

COMPETITIVE ADVANTAGES OF POLISH FOOD PRODUCERS ON THE EUROPEAN UNION MARKET IN THE POST-ACCESSION PERIOD

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ABSTRACT

Processes and phenomena that appear within world economy result in the increase of competition on lots of markets, including the food markets. This competition is won by the entities, sectors and countries that possess the advantages which create their competitiveness. Different types of food producers' competitive advantages may be identified. Mostly pointed out are price advantages and quality advantages. The aim of this paper is to identify the sources of competitive advantages of Polish food producers on the European Union market that appeared within the period 2004–2016. The analysis covered 26 groups of products which were selected according to their significance for Polish agri-food export. The long-term observation let the Authors identify the dominating strategies of competing which were implemented by Polish food producers on the European Union market. Analysis was conducted with the Aiginger's price-quality approach and was based on the data available within Eurostat Comext database.

Key words: competitiveness, competitive advantages, agri-food sector, food producers, agri-food trade, price-quality method, Aiginger's method

INTRODUCTION

The progressing globalization brings a wide range of challenges for different entities operating on the market, including food producers. Within the conditions of trade liberalization leading to strengthening the economic rivalry the role of ensuring the food producers' competitiveness is increasing on both international and internal markets.

The concept of competitiveness, although it appeared in the literature relatively not far ago, became an important part of many areas of economic sciences. As a consequence of its multidimensionality there is no generally accepted definition of competitiveness. Generally we can define competitiveness after OECD as the degree to which a nation can, under free trade and fair market conditions, produce goods and services which meet the test of international markets, while simultaneously maintaining and expanding the real income of its people over the long-term [Rytko 2016]. Competitiveness can be a result of different characteristics of an entity known as advantages, which in the economic rivalry let it reach bigger gains than those reached by its rivals. Their sources can be price as well as other factors, and as a result we can distinguish price and non-price competitiveness, including quality competitiveness.

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Price competitiveness is indirectly explained by the lower costs of production in a given country and as a result it is a dominating way of competing conducted by less developed countries in international markets [Zawiślińska 2003]. The increase of export's price competitiveness does not always confirm the improvement of country's competitive capability [Bossak 1984]. Similarly, the loss of price competitiveness does not have to lead to the loss of competitive capability, especially in the era of new technology. There exists a non-price competitiveness which is chained to the changes in the global economy (i.e. internationalization of economic processes, globalization etc.). One of its most important sources is quality competitiveness. This form of competition is typical for the most developed countries and wealthy markets. What is more, it is getting more and more important ways of competing [Grębowiec 2009].

Competitiveness is chained to the term of comparative advantages, although these terms does not mean the same. Competitiveness is definitely wider term that takes into account the market distortions which are not included by the comparative advantage [Frohberg and Hartmann 1997, Frohberg 2000]. What is more, the term of comparative advantage can be defined according to two widely accepted approaches: in the Ricardian way (it is sourced by the profitability of export of selected products in comparison to other products and countries on internal and external market at the same time) and in the Balassa way (the basic criterion is the export size in a given branch in comparison to other branches and other countries, so-called ability to sell) [Guzek and Biskup 2001]. Comparative advantages in the Balassa sense can be equated to competitive advantages [Misala 2011]. The source of competitive advantage of a given country's economy or sector is its strength in relation to the international competitors being the suppliers of certain goods both on international and internal markets [Wysokińska 1995]. Competitive potential of a given entity being a source of competitive advantages influences its competitive position, too. In general, as a competitive position we can understand a result of competing of an entity in a defined period of time [Gorynia 2010].

Competitive position under wide range of economic and extra-economic factors can change and it definitely needs activities oriented on its maintaining and improvement. This is why its permanent monitoring is needed, also under the conditions of European Union (EU) membership.

Jasiński [2007] noticed that the accession to the EU does not diminish the need of activities oriented on building the international competitiveness understood as an ability to maintain and improve the existing market position of a country or a defined commodity supplied by this country. Changes in the world economy making the competitive rivalry stronger, such as technological progress and widening liberalization of trade, make this problem especially important from the point of view of national economies and the integration groups [Zawiślińska 2003]. Szymański [1996] saw the accession to the EU as a reason for paying special attention to the issue of competitiveness of Polish economy. In his opinion including Poland into the rules of European single market was tantamount to the need of conducting necessary analyses of "real competitiveness" which decides on the country's share in the supply of certain good and is equivalent to the need of being competitive on both internal and foreign market.

