

*Prepared by the New Zealand Embassy in Warsaw*

As in much of Europe, meat consumption in Poland is falling – though this is an anomaly among Warsaw’s meat-loving neighbours Baltic States, Ukraine and Georgia. Meat consumption in those countries has been growing since the 1990s (the latter two from a lower base), and the upward trend is expected to continue. In contrast, meat consumption in Poland has been decreasing steadily since 2016, with the pandemic reinforcing the dietary shift. The Polish market offers a wide array of meat substitutes, though there are currently no serious attempts to manufacture artificial meat. These trends could present both opportunities and (limited) risks for New Zealand exporters.

### **Poland’s meat industry**

Poland is a significant producer of poultry, pork and beef, with a meat processing market worth approximately NZD 30 billion annually. It is one of the EU’s leading meat exporters, particularly of poultry, and also exports pork to New Zealand. In January-May 2021 these exports totalled exported 3,320 tonnes, representing 2% of all Polish pork exports. In 2020 Poland exported 374,000 tonnes of beef, down 2% year-on-year, mainly to EU countries (91%). Several export destinations had reduced their beef imports after a scandal in 2019, when a covert media operation at a major Polish abattoir revealed sick animals were being mistreated, killed and sent on for human consumption. In parallel, a marked trend away from meat to plant-based substitutes, accelerated by the pandemic, has reduced demand for domestically produced beef products. Beef imports into Poland are negligible, as its annual consumption is well below the EU average and met by domestic production. From January to November 2020, Poland imported around 685 tonnes of sheep and goatmeat worth NZD 8.4 million (including NZD 3.4 million worth from New Zealand). Consumption of sheepmeat in Poland is mostly limited to the hotel, restaurant and catering sector, and to big cities. Lamb is difficult to find in the large supermarkets and generally needs to be sourced through speciality butchers.

### **Meat consumption in Poland**

There is a clear trend in Poland of declining meat consumption and rapidly rising sales of vegetarian replacement products. Market research firm GfK reported in September 2021 that domestic fresh meat sales had fallen 7.5% since 2018. Over the same period, sales of vegetarian substitutes for meat grew 480%. During 2020 alone, sales of plant-based meat substitutes in Poland [doubled](#). Annual meat consumption per capita in Poland has been declining steadily since 2016. In that year the average Pole consumed 73.5kg of meat. The average had dropped to 61kg in 2019. This downward trend is likely to continue in coming years as more people consider cutting meat out of their diets, or reduce it significantly.

Data from food delivery service Uber Eats also underlines a shift to vegetarian and vegan choices. The number of vegan food orders rose by 500 percent between Uber Eats’ launch in Poland in early 2017, and November 2020, placing Poland second in Europe (behind the UK) for vegan on-line ordering.

Polish research firm Ariadna estimates that over 3 million Poles no longer eat meat. According to its [survey](#) in January 2020, 8.4% of Polish adults had followed a vegetarian or vegan diet in the preceding month, and another 3.8% had eaten fish but no other meat. 38.5% of those who ate meat said that they had made some effort to limit its consumption, and nearly 60% of respondents professed a desire to reduce meat consumption in the next year or two. Its study also showed that – unsurprisingly – young people are the group most willing to give up eating meat products, with 10% of 16-24 year olds describing themselves as vegans or vegetarians.

Recent surveys by Statista and IQS show similar results: 43% of Poles have reduced their consumption of meat, and 31.2% do not eat meat alternatives but would be willing to eat them from time to time.

### **Plant-eaters: a cultural and economic threat?**

As in many countries, some conservative parts of the population see vegetarianism and veganism as damaging traditions. The number of people reducing or eliminating meat in their diets is also a potential challenge to the Polish economy.

According to the Polish Meat Association, the meat industry employs over 100,000 people in slaughter and processing, and another one million in agriculture. It accounts for around 7% of all employees in Poland. The Institute of Agricultural and Food Economics reports that in 2020 the meat industry generated PLN 60 billion (NZD 21.6 billion), which was down 1% on 2019.

