

## FARMERS' PROTESTS AND IMPORT FROM UKRAINE FACTS, MYTHS, MISINFORMATION

The geopolitical situation related to the war in Ukraine is affecting the agricultural market in Poland and has triggered farmers' protests, opposing the imports of agricultural products from Ukraine.

Social tensions have been exacerbated by political decisions, EU policy and misinformation which have soured Polish-Ukrainian relations and increased resentment towards EU policy.

The situation in Polish agriculture, including protests over imports from Ukraine, reveals deep structural problems, including the failure of farms to adapt to the EU market requirements and the effects of years of neglect in planning agricultural policy.

The conflict over agricultural imports undermines the stability of Polish-Ukrainian relations, exposing Poland to economic and image losses in the EU.

# INTRODUCTION

Since February 24, 2022, the topic of Ukraine has been strongly present in the Polish public space and media. In 2023, what drew a lot of attention were protests – first the drivers’ and then farmers’. As a result, the border with Ukraine had been blocked, some agricultural products from Ukraine were destroyed (e.g. grain was spilled on train tracks). During the demonstrations, there were anti-EU slogans, but also vulgar, offensive, anti-Ukrainian and pro-Putin phrases<sup>1</sup>. The protesters’ were against the European Union’s decision of abolition of tariffs for Ukrainian exporters, and demanded a total embargo on imports of agricultural products from Ukraine. At the same time, they protested against the introduction of the European Green Deal.

Yet, according to publicly available data, imports from Ukraine do not have a significant impact on the decrease in cereal prices in Poland, nor on the situation of price fluctuation in the EU. The sources of the problem are much more complex, as is usually the case with multi-faceted issues, and domestic prices of agricultural products in Poland are influenced by the situation of world markets. However, a survey by the Centre for Public Opinion Research (CBOS) shows that more than 80% of Poles support the agricultural protests and the restriction of imports from Ukraine. Unfortunately, almost two-thirds of respondents are also in favour of blocking border crossings, and almost a quarter supported the destruction of agricultural products from Ukraine.

However, it should be noted that agricultural products constitute only a part of trade between Poland and Ukraine. Poland exports a significant amount of dairy products, meat or animal feed to the neighbouring country. Therefore, insisting on blocking grain transit

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<sup>1</sup> The public prosecutor’s office has sent an indictment to court against two people who during a protest displayed a USSR flag on a tractor and a banner with an inscription calling on Vladimir Putin to “make order” with Ukraine, Brussels and the Polish authorities. The charge concerns the public promotion of communist ideology and violence and the use of symbols and slogans supporting Russian aggression against Ukraine. The farmers face a five-year prison sentence. <https://www.pap.pl/aktualnosci/glosna-sprawa-postulatu-do-putina-i-flagi-zsrr-na-rolniczym-protescie-jest-akt>

and acts of vandalism against Ukrainian products may result in Ukraine also closing its borders to Polish products, and then the damage to the Polish food industry will be much greater than the losses caused by imports from Ukraine.

On April 15, 2023 the Minister of Development and Technology signed the Regulation on the ban on the import of agricultural products from Ukraine, which introduced a unilateral ban on the import of certain agricultural commodities from the country, which was then sanctioned by the European Commission. On May 2, 2023, the European Commission Regulation on the import of wheat, maize, rapeseed and sunflower seeds from Ukraine came into force. A temporary ban on the import of these commodities into the five countries bordering Ukraine was then introduced, while allowing their transit. The ban on imports to Poland lasted until 15 September 2023 and was not extended by the European Commission.

In view of the upcoming parliamentary elections in Poland, scheduled for October 15, 2023, the government again introduced its independent ban on the import of grain and cereal products on September 16, under a Decree of the Minister of Development and Technology dated 15 September 2023. At the time of writing this report, in November 2024, this regulation is still in force.

