



Agri Renaissance

Interreg Europe



European Union
European Regional
Development Fund

MAZOVIA REGION

4 September, 2018 Kick of Meeting of Agri Renaissance

INDEX

1. BRIEF PRESENTATION OF MAZOVIA REGION

2. PRESENTATION OF PRELIMINARY RESULTS OF THE REGIONAL DIAGNOSIS

SOCIOECONOMIC CONTEXT OF AGRIFOOD SECTOR IN THE REGION

SUPRAREGIONAL CONTEXT OF AGRIFOOD SECTOR

REGIONAL INNOVATION SCOREBOARD

STAKEHOLDERS OF THE REGIONAL AGRIFOOD SECTOR

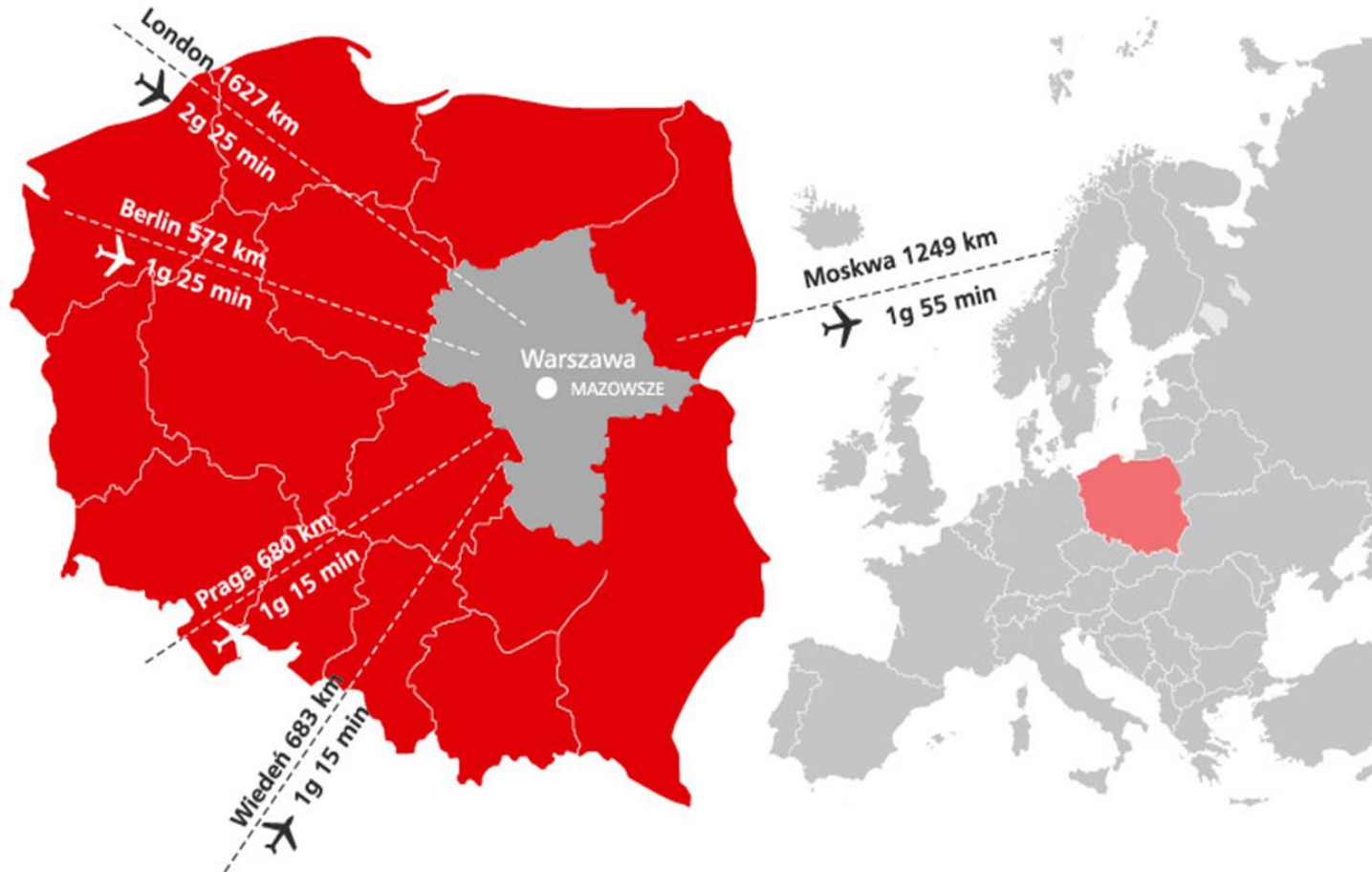
MAIN PROGRAMS AND INITIATIVES SUPPORTING R&D AND INNOVATION

3. PRESENTATION OF GOOD PRACTICES OF MAZOVIA REGION

BRIEF PRESENTATION OF MAZOVIA REGION



BRIEF PRESENTATION OF THE REGION



Mazovia.
heart of Poland

BRIEF PRESENTATION OF THE REGION

Mazovia (the Mazowieckie Voivodeship) is the biggest region in Poland – its surface area amounts to 35,598 km², this constitutes about 11.4% of the total area of the country. Almost the entire voivodeship is located within the Central Polish lowlands in mid-north-eastern Poland. The main national and international roads that cross through Poland run through the area of Mazovia to Warsaw. Warsaw operates as a centre of national transport by road, rail and air.

The fact that over 5 million people live in Mazovia – 13.1% of the population of Poland – makes it the most populous voivodeship. It is also the region where the biggest Polish city, namely Warsaw, is located. The city has about 1.6 million inhabitants, and together with the adjacent areas – 2.5 million. This means that almost 50% of the voivodeship's population live in the conurbation of Warsaw, and in total, 64% of the region's population in urban areas.



BRIEF PRESENTATION OF THE REGION