Poland's meat companies have reduced their spending to ride out the pandemic, reducing their total investments by around 10% in 2020-2021.

### **Poles' dietary changes during the pandemic**

The COVID-19 pandemic appears to have accelerated the trend away from meat consumption in Poland. Uber Eats reports that vegan food sales on its platform rose by 31% in early 2020. A [survey](#) of the eating habits of 2,000 Poles in June 2020 also found over 40% of Poles changed their habits during the social isolation caused by the pandemic. 29.8% of respondents said they ate less meat. 31.6% said they bought more plant-based products, and one third bought meat substitutes. The majority of respondents said that they intend to maintain their new eating habits after the pandemic: 62% said they will continue to use plant-based meat substitutes for meat and 55% will eat less meat overall.

### **Market response**

Polish restaurants and eateries have followed the trend away from meat. In 2017 Warsaw was [ranked](#) the world's third most vegan-friendly city, dropping to sixth place in 2019. Most supermarkets carry a range of plant-based meat substitutes: even fast food restaurants and petrol stations serve vegan burgers and hot dogs alongside traditional ones. The trend is further reflected in the diminishing number of meat wholesalers and butcher shops in Poland. According to research firm Bisnode, between 2015 and 2020 the number of meat wholesalers decreased by over 220 nationwide, and meat retailers by nearly 1,000.

Meat-processing firms, start-ups, multinational companies, local producers and retailers with private label brands have responded by creating a wide range of plant-based meat and dairy replacement products, creating new consumer and product segments. Leading meat and dairy producers, such as Sokołów and Łowicz, now offer a range of plant-based hams. "Dobra Kaloria" is a company that moved from its core breakfast and snack foods business into plant-based meat alternatives in 2019. Its focus on "authentic" meat-like flavour and texture has made it highly successful, and it is seen by other businesses as setting the benchmark in Poland. A number of specialist food firms have also emerged to meet the demand, many making their products as meat-like as possible. An example is producer and online shop [Bezmięsny](#) (Meatless), a "vegan butcher" which offers a range of meat-free sausages, bacon and burgers.

### **Cultured meat in Poland**

There are no current efforts to mass-produce cultured meat in Poland. The first piece of domestically produced cultured meat was presented and consumed at the Copernicus Science Centre in Warsaw during the "Przemiany" (Transformations) festival in 2019. A team led by molecular biologist Stanisław Łudziak grew a piece of chicken on a spinach leaf. Łudziak's view was that Poles would be more willing to replace animal meat with lab-grown meat if the name were changed from "artificially produced" to "pure meat" or "meat without animal suffering". He noted that another key factor for price-sensitive Polish consumers is the cost.

Research indicates that the majority of Poles considering a switch from animal meat to meat substitutes are motivated by personal health rather than animal welfare reasons. That said, organic product enjoys a high price premium (one local Warsaw butcher charges the equivalent of New Zealand retail price for its single-farm organic products). Consumers say they want meat-alternatives that are healthy, affordable and taste similar to or better than their animal equivalents. Research shows that around 50% of Poles expect meat substitutes to be at least as tasty as their conventional counterparts. This is particularly important for male consumers, with over 54% of men saying that the taste is one of the most important features of meat alternatives.

A 2019 study suggests that older Poles will be less likely to switch to artificially produced meat. The study of adults aged over 65 examined the acceptance of cultured meat in five European countries. Poland had the lowest acceptance rates by far. The study's authors concluded that countries with "more traditional values around food", such as Poland, may take longer to adopt the technology.

### **Barriers to switching away from meat**

In a [2020 EU Smart Protein survey](#) Polish consumers said that plant-based food is too expensive, they need more information about it, and it is not available when eating out. Reasons given in other surveys by people who say they will

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not exchange the meat-based component of their diet for plant-based or cultured substitutes include that: humans cannot do without meat nutritionally;

- plant-based foods lack sufficient taste;
- alternatives are not visually appealing; and
- there is little information on how to prepare plant-based foods.

