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## The Polish food products on the foreign markets

*The purpose of the article is to present the position of Polish food products on the foreign markets in the years 2004-2018 in comparison to the background of the EU countries.*

*Research methods.* In the research process were used such methods as: abstract and logical, system analysis with using the mathematic methodology, induction and deduction.

*Research results.* Poland's accession to the EU fundamentally changed economic conditions for the operation of Polish food producers. Poland gained free access to large and developed European market, which is one of the most demanding agri-food markets in the world. Export has become an important channel for managing food surplus, and thus it constitutes an important source of revenue for the national food industry. The share of exports of agri-food products in Polish exports in 2018 worth 13.3% and imports is 8.7%. Another measure of the importance of providing food economy is also a proportion of the exports value in the production value, which for the agri-food sector in 2018 amounted above 40%, compared to an index of 13.7% before the accession to the EU. For years, the foreign trade in agri-food products has been an important part of Polish foreign trade. Over the entire period of Poland's membership in the European Union, the value of agri-food export has increased more than five times, to nearly EUR 30 billion, and of import - four times, to nearly EUR 20 billion, while the trade balance has increased as many as eleven times, to EUR 9.6 billion. Such rapid development of foreign trade is undoubtedly the result of Poland's accession to the EU and the abolition of restrictions on trade with other member states, which has allowed disclosing comparative advantages of Polish food producers.

*Elements of scientific novelty.* Scientific novelty of the article lies in the revealing of development of the foreign trade in food products in condition of the European Union integration and globalization.

*Practical significance.* The research results can be used by the food sector, operators and agricultural enterprises of the EU and Ukraine. Tabl.: 1. Figs.: 5. Refs.: 8.

**Keywords:** food; foreign trade; export; foreign markets; Poland; EU.

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**Scientific problem.** The objective of the article is to analyse the export of food products over 15 years of the membership of Poland in the European Union. The subject of the study was the geographical and commodity structure of the Polish agri-food export in the years 2004-2018.

Foreign trade is one of the most important factors determining both the economic development of the state and international relations. Foreign trade in agri-food products is of great importance in trade balance of Poland. The share of agri-food export in the total export, as from 2009, has been oscillating around 12-13%. The share of agri-food import in the total import is lower and since 2009 has been about 9%. In the years 2004-2018, a surplus in trade in agri-food products had a decisive impact on the trade balance in total trade. The export of agri-food products has become not

only an important sales channel for production surpluses but also a decisive factor of stabilising the domestic agricultural and food markets. This, in turn, had a positive impact on the economic situation in many sectors of agriculture and food industry of Poland.

**The purpose of the article** is to present the position of Polish food products on the foreign markets in the years 2004-2018 against a background of the EU countries.

**Research results.** Understanding the essence of foreign trade should be preceded by a reference to the sources of theory of foreign trade [8]. Only in the classical school of economics was foreign trade perceived as one of factors leading to equalising structural differences in economies [5]. The first comprehensive theory of international trade, to date considered classical, has been created by Adam Smith (theory of absolute advantage) who in his model assumed the international distribution of labour. Adam Smith assumed that each country may

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produce one or more commodities at real costs lower than its trading partners, then trade is beneficial for each party. A basis for trade is specialisation of production on an international scale, expressed by the best possible use of possessed resources [6]. The theory by A. Smith has been extended by D. Ricardo who created the theory of comparative advantages. D. Ricardo noted that absolute advantage in production costs is not a prerequisite of profitable trade. Of decisive importance is, in fact, relative advantage, expressed by a ratio of real costs of individual commodities in both countries. If it is not equal, trade and specialisation bring benefits no matter if we produce all commodities at prices lower (higher) than entities abroad. The country would seek the export of commodities whose relative production cost (in relation to other commodities) is lower than in other countries - has relative cost advantage [3]. The theory by D. Ricardo has been later extended by the monetary aspect (labour costs, amount of remunerations, price of a given commodity) and by its application to trade in more products in Neo-Classical and modern theories of international trade. This theory has been created by Dornbusch, Fischer and Samuelson.

The principle of relative (comparative) costs, even in static terms presented by the Classics, is relevant technical and balance economic law which cannot be challenged. This principle shows how to obtain a given quantity of a specific product while minimising inputs or how to obtain a larger quantity of products with given inputs. However, the problems of international value and terms of trade<sup>1</sup> among countries has remained unsolved, only the limits of production profitability in the export to obtain the import have been specified, i.e. the limits of import profitability in exchange of export goods. Also, the factors on which the distribution of benefits of international trade is dependent have not been explained.