The subject of the agricultural protests attracted media and public attention and translated into a deterioration of diplomatic relations between Poland and Ukraine. Moreover, Poland, as an EU member state, acted to the detriment of the single European market by blocking imports, in breach of international agreements in force, which may result in serious political and economic consequences for Poland. The grain affair is also an image loss for Poland, especially after Polish-Ukrainian relations, political, interpersonal and neighbourly, were historically the best after the outbreak of the 2022 war.

The failure to promote reliable knowledge about the origins of the problem, and to address myths related to the background of these protests, generates unnecessary social tensions and can turn into rhetoric and actions directed against the Ukrainian population in Poland, being a so-called 'ticking bomb'. Especially at the level of

information in social media, where simplified and biased messages predominate, it is easier to spread disinformation, fake news and make a scapegoat out of a selected group. In view of the ongoing hostilities on the territory of Ukraine and, consequently, the long-term perspective of hosting many Ukrainians in Poland, this may turn into actions directed against this group or even become a source of interethnic conflicts. The escalation of negative content and behaviour in the Polish public and online space also creates misunderstanding, fear and unnecessary stress among Ukrainian refugees in Poland.

The aim of the project and this publication is to raise awareness and support the general public with reliable and reader-friendly information on the origins of the farmers' protests, as well as the facts and myths concerning the Polish-Ukrainian agricultural conflict. This publication is based on an analysis and compilation of publicly available sources published by credible institutions, which are listed in the sources below each fragment.

## IN BRIEF. WHAT ARE THE FARMERS' PROTESTS ALL ABOUT?

The deteriorating profitability of agricultural production and resentment towards the European Union's agricultural policy are the main source of discontent among Polish farmers and the reason for protests and blockades of the Polish-Ukrainian border.

Nevertheless, the main issues of the 2023 and 2024 protests focused on two key demands: withdrawing the implementation of the European Green Deal and the introduction of a total embargo on agricultural imports from Ukraine.

It should be remembered that Poland's accession to the European Union involved the adoption of the principles of the Common Agricultural Policy (CAP). This has driven positive changes in agriculture. Rather than the fears that existed prior to accession, the European integration process has contributed to many benefits, particularly through the inflow of EU funds. The changes in agriculture were the result of, among other things, two measures:

direct subsidies to farmers and regulation of the Community market (CAP Pillar I) and structural transformation in agriculture (CAP Pillar II). By 2023, Polish agriculture received €67.1 billion under the CAP, most of which was allocated to direct subsidies. These were mainly linked to the area of agricultural land and it was the farmers' decision how to allocate them. For example, between 2007 and 2013, Member States had the possibility to transfer up to 25% of funds from Pillar II to Pillar I. Under the CAP, each Member State draws up its strategic plan, which is negotiated with the European Commission, with a certain degree of freedom in the choice of measures and the allocation of funds.

Polish farmers have taken advantage of this scheme by transferring a larger share of structural funds to direct subsidies, which has undermined the possibility of financing modernisation measures such as investments on farms. As a consequence, this has prevented adaptation to the requirements of the European Green Deal. Therefore, the farmers' protests are the result of the unfavourable agricultural policies of the last 20 years.

Before 24.02.2022, Ukraine was the fourth largest exporter of cereals in the world, supplying them mainly through the Black Sea to countries in North Africa and the Middle East. After the full-scale invasion began, Russia blockaded Ukrainian ports, including Odesa, which prevented exports via the sea for several months. In July 2022, an agreement called the Black Sea Grain Initiative, often referred to as the grain deal, was reached, which, to a limited extent, allowed the resumption of shipments by sea. However, on 17 July 2023, Russia unilaterally broke this deal, as a result of which Ukraine began to look for alternative routes to transport grain to countries in the Global South by land through the neighbouring countries - Poland, Slovakia, Hungary and Romania.

In the first half of 2022, cereal and rapeseed prices were high. The Minister of Agriculture and Rural Development assured farmers of the of high grain prices trend and their possible increase in the second half of 2022. He appealed to them to refrain from selling grain, which resulted in a reduced supply of this commodity on the Polish market. However, the government institutions had not created

adequate analyses of the risks that such a situation could bring, and did not take the necessary measures to prevent disruptions on the local market. As a result, most of the grain imported from Ukraine that was supposed to transit through Poland remained on the Polish market. As it was cheaper, and Polish farmers were waiting with sales for the suggested price increase, other industries in Poland, such as animal feed production could benefit from buying Ukrainian grain. This contributed to an even bigger increase in domestic stocks, which Polish farmers had problem selling.

