

Food Exports Continue to Grow

Polish food is still popular on foreign markets. Despite a Russian embargo, the value of Polish food exports is expected to set a record by the end of this year.

Recent estimates by agri-food market analysts from Bank Zachodni WBK show that Polish agri-food sector exports this year may grow by 5-6.5 percent compared with 2014 to 23.3 billion euros. Previous projections suggested this could be nearly 25 billion euros, but in the second half of the year the growth of sales on foreign markets decelerated slightly due to slower growth in grain exports.

Assuming that grain, fruit and vegetable crops this year are close to their average level in the last five years, Bank Zachodni WBK analysts expect Poland's 2016 agri-food exports to increase by anywhere from 2 to 6 percent. In 2016, the fastest growth should be recorded for poultry, confectionery goods and candy. Sales of dairy products abroad are also expected to improve. Meanwhile, due to this year's drought, vegetable and fruit exports are expected to be smaller in 2016 than in previous years.

According to Poland's Finance Ministry, the value of Polish agri-food product exports in the first three quarters of this year totaled 17.3 billion euros, marking an increase of 7.6 percent over the first three quarters of last year. Agri-food products accounted for 13.2 percent of Poland's total exports in the first three quarters of this year. In the breakdown of Poland's agri-food export markets, the share of EU countries increased to 81.9 percent, from 79.5 in the first three quarters of 2014. Exports to the Commonwealth of Independent States totaled 812 million euros, falling by 39 percent from the first three quarters of last year.

This was mainly the result of an embargo imposed by Russia in 2014 on many key agri-food products imported from Poland, including meat, dairy products and fruit and vegetables. "In addition, as a result of cases of African swine fever (ASF) in wild boar in Poland, a drop was also noted in sales of pork to some markets to the east of Poland; apart from Russia these included Belarus and Kazakhstan," says a report by the Polish Ministry of Agriculture and Rural Development.

As in previous years, the most agri-food products were sold to Germany, which accounted for 21.9 percent of the total value of Polish agri-food exports. In value terms, exports to the German market were dominated by poultry meat, smoked fish (especially salmon), rapeseed, bakery products (including biscuits and wafers), processed and canned fish, chocolate and cocoa-containing products, wheat, raw milk and cream, frozen fruit (mainly strawberries

and raspberries), fruit juices (mainly apple juice), beef, fish fillets, and cigarettes.

Britain was the second-largest export market for Polish agri-food products; it primarily bought chocolate and cocoa-containing products, poultry meat, processed and salted meat, and wafers and biscuits. The Czech Republic was in third place, absorbing mainly rapeseed oil, coffee, poultry, cigarettes and bakery products (including biscuits and wafers). Further down the list among the largest export markets for Polish agri-food products were France, Italy, the Netherlands, Slovakia and Hungary. Russia, which until the previous year was in fifth place among the largest buyers of Polish food, dropped to 15th place in this ranking in the first three quarters of this year as a result of the continued import embargo on Polish agri-food products. The value of Polish agri-food product shipments to that country declined by 62 percent.

In addition to the European Union, Polish food is shipped further afield. In the period from January to September this year, the value of exports on 130 of these markets exceeded 100,000 euros.

Exports are growing particularly fast to the Middle and Far East as well as Africa. Among Poland's most important non-European markets, the greatest increase in Polish exports in value terms, compared with the first three quarters of the previous year, was recorded in the case of Egypt. This was chiefly due to significant wheat exports. Large shipments of wheat also contributed to a significant increase in Polish exports to markets such as Kenya, Sudan and Tanzania. Increased exports of apple juice and pork contributed to a 40-percent increase in the value of exports to Canada, while greater exports of apple juice and chocolate and cocoa-containing products contributed to a 39-percent increase in the value of sales to the United States.

A significant increase in shipments of Polish agri-food products was also seen in Vietnam, Israel, Croatia, Serbia, Greece, Ireland and Belgium. From January to September this year these exports chiefly included poultry meat, cigarettes, chocolate and foodstuffs containing cocoa, bakery products (biscuits, waffles, etc.), wheat, beef, pork, sugar syrups, smoked fish (especially salmon), cheese and curd, other processed and preserved meat, coffee, fruit juices (mainly apple juice) and frozen fruit.