The theory of economies of scale is a complement to the previously presented theories

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<sup>1</sup> *Terms of Trade* - means terms of trade in the international market of exported and imported goods. The analysis of terms of trade is to describe how, over time, the purchasing power of one commodity group is changing in relation to the other (of exported commodities to imported commodities) in a given country or a group of countries, provided that there are no major changes in their structure. Appropriate indicators higher than one (or, in percentage terms, higher than 100) mean positive changes in prices obtained by a given country or a group of countries in international trade and, consequently, attest to a positive impact of development of this trade on national income of a given country.

of international trade. The possibility of obtaining economies of scale of production and sale, by developing international trade, has been previously indicated by B. Ohlin (1933). In the meantime, this idea has been developed by the so-called theory of absorption capacity of the market. The theory of absorption capacity of the market assumes that the size and structure of foreign trade may be shaped by deepening specialisations, extending series of produced products, making technological and organisational improvements etc. Countries with the large and absorptive internal market, having possibilities of achieving economies of scale of production or sale, are particularly privileged (higher level of price and non-price competitiveness) - these countries show a tendency to specialisation, mainly in areas guaranteeing achieving appropriate benefits. In fact, they may reduce the costs of producing products and improve them in technical terms [2]. The Ohlin-Heckscher model of foreign trade is closely referred to the issue of specialisation (export orientation) of production and allocation of resources made in the most efficient manner. The results of foreign trade thus make it possible to assess the efficiency of using resources.

The theory of intra-industry trade deals with analysing the essence and economic effects of the phenomenon of parallel import and export within these branches by individual countries. According to H. Grubel, theoretical considerations on intra-industry trade may be divided into the theory of trade in homogeneous products and the theory of trade in heterogeneous products. Trade in homogeneous products may be divided into: border trade, reexport, cyclical trade and trade in strategic products. Much larger part of trade is assigned to heterogeneous goods which include: products being close substitutes in consumption and products being close substitutes in production as well as products being close substitutes in both consumption and production.

In the modern world, the importance of intra-industry trade has been steadily growing. This stems mainly from the fact that many countries become closer to each other in terms of the level of their economic development and progressive liberalisation processes [4].

#### **Foreign trade in agri-food products**

Almost 15 years of functioning of Poland in the European Union structures have a positive impact on the development of trade in agri-

food products. This is evidenced by very good results of foreign trade in food products. Over the entire period of Poland's membership in the European Union, the value of agri-food export has increased more than five times, to nearly EUR 30 billion, and of import - four times, to nearly EUR 20 billion, while the trade balance has increased as many as eleven times, to EUR 9.6 billion (Figure 1). The increase in export was mainly determined by the large supply of agri-food products in our country, the continued high demand for Polish food products abroad (mainly in the EU coun-

tries) and the favourable prices and high quality of products offered. Such a dynamic increase in trade in food attests to the high competitiveness of Polish food producers in foreign markets. The trade coverage index (TC)<sup>2</sup>, which is one of the main indicators of competitiveness of the country's export [7], in trade in agri-food products of Poland increased from 1.19 in 2004 to 1.48 in 2018. This means that the export value of agri-food products from Poland in 2018 was by nearly 50% higher than the import value.