### **The legal aspects**

The legal aspects of marketing and selling artificially produced meat in Poland are still not fully settled. Under EU rules, food consisting of, isolated from, or produced from cell culture or tissue culture derived from animals, plants, micro-organisms, fungi or algae is regulated under the EU Novel Foods Regulation. Cultured meat would require a pre-market authorisation and European Food Safety Authority (EFSA) approval. However, it is not yet clear what type of nutritional and toxicological evidence EFSA would be required to grant approval.

Questions also remain as to whether cultured meat could be marketed as “meat”, as it does not meet the current definition in the EU’s Food Information to Consumers Regulation. Unless and until this is revised, labelling on cultured meat products will probably have to specify the production process.

The issue will likely attract an a robust response from Poland’s agricultural sector. In October 2020 farmers strongly supported an [EU proposal](#) to ban the use of words associated with meat in the marketing of vegetarian products. Poland’s Federation of Trade Associations of Agricultural Producers claimed that giving names like “burgers”, “sausages” and “steaks” to non-meat products would mislead consumers and threaten the country’s cultural heritage. One prominent opponent of the proposed ban was vegan Polish MEP Sylwia Spurek, a vocal advocate of animal rights and plant-based diets who regularly tweets in support of plant-based agricultural policy. The European Parliament ultimately voted to accept proposals to ban the use of words like ‘yoghurt substitute’ or ‘imitation cheese’ for alternative products that contain no dairy, but rejected a ban on terms like ‘veggie burger’ or ‘veggie sausage’ for plant-based alternatives to meat.

### **Trends across other accreditations**

Vegetarianism in the rest of Central and Eastern Europe is still in its infancy. Meat consumption has been growing since the 1990s, as the region has become wealthier, and the upward trend is expected to continue in the short to medium term. A 2017 survey in Latvia showed that 90% of residents aged 20-74 regularly eat meat and that meat is a basic component of the daily diet for 80% of them. A second survey showed that 55% of people did not want to reduce the amount of meat in their diets, and 42% believed that northern nations should not reject meat and meat products. The situation in Lithuania is similar.

The trend in Georgia and Ukraine parallels that in the Baltics, though from a lower base. As the Georgian economy grows, per capita meat consumption is also predicted to rise. Domestic meat production does not currently meet demand: around 25% of beef, 50% of pork and 80% of poultry consumed in Georgia are imported. Meat consumption per capita in Ukraine is [projected](#) to increase to a total of 65 kg per capita in 2025, driven mainly by economic growth.

### **Conclusion**

There is a marked trend in Poland toward reducing or in some cases eliminating meat consumption – despite a pushback from more conservative segments of the population. All indications are that this can be considered a long-term, mainstream tendency rather than a passing fad, and one which the COVID pandemic appears to have helped to entrench.

For New Zealand, this raises three potential consequences which New Zealand producers and exporters may want to consider in relation to Poland:

- The first is a greater antipathy from traditional farming groups toward meat substitutes as their market share increases (including, perhaps, a demand for more government protection of the domestic meat industry).
- The second is obviously a shrinking demand for animal meat products. However, given that New Zealand lamb is a relatively luxury product on the Polish market – consumed relatively infrequently and by a minority of Poles - it seems less likely that demand for lamb will be significantly affected by this more mainstream trend (at least in the short to medium term).
- Thirdly, growing market opportunities for meat substitutes (including artificial meat).

With a population of 38 million and the continued normalisation of plant-based eating, even a portion of Poland’s

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approximately NZD30 billion meat processing market presents a potential opportunity for plant-based meat producers and exporters.

Vegetarianism is in its infancy in most of central and Eastern Europe, however. Growing meat consumption in the Baltic States, Georgia and Ukraine, and a price premium for organic or sustainably produced product, may present new opportunities for the New Zealand meat industry.

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