



Strategy of the Polish beef sector

Jerzy Wierzbicki – Polish Beef Association (PBA)



Euroopa Maaelu Arengu
Põllumajandusfond:
Euroopa investeringud
maapiirkondadesse

Presentation Plan

- **Producer organizations in Poland 1918-2018**
- The history of PBA -producers organization
- Standardization
- Conclusions

- in Poland the tradition of cooperation in agriculture has more than 200 years.

but

- Poland is one of the EU-28 countries with the lowest number of farmers' organisations.

why ?

Year 1913

Partition	Number of cooperatives	Members number
Prussian	313	159.704
Austrian	1.670	675.988
Russian	1.405	381.549
Sum	3.388	1.217.241

Year 1937

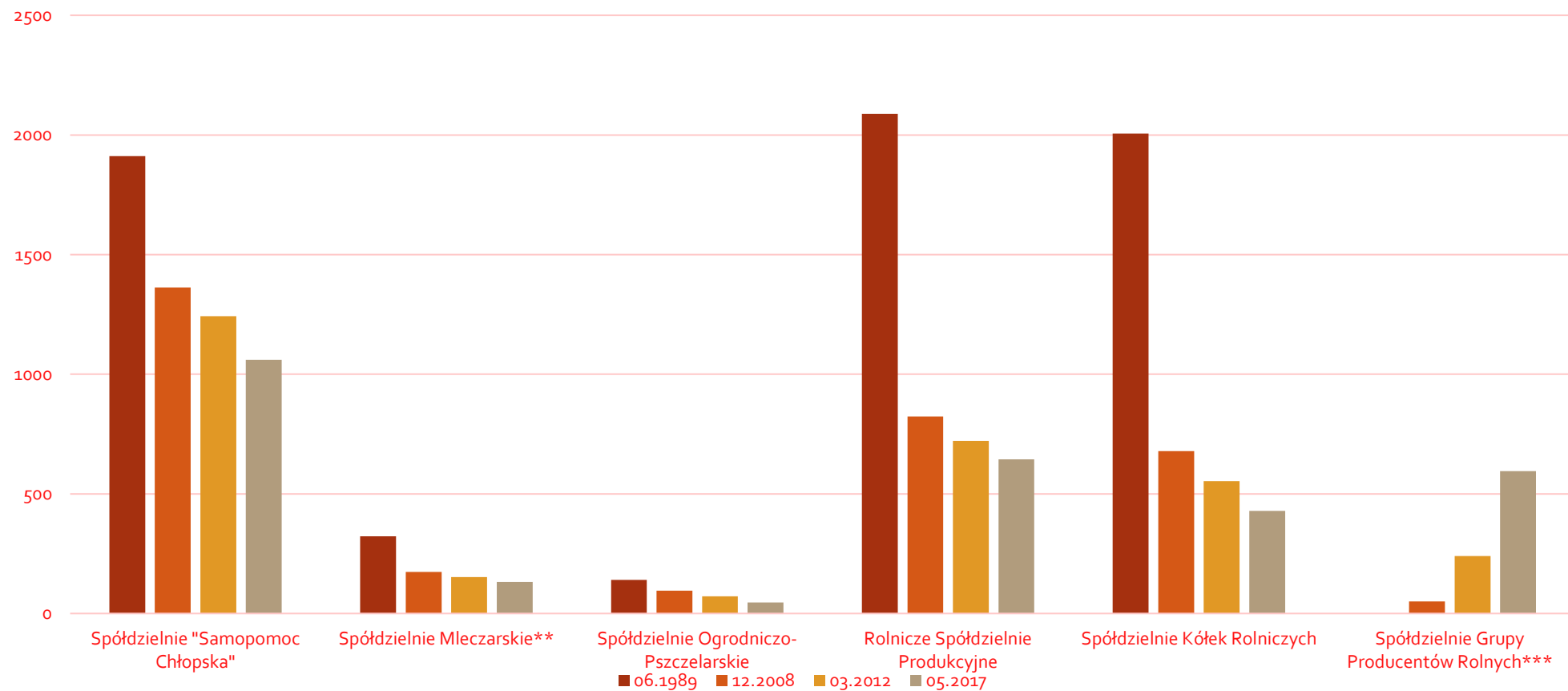
Cooperative type	Number of cooperatives	Members number
Credit cooperatives like Schultze-Delitzsch (Cooperative banks)	625	335 000
Credit cooperatives like Raiffeisen (Kasy Stefczyka)	2 771	706 000
Agricultural and trade cooperatives	228	64 000
Agricultural and food cooperatives	547	65 000
Dairy cooperatives	1 166	430 000
Horticultural cooperatives	14	b.d.
Employment cooperatives	46	24 700
Other	100	b.d.
Sum	5 497	1 624 700