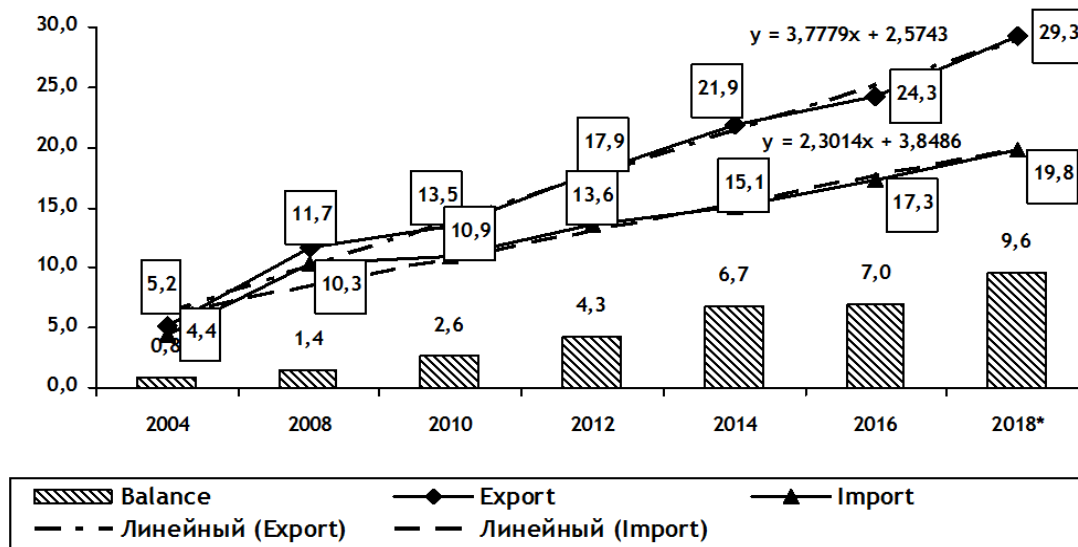


Figure 1. Polish foreign trade in agri-food products in the years 2004-2018 (in billion EUR)

\* preliminary data

Source: Own study based on the data from the Ministry of Finance (MF).

Integration with the EU had a very significant impact on the development of the agri-food sector in Poland and on the dynamic growth of export of food products. The index of export orientation of production [3] in the food industry, which is a ratio of export revenues to the sales value of the sector increased from 17.4% in 2004 to approx. 43% in 2018. The largest share of export in the sales value of the food industry is that of the following sectors: tobacco industry, coffee and tea processing, production of cocoa, chocolate and other sweets, production of petfood, production of potato products, fish industry, production of long-life confectionery bread and fruit and vegetable processing, production of poultrymeat and oil and fats industry. In the above-mentioned sectors, sales for export ac-

counts for from 50% to more than 90% of total sales [1].

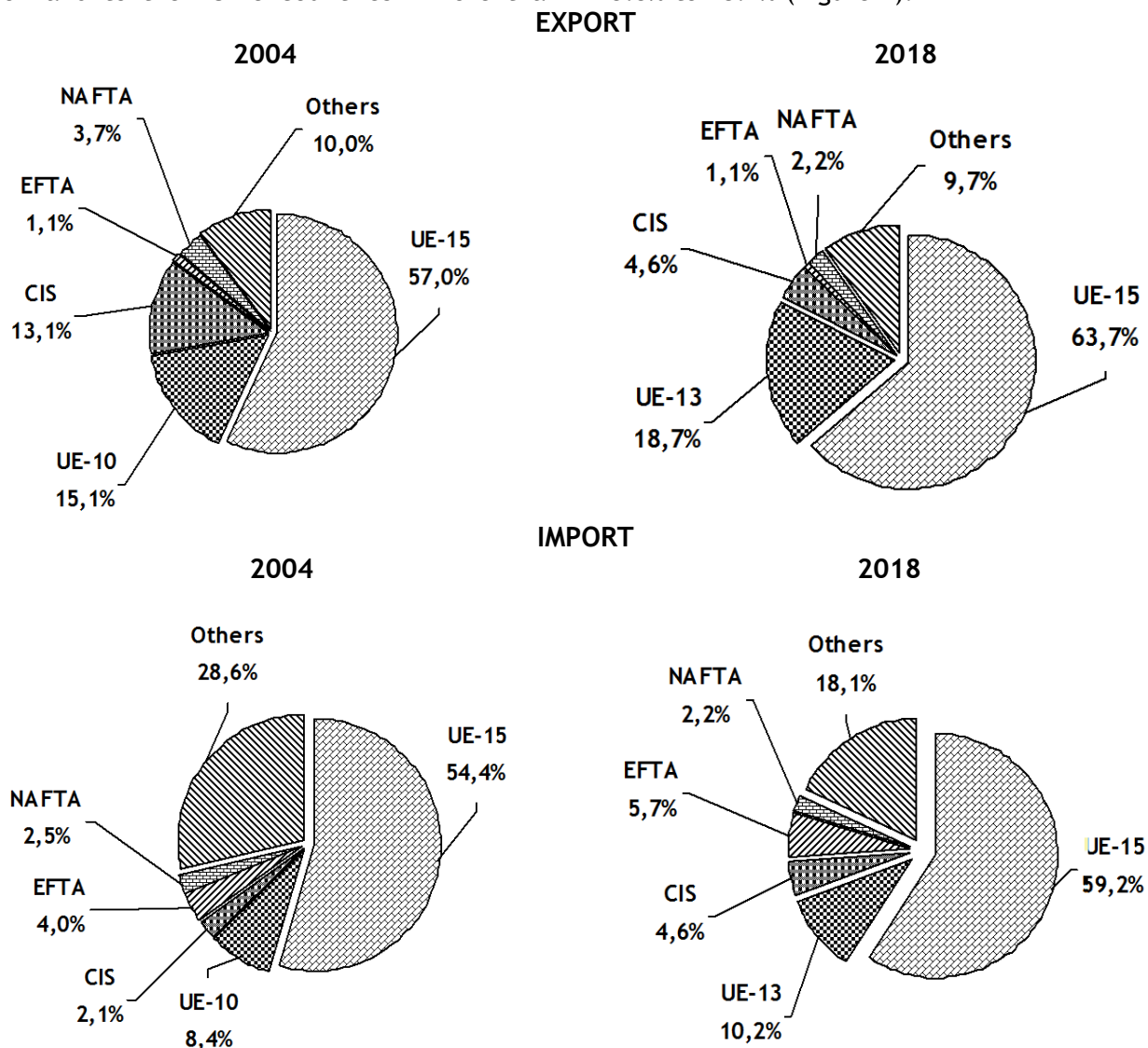
#### Geographical structure of foreign trade in agri-food products

