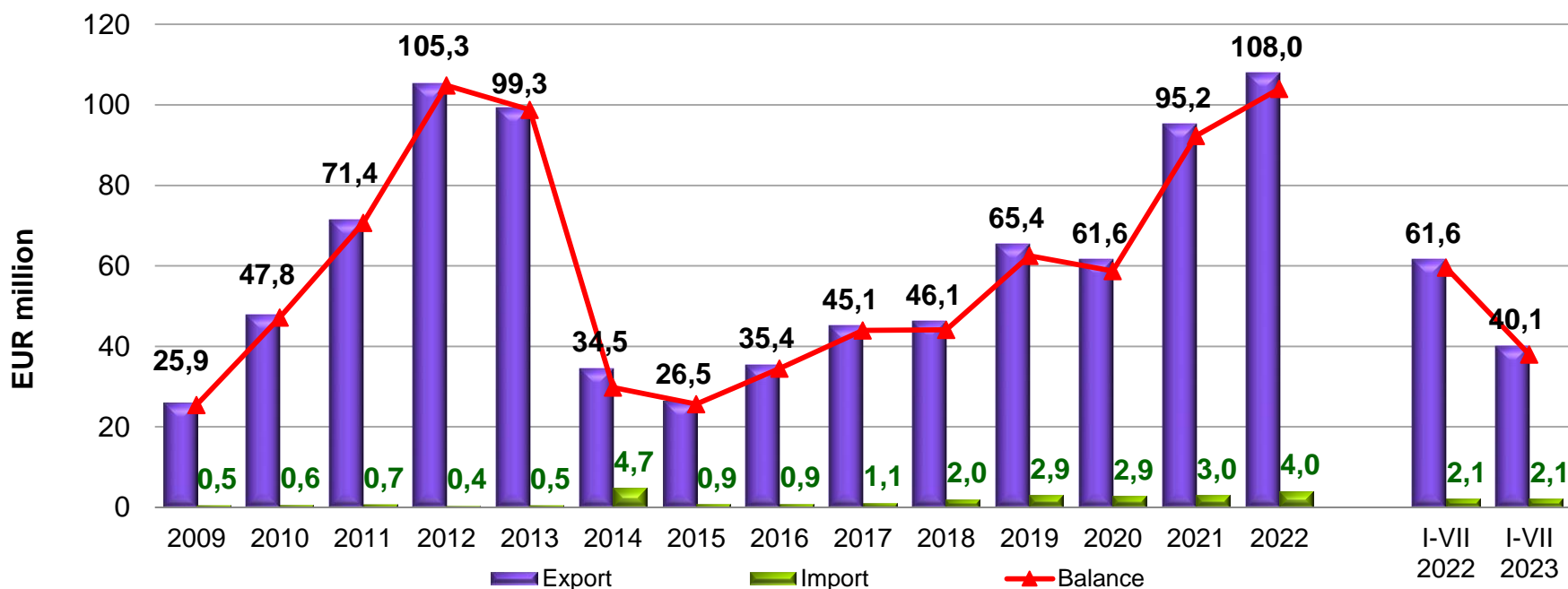


* CN codes 0201 and 0202

A row of five small green seedlings growing out of stacks of gold coins, symbolizing growth and investment. The seedlings increase in size from left to right, and the stacks of coins also increase in height. The background is a soft, out-of-focus green, suggesting a natural, outdoor setting.