Under the conditions of liberalizing world trade and increasing number of bilateral trade agreement competitiveness gains even more significant meaning. What is more, maintenance of competitiveness can become harder, mostly in the branches characterized by low level of technological advancement. This means that in the future some branches and sectors will not be able to gain the profits from export specialization which is reserved exclusively for the areas in which a certain country is competitive [Jagiello 2007].

The aim of presented paper is the determination of competitive advantages Polish food producers within EU market in the post-accession period. To fulfill the defined objective Authors used so-called the price-quality method. The timespan covered years 2004–2016. The conducted analysis was based on the data available within Comext Eurostat database.

RESEARCH METHODS

Among lots of methods used to evaluate the competitive positions of producers on foreign markets, Authors in this research chose price–quality method developed by Aiginger [1998]. This method was previously used in works on competitive advantages conducted, i.e. by Guzek [1999], Gehlhar and Pick [2002], as well as Bojnec and Fertö [2009].

The following method is based on the assumption that for the homogenous products unit prices express the costs of production. As a result countries gaining lower costs of production should be net exporters, while countries with higher unit costs should be net importers of following homogenous products. Each situation in which a country gains higher unit prices in export in comparison to import and is still a net exporter of a given product must prove the existence of quality differences [Aiginger 1998]. As a result competitive position will be fixed as a resultant of relation of export prices and import prices as well as the quantitative trade balance concerning a certain product.

According to Aiginger, the successful strategy of quality competition is the most desirable way of competing on international markets. On the other hand the unsuccessful strategy of price competition is the most undesirable way of competing – sectors in which this strategy dominated Aiginger called hopeless sectors.

The groups of commodities selected for the analysis were compiled according to the quantitative trade balance and relations of prices in export and import. The way of grouping them was presented in Table 1. Because of the 13-year long timespan, the results were ranked with points from the most desirable to the least desirable way of competing:

- successful strategy of quality competition – 3 points;
- successful strategy of competition by lower price – 2 points;
- potentially successful strategy of quality competition – 1 point;
- unsuccessful strategy of competition by lower price – 0 points.

On the basis of the received results of ranking the mean for each product was calculated. This step allowed Authors to identify the dominating strategies implemented by Polish food producers on EU market in the whole analyzed period. The border values that were used for ranking the products were presented in Table 1.

Table 1. Identification of competitive advantages of Polish food producers utilizing price–quality method

Factor	Relation of prices in export to prices in import above or equal to 1	Relation of prices in export to prices in import below 1
Quantity trade balance above or equal to 0	successful strategy of quality competition (from 2.51 to 3)	successful strategy of competition by lower price (from 1.51 to 2.5)
Quantity trade balance below 0	potentially successful strategy of quality competition (from 0.51 to 1.5)	unsuccessful strategy of competition by lower price (from 0 to 0.5)

Source: Own elaboration based on Guzek [1999], Burzyński [2000] and Ambroziak [2012].

The price–quality method, thanks to its construction, allows us for elimination of influence of exchange rate and because of that it lets us make comparisons between longer periods of time.

The analysis covered 26 groups of products which were selected taking into account their role in Polish agri-food export. At the same time products which were reexported from Poland but not produced here were eliminated from the analysis (i.e. wines). The analysis covered following groups of products: live animals, beef and veal, pork meat, poultry meat, fish, butter, cheese and curd, milk and cream, yoghurt and other milk drinks, eggs, honey, vegetables, apples and pears, soft fruits (strawberries, raspberries, blackberries etc.), wheat grain, other grains, wheat flour, chocolate and other products containing cocoa, sugar and confectionery, meat and fish products, flour and starch products, fruit and vegetable products, plant and animal fats, coffee, tea and spices, beer as well as non-alcoholic beverages (fruit juices excluded).

ROLE OF AGRI-FOOD TRADE IN POLAND

Agri-food sector plays an important role in Polish economy, also because of its export performance. After the accession to the EU the share of agri-food export in total Polish export has raised significantly from 8% in 2004. Since 2014 the share of agri-food products in total export has exceeded 13% and the whole sector has noted the positive foreign trade balance [Grzelak and Roszko-Wójtowicz 2016].

Up to 2002 Poland was a net importer of agri-food products, but just before the accession – in 2003 – the trade balance in agri-food products became positive. Since that year Poland has permanently been noting the surplus in agri-food products [Stańko and Mikuła 2014], which until 2015 was increasing. Positive value of turnover in foreign trade, its level and structure illustrate the state of comparative advantages possessed by the certain branches of the sector [Poczta and Pawlak 2006].