Trade links between Poland and foreign countries are asymmetrical. For many years, the most important trading partner of Poland in agri-food trade are the European Union countries. In 2018, the export value of agri-food products to the EU-28 amounted to EUR 24.1 billion and was more than six times higher than in 2004. Thus, the share of the EU-28 countries in the Polish agri-food export increased to 82.3% against 72.1% in 2004. The

<sup>2</sup> The trade coverage index (TC) illustrates in relative terms the extent to which export revenues cover import expenses. The TC index above one means that the country generates a surplus in trade in a given product group and, as a result, has a competitive advantage in trade in products of that group. The value of the TC index below one represents a deficit in trade, a weak competitive position in foreign markets and the lack of competitiveness.

export value of agri-food products to the EU-15 countries during the analysed period increased more than six times to EUR 18.7 billion and to the EU-13 countries - more than

seven times, to EUR 5.5 billion, thus the share of the EU-15 countries increased by 6.7% to 63.7%, while that of the EU-13 countries by 3.5% to 18.7% (Figure 2).



**Figure 2. Geographical structure of Polish foreign trade in agri-food products in the years 2004 and 2018**

Source: Own study based on the unpublished data from the MF.

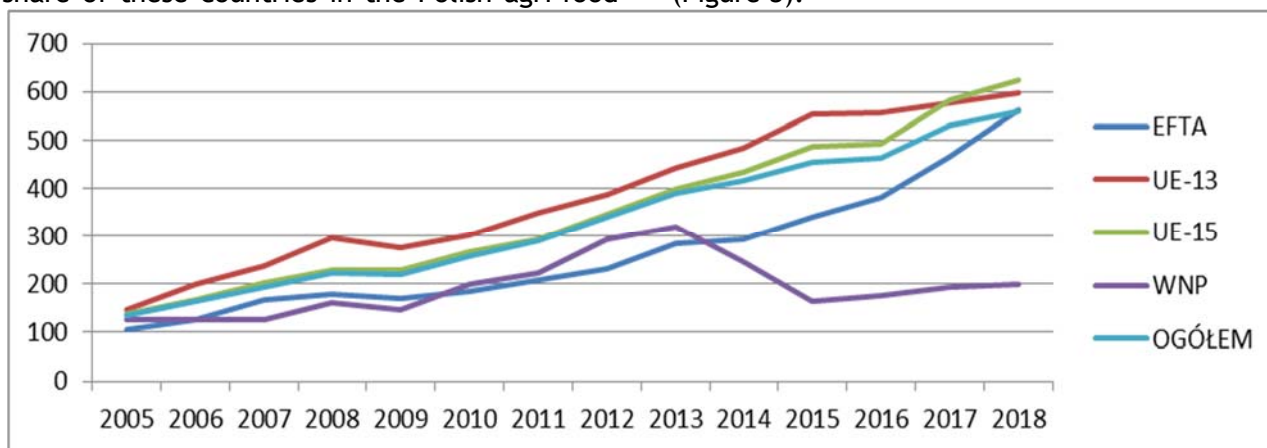
Expenses for purchase of agri-food products from the EU-28 countries in 2018 amounted to EUR 13.7 billion and were nearly five times higher than in 2004, while from the EU-15 countries they were EUR 11.7 billion (increase by nearly five times) and from the EU-13 countries - EUR 2.0 billion (increase by 5.5 times). The share of the EU-28 countries in the Polish agri-food import in 2018 amounted to 69.3% and was higher by 6.6% than in 2004, the share of the EU-15 countries increased to 59.1% (i.e. by 4.8%) and of the EU-13 countries to 10.2% (by 1.8%). In 2018, the balance of trade in agri-food products of Po-