Years 1989-2017

Cooperative sector

	06.1989	12.2008	03.2012	05.2017
Cooperative "Samopomoc Chłopska"	1 912	1 363	1 243	1 060
Dairy cooperatives**	323	173	152	132
Gardening Beekeeping cooperatives	140	95	72	46
Agricultural Production Cooperatives	2 089	823	721	644
Cooperatives of local agricultural groups (Kółek Rolniczych)	2 006	679	553	429
Cooperatives of the Agricultural Producers*** _		50	240	595
Sum	6 470	3 183	2 981	2 906

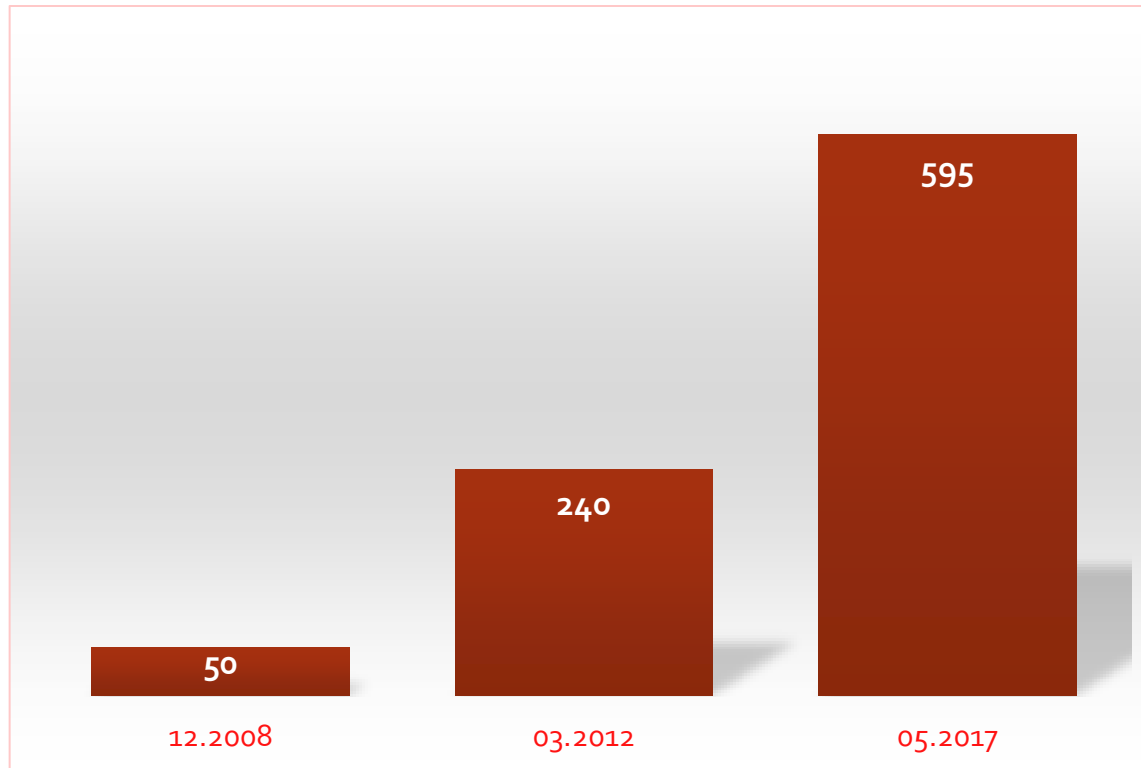
Decrease in the number of cooperatives 1989-2017



Why the number of farmer organizations is so low in Poland?

- Unfortunately, the state policy from 1945-1989 forced farmers to participate in production cooperatives and to transfer ownership of their farms to these cooperatives.
- As a result, older generations of farmers are discouraged to associate within organizations.
- Transformation process and the adopted plan to emerge from the economic crisis led to the collapse of the previous cooperative system (1990-2004), with the exception of dairy cooperatives.

