Poland Agribusiness Sector Report 2025-2026

An EMIS Insights Industry Report

Executive Summary

Sector Overview

Between 2019-2024, Agribusiness in Poland happened to be a modest but strategically meaningful segment: Agriculture, forestry & fishing contribute around 2.3% of GDP in 2024, consistent with recent years. External trade is a key engine: Poland is typically a net exporter of agribusiness goods, strong export performance helps buffer domestic volatility and enables economies of scale in livestock, crops, and fisheries. Even though overall CPI has declined significantly in 2024, inflation persists as a constraining threat: Rising input costs (fertilisers, energy, fuel) and pressure on profit margins under inflationary conditions can erode competitiveness and discourage investment. The sector's future performance will depend heavily on how well agribusiness firms navigate exchange rate shifts, manage cost inflation, and maintain export access in a changing global environment.

Entry Modes

In Poland's agribusiness sector, the most common mode of operation for new or expanding firms is wholly-owned subsidiaries and joint ventures, often in partnership with local farm networks or processing firms. Foreign investors typically establish a Polish limited liability company (Sp. z o.o.) to operate, sometimes entering joint ventures or contractual partnerships with domestic cooperatives or farmers to gain local access and knowledge (a strategy encouraged in foreign investment guides). Because direct purchase of agricultural land by foreign entities is heavily regulated (only possible if the buyer has long-residence in the municipality) many foreign entrants opt to lease land, contract out production, or partner with local landholders rather than own large acreage outright.

Segment Opportunities

In poultry, Poland's status as the EU's largest broiler producer positions it well to capture further market share, especially via export growth and vertical integration of processing and branding (the "aggressive export strategy" is seen as an investment attractor). For cereals and industrial crops, opportunities exist in improved seed varieties, precision farming, and enhanced value chains (e.g. biofuels, feed, starch processing) as Poland is already among the top EU producers of wheat, rapeseed, maize, and sugar beet. In fruits and vegetables, niche and premium crops (berries, apples, greenhouse vegetables) hold upside via differentiation, controlled-environment cultivation, and export of high quality produce. The EU market demand for premium fruit/vegetable products and Poland's favourable climate make these segments promising. Additionally, regional logistics and cold-chain infrastructure investment offers opportunity, since Poland's location in Central Europe can help it serve both Western and Eastern markets efficiently.

Government Policy

The Polish government has been broadly supportive of agribusiness between 2019-2024, deploying multiple subsidy, modernisation, and structural reform instruments to buttress farm incomes and competitiveness. For example, in 2023 the government approved PLN 10bn in aid to farmers to offset fertiliser and input cost shocks, drawing condemnation from Ukraine over WTO compatibility. Under the Common Agricultural Policy Strategic Plan 2023-2027, Poland secured over EUR 25bn to support sustainable farm practices, eco-schemes (e.g. carbon farming, nutrient management), environmental conditionalities, and direct payments to small farmers (the Plan was approved by the European Commission in 2022). The government also channels support via the National Recovery Plan, allocating EUR 1.4bn for agriculture to modernise production, shorten supply chains, and integrate digital technologies. In addition, annual direct subsidy programmes have been expanded, e.g. by February 2025 PLN 15.7bn in direct payments had already been disbursed to farmers. Moreover, targeted price support measures have been introduced: For example, a wheat sales subsidy scheme in early 2025 (200 to 300 PLN/tonne) to stabilise grain market returns. On the regulatory front, recent reforms tightened farmer eligibility for subsidies (limiting support to "active producers") starting in 2026. Together, these policies reflect a proactive governmental role: Both enabling agribusiness growth and imposing environmental/structural constraints through CAP conditionalities and reform.

Sector Snapshot

Poland's agribusiness sector retained its strategic role in the national economy between 2019-2024, accounting for approximately 2.3% of GDP in 2024, supported by stable domestic production and strong export performance. Total crop output reached 73.7 million tonnes in 2024, rising from 62.1 million tonnes in 2019. This comprised approximately 35 million tonnes of cereals, 27 million tonnes of industrial crops (potatoes, sugar beet, rapeseed, etc.), 4.1 million tonnes of fruits, and 5.3 million tonnes of vegetables. Despite a declining trend in total sown area between 2019-2022, yields per hectare improved due to mechanisation and improved farming practices.

Within crops, cereals led Poland's agricultural exports, comprising 29% of total crop export value in 2024, followed by vegetables and roots (22%), and fruits and nuts (20%). Poland is a key supplier within the EU, especially in apples (29% of EU production), berries (53%), and cherries (21%) as of 2024. These products cater both to domestic consumption and EU markets, with cereals and processed vegetables largely destined for export, while fruits serve a dual role.

In livestock, meat production totalled 8.3 million tonnes in 2024, led by poultry (69% of total meat production), followed by pork (25%) and beef (7%). Poultry exports were particularly strong, supporting a USD 4.7bn trade surplus in this segment in 2024. Germany and UK are the top destinations for Polish meat exports. Conversely, fisheries output remained low, with persistent import dependence from countries like Norway, resulting in a sector-wide trade deficit.

A notable challenge emerged in early 2024 with large-scale farmers' protests triggered by low-cost Ukrainian grain imports, which undercut local prices. Farmers also pushed back against obligations under the EU Green Deal, citing cost pressures and bureaucratic complexity. These developments caused temporary disruptions at major border crossings and port terminals, affecting supply chains in both the crops and livestock segments.

Looking forward, the sector is expected to benefit from increased EU digitalisation and precision agriculture funding, helping improve resilience against climate volatility. However, labour shortages, input cost volatility, and geopolitical risks (including Ukraine war spillovers) remain key constraints. Export-driven segments like poultry and cereals are likely to remain strong, while the fruits and vegetables segment may face growing competition from southern EU producers under more favourable climate conditions.

Sector Outlook

According to April 2025 estimations of the IMF, Poland's GDP growth is expected to be 3.2% in 2024, with consumer inflation around 4.3% (reflecting price pressures easing but still significant). Meanwhile, the European Commission projects HICP inflation at about 3.6% in 2025, with a significant drop to 2.8% in 2026, citing energy support measures and moderating commodity prices. These moderate growth and inflation forecasts are favourable for agribusiness: They suggest demand will hold and purchasing power won't be excessively eroded, but input cost pressures may remain.

Poland's monetary policy is currently tight: the National Bank of Poland (NBP) has held interest rates at high levels to contain inflation, with the reference rate at 5.75% since October 2023. Higher borrowing costs will raise financing costs for agribusiness firms (credit, investment, working capital). Empirical studies show that tighter interest rates tend to dampen agricultural competitiveness by increasing costs of capital and reducing margin flexibility. However, there is expectation that rate cuts may begin later in 2025, which could ease financial stress on farms and agribusinesses. Overall, agribusiness will navigate a balancing act: moderate growth and controlled inflation are positive, but high interest rates pose a constraint until monetary policy loosens.

Drivers and Constraints

Drivers

The agribusiness sector in Poland has been propelled by several structural and market-based dynamics. First, strong external demand (particularly for poultry and cereal products) has sustained consistent trade surpluses, with countries like Germany and the UK acting as key export destinations for both meat and crop products. Second, technological modernisation and digitalisation (facilitated by EU-backed subsidies under Poland's Common Agricultural Policy (CAP) allocations and the Rural Development Programme (RDP) have improved productivity, particularly in industrial crops like sugar beet and rapeseed. Third, favourable climatic and soil conditions, especially in the northern and eastern voivodeships, have supported competitive yields in potatoes, cereals, apples, and poultry meat, making Poland a regional leader in several categories.

Constraints

Among the most pressing constraints are climatic extremes (notably floods and droughts) that have inflicted substantial losses on farmers. In September 2024, flooding impacted over 566,000 hectares across more than 72,000 farms, resulting in losses nearing PLN 2.28bn and leaving 27,000 hectares unharvested. In the same period, heavy rains inundated 120,000 hectares of agricultural land (over 2% of total farmland), destroying crops, feeds and inputs on affected farms. Floods also damaged feed, fertiliser stocks and seed materials on many plots, compounding farmers' losses. Drought has compounded the challenge. In 2024, 13 voivodeships suffered agricultural drought, some regions anticipated yield reductions of 20% or more. Soil moisture deficits and prolonged dry periods further constrained yields, especially in cereals and industrial crops. Combined with high inflation, rising interest rates, structural labour shortages, and regulatory burdens (e.g. Green Deal compliance), these environmental shocks represent a major drag on agribusiness resilience and investment capacity.

Upstream and Downstream Industries

In Poland's agribusiness ecosystem, upstream industries (such as fertilisers, seeds, farm machinery, animal feed, energy, finance, cold storage and transport) play a foundational role, while downstream sectors like food processing, bioenergy, textiles & leather (from by-products), nutraceuticals, food retail and export logistics capture value further along the chain. In the upstream domain, fertilizer price spikes (driven by global natural gas, phosphate, and potash cost pressures) have squeezed farmer margins and sometimes curtailed application rates, affecting yield potential. Manufacturers of agricultural equipment (e.g. Pronar in Poland, specialising in tractors, harvesters, trailers) are responding to demand for more precise, efficient machinery as farms modernise. On the feed front, integrated firms like Wipasz control feed production, contract farms, and meat processing, enabling tighter vertical linkages and cost control. There's also rising interest in organic fertiliser from poultry manure conversion as circular-economy input recycling.

Downstream, Poland's food processing companies (meat packers, dairy processors, fruit/veg packers) rely heavily on domestic raw inputs but also must compete in export markets, demanding stringent quality, certification, and cold-chain logistics. Many poultry producers now own or control their processing and distribution arms to capture margin. Meanwhile, export logistics (transport, cold storage, container services) have gained importance, as Poland's role as a regional agrifood supplier expands. The interplay between upstream cost pressures and downstream market demands tightens margins and rewards firms that integrate horizontally and vertically across the value chain.

Sources

European Commission, Eurostat, GUS, IMF, ITC, Ministry of Agriculture and Rural Development, NBP, wodnesprawy.pl, agroberichtenbuitenland.nl, Reuters

Sector in Focus

Main Economic Indicators

Name	2019	2020	2021	2022	2023	2024
GDP, Current Prices, PLN bn	2,313.93	2,362.91	2,661.52	3,100.85	3,415.27	3,653.43
GDP, Constant Prices, y/y change, %	4.58	-2.04	6.93	5.26	0.25	3.03
GVA of Agriculture, Forestry and Fishing, PLN mn	52,749.00	60,689.90	53,896.40	54,432.20	62,276.40	61,462.70
GVA of Agriculture, Forestry and Fishing, % of GDP	2.19	2.57	2.13	2.05	2.34	2.24
Consumer Price Index, y/y change, %	2.14	3.66	5.22	13.20	10.85	3.67
Monetary Policy Rate, % pa, year-end	1.50	0.10	1.75	6.75	5.75	5.75
Foreign Exchange Rate, USD/PLN, period-end	3.84	3.68	4.08	4.42	3.97	4.08
Foreign Exchange Rate, USD/PLN, period-average	3.84	3.90	3.86	4.46	4.20	3.98
Total Imports in Agribusiness, % of Total Imports	4.72	4.99	4.28	4.43	4.77	4.93
Total Exports in Agribusiness, % of Total Exports	6.10	6.32	5.79	6.49	6.52	6.51

Sources: CEIC, GUS, EUROSTAT, NBP, ITC

Economic Performance

According to a statement made by Donald Tusk, Prime Minister of the Republic of Poland, in September 2025, Poland recently achieved a symbolic milestone by entering the “trillion-dollar club,” becoming the 20th largest economy in the world by nominal GDP. Between 2019-2024, Poland has maintained solid GDP growth (with a CAGR of 9.5%) which supports its upward economic trajectory. Consumer price inflation has been volatile, spiking in the post-pandemic/energy shock period, but more recently cooling (It has reached 13.2% in 2022, which was a peak between 2019-2024, then gradually went back to 3.7% in 2024). The Polish złoty (PLN) has also experienced fluctuations against the US dollar, with periods of depreciation under external pressures, affecting export competitiveness and import costs (particularly for agricultural inputs).