The food industry plays a dominant role (due to the area and the scale of production) as well as the petrochemical industry (the largest refinery in Plock). Other important sectors are energy, chemical and electrical engineering. A characteristic feature of Mazovia's industry is the rapid development of modern innovative industries such

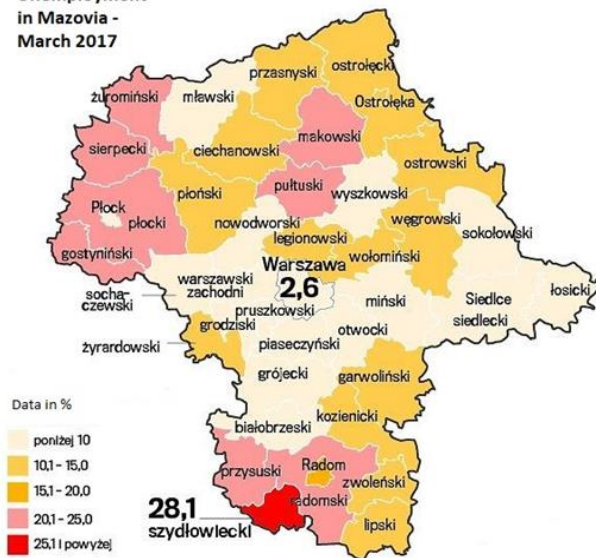
as financial services, insurance, telecommunications, computer technology, pharmaceuticals and electronics.

The largest part of the gross domestic product (GDP), which accounts for 22% of the total revenue of the country (22.14%, Source: Central Statistical Office (GUS) as of October 2017), is generated in Mazovia. Warsaw is a place of registration of 43 enterprises from the first one hundred of the largest Polish companies. One fourth of the foreign investors interested in Poland have chosen Mazovia to be the place of registration of their companies.



BRIEF PRESENTATION OF THE REGION

Unemployment
in Mazovia -
March 2017



The unemployment rate registered in the Mazovia Region stood at 6.7% at the end of April 2017 (the national average was 7.7%). The unemployment rate in the Region is highly diversified. The highest unemployment rate in April was recorded in the following districts: Szydłowiecki – 28.1%, Radomski – 21.3%. The lowest unemployment rate was recorded in Warsaw – 2.6% and in the districts around.

Mazovia is distinguished by the high level of imports and exports of the country. The main partners of Mazovia are other members of the European Union. Exports include: machinery and equipment, electrical and electrotechnical equipment, agricultural products and food, transport equipment, metals and metal products. The import is dominated by provisioning goods.

BRIEF PRESENTATION OF THE REGION



Mazovia is a leading producer of vegetables and second largest producer of cereals in Poland. The region of Mazovia is also a leader in the production of milk, while beef production is also quite exceptional.