When the Ukrainian Armed Forces weakened the Black Sea Fleet destroying key vessels and damaging infrastructure in Crimea, it unlocked the possibility of commodity transit via the traditional Black Sea route. At the same time, in October 2023, Ukraine reached an agreement with Romania that allowed grain transit through the Danube ports and Constanta, while minimising the possibility of importing it into Romanian territory. Ukraine no longer needed Poland to export grain, which in the context of prolonged tensions at the border and acts of vandalism (dumping Ukrainian grain on train tracks), was also a much-needed change for Ukrainian exporters and drivers. While in January 2023 as much as 267,000 tonnes of grain entered Poland, the amount had fallen to 3,000 tonnes by December that year.

However, despite the fulfilment of Polish farmers' demands by the Polish authorities (introduction of an embargo, i.e. closing the borders to grain from Ukraine, halting the implementation of the Green Deal), wheat purchase prices in 2024 are even lower.

## HAS POLAND BEEN FLOODED BY IMPORTED AGRICULTURAL PRODUCTS FROM UKRAINE?

In 2023, 1 million tonnes of grain were imported to Poland from Ukraine, which, with domestic production of 35.2 million tonnes, could not significantly contribute to lowering prices. In comparison, the European Union produced around 271.6 million tonnes of grain in 2023.

At the same time, Poland and the EU received grain from Russia (including some that the aggressor had looted in Ukraine). When imposing sanctions on Russia, the EU deliberately exempted food from the ban, so as not to trigger a humanitarian crisis in the countries of the Global South, whose food security depends on imports. Russia took advantage of this fact by increasing its exports. It was not until 1 July 2024 that the European Union increased tariffs on imports of, among other things, grain and oilseeds from Russia and Belarus, so that it would no longer be profitable to buy cereals from those countries.

The term technical grain has also gained popularity in the public debate, and has influenced the striking farmers' demands. However, the pre-2022 legislation lacked a definition of such grain. The term implied that technical grain was intended for non-food or non-feed purposes, such as burning or biofuel production, and thus was not subject to sanitary and veterinary controls. According to the Supreme Audit Office (NIK) report, from 2022 to April 2023, 102.9 thousand tonnes of this type of grain were imported into Poland, which accounted for only 3% of all grain imports from Ukraine.

## IS POLAND LOSING OUT ON IMPORTS FROM UKRAINE?

Poland is a country that both imports and exports agri-food products. In 2023, **14.8% of total exports were agri-food products** and this was 1% more than in the previous year. **As far as total imports, agri-food products accounted for 9.7%** in 2023, and this was almost 1% more than in 2022. Total imports from non-EU countries also fell by 4.2%.

As for Polish trade of agri-food products, the biggest Polish importer and exporter is Germany.

If a country exports more than it imports, it has a so-called **trade surplus** and the trade balance is considered positive.

If imports from abroad are greater than exports, the country has a so-called **trade deficit** and the trade balance is negative.

However, the words 'positive' and 'negative' have only a numerical meaning and do not necessarily reflect the state of a country's economy. A trade deficit and increased imports can mean, for example, that domestic demand for specific goods for consumption and/or production has increased. A large surplus or deficit for a product or category of products (e.g. wheat) can show a country's advantage but also a weakening of competitiveness in the global market.

In 2023, Poland's **exports of goods exceeded imports**, also in the area of agri-food goods. There was an approximately 20% increase in the balance of trade compared to 2022.

Moreover, Poland ranks second in the European Union (after the Netherlands) in terms of the size of the positive balance in foreign trade (i.e. a situation when exports are bigger than imports). In 2022, only 12 EU countries achieved a positive balance in trade in agri-food goods.