In the structure of output, agricultural GVA’s share in GDP has remained relatively stable between 2019-2024 (generally in the 2-3 % range) which reflects both modest productivity growth in farming and more dynamic growth in other sectors. Meanwhile, agriculture’s role in trade is more pronounced: Poland is a significant exporter of primary agrifood products in the CEE region, so although the sector’s share of total exports is modest in absolute terms (roughly around 6% between 2019-2024), its relative export performance underscores its importance in regional supply chains.

In remarks to the European Parliament, Tusk emphasised that “agriculture is a treasure for Poland and for Europe alike” and warned that excessively high energy prices driven by regulatory burdens threaten competitiveness of Polish producers. Also, Agriculture Minister Czesław Siekierski stressed the importance of food security and preparing for the “unpredictable effects of globalization,” signalling continued state commitment to strengthen the sector.

Finally, Poland’s transition to the 20th economy underscores that it is no longer a peripheral actor: Its scale grants it greater weight in regional agricultural markets, trade negotiations, and supply networks, and strengthens its position as a key agrifood supplier in the CEE region.

Main Sector Indicators

Name	2019	2020	2021	2022	2023	2024
Total Agricultural Output, Poland, EUR bn	25.95	26.41	27.92	39.55	36.81	37.81
Total Crop Output, EUR bn	11.80	12.93	13.62	19.75	18.06	17.38
Total Animal Output, EUR bn	13.49	12.80	13.58	18.90	17.73	19.32
Total Fertiliser Production, EUR bn	1.73	1.65	2.38	3.34	2.97	2.62
Total Fertiliser Production, million tonnes	5.64	5.56	5.35	4.87	4.11	4.52
Total Fruits and Vegetables Production, million tonnes	4.22	4.53	5.10	5.30	5.01	4.59
Total Apple Production, million tonnes	3.08	3.56	4.07	4.26	3.89	3.38
Total Tomatoes Production (for fresh consumption), million tonnes	0.78	0.66	0.73	0.73	0.82	0.93
Total Cereals Production, million tonnes	28.99	35.70	34.64	35.65	35.85	35.00
Total Wheat Production, million tonnes	11.01	12.75	12.12	13.45	13.18	12.41
Total Barley Production, million tonnes	3.37	3.00	3.02	2.83	2.90	3.02
Total Oilseeds Production, million tonnes	2.40	3.16	3.25	3.76	3.85	3.39
Total Poultry Production, million tonnes	5.19	5.39	5.08	5.46	5.49	5.75
Total Beef Production, million tonnes	0.56	0.56	0.56	0.54	0.52	0.64
Total Pigmeat Production, million tonnes	1.98	1.97	1.98	1.80	1.76	1.90
Total Utilised Agricultural Area, million ha	14.55	14.75	14.52	14.20	14.62	
Total Imports in Agribusiness, USD bn	12.53	13.01	14.71	17.16	17.70	18.87
Total Exports in Agribusiness, USD bn	16.29	17.23	19.80	23.73	24.89	24.92
Trade Balance in Agribusiness, USD bn	3.76	4.22	5.09	6.57	7.19	6.05

Sources: CEIC, Eurostat, ITC

Gross Value Added

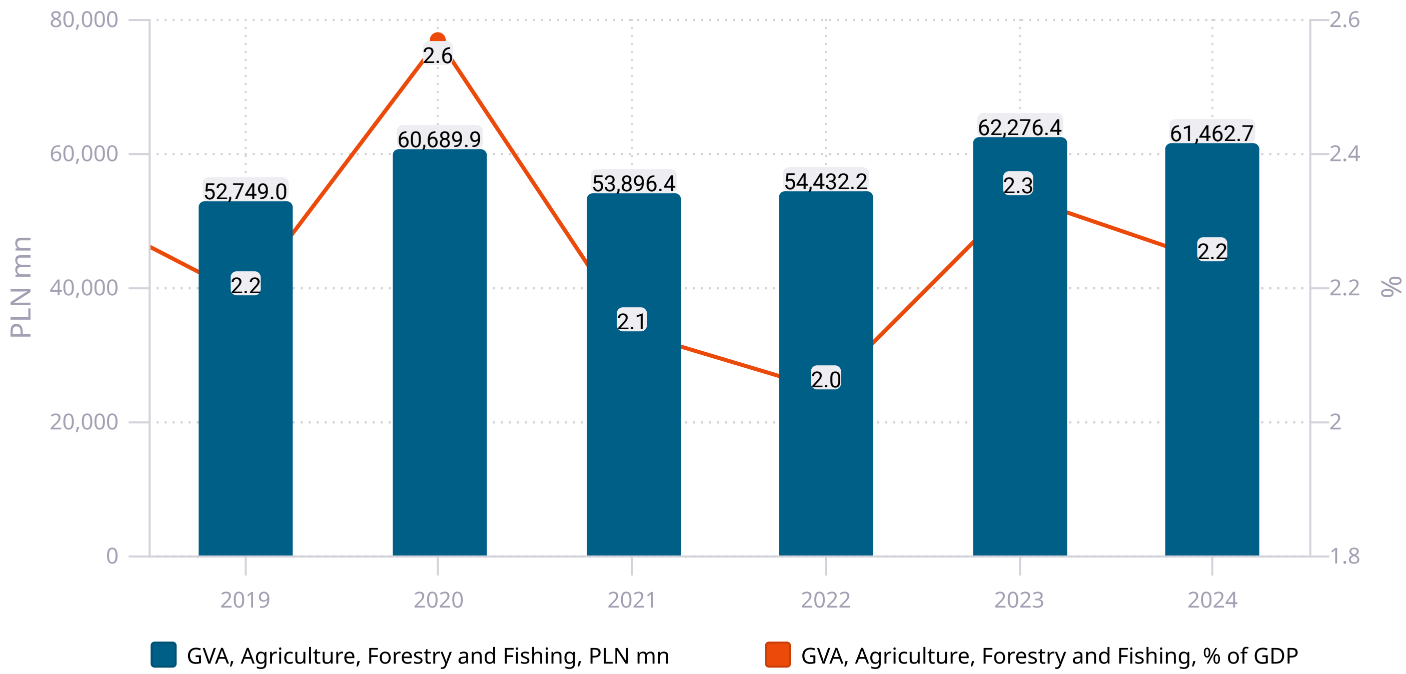
Between 2019-2024, Poland's GVA in Agriculture, Forestry & Fishing have followed an increasing trend in general, at a CAGR of 3.2%, driven by both volume gains and price effects. According to Eurostat, GVA in the sector reached PLN 62.3bn in 2023, marking a 14.4% y/y increase, then slightly declined to PLN 61.8bn in 2024, a -0.8% y/y drop. The sharp rise in 2023 was primarily due to elevated agricultural output prices (especially for livestock and certain crops) combined with increased external demand and partially improved harvest conditions. The drop in 2024 reflects moderating prices, rising costs (notably energy and fertiliser), and mixed climatic conditions that limited output volume gains.

At the same time, the share of GVA in agriculture, forestry and fishing in Poland's real GDP remained fairly stable between 2.0% and 2.6% throughout 2019-2024, according to Eurostat. This consistent share can be explained by the fact that although GVA in the agricultural sector grew, the broader economy (particularly services and manufacturing) also expanded in parallel, maintaining proportionality.

The volatility in annual GVA change is notable: 15.1% in 2020, -11.2% in 2021, 14.8% in 2023, and -0.8% in 2024. In 2020, the agricultural sector benefitted from strong demand during the early COVID-19 pandemic when supply chains were constrained, pushing prices upward. However, in 2021, adverse weather (droughts and localised flooding) and soaring fertiliser and fuel costs reduced margins and output value. The recovery in 2023 was largely price-driven amid global food inflation and favourable livestock output trends, whereas in 2024, both prices and yields plateaued or declined modestly amid ongoing cost pressures and fluctuating weather patterns.

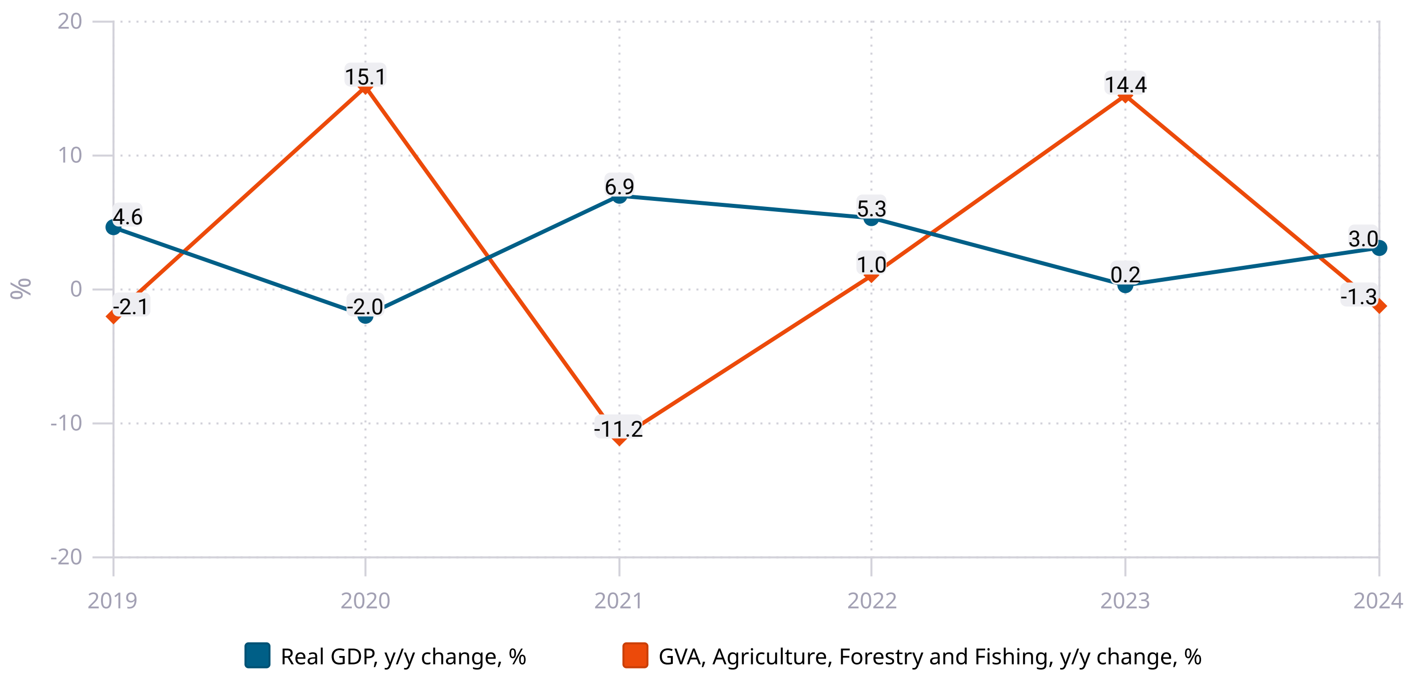
Looking forward, agricultural GVA is expected to stabilise, with lower double-digit or high single-digit volatility. Input cost inflation is projected to ease, though climate risk (especially extreme heat or rainfall) remains a threat to both crop and animal productivity. The European Commission forecasts continued but moderate growth in real agricultural output as part of Poland's broader economic performance, suggesting GVA's share in GDP will remain close to current levels.