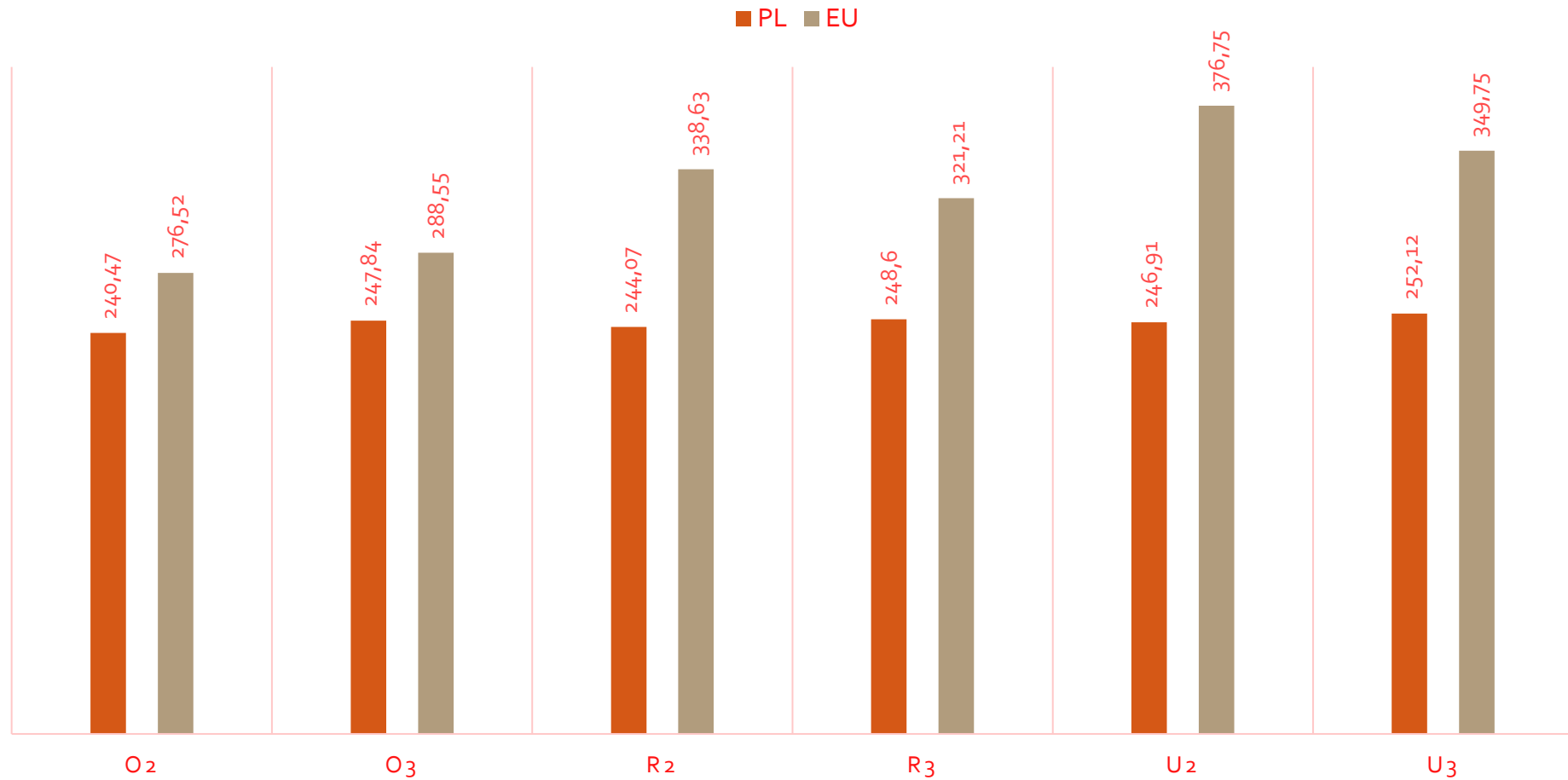
EU accession in 2004 gave impetus to formation of new producer organizations.



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Relatively low and flat prices of Polish livestock in 2006



- In 2005 a dozen of beef livestock producers established the Polish Beef Association.
- The main goal was to increase profits, produce more efficiently and reduce costs.

Our goals

- Defending the rights and interests of individual and collective members and supporting their activities for their further development in beef cattle breeding, improving the quality of produced livestock and qualifications of producers in this area, and improvement of income.

Our tasks

- Striving for the support of the government and non-governmental administration for the development of beef cattle and culinary beef production of a quality that meets the requirements of consumers.
- Supporting the activities of producers towards increasing production, obtaining uniform high-quality batches of live cattle.
- The use of beef in the promotion of regional products and their role as significant elements of cultural heritage.
- Striving for the most profitable outlets for beef cattle, slaughter cattle and culinary meat.
- Promoting the consumption of beef in Poland.

Our tasks

- Support for the implementation of new products, processes and technologies.
- Actions to improve the quality of beef.
- Support for building a cooperation network.
- Knowledge transfer support.
- Consulting and training.