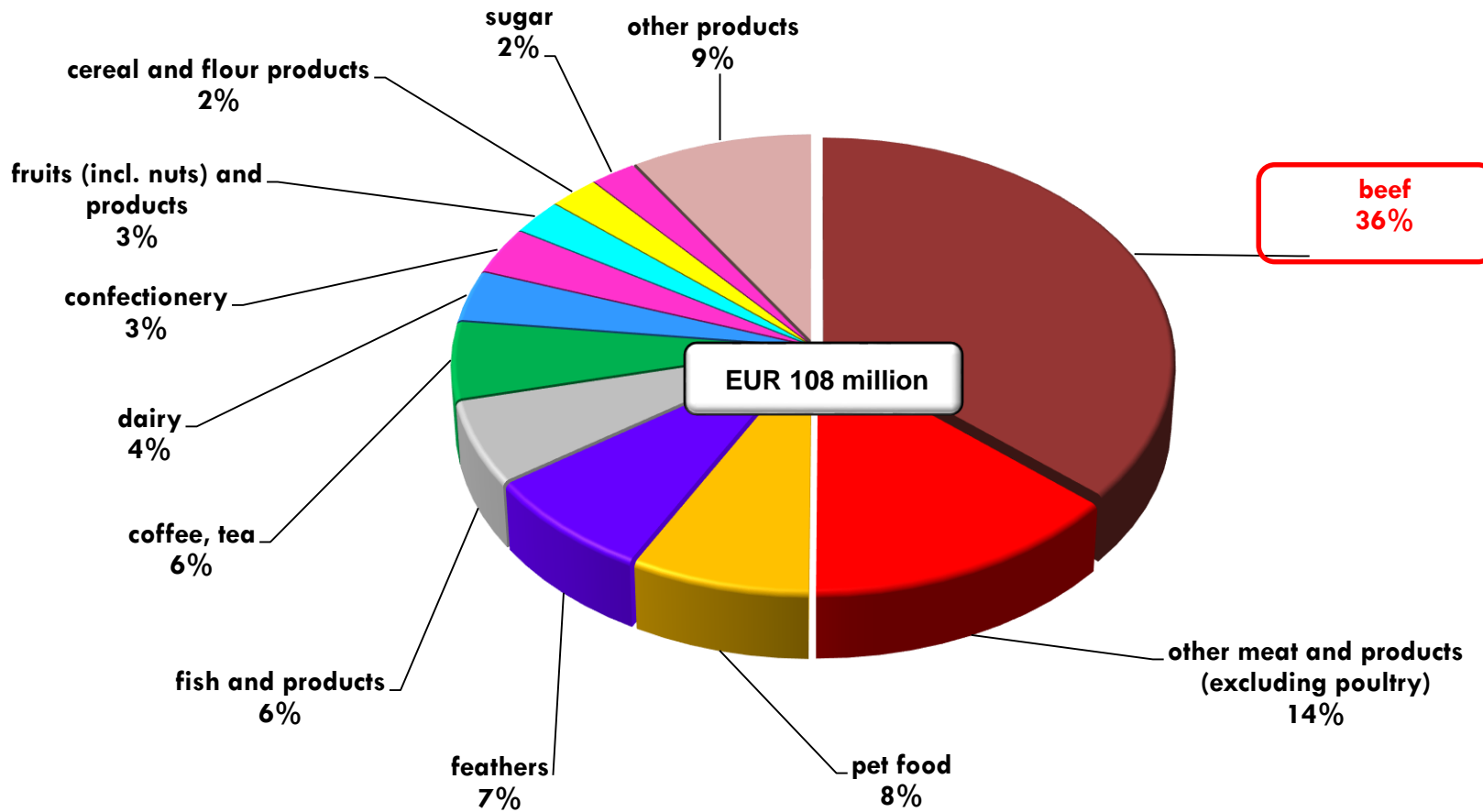
Beef - trade statistics between Poland and Japan