GVA in Agriculture, Forestry and Fishing



Sources: CEIC, EUROSTAT

Real GDP vs. GVA in Agriculture, Forestry and Fishing, y/y change, %



Sources: CEIC, EUROSTAT

Production

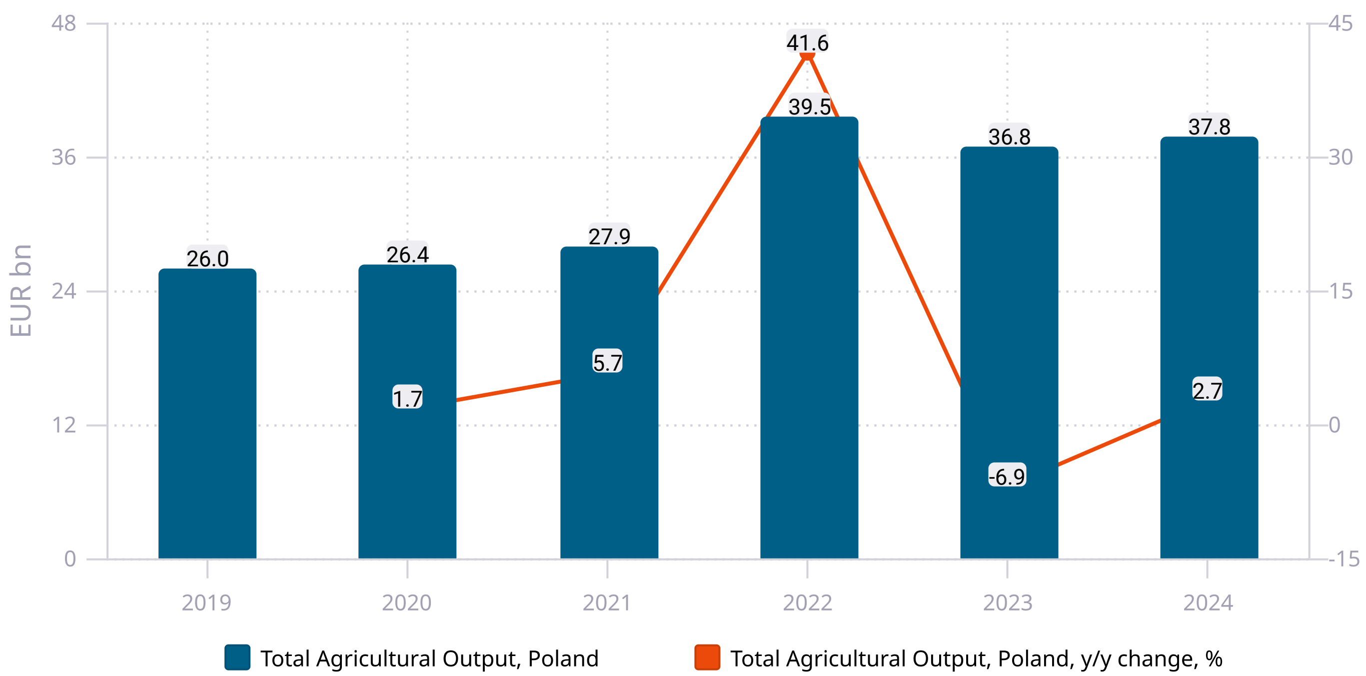
Between 2019-2024, Poland's total agricultural output rose from EUR 26bn in 2019 to EUR 37.8bn in 2024, at a CAGR of 7.8%. The surge was particularly strong in 2022, when output jumped to EUR 39.5bn (41.6%, y/y). That peak was driven by very steep increases in commodity prices, input costs, and favourable early crop yields. Across the EU, similar nominal output boom occurred in 2022, driven by large price rises for agriculture goods and services (estimated to be around 22.8%) even while volumes stagnated or fell slightly. However, in 2023 Poland's agricultural output declined (6.9%, y/y) as input costs (fuel, fertiliser, energy) remained high but price increases lost momentum, and adverse weather reduced volumes. The rebound in 2024 (2.7%, y/y) reflects somewhat better weather, slightly lower input cost inflation, and perhaps recovery in volume growth, but not enough to surpass the 2022 height.

When split into crop output and animal output, similar divergent patterns emerge. Crop output peaked in 2022 at EUR 19.8bn (45% y/y increase), but fell back by 2024 to EUR 17.4bn. The causes were heat and drought in parts of Poland (and Europe), elevated fertiliser and energy-driven input costs, reduced margins, and possibly plant disease or reduced planting area in some crops. USDA reports confirm that for grains like wheat, yields benefited in 2024 from a warm fall and mild winter, but quality was impacted by wet conditions at harvest, and harvesting delays increased costs.

Animal output, by contrast, held up more steadily and in fact surged to EUR 19.3bn in 2024 (9% y/y increase). Livestock and animal product sectors were supported by increasing demand domestically and for export, somewhat less sensitive to immediate weather risks than crop yields, and benefitting from prior investment, favourable feed grain supplies, and stabilization in some input prices.

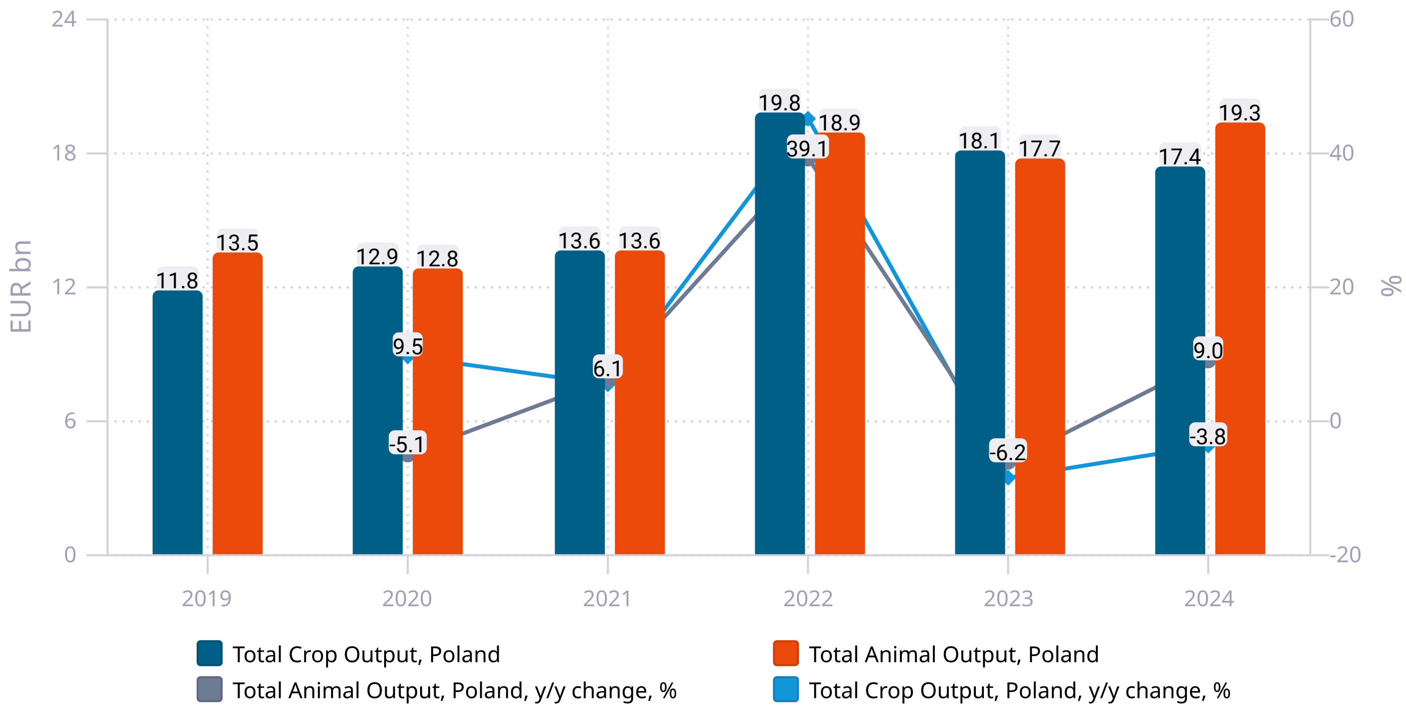
Looking ahead, it is likely that total Polish agricultural output will continue to grow moderately, though without the dramatic jumps seen in 2022. Crop output especially may be constrained by climate volatility, droughts, heat waves, or excessive rainfall around harvest may reduce yields or quality. Input cost pressures (energy, fertilisers) remain a wildcard: If they fall, margins improve; if they stay high, production may be squeezed. Animal output is expected to continue growth, though also subject to disease risk, feed costs, and regulatory constraints (e.g. environmental & sustainability regulations). Overall, average growth in output value may moderate to low single-digit y/y increases unless external price shocks re-emerge.

Total Agricultural Output, Current Prices, EUR bn



Sources: CEIC, Eurostat

Total Crop and Animal Output, Current Prices, EUR bn



Sources: CEIC, Eurostat

Prices

Between 2020-2022, Polish producer prices surged, peaking at around 23.7% y/y in 2022, after a small dip in 2020 (-0.5% y/y). This rise was driven principally by steep increases in input costs: Energy, fuels, fertilisers, and raw materials. The war in Ukraine disrupted energy supply, pushed up global commodity prices, and increased costs of production and transport. These cost-push pressures translated into rapidly rising producer prices. After 2022, producer price indices (PPI) declined from that peak to negative territory (-7.1% y/y in 2024), as energy prices eased, supply chain tensions relaxed, and commodity markets adjusted. PPI of food and beverages mirrored the overall PPI, but with slightly slower movements: It was 23.2% y/y in 2022, then declining to -3.8% y/y in 2024. The delay and moderation reflect that food and beverage producers are buffered somewhat from raw material price swings (through contracts, storage, or gradual pass-through), but still ultimately exposed to energy, feed, transport, and fertiliser cost fluctuations.

Considering Consumer Price Index, data show that food & beverage consumer prices and overall consumer prices exhibited greater volatility than producer prices: CPI overall peaked at 7.2% y/y in 2022, food and beverages at 11.2%, then fell sharply in 2023 (drops of -9.4% and -13.3% respectively), with the rate of decline slowing in 2024. The sharper peaks for consumer food reflect that inflation in inputs (fuel, transport, energy) was passed on to consumers, often more than for industrial goods, and that food items often have less slack in supply side so shortages, bad harvests, weather shocks amplify the consumer side. The decline after 2022 is due to falling energy and fuel prices, improved supply chains, easing of global commodity price shocks, and possibly monetary policy tightening reducing inflationary expectations.

Considering agriculture market price of crops, except 2022, it is visible that price of edible potatoes has always been the highest in the basket of 5 sub-segments (wheat, barley, oats, rye, and edible potatoes). Between 2019-2021, the market price for edible potatoes in Poland (for 100 kgs) dropped from PLN 189 in 2019 to PLN 137 in 2021, reflecting a combination of large harvests and low processing demand. From

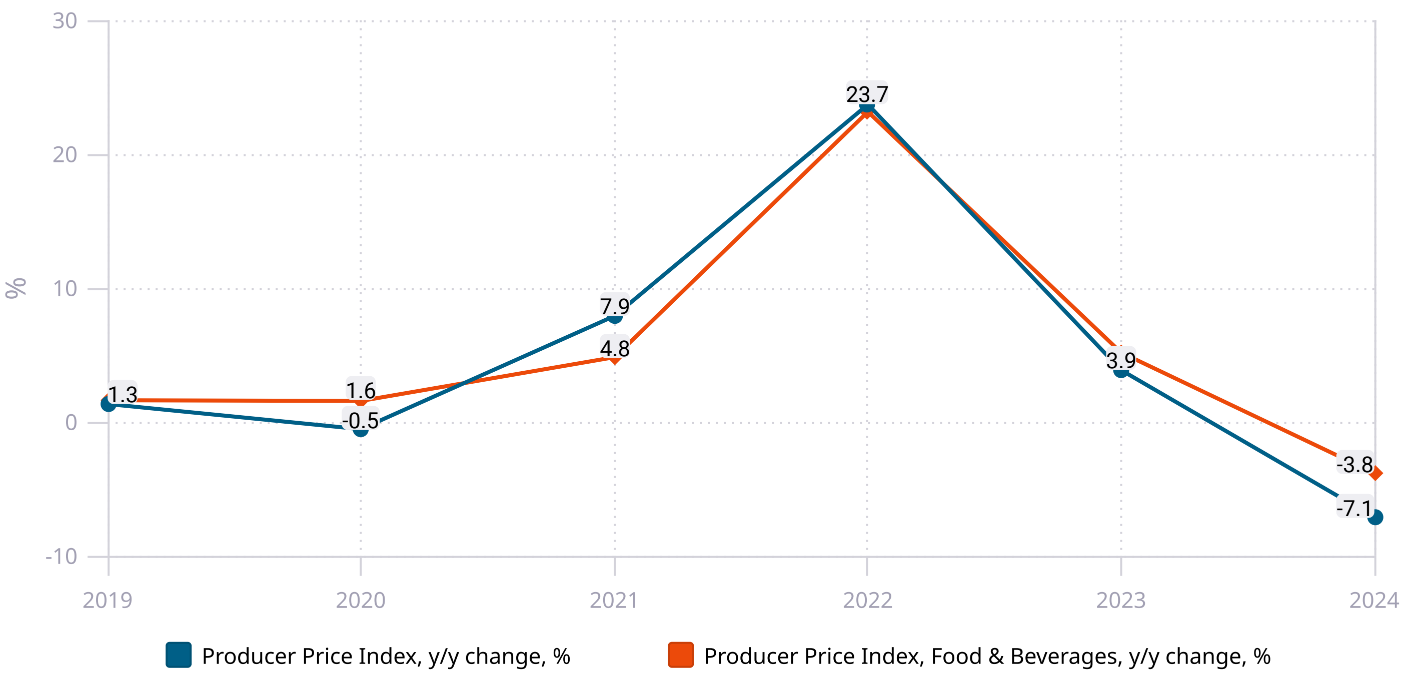
2021 onward, prices climbed steadily, reaching PLN 216 in 2024 primarily driven by tighter supply, elevated input and energy costs, and renewed export interest. According to an article released by Agronomist in July 2024, high price of potatoes (especially since the beginning of 2024) has been a strong incentive for especially small farms to keep growing potatoes.