The upbeat agri-food export statistics are attributable to the taste and quality of Polish products, but also the fact that Poland continues to produce at low cost, which is particularly important at a time of economic slowdown. This, however, would not be possible without efforts to modernize production facilities. In recent years, billions of zlotys have been invested in processing plants, with the greatest investment boom visible in plants producing meat, poultry, milk and fish. Today the Polish agri-food sector is one of the most modern in the world, and Polish agri-food products are of high quality. The proportion of unprocessed farm produce in exports is decreasing while the share of highly processed products is growing, testifying to the development of Poland's food processing industry.

A.R.

Polish Poultry Power

Over the past several years, Poland has become a leading European producer of poultry. This is due to growing consumption of poultry at home and growing sales abroad.

In the first half of this year, production of poultry for slaughter in Poland increased by 12 percent over the first half of 2014 to 1.4 million metric tons. Forecasts show that total poultry production in 2015 as a whole could reach 2.9 million tons and could be nearly 10 percent higher than in 2014. Further growth is expected in the next few years. The Warsaw-based Institute of Agricultural and Food Economics predicts that in 2016 production will increase by about 10 percent.

Consumption of poultry in Poland has increased in recent years. Data from Poland's Central Statistical Office (GUS) shows that poultry meat consumption in Poland in 2014 increased to 28.2 kg per person from 26.5 kg per person in 2013. It is expected that this year poultry consumption will increase to 29 kg per person.

Contributing to the growth of poultry production in Poland is high demand abroad. According to the Agricultural Market Agency (ARR), in the first eight months of this year, Poland exported 639,000 tons of live chickens as well as poultry meat and poultry products, 15 percent more than a year earlier. The increased exports are in part due to the fact that Polish poultry is strongly competitive on EU markets because it costs less than poultry offered by producers from many other countries. Another factor is growing demand abroad. "It is estimated that in 2015 as a whole exports of [Polish] poultry products will exceed 1 million tons and will be about 17 percent higher than in 2014," the Agricultural Market Agency says in a report. Experts predict a further increase in poultry product exports next year.

In terms of Polish poultry meat exports, Germany, the United Kingdom and the Czech Republic remain the biggest markets. These absorb more than 30 percent of total poultry meat exports from Poland. Data from the Polish Ministry of Agriculture and Rural Development shows that 80 percent of Polish poultry exports were destined for EU markets. But the fastest growth was recorded in exports to countries outside the European Union. Two countries dominate among non-European buyers of Polish poultry: China and Benin, but some other far-flung markets, among them the Republic of the Congo, are also increasingly prominent. If the upward trend con-

tinues, demand for poultry meat outside the EU may become a driving force for Polish exports in the long term.

The Polish poultry sector has proven that it is capable of expanding even in difficult times of crisis. Poland's role on the EU market as a poultry producer is steadily growing. Studies by Poland's Bank Gospodarki Żywnościowej show that the Polish poultry sector has bright prospects for the future, mainly due to growing demand for poultry meat on emerging markets and continually increasing consumption of poultry meat throughout the European Union. According to European Commission forecasts, consumption of poultry in the EU will grow at a rate of 0.9 percent annually on average until the end of the decade. This is good news for Polish poultry breeders and producers.

A.R.





Tatra mountains

Rural Tourism in the Podhale Region

The Podhale region at the foot of the Tatra mountains in southern Poland has beautiful landscapes, lush nature and appealing folk customs that make it a perfect setting for rural tourism.

Podhale is a geographical and cultural region that straddles the upper section of the Dunajec River. Agriculture and sheep herding has played an important role in Podhale for centuries, leading to the emergence of a distinctive rural highland culture. Podhale captured the public imagination in the 19th century when its natural attractions and climate started drawing visitors from other parts of Poland. Tourism began to develop in the area, especially in the town of Zakopane, which rose to prominence with new sanitariums and spas.

Podhale is an interesting region in terms of its local culture and customs, as local villagers are well known for preserving the traditions of their shepherd predecessors and they continue to speak the distinctive local vernacular. Old customs also live on in traditional outfits that are worn on many occasions and in folk music and literature. Arts and crafts from Podhale are famous across Poland, with an easily identifiable style that can be seen in woodwork, furniture, household items and the region's hallmark glass painting.

The hills and plains of Podhale are dotted with quaint villages and small towns. Many of them are popular destinations visited by crowds every year, which is why some travelers choose to wander off the main tourist routes and stay at less renowned, but just as picturesque locations. The principal city of the Podhale region is Nowy Targ. This is worth a visit for its historic market square with a large town hall from

the 19th century that houses the Museum of Podhale.

South of Nowy Targ is Zakopane, one of the country's most famous tourist resorts that draws thousands from Poland and abroad every year. They come to hike in the mountains and to practice winter sports, which, coupled with the town's enormous popularity, has earned it the nickname of "the winter capital of Poland."