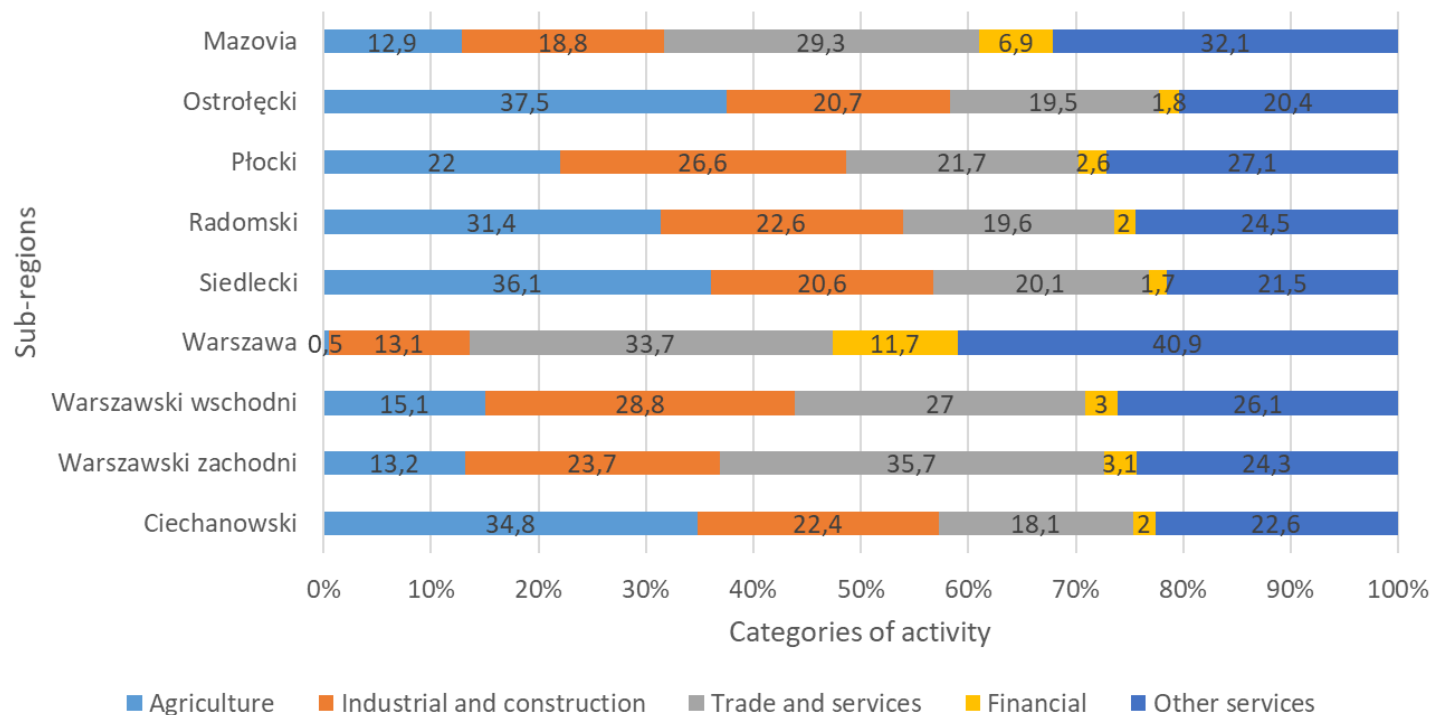
Agricultural areas occupy 65% of the surface area of the region (13% of agricultural land in Poland). Basically into the region of Mazovia, there are horticulturists and fruit growers.



Approximately 30% of Polish orchards are in Mazovia, which makes more than 40% of the national production of fruit. More than half of the total national production of apples and strawberries come from Mazovia.

PRESENTATION OF PRELIMINARY RESULTS OF THE REGIONAL DIAGNOSIS

Structure of the employed in Mazovia and sub-regions



Employed persons in agriculture total in Poland - 2 333 383.

Employed persons in agriculture in Mazovia – 299 976.

Employed persons in agriculture in EU (person aged 15—64, data 2014) - 10238,3 (in thous.).

SOCIOECONOMIC CONTEXT OF AGRI-FOOD SECTOR IN THE REGION



SUPRAREGIONAL CONTEXT OF AGRI-FOOD SECTOR IN THE REGION



Cooperation network created in 2014 as a result of the EU international project in cooperation with Spain. It supports network internationalization, innovation based on shared competences and development of international cooperation. Currently 49 entities from the food industry, bioeconomy and related entities.

Cluster of Innovation in Agribusiness - established by the Warsaw University of Life Sciences – SGGW.

The main focus of the cluster is to transfer the knowledge into business (science to business-S2B), increase the efficiency of technology and knowledge transfer between participants in the cluster, and consequently increase the innovative potential of the Mazovia region.



SOCIOECONOMIC CONTEXT OF AGRI-FOOD SECTOR IN THE REGION



Mazovian Science and Technology Park in Płock - an initiative aimed primarily at supporting the agri-food sector using the competitive advantage of the Mazovia region. The park cooperates with entrepreneurs, scientists and regional public institutions in order to achieve common goals and implement joint projects. The park also focuses on the development of biotechnology, renewable energy sources, innovations in agriculture, as well as the strengthening of clusters.