Animal slaughter market prices (for cattle excluding calves, and pigs) followed broadly increasing trends 2019-2024: Rising feed and energy costs, transport, and disease outbreaks/supply constraints lifted costs.

Sugar production prices rose from PLN 1.8 thousand/tonne in 2019 to PLN 4.4 thousand/tonne in 2023, then dropped sharply by 38% in 2024 to PLN 2.7 thousand/tonne. The drop is likely connected to global sugar market oversupply (good harvests elsewhere, e.g. Brazil, India exporting), easing input cost pressures, exchange rate movements, possibly reduced demand, and competition from imported sugar. Global sugar price indices show downward pressure from large supply in key producer regions and favourable weather in late 2024.

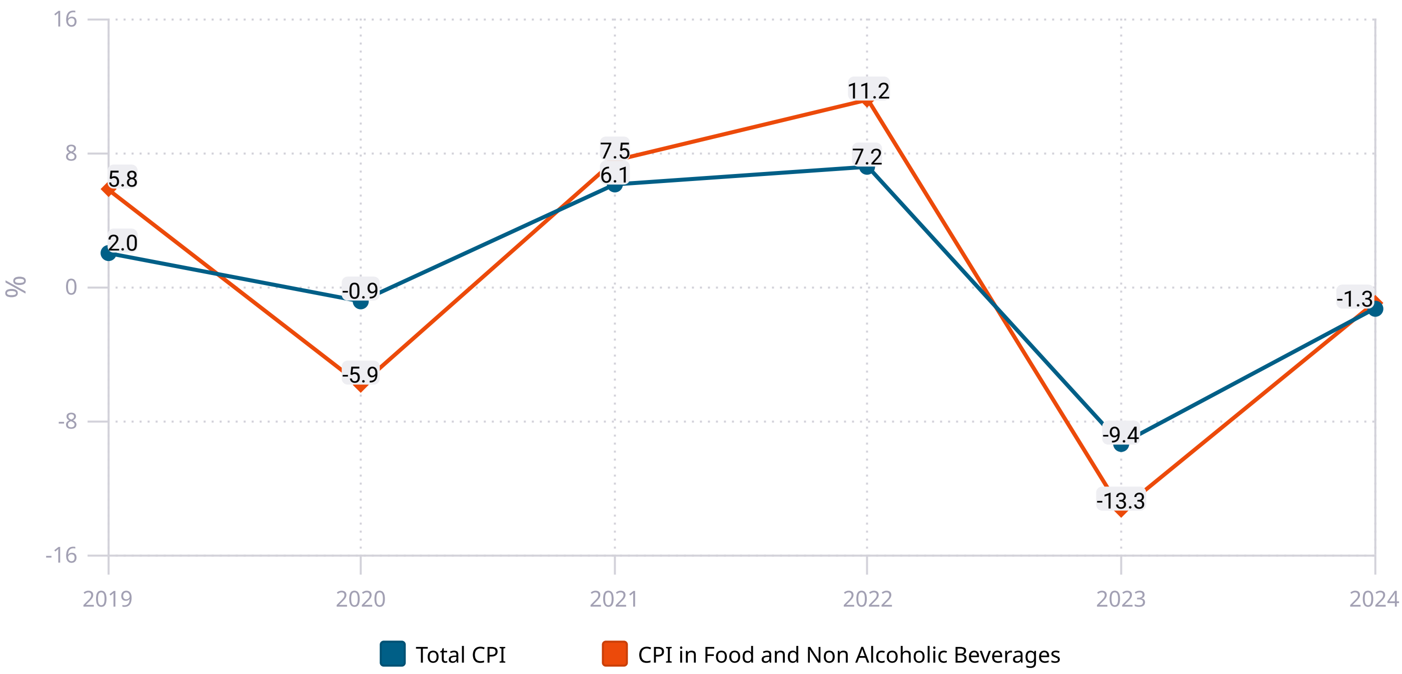
Future price developments in Poland's agribusiness sector are expected to stabilise but remain sensitive to structural and external pressures. Headline inflation is projected to ease gradually, with the OECD forecasting a slowdown to 2.6% in 2026 (European Commission's 2026 projection is 2.8%), before returning closer to the National Bank of Poland's target range by 2026 (2.5%, +/- 1 p.p), assuming no renewed energy price shocks. Food and beverage prices are also expected to moderate, although weather disruptions, transport costs, and global commodity swings could still cause short-term volatility. For specific items, edible potato prices may normalise from their 2024 peak if weather and seed conditions improve, while sugar prices are likely to stabilise at lower levels following the 2024 correction, barring renewed global supply shocks. Market prices for slaughter animals are projected to continue a mild upward trend in 2025, sustained by resilient consumer demand and firm feed costs, though much depends on disease control and input market dynamics. Overall, 2025-2026 is likely to see less volatility than the 2020-2022 period, but pricing risks remain significant across energy-intensive and climate-sensitive segments.