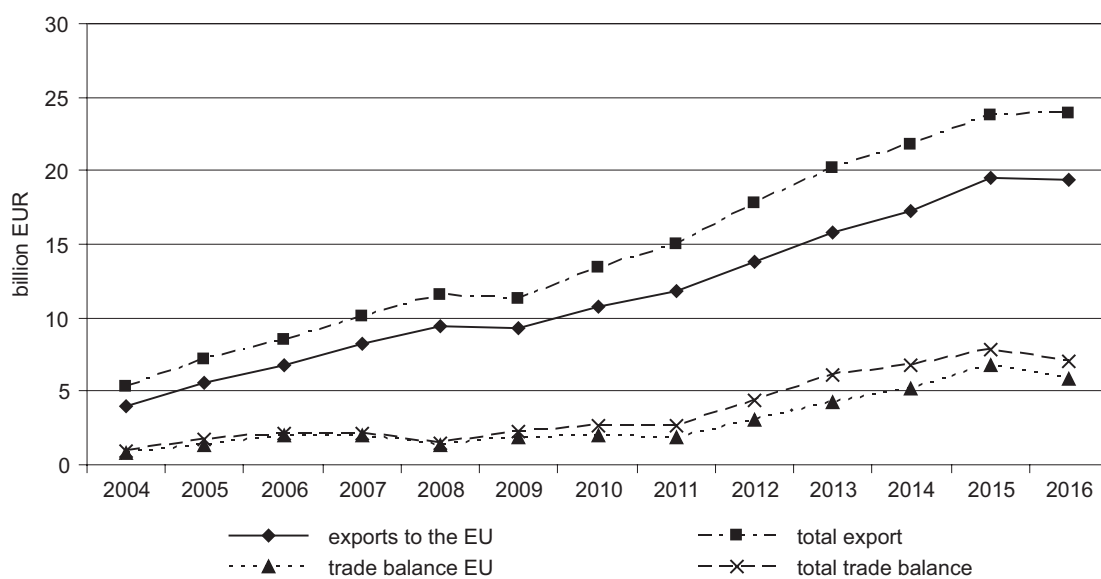


Fig. 1. Export and trade balance in agri-food products between Poland and other EU countries in years 2004–2016

Source: Own elaboration based on data available in Comext Eurostat database.

Value of Polish agri-food export to the other EU countries in the period 2004–2015 has increased five times, from 3.9 to 19.5 billion EUR. This rise was stopped for a moment in 2009 as a result of decrease of demand and the worsening economic situation in some states buying Polish food. In 2009 agri-food export from Poland to

other EU countries had decreased to 9.3 billion EUR, from 9.5, but in 2010 it increased to 10.7 and from that year it constantly rises (Fig. 1). In 2016 the slight decrease of export to the other EU countries was noted and export reached 19.3 billion EUR.

The trade surplus in food products in the period 2004–2015 has increased nine times from 0.88 to 7.84 billion EUR in 2015, although in 2016 it slightly decreased. The trade surplus in a trade with other EU countries in the period 2004–2015 has increased nine times, too, from 0.77 to 6.74 billion EUR in 2015, although in 2016 it decreased reaching 5.84.

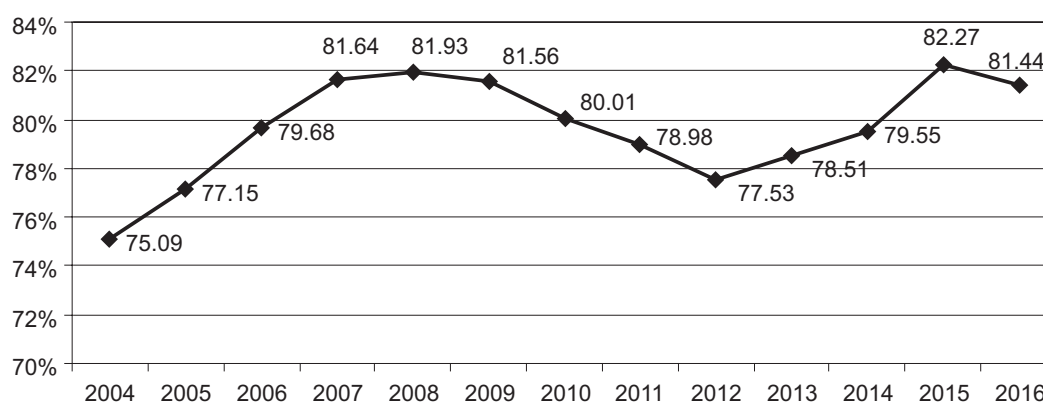


Fig. 2. Share of EU countries in Polish agri-food export in 2004–2016

Source: Own elaboration based on data available in Comext Eurostat database.