land with the EU-28 countries amounted to EUR 10.4 billion when compared to EUR 8.7 billion in 2015 and EUR 1 billion in 2004, with the EU-15 countries - EUR 7 billion and with the EU-13 countries - EUR 3.5 billion.

A different trend was characteristic of by agri-food trade with other developing and developing countries and with the Commonwealth of Independent States (CIS). Revenues from the export to the aforementioned countries in 2018 amounted to EUR 5.2 billion and were 3.5 times higher than in 2004. In 2018, the CIS countries purchased commodities for EUR 1.3 billion, i.e. for the amount nearly twice higher than in

2004, but by 40% less than in 2013. The value of import from non-EU countries increased in 2018 to EUR 6.1 billion, i.e. more than 3.5 times. The share of these countries in the Polish agri-food

import decreased by 6.6%, to 30.6% in the years 2004-2018. The share of the CIS countries increased in the analysed period by 2.5% to 4.6% (Figure 3).



**Figure 3. Growth rate of export of agri-food products in the years 2004-2018 (2004 = 100)**

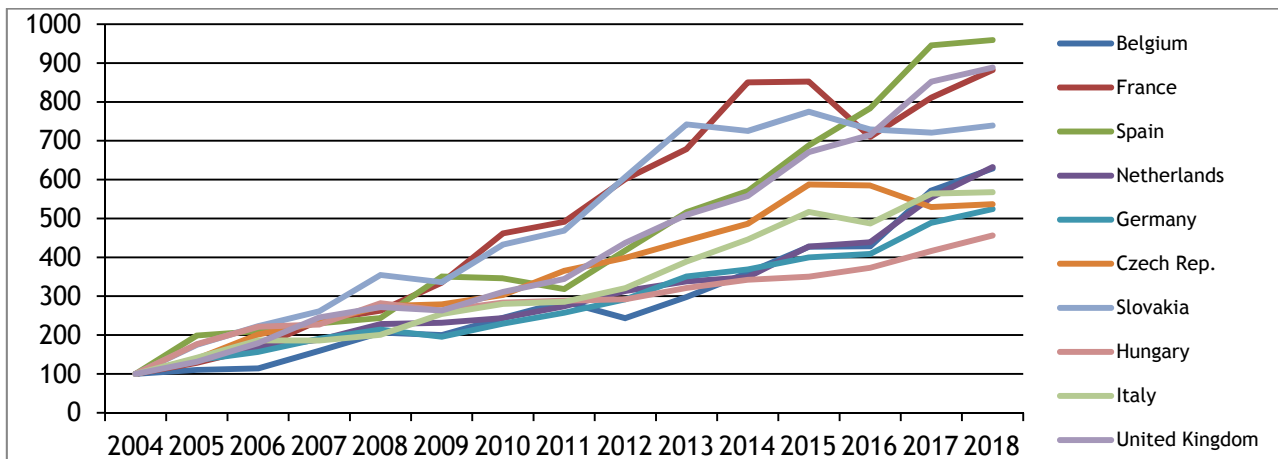
Source: Own study based on the unpublished data from the MF.