Foreign trade turnover of Polish agri-food products - trade with Japan



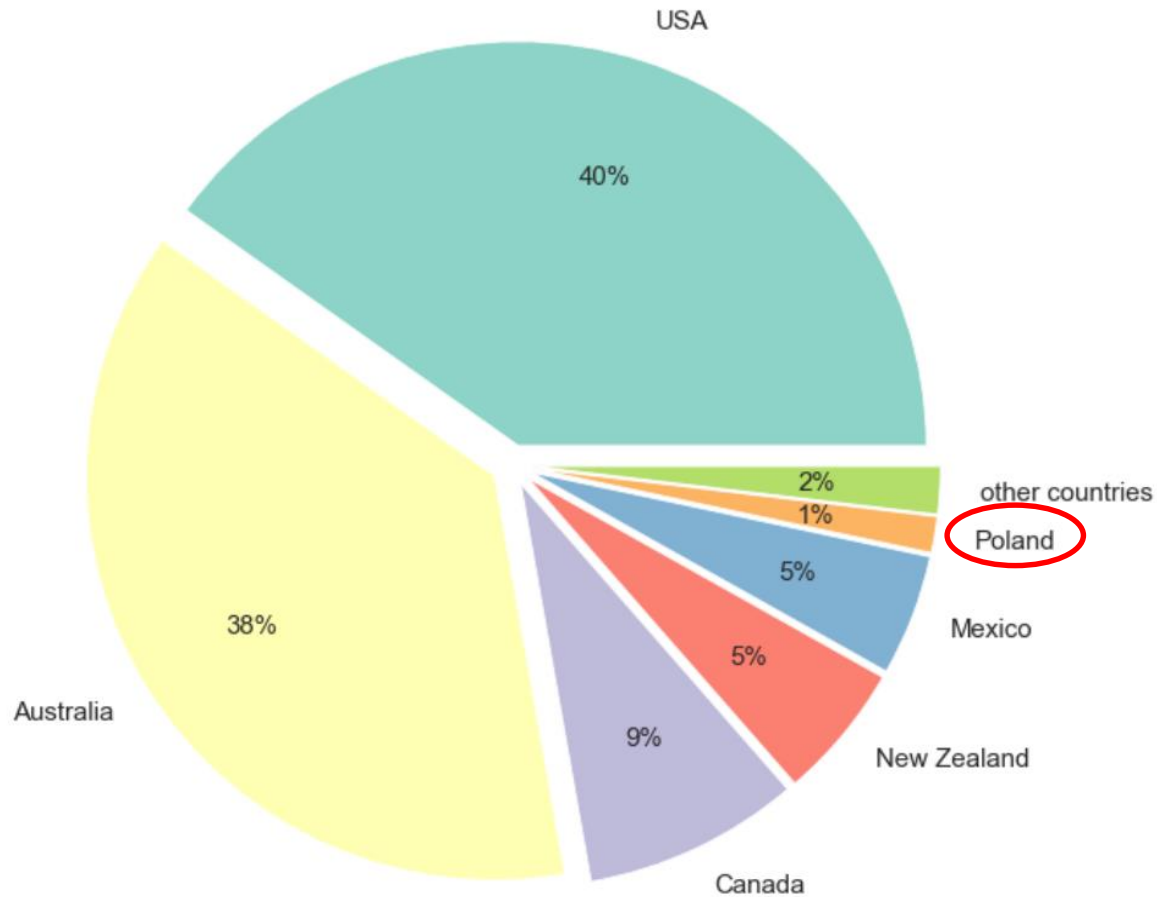
Imports by country of shipment - the country from which the goods were shipped to Poland, regardless of their origin.
The balance was calculated based on the data accurate to a few decimal places.

Commodity structure of agri-food exports from Poland to Japan in 2022



Source: compilation prepared by the KOWR on the basis of data from the Polish Ministry of Finance.

Geographical structure of beef imports by Japan in 2022



Assortment structure of beef exports from Poland to Japan

[tonnes]

CN Code	Listing	2014	2015	2016	2017	2018	2019	2020	2021	2022	I-VII 2022	I-VII 2023	share 2022
0201, 0202	Beef	23	692	362	843	642	2 467	3 363	9 301	7 215	5 004	1 876	100%
0201	Fresh meat	-	22	0.1	-	-	-	0.9	57	9	9	-	0%
0202	Frozen meat	23	670	361	843	642	2 467	3 363	9 244	7 205	4 995	1 876	100%

„-“ means no trade turnover

Source: compilation prepared by the KOWR on the basis of data from the Polish Ministry of Finance, preliminary data for 2023.