- The objective of the PBA was to take advantage of the new opportunities for beef livestock producers under the Common Agricultural Policy.
- In 2006, the PBA developed an operational plan called “Beef Sector Development Programme 2007-2013”.
- It was addressed to the Polish authorities, aiming to draw attention to the problems of the industry.

- The PBA initiative led to introducing of cattle subsidies within the direct payments system (250mln EUR/year) and established “The Beef Promotion Fund” in 2009.
- Polish beef cattle producers collect in Beef Promotion Fund amount of 1,5 mln EUR a year.
- Beef Promotion Fund supports producers and processors organisations to promote Polish beef on internal and external markets.

- In 2007, PBA started "EUROSTEK 2012 – High Quality Beef Production Development Programme".
- The programme aimed to achieve higher prices for beef produced in quality system, and was supported by the Rural Development Programme.
- QMP(Quality Meat Program) is beef quality assured scheme. PBA members implement it on their farms to add value to their production. QMP System is based on the latest innovations, and scientific research of European and world leaders in the production of high quality beef.

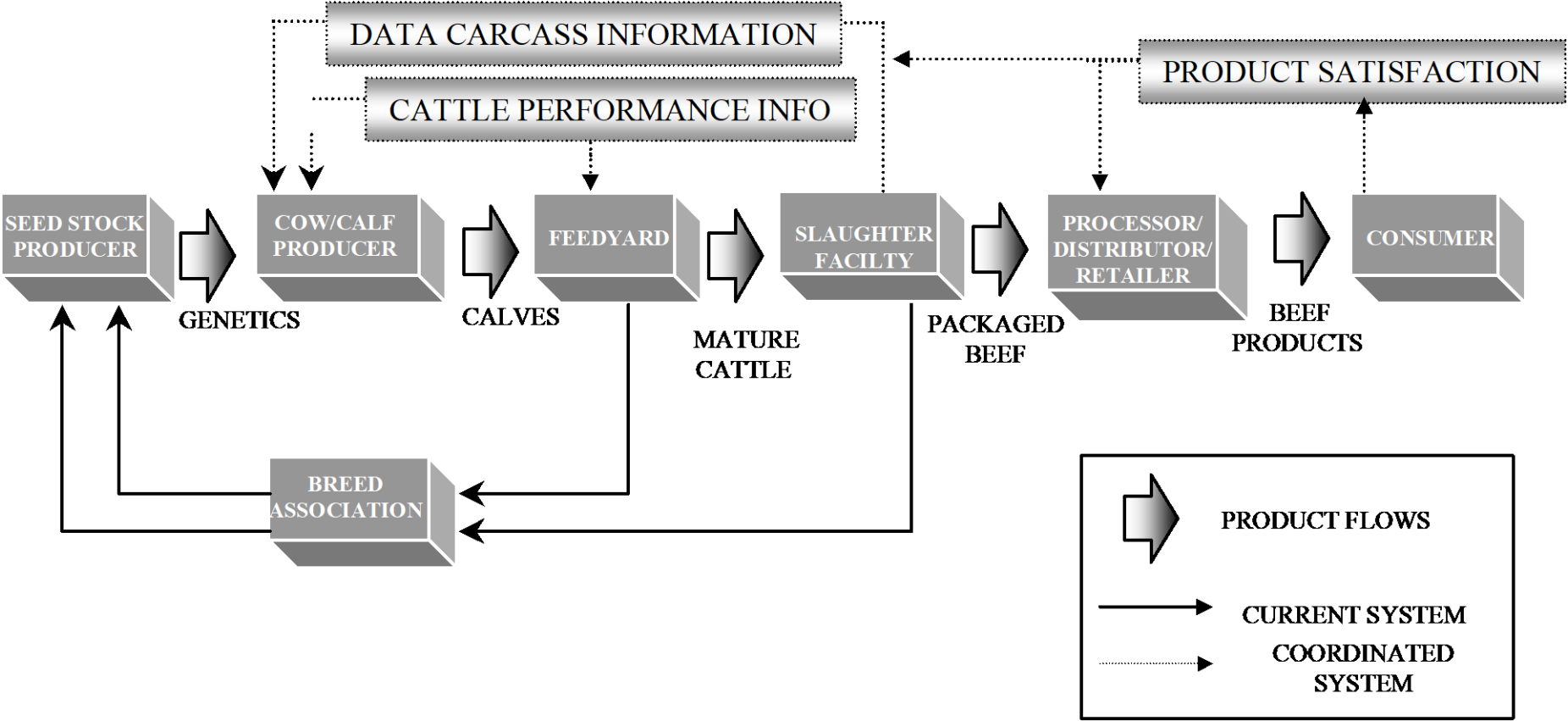
From fork to farm

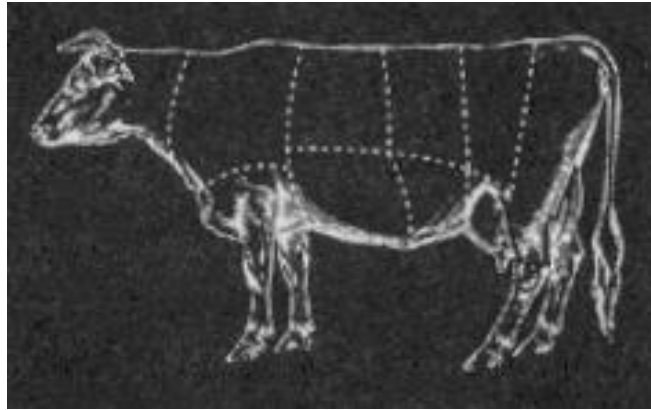
- The EUROSTEK 2012 strategy adopts a "**from fork to farm**" approach.
- It is worth stressing that the aim of the more familiar "from farm to fork " approach is to ensure food safety.
- On the other hand, the objective of the "**from fork to farm**" approach is food quality understood as quality from the consumer's point of view (eating quality).

Cooperations

- Cohasion Fund in 2007 enabled implementation of the project of cluster initiative (budget 180 tys. EUR)
- As a result a scientific and technical consortium was established between PBA and two major agricultural Universities in Poland. Consortium implemented ProOptiBeef scientific project (budget 10mln EUR)

From fork to farm – coordinated supply chain





- This is an organizational chart showing different parts of a cow.
- In a real cow parts are not aware that they are parts. They do not have trouble with sharing information. They smoothly and naturally work together as one unit. As a cow.
- What if the Beef Industry could do that?

Inspirations from EU, US, AU



Research and Innovation

Consumer taste tests

- The MSA program is based on over 160,000 consumer taste tests and 1,120,000 samples.
- 12 cooking methods, 69 cuts tested
- Consumer testing has been carried out in 12 countries
- Largest consumer product testing program in the world