After the EU accession other member states became key buyers of agri-food products from Poland. In the period 2004–2016 around 4/5 of Polish agri-food exports was directed to markets of other EU countries (Fig. 2). In 2015 more than 82% of Polish agri-food export was sold to other EU Member States. This can lead us to the conclusion that on the EU market Polish producers located some part of products which previously were sold to Russian Federation and since August 2014 they had to be directed to other markets because of the implemented ban. In the following years EU Member States will remain the most important trade partners of Poland.

RESULTS AND DISCUSSION

Identification of changes in relations between export and import prices as well as quantitative trade balance in certain groups of food products allowed Authors to evaluate changes of sources of Polish food producers' competitiveness on the EU market in an analyzed period.

In order to evaluate the competitive advantages of Polish food producers Authors made an assumption after Aiginger that the most desirable way of competing on foreign markets is a successful quality competition. It allows the producers to note a positive quantitative trade balance in certain group of products and gain higher prices of exported products in comparison to similar imported ones at the same time. It can be assumed that the branches in which this way of competing dominates have potential to succeed on foreign markets.

The results of conducted research show that in the period 2004–2016 the strategy of successful quality competition on EU markets was dominating for eight analyzed groups of products, including beef meat, pork meat and meat and fish products (Table 2). Gained results are convergent to the results of previous research showing that by competitiveness of meat production and processing Poland has strong competitive advantages and remains one of the most important meat processors within EU [Guzek 1999, Wijnands and Verhoog 2016].

Table 2. Dominating competitive advantages of Polish food producers on EU market

Factor	Relation of prices in export to prices in import above or equal to 1	Relation of prices in export to prices in import below 1
Quantity trade balance above or equal to 0	beef meat	grain (excl. wheat grain)
	poultry meat	wheat flour
	yoghurts and other milk drinks	eggs
	vegetables	butter
	wheat grain	cheese and curd
	meat and fish products	apples and pears
	flour and starch products	sugar and confectionery
	fruit and vegetable products	beer
	chocolate and other products containing cocoa	non-alcoholic beverages (excl. fruit juices)
	Quantity trade balance below 0	live animals
honey		plant and animal fats
fish		
soft fruits (i.e. strawberries, raspberries, blackberries)		
coffee, tea, spices		

Source: Own elaboration based on data available in Comext Eurostat database.

Strategy of competing by quality was also realized by vegetable producers and fruit and vegetable processors. On EU markets producers of wheat grain, flour and starch products and chocolate producers were successfully competing with high quality (Table 2).

Gained results proved that in nine analyzed groups of commodities Polish exporters competed with lower prices. This strategy was mostly implemented by entities from dairy sector for butter, cheese and curds. Among products for which strategy of lower price competitiveness was dominating we can also indicate grain of cereals (excluding wheat), wheat flour, eggs, apples and pears, sugar and confectionery, non-alcoholic beverages (excluding fruit juices) and beer (Table 2).

The obtained results have also shown that the perspectives for successful quality competition on EU markets were gained by producers of live animals, fish, soft fruit and honey. In addition the potentially successful strategy of quality competition was realized by producers of coffee, tea and spices. In this case (similar to the issue of chocolate production) imported raw materials were processed and packaged in factories located in Poland and after that they were reexported as a final product of higher value added (Table 2).

Research conducted with price-quality method let Authors appear that in two groups of products processors used unsuccessful strategy of low price competition. These were pork meat and plant and animal fats (Table 2).

For measuring the international competitiveness of food sector level of prices are vital from the perspective of position on international markets. What is more, gained advantages play a crucial role for most of agricultural products [Juchniewicz 2006].