Assortment structure of exports of bovine offal from Poland to Japan

[tonnes]

CN Code	Listing	2014	2015	2016	2017	2018	2019	2020	2021	2022	I-VII 2022	I-VII 2023	share 2022
	Bovine offal	0	0	418	628	823	856	913	1 312	1 369	766	714	100%
0206 10	Bovine offal, fresh or chilled	-	-	1	21	-	-	-	43	26	10	10	2%
0206 21	Frozen bovine offal - tongues	0	-	295	422	446	457	665	852	860	493	403	63%
0206 29	Frozen bovine offal without tongues and livers	0	-	121	186	377	399	247	417	483	263	301	35%

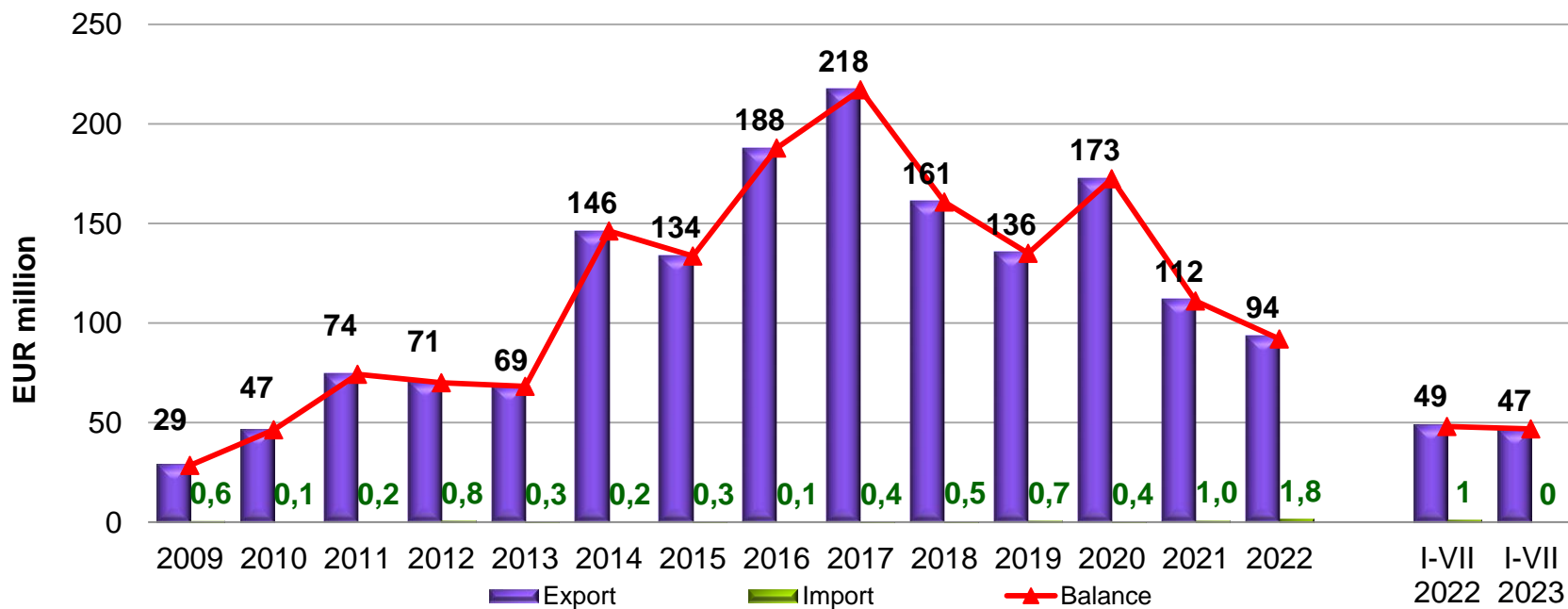
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Source: compilation prepared by the KOWR on the basis of data from the Polish Ministry of Finance, preliminary data for 2023.