MEAT & LIVESTOCK AUSTRALIA

- ISO 9000's definition of quality is "degree to which a set of inherent characteristics fulfils requirement".

- Another element of support for the development of the system was the joint promotion activities carried out by meat processing plants.
- Due to the fact that former legal restrictions meant it was only possible to support the promotion of beef that was produced within a quality system, meat processors were encouraged to actively engage and cooperate in the development of the system.
- The reality turned out to be more complex, but further obstacles did not discourage us in achieving the goal.

- The driving force behind the development of PBA is the development of the QMP quality system, which meets EC guidelines for voluntary quality assured schemes.
- It guarantees, among other things, higher animal welfare standards and higher eating quality of meat.


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




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











































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JAKOŚCI QMP

QMP system and its holistic approach – producer + processor + trader + consumer.

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Notification Detail


'Quality Meat Programme (QMP)' scheme

Notification Number: 2021/212/PL (Poland)**Date received:** 01/04/2021**End of Standstill:** 02/07/2021**Issue of comments by:** Commission**Draft Text:** [de](#) [en](#) [fr](#) [pl](#)**Final Text:** [de](#) [en](#) [fr](#) [pl](#)**Message Text:** [bg](#) [cs](#) [da](#) [de](#) [el](#) [en](#) [es](#) [et](#) [fi](#) [fr](#) [hr](#) [hu](#) [it](#) [lt](#) [lv](#) [mt](#) [nl](#) [pl](#) [pt](#) [ro](#) [sk](#) [sl](#) [sv](#)

Dokument 32013R1305

Euroopa Parlamendi ja nõukogu määrus (EL) nr 1305/2013, 17. detsember 2013, Euroopa Maaelu Arengu Põllumajandusfondist (EAFRD) antavate maaelu arengu toetuste kohta ja millega tunnistatakse kehtetuks nõukogu määrus (EÜ) nr 1698/2005
























ELT L 347, 20.12.2013, lk 487–548 (BG, ES, CS, DA, DE, ET, EL, EN, FR, GA, HR, IT, LV, LT, HU, MT, NL, PL, PT, RO, SK, SL, FI, SV)


 Kehtivad: Seda akti on muudetud. Praegune konsolideeritud versioon: 25/06/2021

ELI: <http://data.europa.eu/eli/reg/2013/1305/oj>

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> Mitmekeelne kuva

▼ Tekst

20.12.2013

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Euroopa Liidu Teataja

L 347/487

EUROOPA PARLAMENDI JA NÕUKOGU MÄÄRUS (EL) nr 1305/2013,

17. detsember 2013,

Euroopa Maaelu Arengu Põllumajandusfondist (EAFRD) antavate maaelu arengu toetuste kohta ja millega tunnistatakse

