

Summary of the 11th International Beef Forum Report

European and Polish agriculture, including the beef industry, is undergoing significant transformation. These changes must be accompanied by strengthening farmers' role, which will only be possible if the entire process is based on a long-term and comprehensive plan to enhance the competitiveness of Polish agriculture and farmers' standing within the food value chain. Sustainable development must not mean the gradual exclusion of European, including Polish, agricultural producers from the global market.

Summarizing the 11th International Beef Forum, held in January 2025 in Warsaw, we now know what we did not know then: the new EU budget may bring radical changes for farmers, as it could mean the end of the Common Agricultural Policy in its current form. On February 13th, 2025, the European Commission (EC) confirmed that it would propose that the Multiannual Financial Framework (MFF) until 2028 should no longer include separate budgets for EU policies but should be based on three pillars: national reform and investment plans, funds for external financing, and the European Competitiveness Fund.

Competitiveness is the common ground among farmers, entrepreneurs, the European Commission, and the Polish government. Today, we speak with one voice about the need to strengthen competitiveness. The Competitiveness Compass, announced by the EC in February, also highlights this issue. Previously, its importance was underscored in the report by former Italian Prime Minister Mr. Mario Draghi, and now in the announcement of the MFF. The need to enhance the competitiveness of Polish agriculture was also emphasized at the 11th International Beef Forum by Jacek Czerniak, Deputy Minister of Agriculture and Rural Development. In his speech, he highlighted that the beef industry has and is implementing a development strategy that responds to the challenges facing modern agriculture, identifying food security as one of the priorities of the Polish Presidency of the EU Council.

Polish farmers and processors want to be competitive, which today means facing challenges such as environmental and climate protection, as well as animal welfare. The strategic role of livestock production in food security, sustainable production, biodiversity, and the functioning of rural communities must be taken into account. To develop and participate in a sustainable transformation, farmers and processors must have equal opportunities with trade agreement partners in the EU and global markets. Therefore,

they need support in access to financing, advisory services, tools, innovations, new research, and reasonable legislation.

The 11th International Beef Forum brought together key industry stakeholders, including farmers, processors, experts, scientists, and government representatives. Discussions focused on crucial industry challenges: the European Green Deal, difficulties related to ESG regulations, the role of agricultural producers in the value chains, and the impact of trade agreements on the competitiveness of European beef.

Forum participants developed recommendations for national and EU policy. The Warsaw Call was also presented, the full text of which can be found in this report.



Key Findings from the 11th International Beef Forum:

1. REASONABLE REGULATIONS – The beef industry is actively implementing solutions to reduce its environmental footprint, but to strengthen farmers' efforts, regulations must be adapted to real farming conditions. The transition to low-emission sustainable production must not weaken European agricultural competitiveness through excessive mandates and restrictions. It is crucial to provide farmers with tools that strengthen their position in the supply chains, create stable development conditions, and ensure fair wages for their work.

2. ADEQUATE SUPPORT FOR EMISSION REDUCTION – EU budget funds play a crucial role in accelerating transformation and building market advantages, particularly by supporting farmers through CAP eco-schemes related to emission reduction and carbon sequestration. With properly designed support, farmers can not only effectively reduce their carbon footprint but also achieve better prices and secure stable contracts through improved organizational forms such as recognized producer groups, producer organizations, or quality systems. This will strengthen their position in the supply chain and is essential for ensuring competitiveness and food security.

3. ECOLOGY MUST GO HAND IN HAND WITH ECONOMY – Agricultural policy should balance ecology with economy. Implementing emission reduction solutions in agriculture should not be merely an obligation or cost but also an opportunity for farmers and processors to increase the added value of agricultural production. It is necessary to promote solutions that integrate environmental and social initiatives with trade and marketing policy.

4. SUPPORTING THE EVOLUTION OF ESG – ESG reporting is becoming crucial for market and financing access, which is why farmers need support in its implementation. This includes both education and appropriate incentives for change. The transformation of the industry regarding ESG must be an evolutionary, not a revolutionary, process, taking into account long-term adaptation and access to the right tools. Collaboration among farmers, processors, the government, and EU institutions is essential.

5. FAIR COMPETITION – European farmers today compete with non-EU suppliers who are not subject to the same environmental and quality requirements. It is crucial that EU regulations do not weaken farmers' market positions through excessive adaptation costs, particularly in the context of ESG and climate requirements.

6. SECURE TRADE AGREEMENTS – The Mercosur agreement leads to unfair competition, undoubtedly weakening the position of European agricultural producers. Imported beef is not subject to the same animal welfare, environmental protection, or pharmaceutical substance regulations as beef produced within the EU. This poses a risk of lowering EU standards. Reciprocity clauses must be introduced to enforce the same environmental and quality standards on non-EU producers. When analyzing the effects of trade agreements, the structure of beef carcass value must be considered, where high-quality cuts account for a small portion of the weight but generate the majority of revenue.

7. DECISIONS ON OPENING THE MARKET TO UKRAINE – Integrating Ukraine into the EU should be supported in the interest of European security, but a thorough impact analysis on European agriculture is necessary. Special attention must be given to large agro-holdings owned by oligarchs. All possible scenarios must be analyzed to make informed decisions regarding the timing and scale of Ukrainian agricultural products' access to the EU market. The decision to remove barriers and open the EU market to full-scale Ukrainian agricultural imports should be made with proper foresight, allowing European farmers to assess the situation and make informed choices. The model used for delaying Romania and Bulgaria's entry into the Schengen Area serves as a good precedent.

8. WARSAW CALL – The Warsaw Call was presented at the Forum, emphasizing the need to base policy and legislation on real data and scientific research resulting from collaboration between scientists and industry expertise, rather than reflecting the views of a single person or lobbying group. This is the only way to ensure fair competition conditions. The Call refers to the Denver Call for Action and the Dublin Declaration, which highlight the need for political and economic decisions based on science rather than ideology.