For many years, the most important customer of agri-food products from Poland has been **Germany**. In 2018, revenues from exporting these products to the German market amounted to EUR 7.0 billion which represented 24% of the Polish agri-food export. In the years 2004-2018, the value of food export from Poland to Germany increased more than four times, at an average annual growth rate of about 13%. The largest revenues were achieved from selling fish and fish products, including mainly smoked fish (15.2% of the export value), tobacco products (9.2%), poultry meat and offal (7.9%), bread, confectionery and cakes (5.1%), chocolate and chocolate products (4.2%) and milk and cream (3.6%). The second important customer of Polish food products in 2018, with the share of 9.2% in the total agri-food export of Poland was the **United Kingdom** which imported food for EUR 2.7 billion. Revenues from exporting to that country increased in the years 2004-2018 nearly eight times, with an average growth rate of 17% a year. The British purchased in Poland mainly: meat products (15.5% of the export value), poultrymeat and offal (11.7%), chocolate products (10.3%), tobacco products (7.0%), as well as bread and confectionery bread (5.9%). The third position, among the major customers of food from Poland, was occupied by the **Netherlands**, which in 2018 spent on purchasing food in Po-

land almost EUR 2.0 billion (6.7% of the value of agri-food export from Poland), i.e. more than five times more than in 2004. What was mainly exported there were tobacco products (21.6% of the export value), poultrymeat and offal (9.6%), chocolate products (5.3%) and beef (4.0%). Further positions, according to the export value of agri-food products, were occupied by the following countries: Italy and France - EUR 1.6 billion each (5.3% share in the export value) and nearly a five-fold increase compared to 2004, then the Czech Republic - EUR 1.5 billion (5.1%) with a five-fold increase and Belgium (2.6%), Hungary (2.6%) and Romania (2.6%), as well as Spain (2.5%), where the most significant increase was recorded in the analysed period (more than 8.5 times) to EUR 0.7 billion (Figure 4).

#### **Commodity structure of foreign trade in agri-food products**

For many years, the commodity structure of Polish foreign trade in agri-food products (in value terms) has been dominated by food products. Therefore, the results of trade in these products determine the value of the surplus of trade in agri-food products. In 2018, revenues from their sale accounted for about 86% of the total agri-food export, when compared to 82.8% in 2015. The share of processed products in the agri-food import was also relatively large, but clearly lower than in the export and amounted to about 65%.

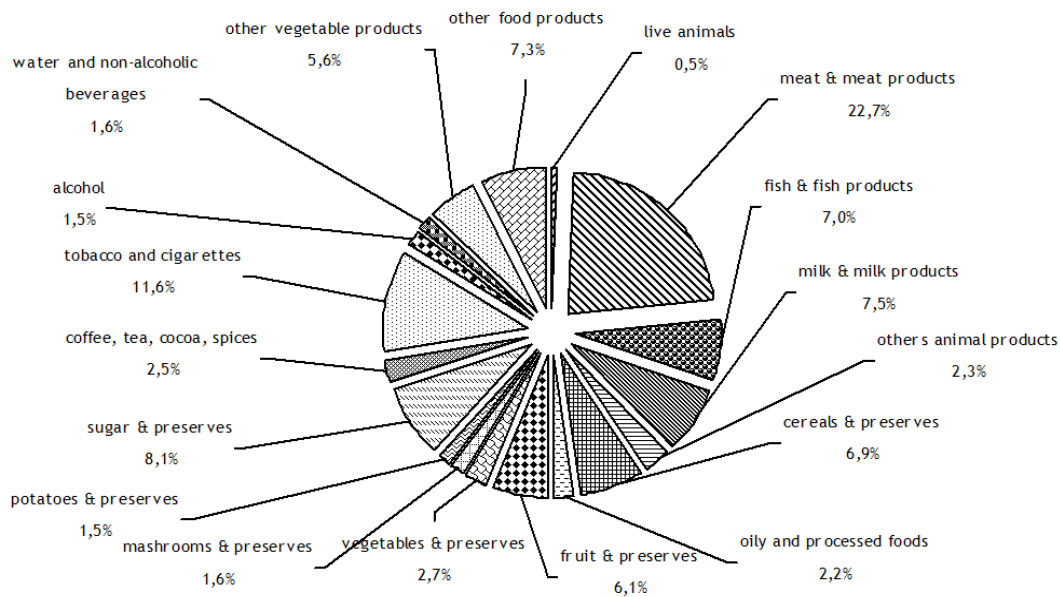


**Figure 4. Growth rate of export of agri-food products to the largest customers of food from Poland in the years (2004 = 100)**

Source: Own study based on the unpublished data from the MF.