Tekst

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25/06/2021

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26/06/2020

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23/05/2015

24/12/2014

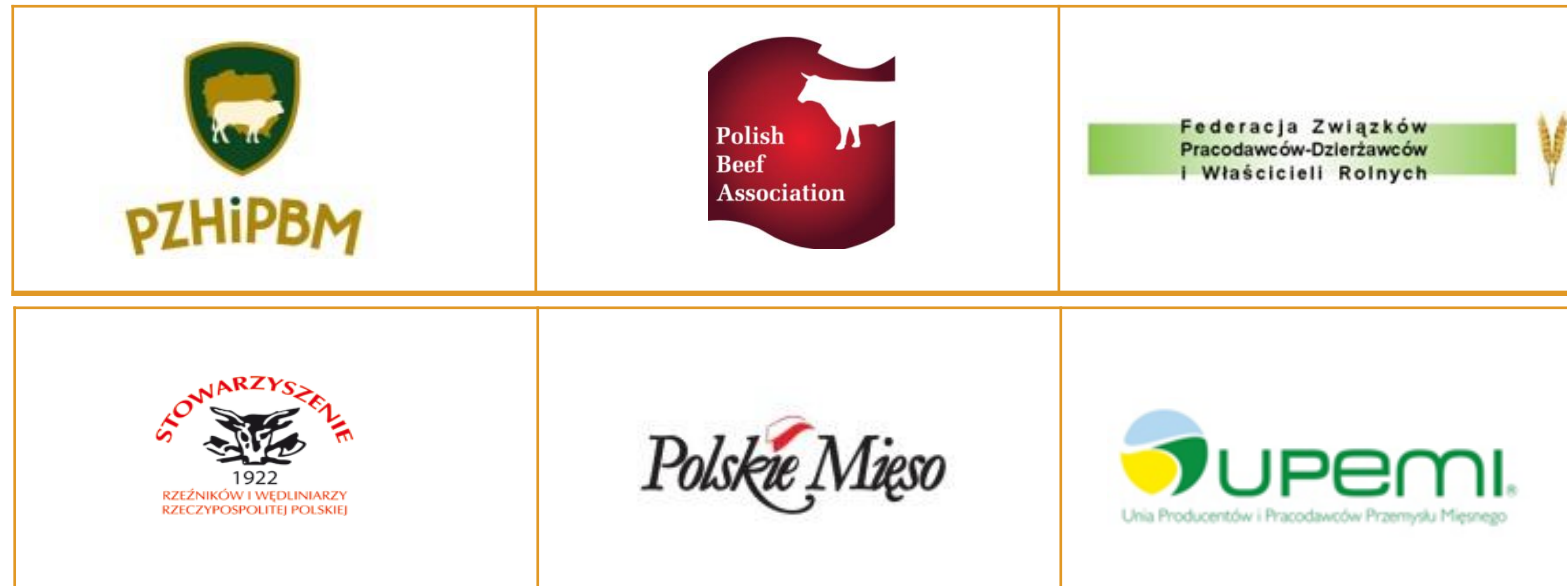
Quality schemes for agricultural products, and foodstuffs

1. Support under this measure shall cover new participation by farmers and groups of farmers in:
 - (a) quality schemes established under the following Regulations and provisions:
 - (i) Regulation (EU) 1151/2012 of the European Parliament and of the Council ⁽¹⁸⁾;
 - (ii) Council Regulation (EC) No 834/2007 ⁽¹⁹⁾;
 - (iii) Regulation (EC) No 110/2008 of the European Parliament and of the Council ⁽²⁰⁾;
 - (iv) Council Regulation (EEC) No 1601/91 ⁽²¹⁾;
 - (v) Part II, Title II, Chapter I, Section 2 of Council Regulation (EU) No 1308/2013 as concerns wine.
 - (b) quality schemes, including farm certification schemes, for agricultural products, cotton or foodstuffs, recognised by the Member States as complying with the following criteria:
 - (i) the specificity of the final product under such schemes is derived from clear obligations to guarantee any of the following:
 - specific product characteristics,
 - specific farming or production methods, or
 - a quality of the final product that goes significantly beyond the commercial commodity standards as regards public, animal or plant health, animal welfare or environmental protection;
 - (ii) the scheme is open to all producers;
 - (iii) the scheme involves binding product specifications and compliance with those specifications is verified by public authorities or by an independent inspection body;
 - (iv) the scheme is transparent and assures complete traceability of products; or
 - (c) voluntary agricultural product certification schemes recognised by the Member States as meeting the Union best practice guidelines for the operation of voluntary certification schemes relating to agricultural products and foodstuffs.
2. Support under this measure may also cover costs arising from information and promotion activities implemented by groups of producers in the internal market, concerning products covered by a quality scheme receiving support in accordance with paragraph 1.