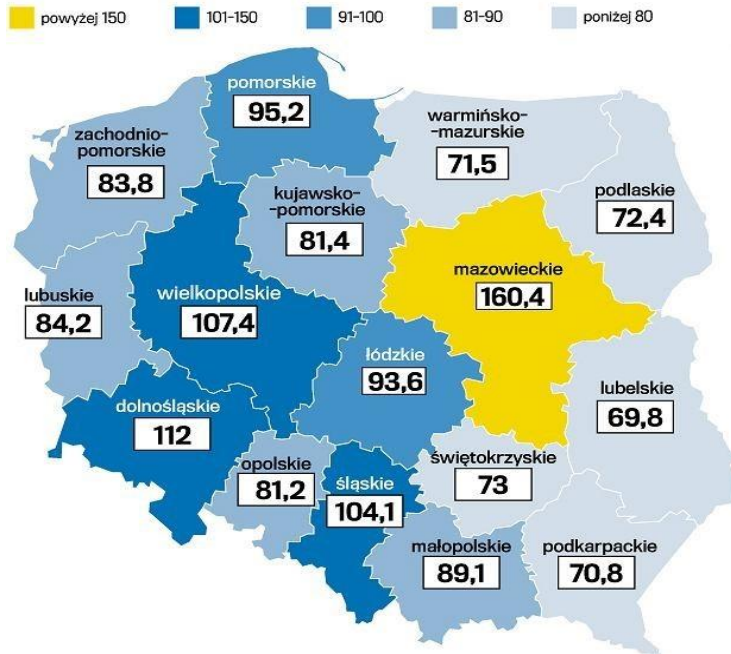
Institute of Agricultural and Food Biotechnology - Elaboration of the scientific fundamentals of food technology and technique development is the purpose of Institute activity. This purpose is realised by carrying on the R&D works and their implementations, as well as by dissemination of the research results.



The Agricultural Advisory Centre in Brwinów - The Centre is an operator that cooperates with agricultural advisory organizations, government and self-government administration institutions, professional associations, research and development units, as well as other entities working for the development of agriculture and rural areas in Poland.

SOCIOECONOMIC CONTEXT OF AGRI-FOOD SECTOR IN THE REGION

REGIONAL CONTEXT OF AGRI-FOOD SECTOR IN THE REGION



GDP per capita of Polish provinces
(Poland: 100%).

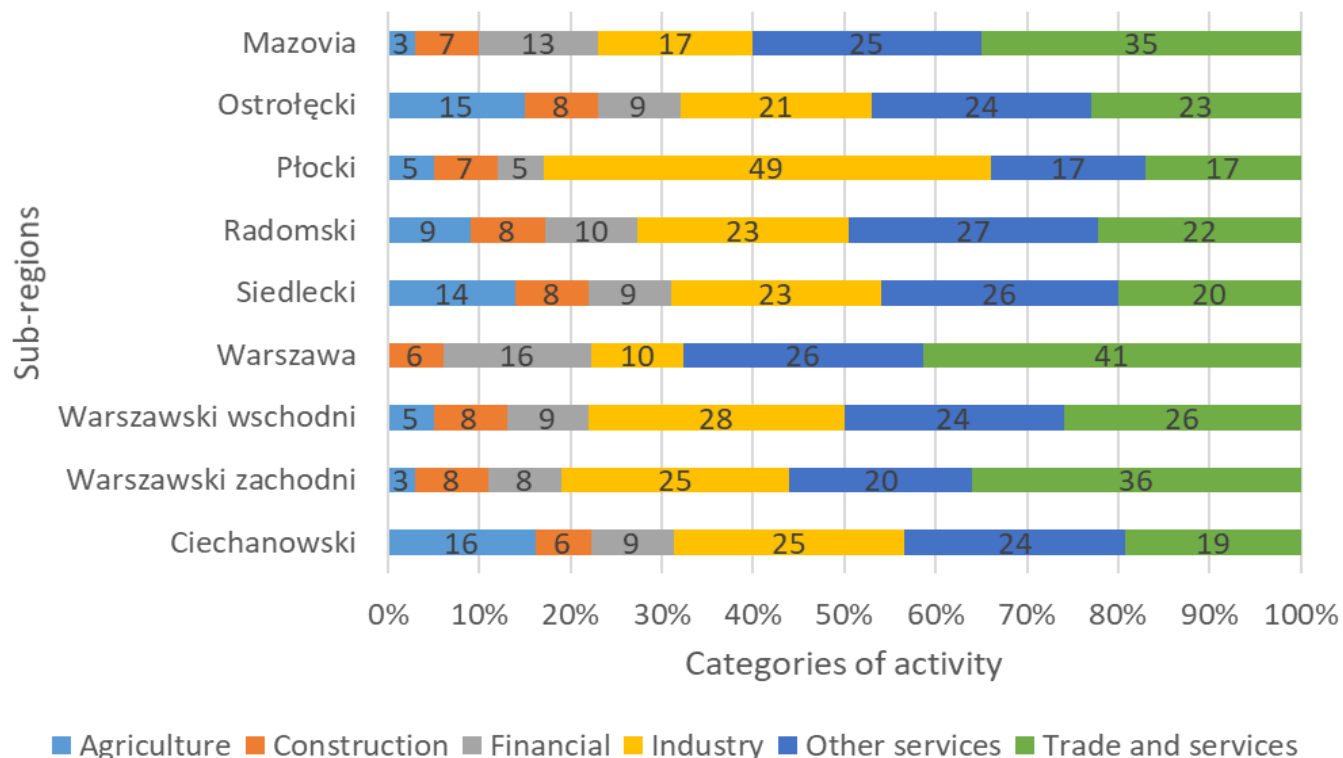
Mazovia generated 22% of the total revenue of the country.
The value of GDP per capita in 2015 in Mazovia was EURO 17 290,00.