Producer Price Index, y/y change, %



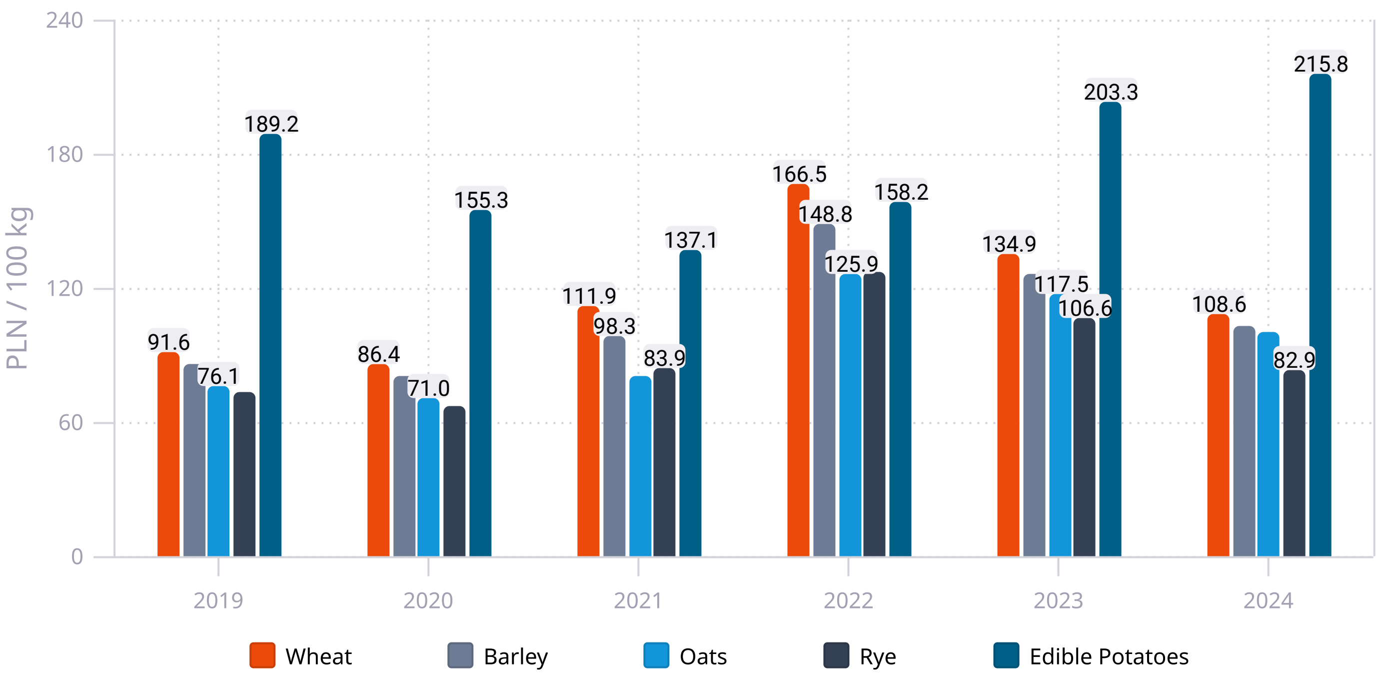
Sources: CEIC, EUROSTAT

Consumer Price Index, y/y change, %



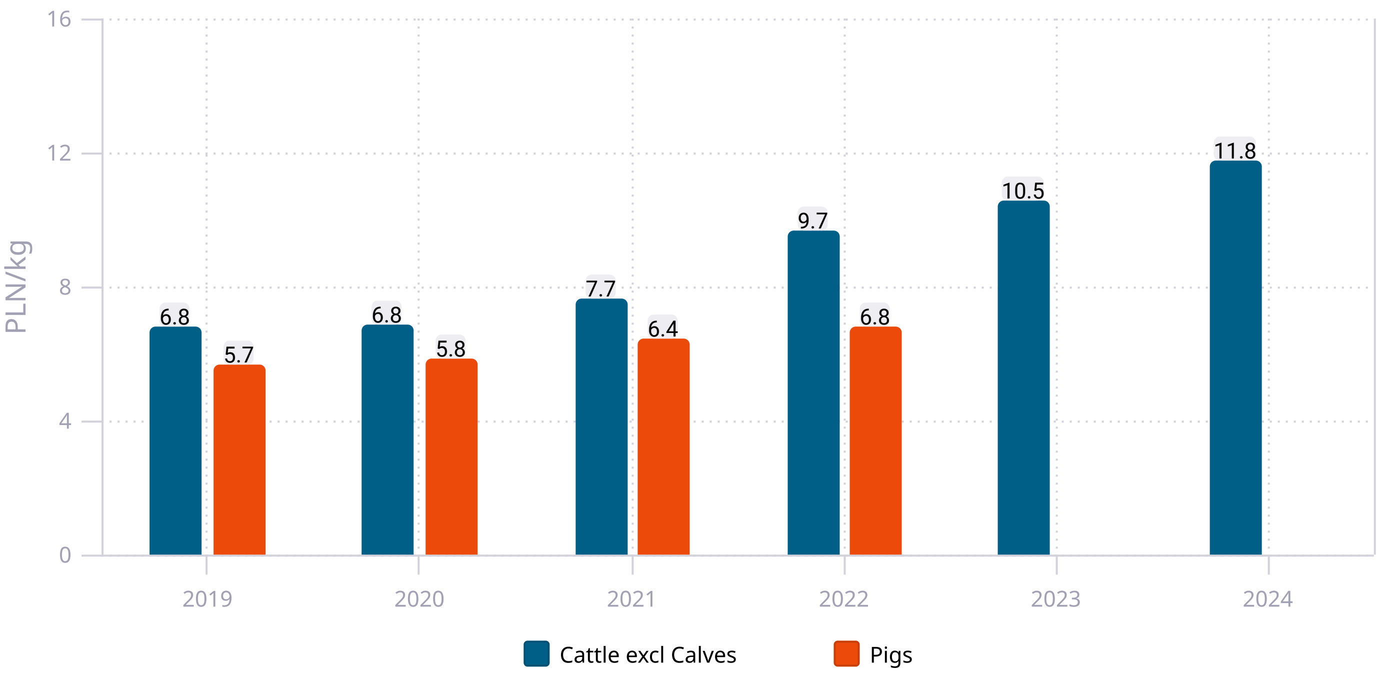
Sources: CEIC, GUS

Agriculture Market Price, Crops, PLN/100kg



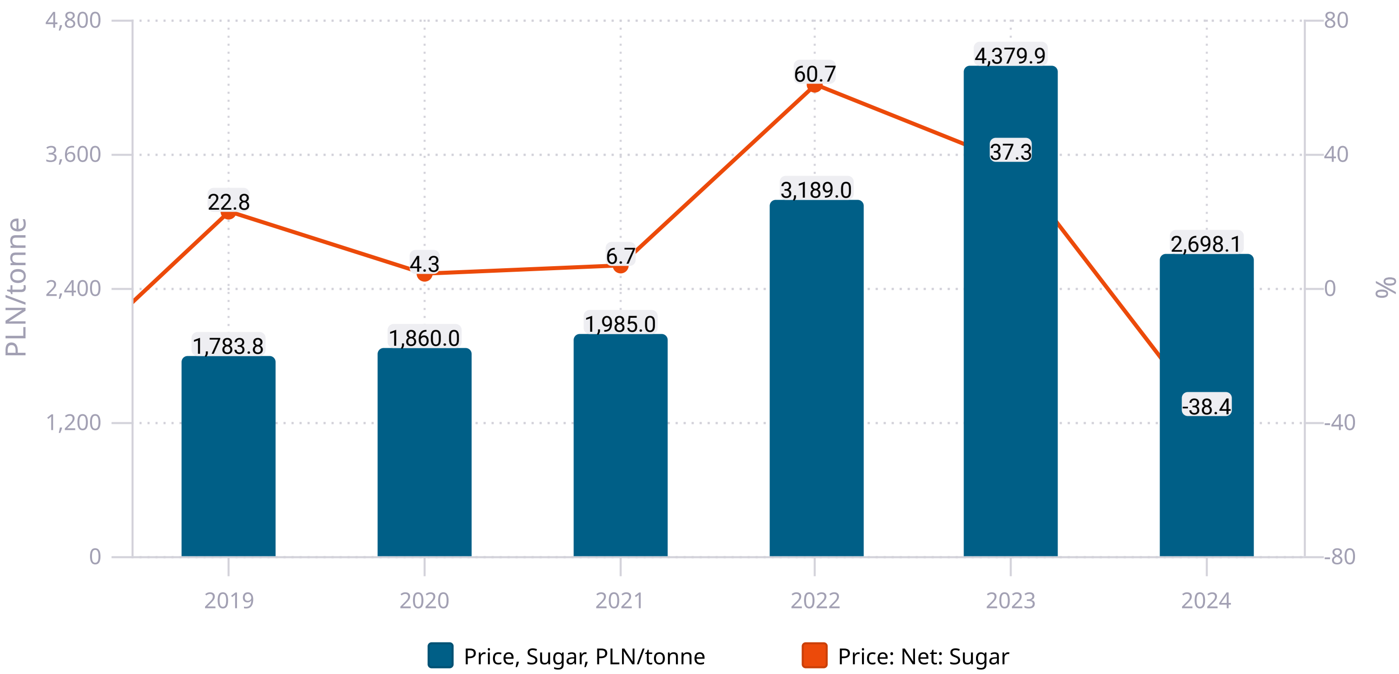
Sources: CEIC, GUS

Agriculture Market Price, Animals for Slaughter, PLN/kg



Sources: CEIC, GUS

Producer Price, Sugar, PLN/tonne



Sources: CEIC, MRiRW

Regional Positioning

Between 2019-2024, Poland has emerged as one of the strongest agribusiness players in the EU, especially in raw agricultural outputs. In the EU, Poland ranks high in livestock (beef, pigmeat, poultry), crop (cereals, oilseeds, barley), fruit & vegetable, sugar, and fertiliser production. Its leading positions are due to a combination of large agricultural land base, relatively favourable climate for cereals/oilseeds, intensive livestock farming infrastructure, and substantive public and EU CAP investment in modernising farms.

Poland's position in livestock segments seems promising in 2024. Its pigmeat production reached 1.9 million tonnes, placing it 4th in the EU, up 7.7% y/y, as well as beef production of 0.64 million tonnes puts it 5th with a large rise (23.7%, y/y). Poultry is especially strong: Poland leads the EU with 5.8 million tonnes of poultry production as of 2024, with a growth of 4.7% y/y. These strengths derive from established feed industries, relatively low-cost labour (compared to Western Europe), strong integration of poultry and pork sectors, and feed grain availability from its large cereal/oilseed production.

In crop segments, Poland is among top producers: 35 million tonnes of cereals and 3.4 million tonnes of oilseeds were produced in 2024 (3rd in the EU for both). Barley production is also strong (3 million tonnes, 5th place), which is well-suited to regions with mixed farming and brewing demand. Fruit and vegetable production is also high (3rd in EU) but showing volatility and recent declines (-8.3% y/y), likely due to adverse weather (droughts, late frosts), rising input costs, and labour shortages. Sugar production (2.3 million tonnes, 3rd in EU) benefits from favourable beet yield zones and strong domestic processing capacity. Fertiliser production is another strong pillar, which is very important for the agribusiness industry: Poland is 2nd largest fertiliser producer in the EU (4.5 million tonnes in 2024), supported by domestic mineral resources, investment in chemical fertiliser plants, and demand from its large agricultural sector.

Despite being the leader in many CEE metrics, Poland's share of total EU agricultural output value remains stable at around 6-7% between 2019-2024 (output of EUR 37.8bn for Poland vs total EU agricultural output of EUR 532.4bn, in 2024). This relative constant share reflects both Poland growing in absolute terms, but similar growth also occurring in other large EU agricultural states. Crop output in Poland (EUR 17bn in 2024) places it 6th in EU, but among CEE countries it leads; animal output (EUR 19bn) is even stronger comparatively, again leading CEE. These strengths are underpinned by favorable land availability, economies of scale (especially in animal production), CAP subsidies, and increasing mechanisation.

Looking forward, Poland is likely to maintain strong leadership in livestock and animal output in the EU, due to continuing investments in genetics, scale, feed chain improvements, and export orientation. However, crop output may face more variability: Climate risk (extreme weather, droughts) may weigh on fruit & vegetable yields and sugar beet output, particularly if input cost inflation (energy, fertiliser) remains volatile. Also, Poland's fertiliser industry may see both opportunities and challenges: Strong demand domestically will support capacity usage, but higher environmental and regulatory constraints (EU Green Deal, nitrogen/pollution regulation) might force modernisation or limit some production modes. Thus, while Poland will likely sustain its lead in many raw agricultural segments, growth rates may moderate, and comparative strengths may shift slightly depending on climate and regulation.

Top 10 EU Countries by Beef Production, 2024

Ranking	Country	Production, mn tonnes	y/y change
1	France	1.30	-0.2%
2	Germany	1.01	1.2%
3	Spain	0.72	3.0%
4	Italy	0.66	6.3%
5	**Poland**	**0.64**	**23.7%**
6	Ireland	0.60	0.5%
7	Netherlands	0.43	-0.9%
8	Belgium	0.25	3.8%
9	Austria	0.20	-0.5%

10	Sweden	0.14	0.9%

Source: Eurostat

Top 10 EU Countries by Fruit & Vegetable Production, 2024

Ranking	Country	Production, mn tonnes	y/y change
1	Italy	11.5	2.0%
2	Spain	11.4	-12.7%
3	**Poland**	**4.6**	**-8.3%**
4	France	3.9	1.6%
5	Greece	3.7	7.7%
6	Netherlands	1.5	5.5%
7	Portugal	1.2	0.8%
8	Germany	1.2	-4.5%
9	Romania	1.1	-11.0%
10	Others	2.8	-8.5%

Source: Eurostat

Top 10 EU Countries by Pigmeat Production, 2024

Ranking	Country	Production, mn tonnes	y/y change
1	Spain	5.0	1.7%
2	Germany	4.3	1.9%
3	France	2.1	1.5%
4	**Poland**	**1.9**	**7.7%**
5	Netherlands	1.4	-5.2%
6	Denmark	1.3	2.7%
7	Italy	1.2	3.2%
8	Belgium	0.9	1.7%
9	Austria	0.5	0.8%
10	Others	2.5	1.9%

Source: Eurostat

Top 10 EU Countries by Sugar Beet Production, 2024

Ranking	Country	Production, mn tonnes
1	France	4.2
2	Germany	4.2
3	**Poland**	**2.3**
4	Netherlands	1.1
5	Denmark-Finland	0.7
6	Belgium	0.7
7	Czech Republic	0.6
8	Austria	0.4
9	Spain	0.4
10	Others	0.9

Source: Eurostat

Top 10 EU Countries by Poultry Production, 2024

Ranking	Country	Production, mn tonnes	y/y change
1	**Poland**	**5.8**	**4.7%**
2	Spain	3.5	4.5%
3	France	3.4	11.3%
4	Germany	3.1	-1.8%
5	Italy	2.8	3.8%
6	Netherlands	1.7	-1.1%
7	Romania	1.1	6.7%
8	Hungary	1.1	4.6%
9	Belgium	1.1	25.0%
10	Others	4.0	5.0%

Source: Eurostat

Top 10 EU Countries by Oilseeds Production, 2024

Ranking	Country	Production, mn tonnes	y/y change
1	France	5.8	-14.9%
2	Germany	3.9	-13.7%
3	**Poland**	**3.4**	**-11.8%**
4	Romania	3.0	-28.2%
5	Hungary	2.5	-9.8%
6	Bulgaria	1.8	-10.5%
7	Italy	1.4	-0.4%
8	Spain	1.1	8.2%
9	Czech Republic	1.1	-25.4%
10	Others	4.1	-8.7%

Source: Eurostat

Top 10 EU Countries by Barley Production, 2024

Ranking	Country	Production, mn tonnes	y/y change
1	Germany	10.6	-3.5%
2	France	9.7	-19.8%
3	Spain	7.7	105.8%
4	Denmark	3.1	23.6%
5	**Poland**	**3.0**	**3.8%**
6	Romania	2.7	34.1%
7	Czech Republic	1.7	-5.3%
8	Hungary	1.6	-29.0%
9	Ireland	1.3	4.0%
10	Others	9.1	4.0%

Source: Eurostat

Top 10 EU Countries by Cereal Production, 2024

Ranking	Country	Production, mn tonnes	y/y change
1	France	54.2	-16.6%
2	Germany	39.3	-7.6%
3	**Poland**	**35.0**	**-2.4%**
4	Spain	20.0	77.9%
5	Romania	19.8	-4.5%
6	Hungary	12.9	-15.0%
7	Italy	12.5	-9.8%
8	Bulgaria	9.6	-3.2%
9	Czech Republic	7.5	-5.9%
10	Others	45.1	-2.6%