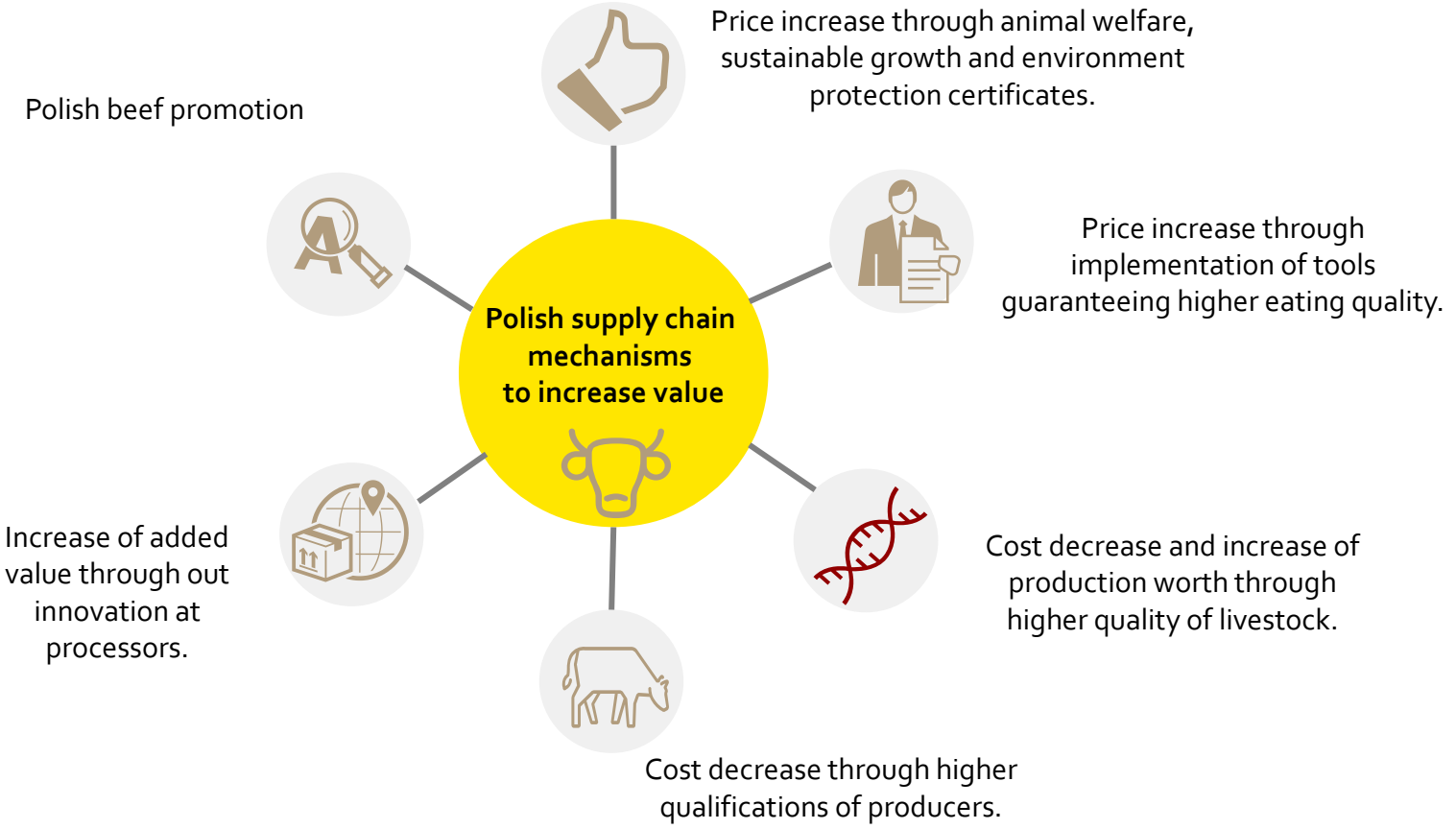
Why the farmers join the PBA ?