The new division of Masovia into NUTS-2 units effective from January 1, 2018 - the metropolis of Warsaw and the rest of the voivodship.

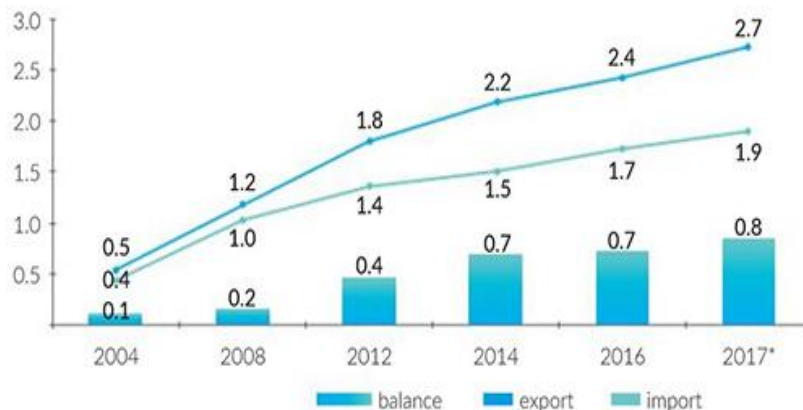
SOCIOECONOMIC CONTEXT OF AGRI-FOOD SECTOR IN THE REGION

Gross value added structure in sub-regions of the Mazovia region



In the Mazovia, the highest gross added value is generated by entities economic, whose business activity was: trade, repair of motor vehicles; transport and storage management; accommodation and catering, information and communication - 35.2% and other services - 24.9%. In the following places were found - industry - 17.4%, financial and insurance activity, real estate market service - 12.6%, construction - 6.9% and agriculture, forestry and hunting - 3.1%.

SOCIOECONOMIC CONTEXT OF AGRI-FOOD SECTOR IN THE REGION



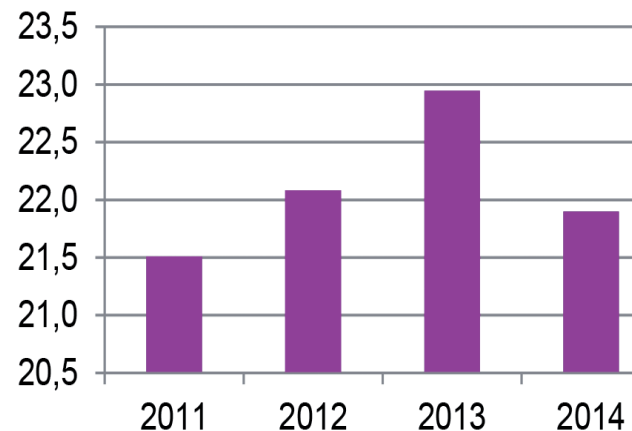
Foreign trade in Polish agri-food products (in EUR billion).

The Mazovia region is the biggest exporter in Poland of fruits and vegetables which reach markets of EU and of 23 non-Community countries. It is from Mazovia that half of Polish vegetables and as much as 70% of fresh fruits sold abroad come.

In 2017, the value of Polish exports in the agri-food sector amounted to EUR 27.3 billion.