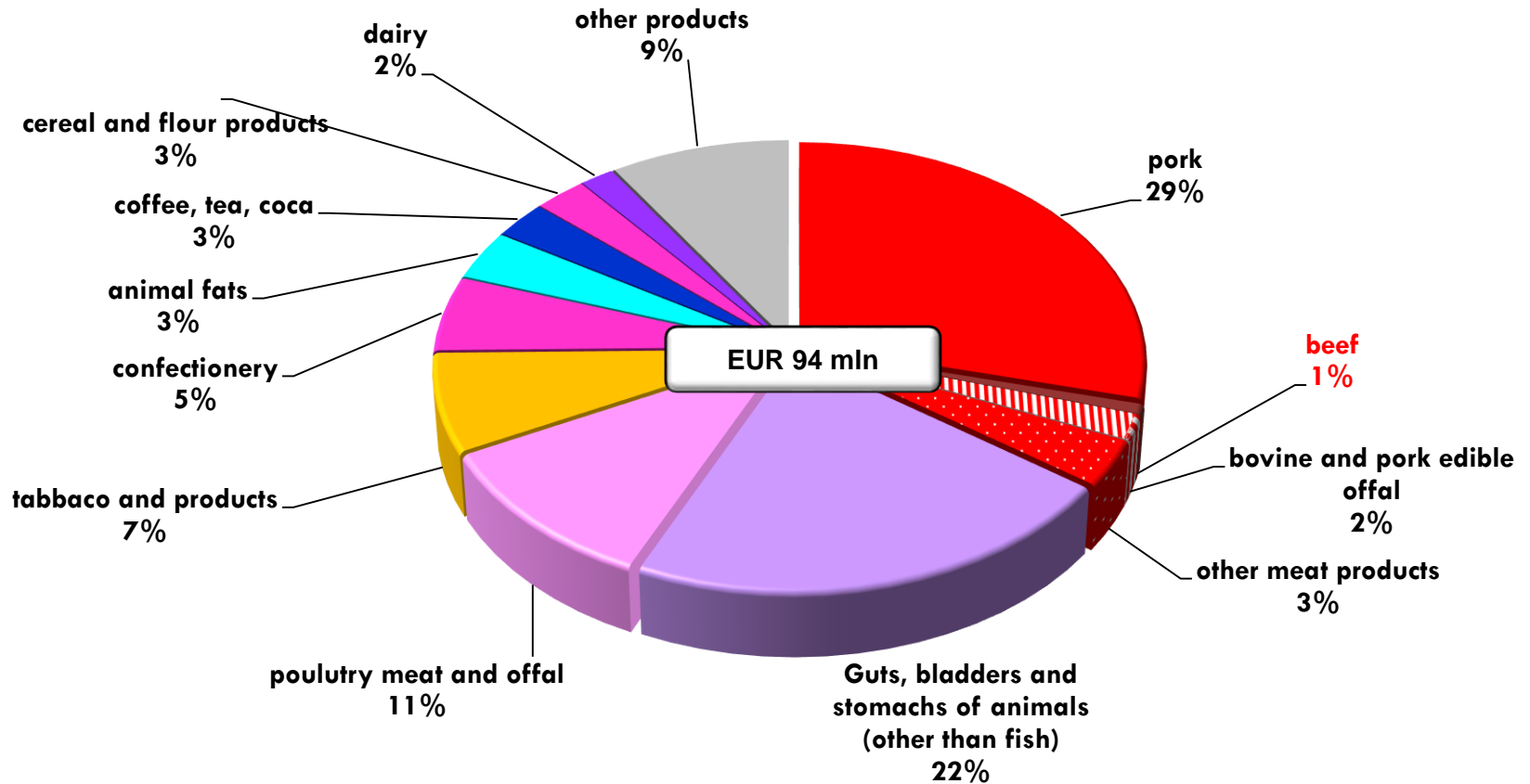
A row of five small green seedlings growing out of stacks of gold coins, symbolizing growth and investment. The background is a soft, out-of-focus green bokeh.