- The premium for certificate, paid to farmers by slaughterhouses, varies between 0,25 and 0,50 EUR/kg carcass weight.
- Supply is assured of the PBA. In case of claim, PBA is a mediator

- In 2017, PBA initiated an agreement between six producer and processor organisations on the “Strategy for the Polish Beef Sector 2022”, with the help of EY enterprise and in consultation with the Ministry of Agriculture and Rural Development.



Objectives



- The strategy was analysed by the Minister of Agriculture and Rural Development to plan an exact scope and the schedule for the implementation.
- The Polish Strategic Plan for CAP includes some of our tasks.

Green Deal EU Fork to Farm Strategy

Furthermore, the Commission is undertaking a review of the EU promotion programme for agricultural products, with a view to enhancing its contribution to sustainable production and consumption, and in line with the evolving diets.



In relation to meat, that review should focus on how the EU can use its promotion programme to support the most sustainable, carbon-efficient methods of livestock production.

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Shaping the future of European beef sustainability

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for Beef Sustainability



Action areas and outcome targets



Environment



1. An intensity reduction of 15% in GHG emissions by 2025, with the aim of recognising the positive role beef production can contribute to mitigating climate change through reduction strategies and sequestration.



Animal medicines



2. Total usage of antibiotics below 10mg/Kg PCU by 2023.
3. Reductions of 50% in the use of HP-CIAs by 2023.



Animal health and welfare



4. Target mortality rates are below 1.5%. For systems with mortality rates above this target, a year on year reduction of 20% should be achieved.
5. All animals to have access to loose housing (when housed) by 2030.
6. All animals are given pain relief (analgesics) for all surgical procedures and for all forms of castration, dehorning and disbudding.



Farm management



7. A reduction in serious accidents (reportable; ref: European Reporting Framework) on farm and a reduction in fatalities with an overall target of zero.
8. Financially viable farms that have a business plan in place.

O NAS

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Meat

UNECE Reference addresses and Codification System

[Reference addresses](#)[ENG](#)[RUS](#)[FRE](#)[DOC](#)[DOC](#)[DOC](#)[Codification system](#)[DOC](#)[DOC](#)[DOC](#)

List of Codex reference standards

[DOC](#)[UNECE text on eating quality \(Bovine standard\)](#)[PDF](#)[PDF](#)[PDF](#)

UNECE Standards for Meat

Product	Symbol No.	Published/ Last revised	ENG	FRE	RUS
Bovine meat - carcasses and cuts	ECE/TRADE/326/Rev.2 (Revised 2015 version)	2016	PDF		



Economic and Social Council

Distr.: General
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Economic Commission for Europe

Steering Committee on Trade Capacity and Standards

Working Party on Agricultural Quality Standards

Specialized Section on Standardization of Meat

Twenty-fifth session

Geneva, 29-31 August 2016

Item 6 of the provisional agenda

Eating quality

Eating quality – proposals by the discussion group

The following document was prepared by the Rapporteur (Poland) for discussion by the scientific reference group at the session on Monday 29 August 2016 and will be the basis for the recommendations to be reviewed under agenda item 6.



Why should we be interested in eating quality of our beef?

- Consumers are only point where money enters the supply chain
- When they are paying more for beef than ever before.....we cannot let them down



- The working group is pleased to report that AUS-MEAT have advised that they are willing to provide these needs within Europe and other regions on a commercial basis including through collaboration with **the International Meat Research 3G Foundation**.
- AUSMEAT and an expert scientific working group appointed by the Foundation will further consider and endorse detailed standards application for documentation as addendums to the UNECE Bovine Standard language.

THE COUNCIL

The Council is a body which makes decisions, monitors the activity and assesses the work of the Foundation.



Jerzy Wierzbicki

Chairmen

President of Polish Beef Association



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Director in Meat Livestock Australia



Dr Rod Polkinghorne

Member of the Council

Leader of Meat Standard Australia project



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BovINE is an EU funded thematic network project focused on knowledge exchange to help address the challenges and drive the sustainability of the European beef farming sector and community. The project will connect with farmers across Europe by providing an open platform – the BovINE Knowledge Hub – where beef farmers, advisers, member organisations and researchers can exchange knowledge and share experiences to drive awareness and adoption on farms of innovative and proven practices.



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Lesson learned - success factors

- Leadership
- Leaders
- Human resources
- CAP
- Cohesion policy

Conclusions

More attention and support require such areas as:

- Cooperation between producers, processors and science
- Producer organizations operational programs
- Scholarships for leaders
- Study trips

Conclusions

More attention and support require such areas as:

- joint investments carried out by producer organizations
- development and implementation of Quality Assured Schemes that empower producers in the supply chain
- programs that increase market transparency and cooperation in the supply chain
- delegated tasks for producer organizations from the administration



Questions ?