Popular tourist destinations in Podhale also include the village of Chochołów, with a history dating back to 1592. The main tourist appeal of Chochołów is its meticulously renovated highland cottages from the late 18th and early 19th centuries. Built of wooden beams with naturally rounded edges, the cottages are a classic example of the Podhale style in architecture. One of the oldest villages in the area, Ludźmierz, is home to a Shrine of the Blessed Virgin Mary, founded by the Cistercian monks in 1234. The shrine is one of the most popular pilgrimage destinations in the region.

Another popular village in Podhale is Łopuszna, first mentioned in historical accounts from the early 15th century. The village's historic sites include nine old manor buildings with farm houses and an old highland-style cottage. The interiors of the buildings have been restored and are frequently used as venues for temporary art exhibitions. Łopuszna is also home to a beautiful wooden church with a shingle-roofed steeple from the early 16th century.



While Zakopane and the quaint villages are the main draw of Podhale, the region boasts a unique combination of natural and cultural heritage that makes it one of Poland's top tourist destinations. Tourism in Podhale relies heavily on culture, health resorts and active recreation, but the scenic landscapes and pristine nature make the region ideal for other forms of tourism, including rural tourism.

Greatest hits of rural tourism

Podhale is part of Małopolska, a province with a well-developed network of farms with accommodation for tourists. The most recommendable farms have been included on the "Greatest Hits of Rural Tourism" list compiled by the Polish Ministry of Agriculture and Rural Tourism.

Twenty attractively located farms that specialize in growing and processing herbs are linked by a picturesque tourist trail with the appealing name of *Małopolska Wieś Pachnąca Ziołami* (The Herbal Scents of the Małopolska Countryside). Several of them are located in Podhale. The farm owners know everything about the properties of different herbs. Experts in herb growing and harvesting methods, they know how to dry the herbs and arrange them into bouquets or use them as spices and for medical purposes. Herbs and spices grown in the farms' gardens include lovage, tarragon, peppermint, oregano, thyme, rosemary, sage, marjoram and sweet balm. The farmers use vegetables and herbs from their home gardens as ingredients of healthy regional dishes to which they treat visitors. Many also offer herbal baths, aromatherapy, different kinds of massage and beauty treatments based on the relaxing and energizing properties of various herbs. Located on the edge of villages near forests, the farms are run by avid herbalists and envi-

ronmentalists who make every effort to cultivate the local heritage.

One of the trail's farms in Podhale is Rzepka (Turnip) in Czarna Góra, near the touristy villages of Bukowina Tatrzańska and Białka Tatrzańska. This farm is located in a mountain pass 850 meters above sea level, offering a panoramic view of the Tatra Mountains and the nearby Gorce Mountains. It is also close to the Białka, Poland's only river of the Alpine kind. The farm's owners keep goats and horses, and the lady of the house is a horse-riding instructor who uses natural teaching methods. She likes to treat her guests to homemade dishes that make use of herbs and organic ingredients.

Sixteen other rural tourism farms in Małopolska province have joined forces in a project called *Małopolska Villages for Children*. Facilities available at these farms ensure that children of different ages can enjoy a variety of activities in an attractive and safe environment. Each farm has an





Akiko Villa

enclosed playground and kids can play with pets and farm animals. Learning through play, child visitors to the 16 farms find out about rural traditions and local culture, the wildlife of Małopolska province and the region's tales and legends. The owners also offer regional dishes using ingredients from organic crops.

Małopolska Villages for Children in Podhale include the Akiko Villa boarding house and farm in Harklowa near Nowy Targ, next to the picturesque Gorce Mountains National Park. The lady of the house was born and raised in Japan. With a forest close by, children can be taken on walks during which they can watch birds and other animals and pick herbs, mushrooms and forest fruit. The Akiko Villa stands in a working farm with goats, sheep, chickens and trout.

Regional cuisine and dishes

Podhale takes a lot of pride in its cuisine which, despite its simplicity, offers delightful flavors. The cuisine is heavily influenced by the fact that the geological features of Podhale and its climate have made farming difficult. As a result, staple dishes from Podhale are traditionally made of whatever a farmer in the mountains was able to produce and keep for himself rather than sell at a meager profit. The local cuisine heavily relied on boiled potatoes, turnips and *bryjka* dumplings made from flour boiled in salted water. Flour used in Podhale was usually made from barley, oats and corn.