As a result of the conducted research it has been proved that Polish producers maintained the price advantages held in the year of EU accession [Szczepaniak 2009, 2012] – Table 3. Relations of unit prices gained in export and import of dairy products did not indicate significant chances. All of analyzed groups of dairy products

Table 3. Relation between export and import prices in agri-food trade between Poland and EU member states in the period 2004–2016

Group of products	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	Average 2004– 2016
Live animals (HS 01)	0.76	1.15	1.04	1.13	1.16	1.27	1.09	1.18	1.16	1.11	1.15	1.24	1.06	1.12
Beef meat and veal (HS 0201 and HS 0202)	1.50	1.25	0.98	0.87	0.91	0.91	1.01	1.00	1.10	0.95	1.02	1.23	1.14	1.07
Pork meat (HS 0203)	1.05	1.02	0.86	0.86	0.95	1.09	0.97	1.02	0.99	0.97	0.94	0.94	0.96	0.97
Poultry meat (HS 0207)	3.59	2.93	3.10	2.98	2.16	1.94	1.89	2.17	2.33	1.89	1.50	1.26	1.18	2.22
Fish, molluscs and crustaceans (HS 03)	3.01	2.23	2.19	1.80	1.86	1.40	1.66	1.80	1.68	1.50	1.79	1.51	1.68	1.85
Yoghurts and other milk drinks (HS 0403)	1.08	0.74	0.90	1.10	1.09	0.85	0.95	0.87	0.87	0.77	0.76	0.82	0.96	0.90
Butter (HS 0405)	0.94	0.74	0.79	0.93	0.78	0.83	0.86	0.90	0.76	0.84	0.84	0.82	0.78	0.83
Cheese and curd (HS 0406)	0.76	0.89	0.86	0.87	0.91	0.87	0.91	0.95	0.91	0.91	0.83	0.76	0.81	0.86
Eggs (HS 0407 i 0408)	0.79	0.58	0.82	0.88	0.66	0.69	0.91	1.14	0.64	0.68	0.70	0.69	0.69	0.76
Natural honey (HS 0409)	1.34	2.19	1.38	1.35	1.11	0.91	1.08	1.04	1.08	1.04	1.10	1.10	0.62	1.18
Vegetables (HS 07)	1.00	0.98	1.14	1.21	1.09	1.14	1.38	1.33	0.95	0.94	1.22	1.04	0.98	1.11
Apples and pears (HS 0808)	0.36	0.56	0.50	0.96	0.52	0.48	0.61	0.67	0.64	0.57	0.48	0.52	0.47	0.56
Strawberries, raspberries, blackberries and other soft fruits (HS 0810)	1.04	1.18	1.15	1.76	1.28	1.39	1.51	1.37	1.56	1.54	1.47	1.92	2.02	1.48
Coffee, tea and spices (HS 09)	1.56	1.78	1.43	1.62	1.88	2.00	1.82	1.79	1.75	1.68	1.62	1.81	1.89	1.74
Wheat grain (HS 1001)	0.88	1.13	0.94	1.28	0.91	1.26	1.16	0.99	1.13	1.09	1.11	1.08	1.19	1.09
Wheat flour (HS 1010)	0.95	0.96	0.90	1.16	0.81	0.62	0.70	0.80	0.82	0.78	0.77	0.82	0.77	0.84
Plant and animal fats (HS 15)	0.94	0.96	1.03	0.87	0.92	0.81	0.76	0.86	0.85	0.83	0.76	0.73	0.76	0.85
Meat and fish products (HS 16)	1.44	1.16	1.24	1.20	1.17	1.00	1.01	0.90	0.91	0.97	1.05	1.03	0.98	1.08
Sugar and confectionery (HS 17)	0.57	0.57	0.60	0.75	0.71	1.00	0.89	1.01	1.01	0.84	0.80	0.75	0.85	0.80
Chocolate and other products containing cocoa (HS 1806)	0.85	1.29	1.62	1.20	1.09	1.27	1.21	1.16	1.11	1.16	1.15	1.14	1.14	1.18
Cereal, flour and starch products (HS 19)	1.27	1.44	1.42	1.50	1.40	1.25	1.22	1.17	1.17	1.19	1.21	1.28	1.29	1.29
Fruit, vegetables and nut products (HS 20)	0.98	1.06	1.15	1.34	1.27	0.95	0.96	1.30	1.15	1.08	0.98	0.93	0.97	1.09
Non-alcoholic beverages, excl. fruit juices (HS 2202)	0.62	0.54	0.54	0.63	0.73	0.49	0.57	0.75	0.72	0.68	0.80	0.76	0.56	0.65
Beer (HS 2203)	0.76	1.41	1.75	0.93	0.70	0.59	0.59	0.60	0.63	0.70	0.87	0.81	0.73	0.85

Source: Own elaboration based on data available in Comext Eurostat database.

(yoghurts, butter, cheese and curd) maintained the positive price relations in comparison to imported assortment. Price advantages were also preserved by producers of eggs, apples and pears, sugar and confectionery, non-alcoholic beverages and beer.