The region remains also an important exporter of pork and beef meat as well as poultry. Mazovia, renowned for the Agaricus mushroom export, has among its other specialties, e.g., “jabłko grójeckie” (Grójec apple), sweet peppers from the area of Radom, a Napa cabbage and tomatoes. The voivodeship is also an important producer of milk and its products.

The popularity of Polish products is evidenced by the success of Polish apples in the world: Poland is on the 1st position in the world in the exports of apples, 2nd position in the production of concentrated apple juice and 4th position in the production of apples.



Share of export value of articles agro-food in the value of exports Mazovia in total in %. The share of the Mazovia in Polish exports oscillates around the level of 16%.

SOCIOECONOMIC CONTEXT OF AGRI-FOOD SECTOR IN THE REGION

Traditional and protected products



Strong brands from Mazovia

Bakoma

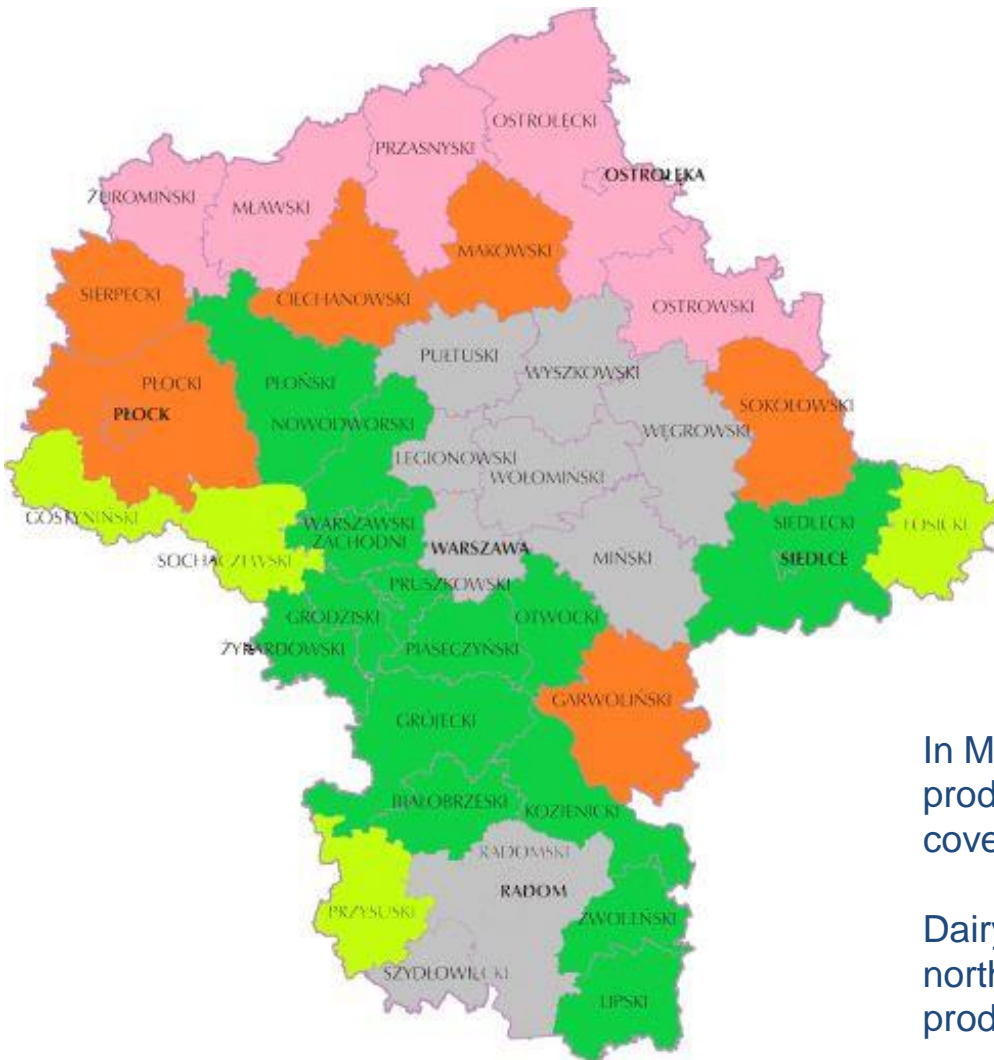
Hortex

WARKA

E. Wedel
od 1851

SOKOŁÓW

SOCIOECONOMIC CONTEXT OF AGRI-FOOD SECTOR IN THE REGION



Areas of the specialization of agricultural production:

Fruit and vegetable production

Fruit and vegetable/meat
production

Meat production

Meat/milk production

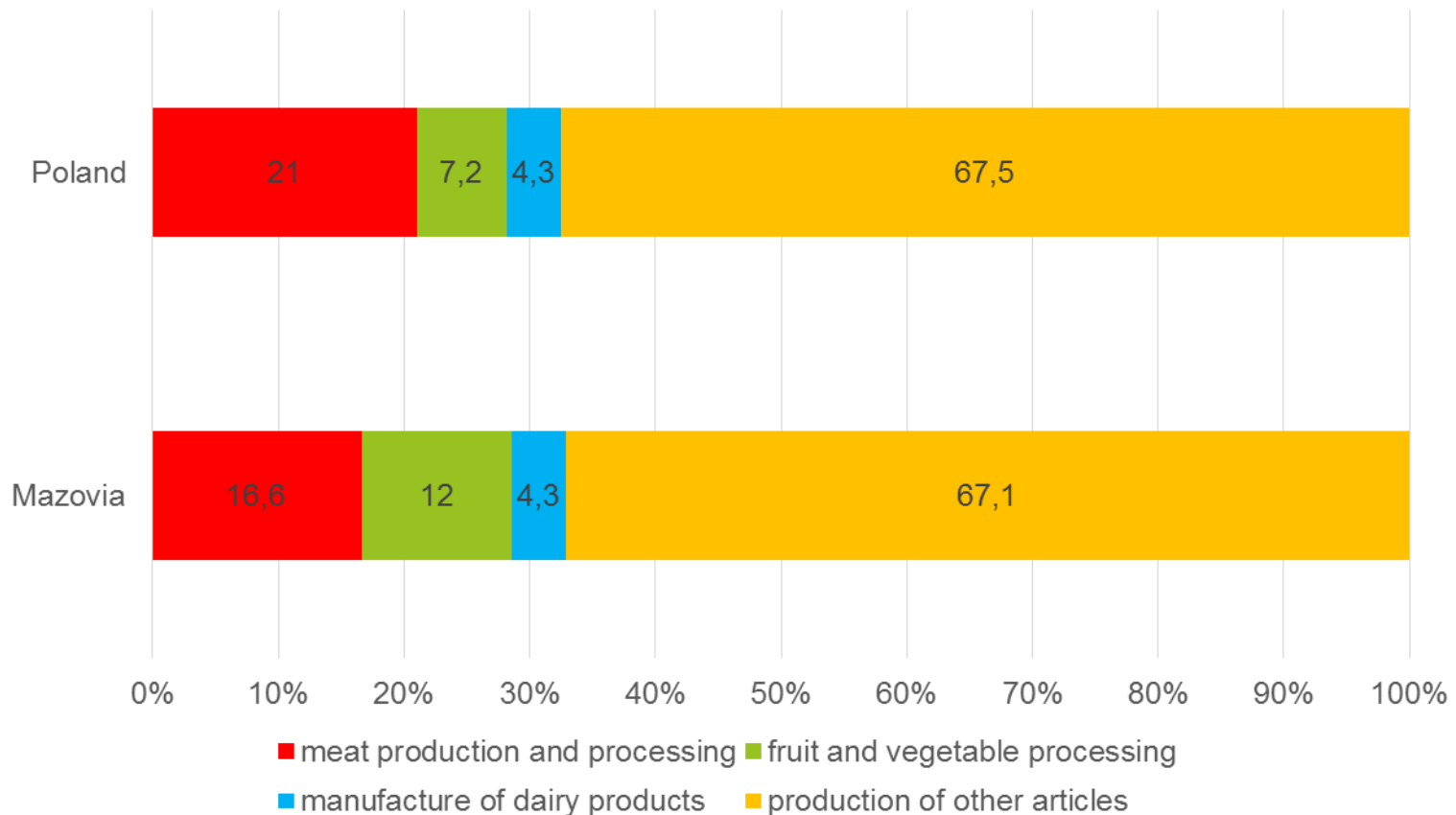
Areas with no specialization

In Masovia there are areas specialized in fruit production, vegetables, flowers, peppers under covers and strawberries.

Dairy cattle is specialized in northern and northeastern areas parts of Mazovia as well as production of beef, pork and poultry.

SOCIOECONOMIC CONTEXT OF AGRI-FOOD SECTOR IN THE REGION

Subjective structure of the food industry by type of processing



Regional Innovation Scorebord 2017

Mazovia is the leader of innovation among 16 Polish voivodships and is at the same time placed in 159th place (among 220 regions) in Europe in terms of innovativeness. Mazovia belongs to the group of "moderate" regions.