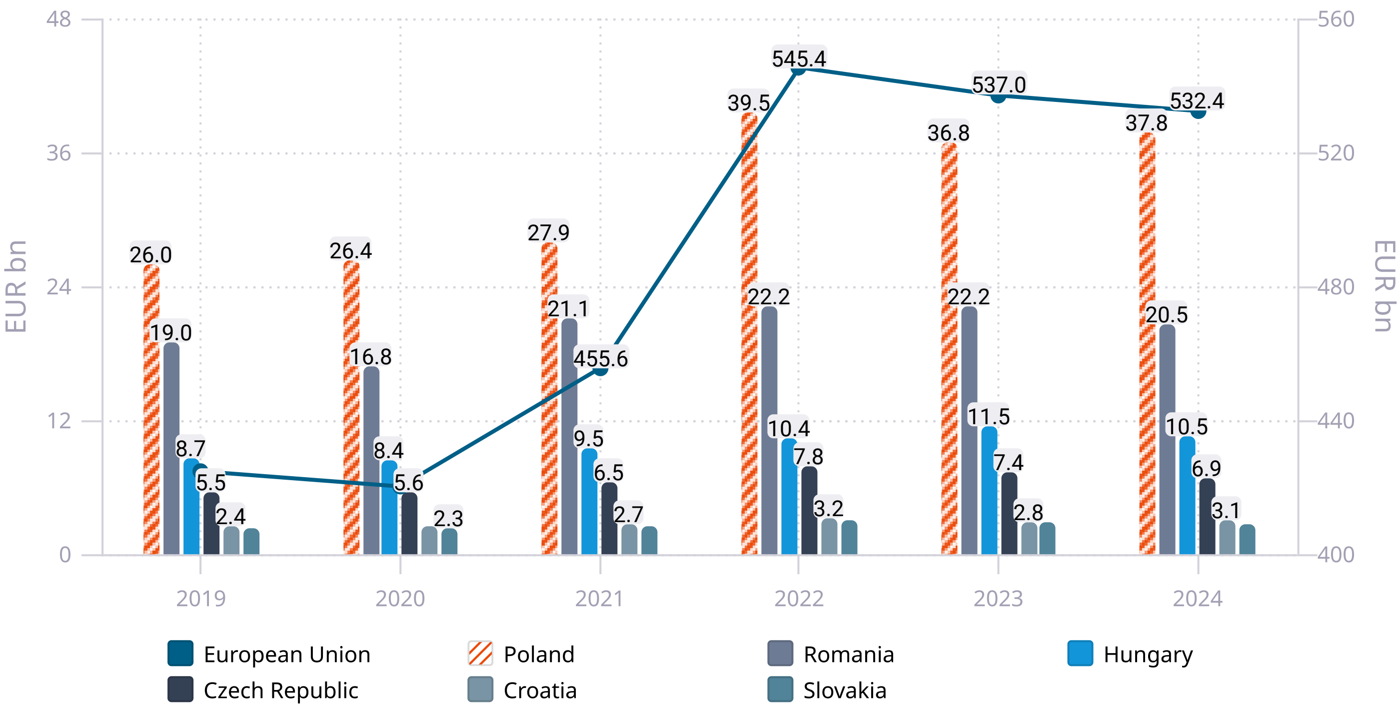
Source: Eurostat

Top 10 EU Countries by Fertiliser Production, 2024

Ranking	Country	Production, mn tonnes	y/y change
1	France	4.63	-9.6%
2	**Poland**	**4.52**	**9.9%**
3	Germany	3.97	1,418.0%
4	Spain	3.88	-21.7%
5	Belgium	3.32	-12.7%
6	Lithuania	2.00	42.3%
7	Italy	1.63	-17.6%
8	Slovakia	1.33	14.9%
9	Portugal	0.99	438.3%
10	Others	3.77	-59.7%