Beef - trade statistics between Poland and Hong Kong

Foreign trade turnover of Polish agri-food products - trade with Hong Kong

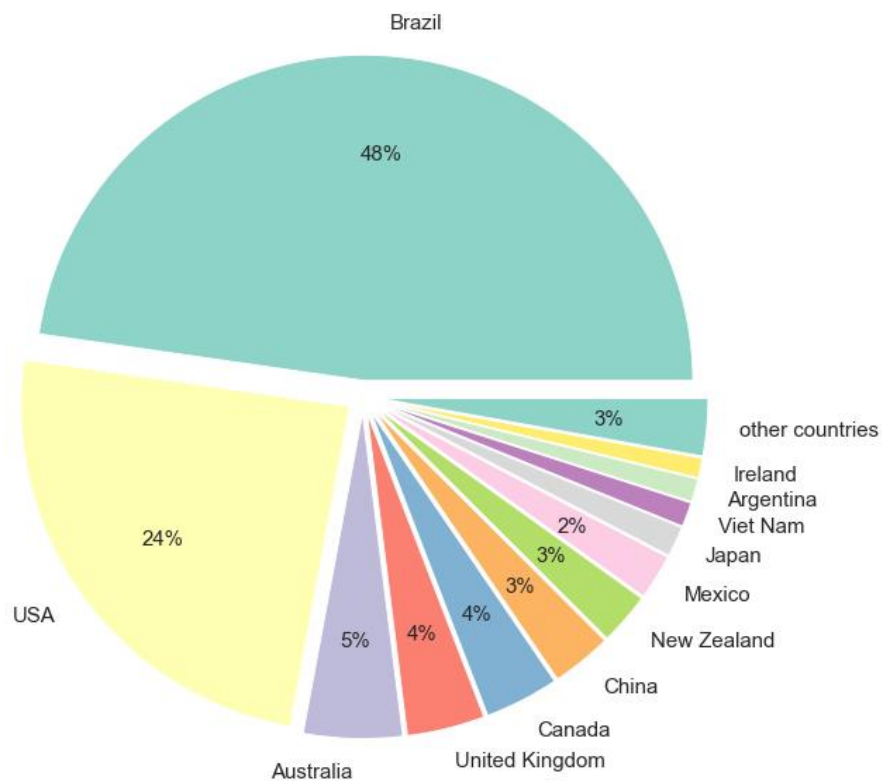


Commodity structure of agri-food exports from Poland to Hong Kong in 2022



Source: compilation prepared by the KOWR Analysis on the basis of data from the Polish Ministry of Finance.

Geographical structure of beef imports by Hong Kong in 2022



Assortment structure of beef exports from Poland to Hong Kong

[thousand tonnes]

CN Code	Listing	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	I-VII 2022	I-VII 2023	Share 2022
	Beef	0.04	0.00	0.06	0.02	0.12	3.26	3.33	3.76	6.45	3.44	3.40	4.32	3.81	0.66	0.43	0.48	100%
0202	Frozen meat	0.02	0.00	0.05	0.02	0.12	3.22	3.33	3.73	6.37	3.44	3.40	4.29	3.76	0.66	0.43	0.48	99%
0201	Fresh meat	0.03	-	0.02	-	-	0.04	0.00	0.03	0.07	0.00	-	0.03	0.05				1%

„-“ means no trade turnover

Source: compilation prepared by the KOWR on the basis of data from the Polish Ministry of Finance, preliminary data for 2022.

Assortment structure of exports of bovine offal from Poland to Hong Kong

[thousand tonnes]

CN Code	Listing	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	I-VII 2022	I-VII 2023	Share 2022
	Bovine offal	0.03	0.08	0.06	0.52	0.80	1.89	1.42	1.84	3.27	3.02	1.82	3.25	3.06	0.61	0.40	1.22	100%
0206 29	Frozen bovine offal excluding tongues and livers	0.03	0.08	0.06	0.50	0.79	1.89	1.42	1.73	3.20	2.91	1.79	2.63	2.11	0.61	0.40	1.22	100%
0210 99 59	Offal of bovine animals excluding thick skirt and thin skirt, salted, in brine, dried or smoked	-	-	-	-	-	-	-	-	-	0.11	0.03	0.57	0.95	-	-	-	0%
0206 10	Bovine offal, fresh or chilled	-	-	0.006	-	-	0.001	-	-	0.035	-	-	-	-	-	-	-	0%
0206 21	Frozen bovine offal - tongues	-	-	-	0.013	0.001	-	-	0.104	0.022	-	-	0.049	0.001	-	-	-	0%
0206 22	Frozen bovine offal - livers	-	-	-	-	-	-	-	0.000	0.011	-	-	-	-	-	-	-	0%

„-“ means no trade turnover

Source: compilation prepared by the KOWR Analysis on the basis of data from the Polish Ministry of Finance, preliminary data for 2022.



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KOWR

National Support
Centre for Agriculture

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