### **Only 5% of the agri-food products imported into Poland in 2023 came from Ukraine.**

As for the countries from which Poland imported more than it exported to in 2023, these were Norway, Brazil, Ukraine, Denmark and Argentina. In the case of the first two countries, the value of imports was double that of Ukraine.

Although Poland imported more agricultural products (especially wheat, maize, soya, rapeseed and oilseed cake) from Ukraine in 2023 than it had exported there, it should be noted that at the same time we exported much more dairy products (cheese, cottage cheese), live poultry, pork and animal feed to Ukraine.

It is also important to remember that trade is a two-way exchange. Apart from the value of the goods traded, let us look at the variety of products. The list of agri-food goods that Poland and Ukraine sell to each other made available by the Ministry of Agriculture and Rural Development contains 187 items. One item may include a single type of product, e.g. potatoes, or several products treated as one category, e.g. cabbage, cauliflowers, kohlrabi, savoy cabbage. In 2023, Poland exported goods from 168 categories (i.e. 90% of product types) to Ukraine, while it imported products from 125 categories (67% of product types) from that country.

### **Blaming Ukraine for all the difficulties of Polish agriculture and agri-food trade is therefore an oversimplification.**

Poland's ban on imports from Ukraine triggers similar effects on the Ukrainian side. That means many non-agricultural industries could suffer, such as producers of goods that Poland exports to Ukraine in large quantities, and as a result lose important markets as a result. It should also be stressed that Poland acts as an intermediary in the export to Ukraine of products that it itself is an importer of, such as coffee and cocoa products. There are also products that Poland has to import, inter alia, from Ukraine due to insufficient domestic production, such as soya and soya oil.

Good trade relations are therefore in the interests of both Poland and Ukraine.

## ARE UKRAINIAN IMPORTS DRIVING DOWN GRAIN PRICES?

The prices of agricultural products depend primarily on trends on global markets and exchanges, and this makes them difficult to control at the level of an individual country (such as Poland or Ukraine).

In 2022, the largest cereal producers were:

- China (569.4 million tonnes)
- USA (408.5 million tonnes)
- India (293.7 million tonnes)
- European Union (269.0 million tonnes)
- Russia (146.4 million tonnes)

Poland produced 35.3 million tonnes of cereals in the 2022/23 season, being the third largest cereal producer in the European Union. Ukraine produced 53.5 million tonnes during the period (including 26.2 million tonnes of maize).

The fall in the prices of wheat, rape and maize is a global trend. On the Paris MATIF exchange, one of the most important exchanges for the trading of agricultural crops, the fall in prices also occurred at the time when Poland had imposed an embargo on agricultural products from Ukraine. Unfortunately, the purchase prices of most crops in the 2022/23 season did not cover production costs, and this was due to an increase of at least 25% in almost all costs, especially the price of mineral fertilisers.

At the beginning of 2022, wheat, oilseed rape and maize prices on the MATIF exchange were at record highs. The Minister of Agriculture in mid-2022 appealed to farmers to refrain from selling grain, assuring them that prices of agricultural products would continue rising in the second half of the year. He also reassured them that the situation related to increased imports of Ukrainian grain on the Polish market should not be a cause for concern, even though effective measures and risk analyses had not been undertaken in time. However, in the second half of 2022, prices for these products began to fall steadily. Those Polish farmers who, in line with the Minister's suggestions, held back on sales and had surplus products in storage found

themselves in a difficult situation. Most of the grain imported from Ukraine that was supposed to transit remained on the Polish market. Ukrainian grain was cheaper so other industries, such as animal feed production could benefit from buying at lower prices. This, in turn, contributed to an even bigger increase in domestic stocks, which Polish farmers had problem selling.

## DOES THE INTRODUCTION OF A UNILATERAL EMBARGO REALLY PROTECT POLISH FARMERS' INTERESTS?

On 27 June 2014, an Association Agreement was signed between the European Union and its Member States and Ukraine, of which the Free Trade Area Agreement is an integral part.