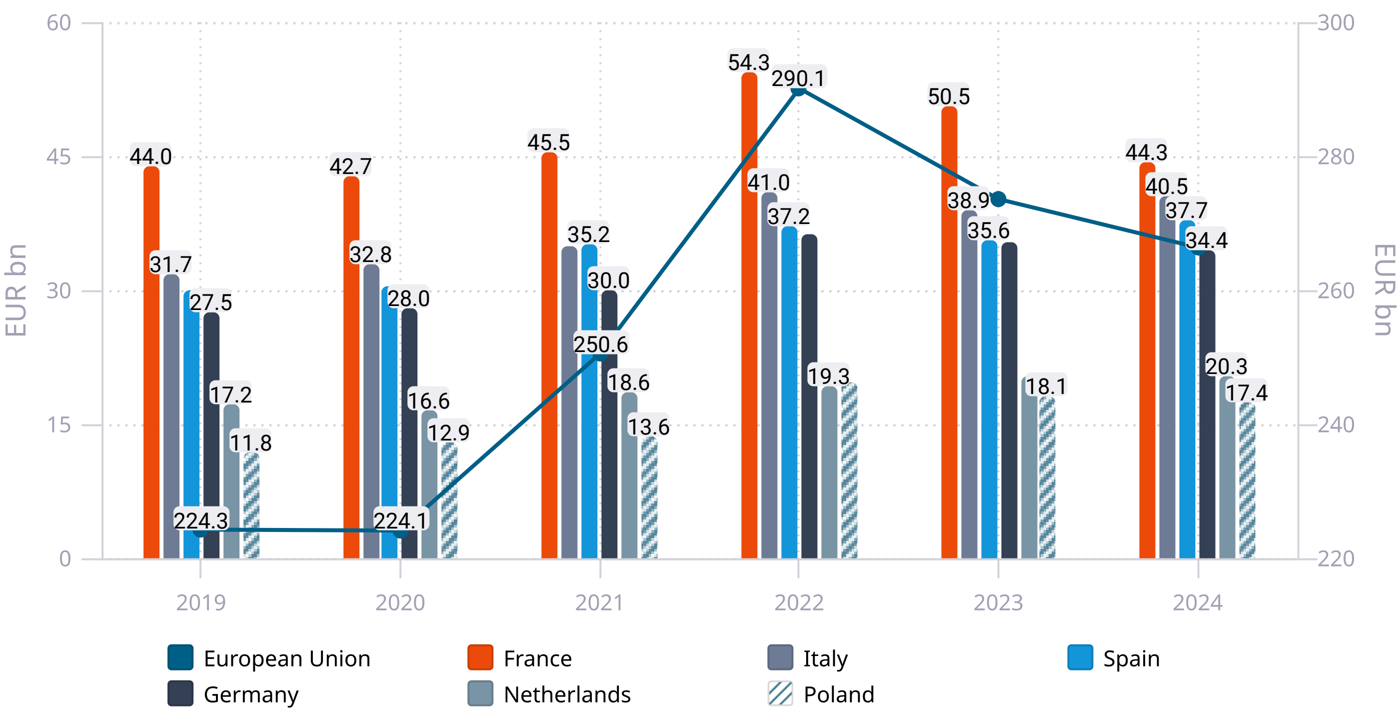
Source: Eurostat

Total Agricultural Output, EUR mn



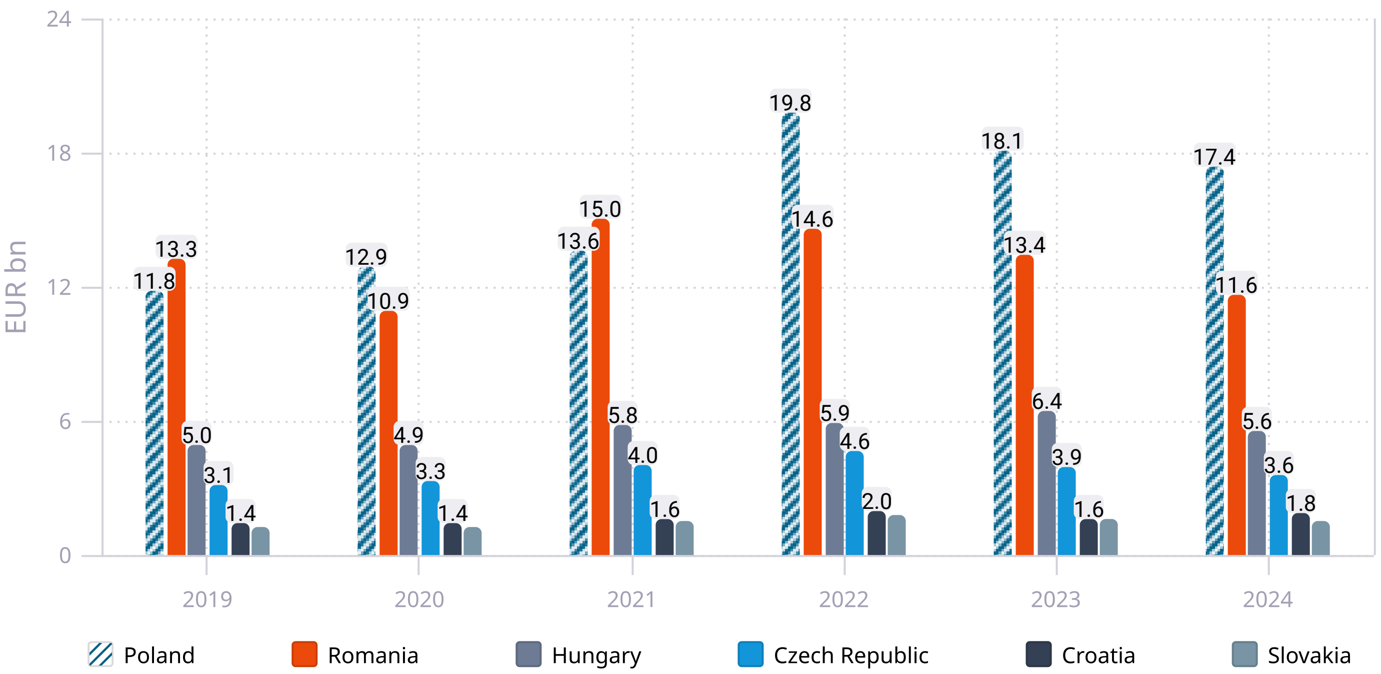
Sources: CEIC, Eurostat

Total Crop Output in the EU, EUR bn



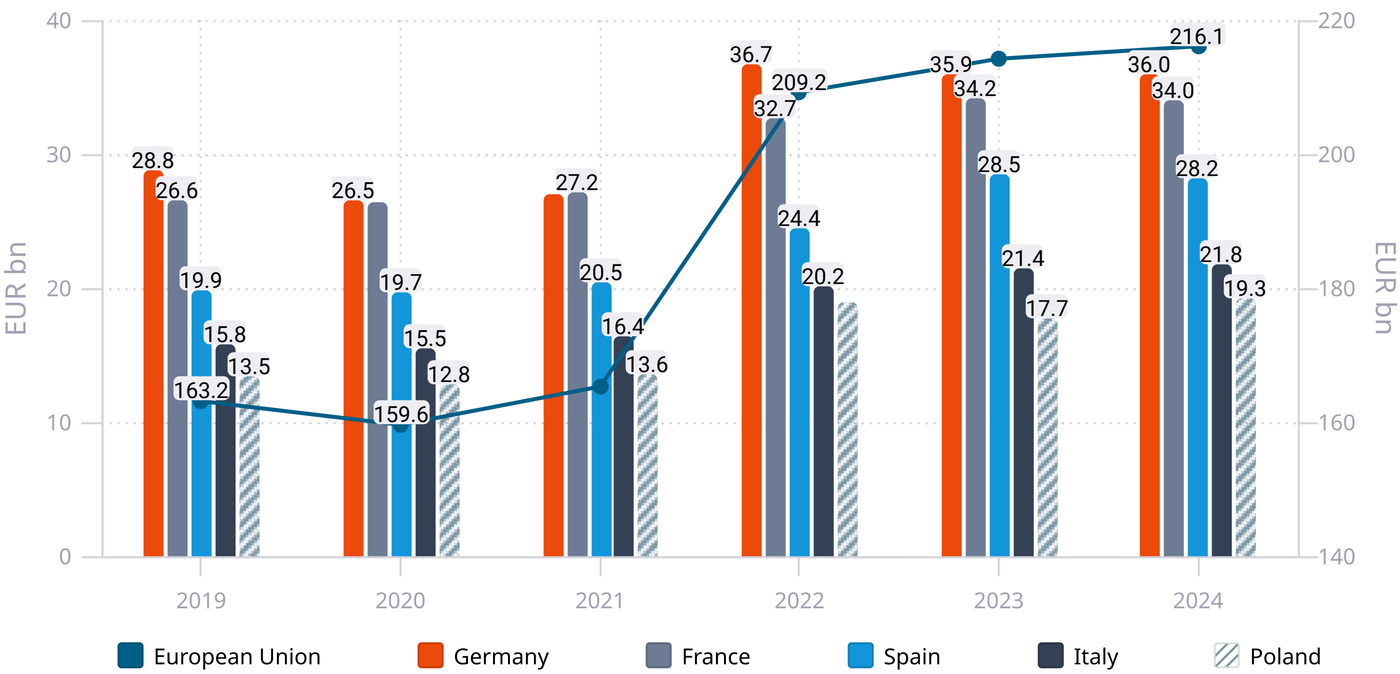
Sources: CEIC, Eurostat

Total Crop Output in CEE, EUR bn



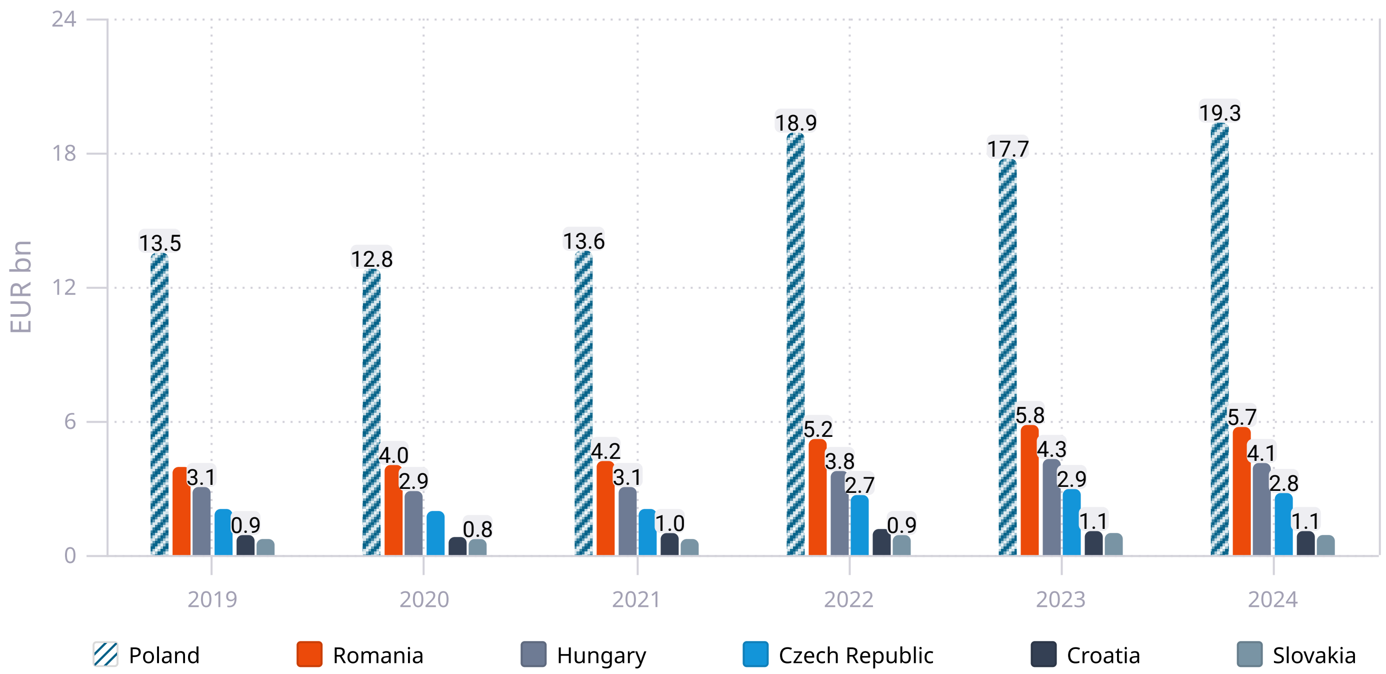
Sources: CEIC, Eurostat

Total Animal Output in the EU, EUR bn



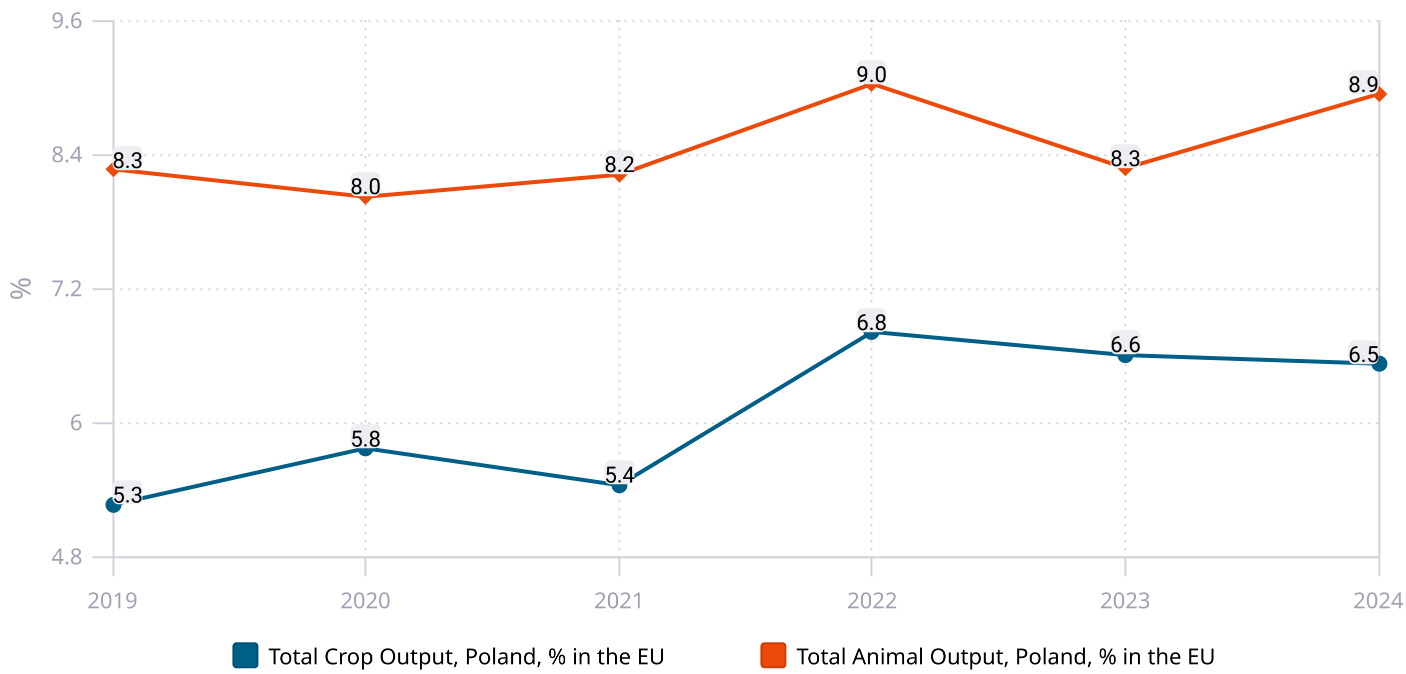
Sources: CEIC, Eurostat

Total Animal Output in the CEE, EUR bn



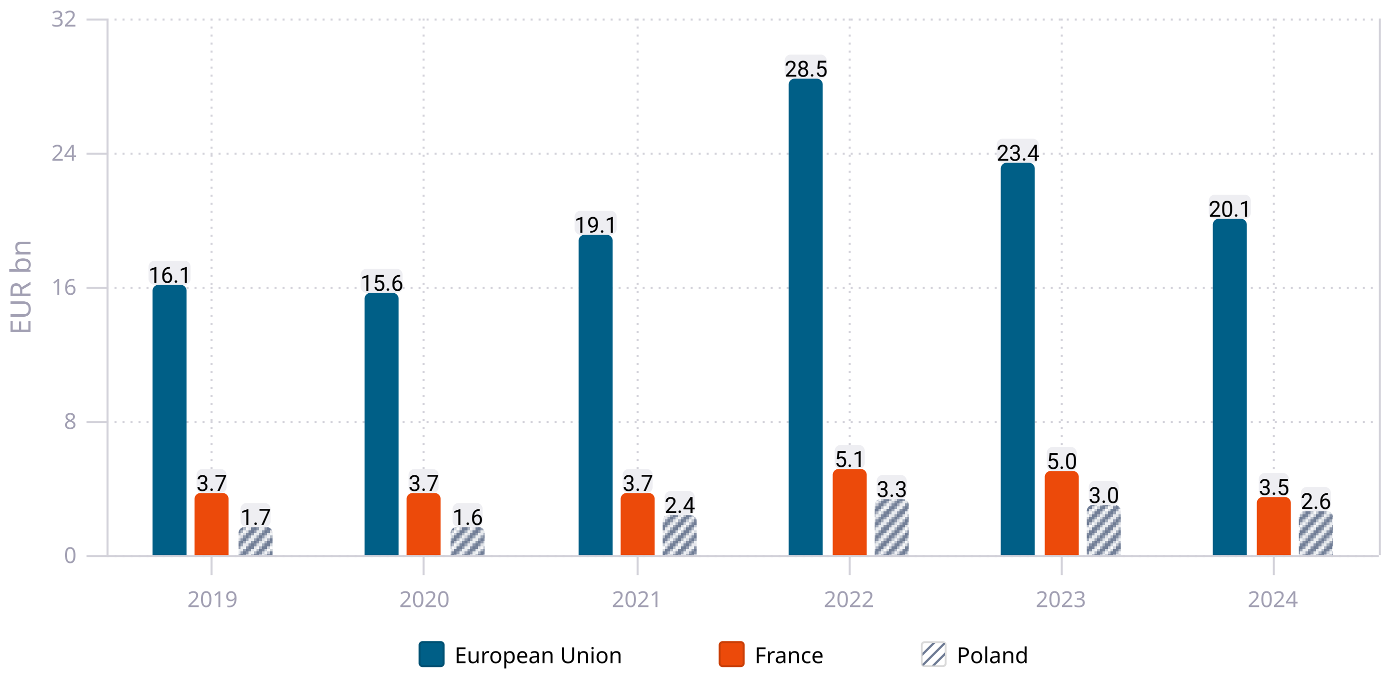
Sources: CEIC, Eurostat

Agricultural Output of Poland, % in the EU



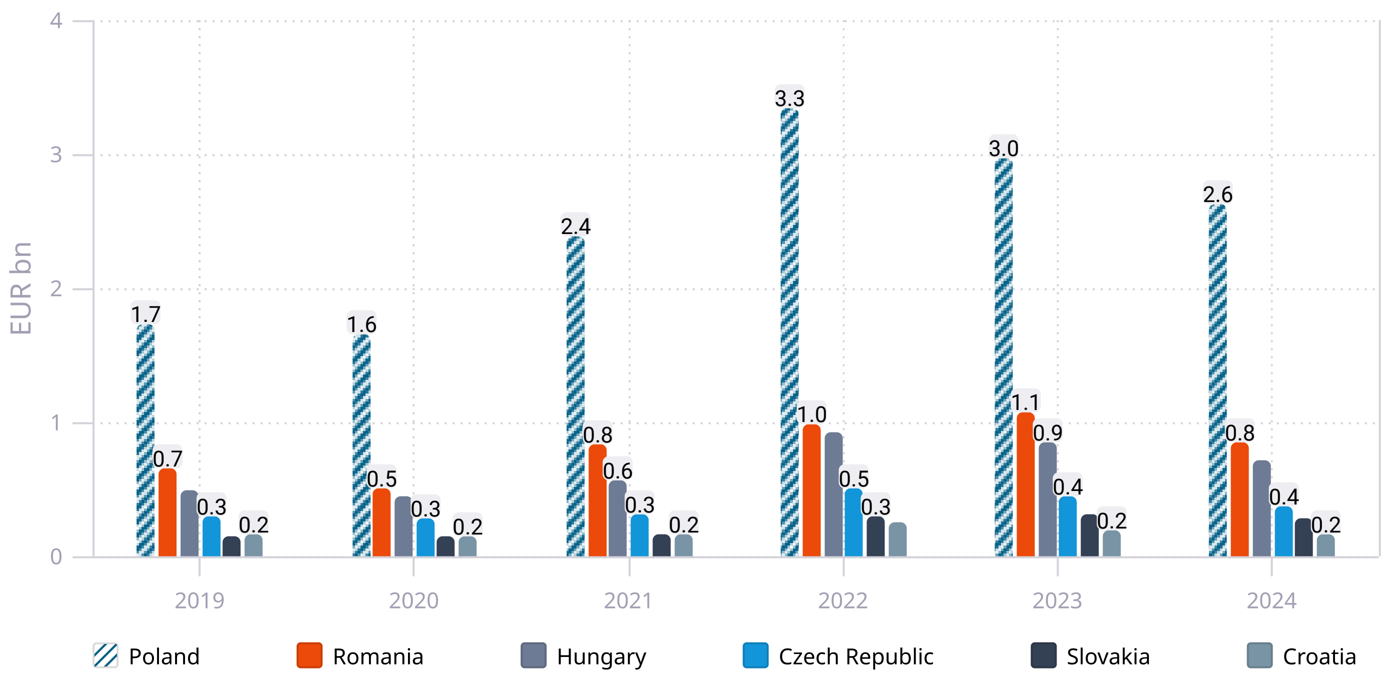
Sources: CEIC, Eurostat

Total Fertiliser Production in the EU, EUR bn



Sources: CEIC, Eurostat

Total Fertiliser Production in the CEE, EUR bn



Sources: CEIC, Eurostat

External Trade

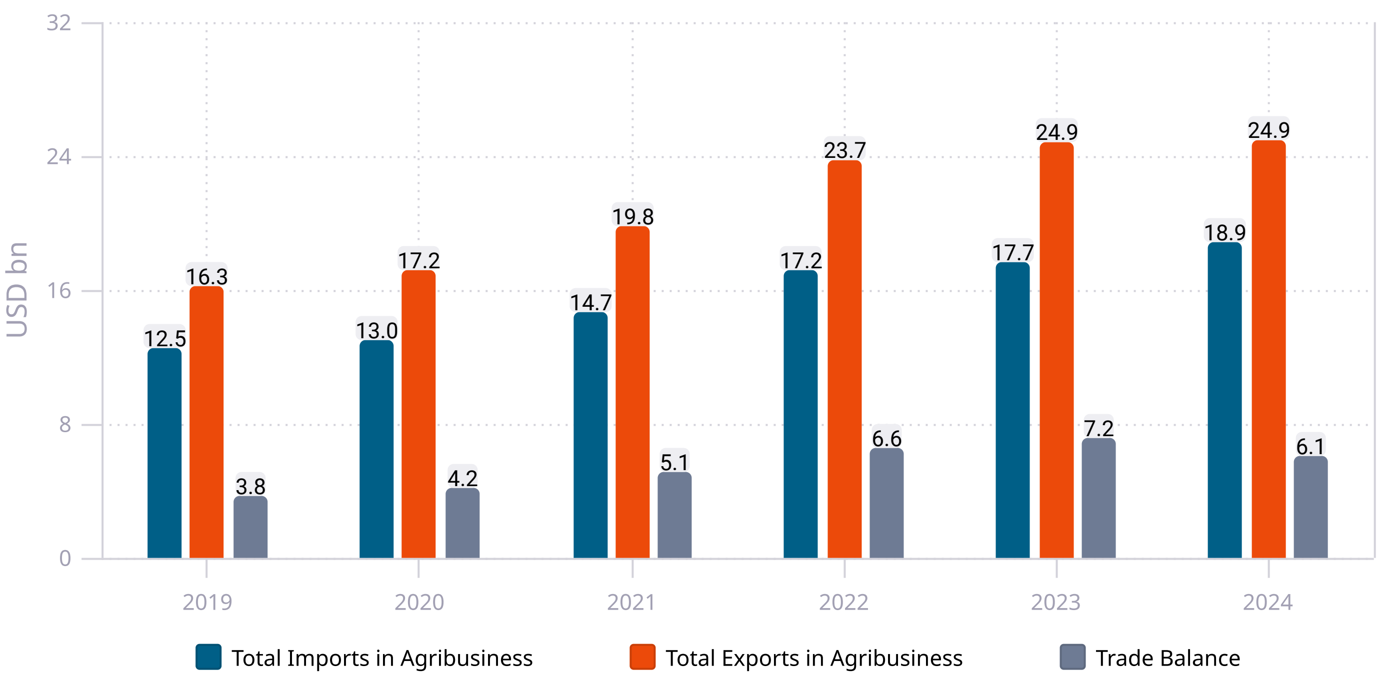
Between 2019-2024, Poland's agribusiness sector was a consistent net exporter: Exports rose from USD 16.3bn in 2019 to USD 24.9bn in 2024, at a CAGR 8.8%, while imports climbed from USD 12.5bn to USD 18.9bn, at a CAGR 8.6%. As a result, trade surplus expanded steadily up through 2023, reaching to USD 7.2bn, but narrowed in 2024 to USD 6.1bn. The dip in 2024 is largely due to stronger growth in imports relative to exports: Rising input goods (animal feed, fertilisers, seeds) and energy-related dependencies pushed import bills up, while export value increases slowed somewhat due to weaker commodity price inflation and exchange rate pressures that made Polish goods less competitive abroad.

Imports in agribusiness made up between 4.3-5.0% of Poland's total imports over 2019-2024, with a small upward trend between 2021-2024. This reflects growing reliance on imported inputs (especially higher-quality or speciality feed, processed fertiliser components, seeds, and imported machinery equipment used in agricultural production) parts of which Poland does not produce domestically or at scale. Meanwhile, agribusiness exports constituted roughly 5.8-6.5% of total exports, showing that agribusiness is an important but not dominant sector in Poland's trade mix, benefiting from strong external demand of Polish agribusiness products, especially in EU neighbour states.

Countrywise, Germany in particular is Poland's top partner for agribusiness: In 2024 it accounted for 20.7% of Poland's agribusiness imports and 24.1% of agribusiness exports. This reflects geography (proximity and low transport costs), long-established trade linkages (supply chains, processing, feed inputs), and high demand in Germany for Polish products (as well as Polish needs for German machinery, fertilisers, seeds etc.). Also, EU internal market rules, common standards, and trade facilitation help reduce non-tariff barriers in trade with Germany.