In the commodity structure of the Polish agri-food export in 2018 (Figure 5) there were no major changes compared to previous years. Dominant are products of plant origin whose share in the value of the agri-food export amounted to 52%, when compared to 55% in 2004. Most important in this group in 2018 were: tobacco and tobacco products (11.6%), sugar and products (8.1%), cereals and pro-

ducts (6.9%) and fruits and products (6.1%). The share of products of animal origin in the agri-food export in 2018 was 41%, and was higher than in 2004 by 3%. The main item in the export structure of animal products was meat and its products (23% of the agri-food export value). Of great importance in the Polish agri-food export were also milk products (7.5%) and fish and fish products (7.0%).



**Figure 5. Commodity structure of the Polish agri-food export in 2018 (in value terms) in %**

Source: Own study based on: Foreign trade in agri-food products. Condition and prospects, No 48, „Market Analyses”, 2018, IAFE-NRI, NASC, MARD, Warsaw.

Despite many restrictions in trade in pork (*inter alia*, ASF and the Russian embargo in 2014), the export value of animal products increased six times in the years 2004-2018, to almost EUR 12.0 billion. The export of most groups of animal products increased, including mostly meat and its products (more than 8.5

times), fish and fish products (nearly six times), and milk products (four times). On the other hand, the export of live animals decreased by about 40%.

Revenues from the export of plant products in 2018 were lower than the year before by 1.5% and amounted to approx. EUR 15 billion,

while compared with 2004 they increased more than five times. The largest increase in the years 2004-2018 was recorded in the export value of tobacco products and cigarettes (24 times), sugar and products (almost 12.5 times), cereals and cereal products (6 times) and coffee, tea, cocoa and spices (2 times).

In 2018, the largest share in the export value of agri-food products was held by tobacco products (9.8%), from sale of which

revenues amounting to EUR 2.9 billion were achieved. The export of poultry meat and offal, in the case of which Poland is the largest producer in the EU, accounted for 8% of the agri-food export value and revenues from sale amounted to EUR 2.4 billion. An important export product of Poland are also chocolate and bakery products (about 5% each), as well as beef (4%) and pork (3%) (Table).

**Table. Exports of agri-food products from Poland in 2018 by value**

Specification	Value [EUR mln]	Share in the value of exports (%)
<b>Agri-food products - in total</b>	<b>29 336,2</b>	<b>100,0</b>
Tobacco products (CN code 2402)	2 876,6	9,8
Meat and edible offal of poultry (0207)	2 359,2	8,0
Bread, pastry, cakes (1905)	1 481,5	5,1
Chocolate and other products containing cocoa (1806)	1472,0	5,0
Fresh or chilled beef (0201)	1136,6	3,9
Food for farm animals and domestic animals (2309)	969,8	3,3
Food preparations (2106)	968,8	3,3
Pork meat, fresh, chilled or frozen (0203)	868,9	3,0
Meat preparations (1602)	830,7	2,8
Cheese and curd (0406)	784,5	2,7
Fish, dried, salted or in brine; smoked fish (0305)	779,7	2,7
Fish fillets and other fish meat (0304)	686,1	2,3
Fruit juices (2009)	591,6	2,0
Fish products; caviar (1604)	545,3	1,9
Malt extract (1901)	501,6	1,7
Frozen fruit (0811)	475,8	1,6
Waters, including mineral and aerated waters (2202)	450,7	1,5
Other fresh or chilled vegetables (0709)	429,4	1,5
Milk and cream (0401)	396,8	1,4
Apples, pears and quinces, fresh (0808)	344,5	1,2

Source: Own study based on the unpublished data from the MF.

**Conclusions.** Very good results of foreign trade in agri-food products and the improvement in the competitiveness indicators prove the high international competitiveness of the Polish agri-food sector. Progress achieved in this area during the Polish membership in the EU, i.e. strengthening the position of Polish food business operators in the EU market was mainly due to economic conditions such as free trade within the EU and the development of the global market.

The rapid growth in the agri-food export and the significant improvement in the trade balance are certainly a huge success of the

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Polish food economy, but Poland's position in the EU market is weaker than it results from the production potential of this economic sector. Although Poland occupies the third position among 10 countries with a positive trade balance, it has only the 5.5% share in export to other Member States and outside the EU.