Article 29 par. 4 of this Agreement provides that “Five years after the entry into force of this Agreement, at the request of either Party, the Parties shall consult one another in order to consider accelerating and broadening the scope of the elimination of customs duties on trade between themselves.”

Thus, the Agreement provided for a progressive abolition of customs, and after the Russian Federation’s attack on Ukraine in February 2022, these procedures were accelerated. In June 2022, the European Commission unilaterally abolished tariffs that could still be applied to imports from Ukraine under the EU-Ukraine Association Agreement. On 31 January 2024, the EC published a draft regulation extending autonomous trade measures (so-called ATMs) on imports from Ukraine for a further year, until 5 June 2025.

The Polish government, by unilaterally introducing and maintaining an embargo on the import of four groups of commodities from Ukraine (wheat, maize, rapeseed and sunflower and products derived from their processing), has taken decisions which fall within the competence of the EU. In doing so, it has violated EU law and the functioning of the European single market from which Polish producers and exporters so effectively benefit.

Grain imports represent only a small fraction of bilateral trade with Ukraine. The imposition of an embargo on Ukrainian agricultural products could result in adequate and proportionate retaliation measures, which would harm Polish exporters. **While grain and fruit producers would gain from an embargo, exporters of animal products would lose.**

Furthermore, Poland, as an EU member state, by blocking imports of e.g. maize, acts to the detriment of the single European market, as e.g. southern EU countries such as Spain, Italy or Portugal are the recipients of this product and need it for animal feed. Thus, the embargo is also a violation of international agreements and may result in serious political and economic consequences for Poland.

Polish ports also lost out on the embargo and the conflict over grain, as when grain transit from Ukraine through Poland was large-scale, the ports of Gdańsk, Gdynia and Szczecin-Świnoujście generated a very large profit on transshipment.

## CAN POLISH FARMERS COMPETE WITH UKRAINIAN AGROHOLDINGS?

In addition to the purchase prices of agricultural products, which depend on trends on world markets and stock exchanges, another factor influencing the economic situation of farmers is the structure of farms.

In Poland, small farms prevail - more than half are less than 5 hectares, while the average size of a farm in Poland is 11.42 hectares. In France and Germany, the average farm is 60 hectares, in the Czech Republic 120 hectares and in Ukraine more than 130 hectares.

However, it must be taken into account that the size of Poland is 312 696 km<sup>2</sup>, while the area of Ukraine excluding Crimea is approximately 603 700 km<sup>2</sup>. Ukraine is therefore almost twice the size of Poland, and the agri-food sector accounts for 11% of the country's GDP. Ukraine has approximately 28 million hectares of agricultural land, almost half of which is fertile chernozem. Some 52% of Ukraine's agricultural land is in the hands of companies and agroholdings, which produce 54% of total agricultural output, despite employing only 18% of the approximately 2.5 million workers in the agricultural sector. The

remaining 48% of agricultural land is owned by individual farmers, who employ 82% of the agricultural sector workforce.

In Poland, the number of farms over 50 hectares is only 3.1% of the total number of farms, which account for just over 35% of total agricultural land. Moreover, the quality of Polish soils is among the lowest in Europe. In 2023, agriculture generated 3.3% of Poland's GDP. Therefore, the production potential of Ukraine, especially in terms of grain and oilseed production, is much greater than that of Poland. The question is, does this have to be a threat to Polish farmers? A large amount of cheaper grain from Ukraine could be an opportunity for the domestic meat and dairy sector. Also, what could be investigated is the profitability of importing more soya from Ukraine, rather than from Brazil as is currently the case.

Poland could aim to become a strategic partner for Ukraine in the transit of grain and other agri-food products. However, it has missed the opportunities of the last 20 years to carry out the necessary reforms and modernisation. Faced with the situation in Ukraine and the blockade of the Black Sea route, it has missed the opportunity to, by helping Ukraine in transit, benefit itself. Romania has done so by investing in infrastructure development - launching a new rail corridor through Moldova to Romanian ports, declaring the development of four new border crossings, increasing the capacity of rivers and canals, using additional funds provided by the European Commission for this purpose.

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