One of the most distinctive highland dishes is the *kwaśnica* sour soup made of sauerkraut and meat, usually served with

potatoes and bread. The soup has a sharp, tart taste and, if prepared by the book, it cannot contain vegetables such as carrots. Otherwise, it becomes the traditional Polish soup called *kapuśniak* and has little to do with the genuine *kwaśnica*, but is sometimes wrongly served under this name. Other popular dishes in the area include *prażucha*, a thick kind of paste made from roasted barley flour, water and fried bacon and served with soured milk. The locals also enjoy *moskole*, pancakes made from mashed boiled potatoes, flour, water, salt and eggs. This dish took its name from Russian captives who brought it to Podhale during World War I. At present *moskole* are mainly available as a regional specialty in restaurants.

To most Poles, a typical Podhale dish is the *osypek* variety of smoked cheese. Usually sold as spindle-shaped blocks of different size and with the edges ornamented in Podhale style, this cheese is made from sheep's milk. Making *osypek* cheese has been a traditional occupation of experienced shepherds on mountain pastures and recipes for the cheese are handed down from generation to generation. Fresh sheep's milk is first poured into a wooden vat through a linen cloth to remove bits of grass and other impurities. Then, powdered rennet is added to the milk, causing it to coagulate and the resulting product is pressed in hot water and then molded. Later, it is placed in salted water for a day, after which *osypek* blocks are left to mature and then smoked.

Another popular kind of cheese from Podhale is *bundz*, made from cottage cheese produced from sheep's milk. First, the cheese is put into decorative molds and immersed in boiling water until its shape is fixed. Then, it is put in salted, cold water, after which it is smoked. After the milk coagulated by rennet is removed, the remaining fluid is used as a beverage that Carpathian highlanders call *zentyca*.

In addition to giving milk and wool, sheep in Podhale are used as a source of meat, usually eaten as mutton chops and roasts.

Typical sweet dishes from Podhale include *kolacz* pies, poppy-seed cakes, apple pies and sweet pies made from potatoes mixed with yeast dough. The locals and tourists also relish honey-based *kremarz* cakes layered with cream. Podhale delicacies are said to go down best with mulled wine and highland-style tea with plum vodka.

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Osypek



Kwaśnica

Regional and Traditional Products

Zator Carp

About 200 metric tons of Zator carp (karp zatorski) are sold in Poland every year. This is the only type of Polish fish so far to have received EU protected designation of origin status. Most of the fish are purchased in December and end up as a dish at a traditional Polish Christmas Eve supper.

The Zator carp is a hybrid of pure Zator carp and pure Hungarian, Yugoslavian, Golysz (in Poland's southern Silesia province) and Israeli types of carp. Its distinctive features include a pronouncedly curved back, compact shape and an olive green hue with shades of blue. The meat is free from a muddy smell and has a delicate flavor.

The fish are bred in three neighboring communities (Zator, Przeciszów

and Spytkowice) in the western part of Małopolska province, southern Poland. These communities joined forces in 2003 in a project called Carp Valley. The only fish which are released into the local fish ponds are hybrids from the Experimental Fish Facility in Zator. The fish grow to 1.2-1.8 kilograms in weight in organic fish farms, feeding mostly on natural food with a small addition of cereals.



According to the Ministry of Agriculture and Rural Development website, the history of fish ponds in Zator dates back to the 14th century. The most distinctive feature of fish farming in the area was how widespread it was. Fish ponds were set up not just in areas owned by magnates, churches and the king, but were also found on the estates of the nobility from modestly affluent landowners to minor nobles. Some of the most noteworthy fish farming regions included the Duchies of Oświęcim and Zator and the Wieluń Region in the west of present-day Małopolska province. Fish farming thrived during long periods of peace until wars ruined ponds, causing carp breeding in Poland to decline.

Things improved after World War I when fish ponds were restored and Poland imported new technology. New regulations were introduced governing trade by minor fish merchants and the first fish store was opened in Cracow. After World War II the Jagiellonian University established an Institute of Animal Husbandry where research began on enhancing the commercial quality of carp. The market demand for fresh fish drove up production which, thanks to the high number of fish ponds, rose rapidly. The amount of carp produced increased from 200 metric tons in the 1950s to 490 tons in the 1990s.

Today, the Carp Valley has evolved into a recreational area attracting anglers and fans of aquatic sports.

Most work involved in carp farming is done manually, which means that skilled workers with extensive experience are essential. The production process has not changed much over the years, though horse-drawn carts have been replaced by special transportation equipment to make sure that the fish are shipped in better and more comfortable conditions, and aluminum boats are now used instead of wooden ones.

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