REGIONAL CONTEXT OF AGRI-FOOD SECTOR IN THE REGION

18th June 2018 - I Meeting of the Mazovian Group of Stakeholders of the Agri Renaissance project



REGIONAL CONTEXT OF AGRI-FOOD SECTOR IN THE REGION



MAIN PROGRAMS AND INICIATIVES SUPPORTING R&D AND INNOVATION

The Development Strategy of the Mazowieckie Voivodship 2030. Mazovia as an Innovative Region – Main goal: Reducing socio-economic disparities within the Mazovia Region, increasing the role of the Warsaw Metropolitan area in Europe.

Regional Operational Programme for Mazowieckie Voivodeship 2014-2020 The objective of this multi-fund ERDF/ESF Operational Programme (OP) is to increase the competitiveness of the region's economy based on the regional strengths and assets.

Regional Innovation Strategy for Mazovia 2020 - Innovation support system and smart specialisation of the region.

PRESENTATION OF GOOD PRACTICES PER REGION

GOOD PRACTICE Nº 1

TITLE: Increasing the recognition of regional products

BRIEF DESCRIPTION: Increasing the competitiveness of entrepreneurs with the logo of the Culinary Heritage Network Mazowsze, by introducing regional products to the HORECA offer

INSTITUTION INVOLVED: UMWM, NGO sector, Local Action Groups, universities with tourist and gastronomic profile

RELATION WITH THREE THEMATIC AREAS:
- Hybridation of the agri food sector with other sectors



MAIN RESULTS: Building relations between the HORECA industry (hotel industry, gastronomy) and the food industry (producers with the logo of the Culinary Heritage Network Mazowsze, including farmers) with an emphasis on regional products.
Promotion of local food. An attempt to create the region's brand (apple grójeckie, paprika) by introduction in hotels regional breakfast.

GOOD PRACTICE Nº 2

TITLE: Scientific research on new products

BRIEF DESCRIPTION: Research on the use of coatings and edible packaging. Research on the use of active packaging in the meat industry.



INSTITUTION INVOLVED: Warsaw University of Life Sciences, Faculty of Food Sciences SGGW

RELATION WITH THREE THEMATIC AREAS:
- Hybridation of the agri food sector with other sectors



COFUNDING (FEDER, FSE, FEADER...):

MAIN RESULTS: Design of edible coatings for various food products and extending the durability of raw materials. Oxygen absorbers in active packaging. Extending the durability of fresh meat.



GOOD PRACTICE № 3

TITLE: Development of new products

BRIEF DESCRIPTION: As part of research work carried out by the Faculty of Food Sciences SGGW has developed new products for Polder Sp. z o.o. - dulce de leche and marshmallow. As part of the project, it was developed recipes of the above products and have been verified, in order to be possible transferring research to the production environment. The production technology was then adapted to take into account the requirements of the new products and implementation tests were carried out.

INSTITUTION INVOLVED: Warsaw University of Life Sciences
- SGGW, Polder Sp. z o.o.

RELATION WITH THREE THEMATIC AREAS:
- R&I public-private collaboration

COFUNDING (FEDER, FSE, FEADER...): Voucher for innovation of SMEs - Polish Agency for Enterprise Development

MAIN RESULTS: The immediate effect of the implementation was the acquisition of new milk and confectionery products.



GOOD PRACTICE Nº 4

TITLE: The SatAgro web application

BRIEF DESCRIPTION: The SatAgro web application enables the use of automatically processed satellite data in monitoring arable fields and in agrotechnical operations. The application acts as a link between the dynamically developing sector of satellite observation on the one hand and a group of agronomists on the other. The application module SatAgro, introduced in the 2017 season, is used to automatically create application maps based on satellite imagery. The maps enable precise application of fertilizers or plant protection products and perform such operations as precise sowing or optimal determination of soil sampling points - the basis for rational plant production.

INSTITUTION INVOLVED: SatAgro Sp. z o.o., Centre of new technologies of the Warsaw University, University technology transfer centre

RELATION WITH THREE THEMATIC AREAS:

- Hybridation of the agri food sector with other sectors

COFUNDING (FEDER, FSE, FEADER...): Operational Programme Innovative Management of 2007-2013

MAIN RESULTS: Local adjustment of doses to the cultivation properties and its habitat results in a better use of the potential of individual fields (improvement of yield size and quality), savings (10-30%) and less pressure on the natural environment (eg. reduction of eutrophication)





Agri Renaissance

Interreg Europe



European Union
European Regional
Development Fund

Thank you!

Questions welcome



Project smedia