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## An overview of the situation with GIs in POLAND

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# GI (PDO/PGI/TSG) SECTOR IN POLAND

	<b>PDO</b>	<b>PGI (+spirit drinks)</b>	<b>TSG</b>	<b>Total</b>
<b>Poland</b>	<b>10</b>	<b>26 (+2)</b>	<b>10</b>	<b>46 (+2)</b>
Fruits and vegetables	3	7		10
Meat/meat products		4	4	8
Cheese/Dairy products	3	2		5

- PDO / PGI / TSG products in Poland are characterized by a rather low „market power” and low production volume, which is why they are sold mainly on the domestic market.
- About half of PDO / PGI / TSG products are sold nationwide, the rest on a regional or local scale.
- The exception is Polish Vodka GI - product exported to most of the world's markets. The value of pure vodka exports from Poland in 2020 was around PLN 521 million (about EUR 120 million). Poland is the first vodka producer in the EU and the fourth in the world.

# REGULATORY FRAMEWORK

- From the procedural and institutional point of view, the system of evaluation, registration and protection of PDO / PGI / TSG products works quite well in Poland.
- The Ministry of Agriculture and Rural Development (MARD) plays the main role in the implementation of food quality policy (PDO/PGI/TSG products). The Ministry is responsible for the registration process, for evaluating proposals at national level and for cooperation with the European Commission on the GIs' issues .
- Ex-officio controls are realized by institutions (inspections) dependent on the MARD - Agricultural and Food Quality Inspection. Infringements of the law related to the protected names occur rather sporadically in Poland.
- The Polish authorities (Ministry of Agriculture and Rural Development) - due to the marginal level of exports of GI products to the countries covered by the Geneva Act of the Lisbon Agreement, do not plan to use this protection option yet.
- Polish Vodka GI is protected under several dozen of agreements signed by EU with other countries, e.g. Polish Vodka GI is protected in China under the EU-China trade agreement (like 99 other GIs from the EU).

# SECTOR POTENTIAL AND OBSTACLES (INCLUDING WITH RESPECT TO SUSTAINABILITY)

- Some PDO / PGI / TSG producers groups in Poland understand the importance of the inevitable transformation into sustainable agriculture (e.g. by the use of organic farming and integrated production methods or protecting/endemic varieties or breeds).
- Sector potential - 3 main groups/sectors show the greatest economic and quantitative potential for further registration as PDO / PGI / TSG:
  1. **dairy sector** due to strong traditions in almost all regions of Poland, the variety related to both local know-how and the specificity of the raw material, market structure dominated by dairy cooperatives with long traditions.
  2. **meat (meat products) sector** - for example, one of the Polish export bestsellers, i.e. Polish oat goose (has not been registered yet), and;
  3. **fruit and vegetable** sector - Poland is distinguished not only by a large range of fruit and vegetable varieties specific to its regions, it is also characterized by a great uniqueness of individual local crops and local know-how, but is also a dominant producer of certain fruits or vegetables (such as blackcurrant, chokeberry, strawberries or apples) which affects the reputation and perception by consumers.
- The biggest obstacle to the development of the GI system is the mentality of producers who often do not want to form groups, associate and cooperate, and thus registration becomes impossible. In order to support groups under the funds for rural development, both co-financing of the costs of the participation of producers in the association and the creation of the so-called Operational groups (EIP) for the development of the high-quality food sector are (will be) possible.

# MARKET SITUATION

- Main channels of Gis' distribution: Discount stores and supermarkets have the largest share in trade in Poland, and they currently own 53 percent. market and hypermarkets' shares dropped to 10 percent in 2020. The rest of the market - 37 percent - belongs to large and small grocery stores as well as kiosks and petrol stations (Nielsen IQ). These channels sell most of the country-wide PDO / PGI / TSG products.
- It should be emphasized that retail chains in Poland are increasingly turning to regional and traditional (GI) products, which attract consumers to the stores.
- The report "E-commerce B2B - Business on the Internet" shows that during the pandemic, the value of e-commerce in Poland increased by 30%, and the forecasts for 2021 say that it will increase by up to 40%. Unfortunately, there is no data that would in any way make reference to the PDO / PGI / TSG products.
- In the perception/mind of Polish consumers, there is a link between the local product (not necessarily GI) and sustainable development - in the minds of consumers, a local product purchased in a local store from a local supplier reduces CO2 emissions. This environmental value related to closeness (locality and freshness) definitely outweighs other dimensions of sustainability, such as the social or economic dimension.
- GIs groups are entitled to benefit from the EC promotion mechanism established by Regulation 1144/2014 and by Rural Development Programme 2014-2020 (support to perform information and promotion activities) as well as are eligible for and for national promotion funds (established in Poland in 2009 to support agricultural marketing, increase consumption and promote agri-food products)

# CONSUMERS AWARE OF THE EU GIs LOGOS

Have you ever seen products bearing any of the following food quality / origin labels?				
Label	Sample	Yes, and I know what it means	Yes, but I don't know what it means	I have not seen
	City residents	23,4%	9,4%	67,2%
	Inhabitants of rural areas	36,1%	7,6%	56,3%
	<b>Total</b>	<b>30,9%</b>	<b>8,3%</b>	<b>60,8%</b>
	City residents	19,3%	7,5%	73,2%
	Inhabitants of rural areas	27,6%	5,4%	67%
	<b>Total</b>	<b>24,3%</b>	<b>6,2%</b>	<b>69,5%</b>

**2020 study:** Total sample (N = 2627); City (N = 1067); Rural areas (N = 1560)

Source: MARD

# ROLE OF THE FAO

- It seems that cooperation with FAO in the field of GI in Poland should focus on the aspect of sustainable agri-food production based on GI.
- FAO is an organisation that has been implementing the global Sustainable Development Goals for years and has extensive experience in the field. This is an interesting approach that will surely be developed across the EU and beyond, and due to its complexity it will not be easy to implement - ergo producers, their GI groups and associations, and public administrations may need support in the issue.