

Debate: “The Impact of Ukraine’s European Integration on Poland’s Agricultural and Processing Sectors”

April 22, 2026

The debate, jointly organized by the Warsaw Enterprise Institute (Poland) and the Institute for Economic Research and Policy Consulting (Ukraine), was part of a series of events held under the project “A Common Future: Poland and Ukraine in the European Single Market.” The discussion focused on Ukraine’s future integration into the EU agri-food market and its implications for Poland. Participants identified opportunities for cooperation, joint processing projects, and expansion into third-country markets, while also highlighting the risk of intense competitive pressure on Polish farmers and producers. The main concerns voiced by Polish agricultural producers relate to unequal conditions of competition, the scale of Ukrainian agriculture, the costs of adapting to EU standards, and the impact of imports on sectors such as grains, fruit, vegetables, poultry, and eggs. The Ukrainian side emphasized that Ukraine is already adapting to EU norms, bears high costs related to the war and logistics, and in the long term could become not only a competitor for Poland and Europe, but also a partner strengthening food security.

The debate brought together representatives of business, financial institutions, business support organizations, and public administration from Poland and Ukraine:

- **Andrzej Gantner**, Director General of the Polish Federation of Food Industry;
- **Witold Boguta**, President of the National Association of Fruit and Vegetable Producer Groups;
- **Dr. Vitaliy Krupin** of the Institute of Rural and Agricultural Development of the Polish Academy of Sciences;
- **Oleksandra Avramenko**, Chair of the European Integration Committee of the Ukrainian Agribusiness Club (UCAB);
- **Yelyzaveta Svyatkivska**, Coordinator of the European Integration Committee of the Ukrainian Dairy Enterprises Association;
- **Pavlo Martyshev**, agri-food markets expert at the Kyiv School of Economics;
- **Mykola Horbachov**, President of the Ukrainian Grain Association.

The discussion was moderated by **Łukasz Wojdyga**, Director of the WEI Center for Strategic Studies.

1. The Current State of Trade Relations: Between Cooperation and Strong Competition

The discussion opened with an analysis of the current state of bilateral relations. **Andrzej Gantner** noted that Polish-Ukrainian agricultural relations are a combination of trade cooperation and very strong competition. He emphasized that both the Polish and EU markets are already highly saturated, forcing an extremely tough fight for every customer. He also recalled that agriculture is not merely a sector of the economy governed by a simple profit-and-loss calculation, but a foundation of national sovereignty and food security. Representatives of the Ukrainian side, in turn, pointed to an imbalance in trade relations. **Oleksandra Avramenko** noted that Polish businesses enjoy much easier access to the Ukrainian market, while Ukrainian exports to the EU still face numerous restrictions. She also highlighted the difficult wartime realities: blocked maritime routes and power supply problems, which force Ukrainian companies to make costly investments in generators and significantly increase transportation costs. As a positive example of bilateral relations, **Yelyzaveta Svyatkivska** pointed to the dairy sector, where the two countries complement each other. Strong demand from Ukrainian consumers for Polish cheeses helps maintain stable milk prices in Poland. She encouraged direct investment in processing facilities in Ukraine, which would help align standards and protect markets from trade wars.

2. The Dual Nature of Ukrainian Agriculture and the Challenge Posed by Agroholdings

An important part of the debate was a research-based assessment of Ukraine's agricultural potential. **Dr. Vitaliy Krupin** emphasized that treating Ukrainian agriculture as a single, uniform bloc is a fundamental mistake. He pointed to a clear division: on the one hand, there is a farming sector made up of nearly 4 million smaller family farms, whose operating philosophy closely resembles the European model. On the other hand, the market is dominated by a corporate sector consisting of around 100 powerful agroholdings. The ten largest of these agroholdings alone control more than 2.5 million hectares of land, operating large-scale, export-oriented monocultures. These large corporations, according to the speakers, enjoy an unfair cost advantage, partly due to gaps in compliance with strict environmental and sanitary standards, as well as the use of intensive chemical inputs that would not be acceptable in the European Union. **Andrzej Gantner** expanded on this point, noting that agroholdings are able to drastically reduce unit production costs because of the enormous scale of their operations. Ukraine also has some of the best black soils in the world, while Poland's poorer soils require Polish farmers to use much more fertilizer, sharply increasing production costs. The impact of Ukrainian imports on Polish farms is already clearly visible. **Witold Boguta** observed that cheap imports are forcing painful changes. He cited the example of raspberry producers, who, because of frozen imports from the East, have had to switch to more expensive protected cultivation. He also

expressed serious concerns about the blueberry market, since blueberries ripen in both countries at the same time, creating the risk that Polish producers could be pushed out of Western markets. The Ukrainian side, however, argued that this picture requires some clarification. **Oleksandra Avramenko** emphasized that approximately 75 percent of Ukraine's agricultural land is in fact held by small and medium-sized enterprises, not exclusively by large agrohholdings. She also pointed out that some large entities, through cooperation with European financial and investment institutions, were among the first in Ukraine to implement European production standards, later passing on their knowledge and resources to smaller producers.