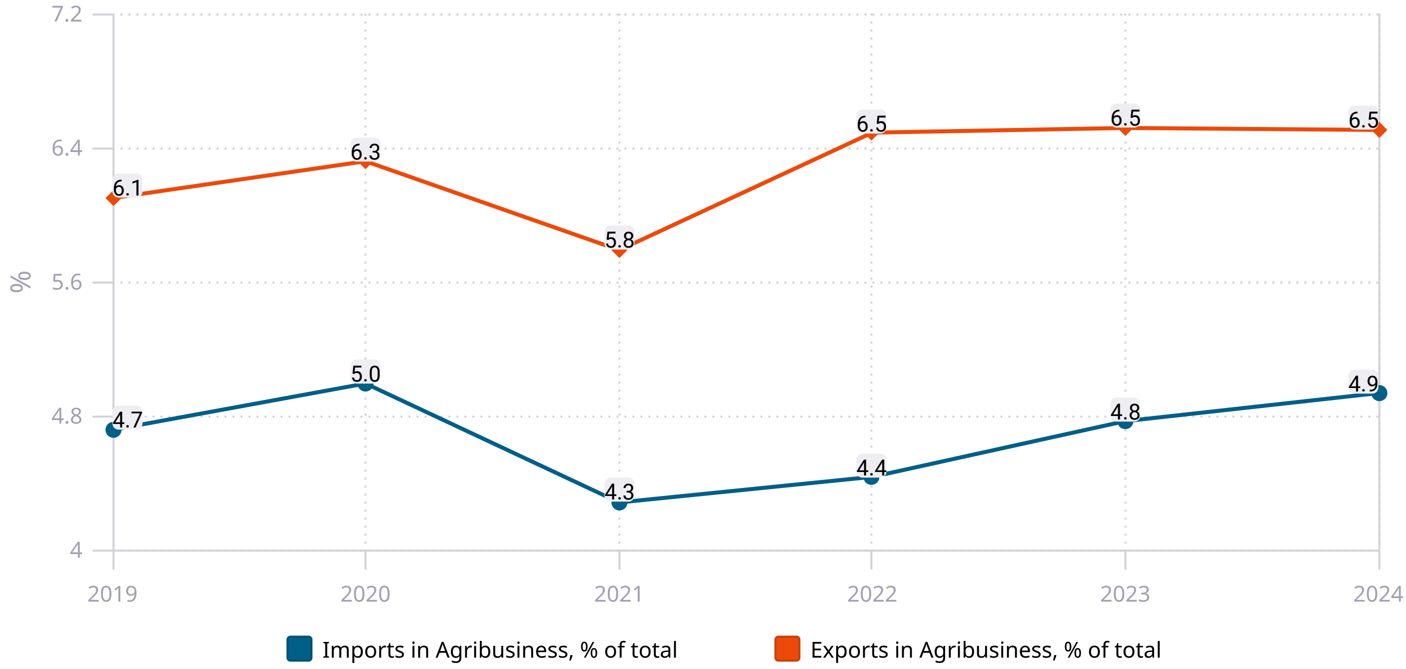
Looking ahead, Poland's agribusiness trade balance is likely to remain positive but may fluctuate. Exports might face headwinds from slowing global commodity price inflation and potential currency appreciation, reducing competitiveness. On the other hand, import costs (feed, energy, fertilisers) may remain elevated in the short term, eroding margins or leading to larger import bills. Germany will likely stay a dominant trade partner, but Poland may seek to diversify export destinations (e.g. in Asia, Middle East, neighbouring non-EU countries) to cushion against demand or regulatory shifts. Also, shifts in EU policy (green deal, sustainability standards) may raise compliance costs for exports, potentially reducing volumes or pushing goods towards higher value-added or niche products.

External Trade in Agribusiness, USD bn



Sources: CEIC, ITC

Imports and Exports in Agribusiness, % in Total



Sources: CEIC, ITC

Agricultural Products Import Share by Countries, 2024

Country	Share
Germany	20.7%
Netherlands	9.2%
Italy	6.2%
Spain	5.7%
Denmark	4.9%
Ukraine	4.8%
France	4.4%
Belgium	4.1%
Brazil	3.2%
Czech Republic	2.8%
Others	34.1%

Source: ITC

HS Codes: 01 to 14

Agricultural Products Export Share by Countries, 2024

Country	Share
Germany	24.1%
United Kingdom	8.5%
France	6.0%
Netherlands	5.7%
Czech Republic	4.8%
Italy	4.7%

Spain	3.5%
Hungary	2.8%
Romania	2.6%
Belgium	2.4%
Others	34.9%

Source: ITC

HS Codes: 01 to 14

Agricultural Products Import Share by Segments, 2024

Country	Share
Fish and crustaceans	17.6%
Fruit and nuts	16.6%
Meat	12.6%
Dairy products	10.5%
Vegetables	9.0%
Coffee and tea	8.3%
Live animals	7.4%
Oilseeds	5.4%
Others	12.6%

Source: ITC

HS Codes: 01 to 14

Agricultural Products Export Share by Segments, 2024

Country	Share
Meat	35.5%
Dairy products	16.5%
Fish and crustaceans	10.4%
Cereals	10.0%
Vegetables	7.7%
Fruit and nuts	7.0%
Coffee and tea	3.9%
Oilseeds	2.8%
Others	6.0%

Source: ITC

HS Codes: 01 to 14

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Automotive	+	+	+	+		+			+	+	+	+	+	+	+	
Banking	+	+	+	+	+	+	+	+		+	+	+	+			+
Cement	+	+														
Chemical	+	+		+									+			
Consumer Electronics		+		+			+	+								
Consumer Goods and Retail	+	+	+		+	+	+			+	+		+			
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