On the basis of results of conducted research we can tell that poultry meat producers and fish producers have been improving their price competitiveness on EU market. During the post-accession period the price relations between export and import of this assortment have visibly decreased.

For pork meat, meat and fish products, vegetables as well as fruit and vegetables products unit prices of exported assortment were similar to prices paid for imported products. In case of soft fruit (i.e. strawberries, raspberries, blackberries etc.) and coffee, tea and spices prices reached in export were higher than prices of imported assortment through the whole post-accession period.

CONCLUSIONS

Processes observed in the world economy result in the increasing competition between acting entities. Because of strengthening economic rivalry on national markets and outside them it is crucial to gain and widen the competitive advantages of enterprises, branches and sectors in order to get and maintain the best possible position in relation to the competitors. This takes place because competitive position is created by the wide range of economic and non-economic factors. Consequently it is shaped again and again and it definitely needs constant observation. It also applies to Polish agri-food sector, which with 13% shares in total export of the country and trade surplus is an important in national economy.

The other EU Member States are and in the following years will remain, important partners in Polish agri-food trade. In the analyzed years 2004–2016 ca. 4/5 of Polish agri-food export was directed to other Member States. On this important market Polish food producers have shown different advantages depending on commodity. The effective use of these advantages resulted in export success of the whole Polish food industry.

The most visible quality advantages were identified for beef meat, poultry meat, meat and fish products, flour and starch products, chocolate and other products containing cocoa, as well as for wheat grain. Producers of this assortment were able to compete successfully on EU markets by quality, which let them gain higher prices, higher margins and more stable prices for their products.

Quality advantages which effective use would create possibilities of successful quality competition were identified for the following commodity groups: live animals, fish, soft fruit, honey, as well as coffee, tea and spices. The results of research show that exporters were managing to compete with quality what can be very promising and successful in the future. In case of pork meat and fats neither quality advantages nor price advantages were identified.

In the export of such commodities, as: butter, cheese and curd, cereal grain (excluding wheat grain), wheat flour, eggs, apples and pears, sugar and confectionery, non-alcoholic beverages (excluding fruit juices) and beer, Polish exporters have shown the price advantages which were mainly the result of lower costs of production. Price advantages and their utilization let them gain new foreign markets effectively thanks to the possibility of offering more attractive pricing conditions.

Polish producers of most of products covered by the analysis affirmed the price advantages identified after accession to the EU. But there is a threat that these advantages can be lost or significantly limited due to the progressing trade liberalization expressed i.e. by bilateral trade agreements negotiated at the moment by the EU.

The results of conducted analyses proved that in the period 2004–2016 national producers of the certain assortment operated efficiently on markets of other EU Member States. Efficient utilization of existing advantages will be a crucial condition influencing the future export performance of the whole Polish agri-food sector on both EU markets and in the third countries.

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CENOWE I JAKOŚCIOWE PRZEWAGI KONKURENCYJNE POLSKICH PRODUCENTÓW ŻYWNOSCI NA RYNKU UNII EUROPEJSKIEJ W OKRESIE POAKCESYJNYM

STRESZCZENIE

Procesy i zjawiska zachodzące w gospodarce światowej powodują, że wzrasta konkurencja na wielu rynkach, również żywnościowych. To współzawodnictwo wygrywają podmioty, sektory i kraje, które mają przewagi kształtujące ich konkurencyjność. Można zidentyfikować różne źródła przewag konkurencyjnych producentów żywności. Najczęściej wskazywanymi są przewagi cenowe oraz jakościowe. Celem niniejszego artykułu jest określenie źródeł przewag konkurencyjnych polskich producentów żywności w Unii Europejskiej w latach 2004–2016. Analiza została przeprowadzona w podziale na 26 grup produktowych zidentyfikowanych na podstawie ich znaczenia dla polskiego eksportu produktów rolno-spożywczych. Obserwacja wieloletnia pozwoliła na wskazanie dominujących strategii konkurencyjnych polskich producentów żywności realizowanych na rynku unijnym. Analizę przeprowadzono z wykorzystaniem metody cenowo-jakościowej Aigingera na podstawie danych dostępnych w bazie Comext Eurostat.

Słowa kluczowe: konkurencyjność, przewagi konkurencyjne, sektor rolno-spożywczy, producenci żywności, handel produktami rolno-spożywczymi, metoda cenowo jakościowa, metoda Aigingera