3. A Level Playing Field and Prospects in Global Markets

The Polish side strongly emphasized the need to maintain equal conditions of competition. **Andrzej Gantner** noted that Polish producers have for years borne enormous costs related to meeting strict European standards on quality, food safety, labeling, environmental protection, and animal welfare, all of which have a significant impact on the profitability of every sector. A clear demand was made that Ukrainian products entering Europe must be subject to exactly the same rules, with no preferential treatment. **Mykola Horbachov** defended free competition, arguing that consumers ultimately benefit from it through higher-quality goods and lower prices. He also expressed confidence that Ukrainian producers are capable of meeting all EU requirements. He pointed to the need for deeper integration of Ukraine's corn market with European financial instruments and the Euronext exchange. In his view, this would help stabilize the European market and make processors less dependent on fluctuations in the United States, from which Europe still imports millions of tons of raw material. **Pavlo Martyshev** offered a more moderate view of trade flows. He explained that, according to research, trade between the countries is based on complementarity: Ukraine buys large quantities of products such as dairy products, oil, and oilseed meal from Poland. Crucially, Ukraine's main strategic goal is not to flood the EU market with its goods, but to direct its natural competitive advantages — grains, oils, and poultry — toward highly profitable markets in the Middle East, North Africa, and Sub-Saharan Africa. Research confirmed that Ukrainian imports did not constitute price dumping and that wheat prices in Poland moved in line with global commodity markets. Both sides pointed to the potential for cooperation in jointly developing markets outside Europe.

4. Dialogue, Trust, and Countering Populism

A separate theme of the debate was the need for ongoing dialogue between the Polish and Ukrainian agri-food sectors. **Oleksandra Avramenko** emphasized that both sides lack regular, constructive communication that would enable them to address tensions more quickly and distinguish real

problems from political oversimplifications. In a similar vein, **Yelyzaveta Svyatkivska** noted that the greatest threats to the integration process are a lack of information, myths, and populism, which on both sides of the border make it harder to assess the situation rationally. Polish participants also recognized this problem. **Andrzej Gantner** pointed out that poor communication from EU institutions regarding the rules for opening the market and the future conditions of competition increases uncertainty among farmers and processors. **Witold Boguta**, in turn, emphasized that many key decisions concerning Ukraine's accession and the future of the Common Agricultural Policy will be made not only in Warsaw and Kyiv, but above all at the level of the European Commission; therefore, the transparency of this process will be essential to reducing social tensions. **Dr. Vitaliy Krupin** added an important analytical perspective, arguing that part of the misunderstanding stems from treating Ukrainian agriculture as a single, uniform category. In his view, a more precise debate must distinguish between different types of agricultural producers, because only then can policymakers avoid simplistic narratives and design solutions that address real risks rather than politically amplified fears.

5. Key Conclusions and Recommendations from the Debate

The process of bringing Ukraine into the framework of the European single market requires great caution and precise legal regulations. During the discussion, participants formulated a series of clear recommendations and necessary conditions to ensure that integration proceeds safely for both sides:

1. **Full and rapid harmonization of production standards.** This is the absolute foundation of cooperation. Environmental, quality, and sanitary standards must be fully aligned for all producers, with no exceptions for large Ukrainian agribusinesses, in order to prevent unfair price competition.
2. **Reform of the Common Agricultural Policy (CAP).** Support mechanisms need to be redesigned. Financial safeguards should be introduced to ensure that subsidies protect the family-farm model on both sides of the border, rather than funding large agroholdings.
3. **Strengthening Ukraine's farming sector.** Support for small and medium-sized individual farms in Ukraine should be treated as a separate and key precondition for accession. When designing EU solutions, policymakers must not overlook the extremely important social role of small farms, which provide livelihoods for entire families.
4. **Partnership instead of battles over the EU consumer.** Polish and Ukrainian companies should actively build joint processing initiatives. Combining Poland's technological base with Ukraine's raw-material base would make it possible to successfully enter new global markets together and ease tensions within EU markets.

5. **Use of pre-accession funding.** Governments and industries should already be seeking access to EU funds that stimulate safe pre-accession business contacts.

All participants agreed that the debate must be based solely on reliable, emotion-free data. All contributions will serve as the basis for a comprehensive report assessing the impact of Ukraine's accession, to be prepared jointly by the Warsaw Enterprise Institute and the Institute for Economic Research and Policy Consulting.