The increase in the position of Polish food producers would not have been possible if they had not achieved competitive advantages over producers from other EU countries, i.e. if they had not offered better and cheaper products to EU consumers than competitors.

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#### **Терещук М. Польська продовольча продукція на міжнародних ринках**

**Мета статті** - висвітлити позиції продовольчої продукції Польщі на міжнародних ринках у 2004-2018 рр. у порівнянні з країнами ЄС.

**Методика дослідження.** У процесі дослідження використано такі методи: абстрактний та логічний, системного аналізу з використанням математичної методології, індукції та дедукції.

**Результати дослідження.** Зі вступом Польщі до ЄС виробники продовольства цієї країни отримали вільний доступ до розвинутого європейського ринку, який висуває високі вимоги до агропродовольчих ринків у світі. Експорт польської продовольчої продукції став важливим каналом управління надлишками продуктів харчування і вагомим джерелом доходу для національної харчової промисловості. Частка експорту агропродовольчих товарів у польському експорті у 2018 р. становила 13,3%, імпорту - 8,7%. Іншим показником, що характеризує агропродовольчий сектор економіки, є частка вартості експорту у вартості продукції, яка в 2018 р. становила понад 40% порівняно з 13,7% до вступу в ЄС. За період членства Польщі в Європейському Союзі вартість експорту агропродовольчих товарів зросла більш ніж у п'ять разів - до майже 30 млрд євро, а імпорту - в чотири рази, до майже 20 млрд євро, торговельний баланс збільшився в одинадцять разів - до 9,6 млрд євро. Такий стрімкий розвиток зовнішньої торгівлі, безперечно, є результатом вступу Польщі до ЄС та скасування обмежень на торгівлю з іншими державами-членами, що дозволило виявити порівняльні переваги польських виробників продуктів харчування.

**Елементи наукової новизни.** Наукова новизна полягає у виявленні особливостей розвитку зовнішньої торгівлі продовольчими товарами в умовах інтеграції та глобалізації європейської економіки.

**Практична значущість.** Результати досліджень можуть бути використані продовольчим сектором, операторами та сільськогосподарськими підприємствами ЄС та України. Табл.: 1. Рис.: 5. Бібліогр.: 8.

**Ключові слова:** продовольство; зовнішня торгівля; експорт; зовнішні ринки; Польща; ЄС.

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#### **Терещук М. Польская продовольственная продукция на международных рынках**

**Цель статьи** - высветить позиции продовольственной продукции Польши на международных рынках в 2004-2018 гг. по сравнению со странами ЕС.

**Методика исследования.** В процессе исследования были использованы такие методы: абстрактный и логический, системного анализа с использованием математической методологии, индукции и дедукции.

**Результаты исследования.** При вступлении Польши в ЕС производители продовольствия этой страны получили свободный доступ к развитому европейскому рынку, который выдвигает высокие требования к агропродовольственным рынкам в мире. Экспорт польской продовольственной продукции стал важным каналом управления излишками продуктов питания и важным источником дохода для национальной пищевой промышленности. Доля экспорта агропродовольственных товаров в польском экспорте в 2018 г. составляла 13,3%, импорта - 8,7%. Другим показателем, характеризующим агропродовольственный сектор экономики, является доля стоимости экспорта в стоимости продукции, которая в 2018 г. составляла более 40% в сравнении с 13,7% до вступления в ЕС. За период членства в Европейском Союзе стоимость экспорта агропродовольственных товаров возросла более чем в пять раз - до почти 30 млрд евро, а импорта - в четыре раза, до почти 20 млрд евро, торговый баланс увеличился в одиннадцать раз - до 9,6 млрд евро. Такое стремительное развитие внешней торговли, несомненно, является результатом вступления Польши в ЕС и отмены ограничений на торговлю с другими государствами-членами, что позволило выявить сравнительные преимущества польских производителей продуктов питания.

**Элементы научной новизны.** Научная новизна заключается в выявлении особенностей развития внешней торговли продовольственными товарами в условиях интеграции и глобализации европейской экономики.

**Практическая значимость.** Результаты исследований могут быть использованы продовольственным сектором, операторами и сельскохозяйственными предприятиями ЕС и Украины. Табл.: 1. Илл.: 5. Библиогр.: 8.

**Ключевые слова:** продовольствие; внешняя торговля; экспорт; внешние рынки; Польша; ЕС.

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