Jan Siekierski*

Innovativeness in food industry in the European Union and Poland

K e y w o r d s: innovativeness, innovations, food industry, agricultural business, economic and financial results, Sokołów S.A. company

S u m m a r y: The paper presents major issues related to innovativeness of the Polish food industry on the background of the entire industry and the European Union. The EU framework programme for the benefit of competitiveness, and the adjusted Lisbon Strategy formulate the strategic objective of stimulating innovativeness in the European Economic Area (EEA).

After discussion of theoretical issues related to innovatics and innovations, the level of innovativeness of the Polish industry has been analysed. On the basis of presented measures, the author finds low level of innovativeness of the industry, apparent especially in comparison with many other countries. The situation is similar in the food industry, even though its major restructuring and modernisation occurred in the system transformation period. It is confirmed with the analysis of changes in this branch of industry in 1990s and later.

In the light of *Rzeczpospolita* daily paper List 2000 ranking and comparisons of innovativeness in the enterprises of our food industry in the years 2006 and 2009, unfavourable trends in this field are apparent. However, the world-scale financial crisis and recession in business in the years 2008–2009 had effect on this situation. It is also worth noting that Poland evaded these threats after joining the EU and one of the reasons was that it became a major exporter of agricultural products and food in Europe and in the world.

1. Introduction

As the modern economy is created based on knowledge, innovativeness, entrepreneurship and competitiveness of companies play an important role in this respect. The European Union actively supports activities in this field within the adopted strategy and policy of economic growth and development. In conclusion of the European

* Prof. Jan Siekierski, PhD—head of the Chair of Economy and European Studies, Małopolska School of Economics in Tarnów.

Council peak in Brussels in 2004 it was assumed that "competitiveness, innovativeness and propagation of the culture of entrepreneurship are the decisive conditions necessary for the growth of the economy at large, and is specifically important for the sector of small and medium-size companies (1).

The EU framework programme for competitiveness and innovativeness (CIP) sets the objective of integrating innovativeness and improvement in effectiveness of companies, growth and compatibility of scientific research, directed at modernising economy, taking into account the requirements of solid and sustained use of resources.

In the new approach to the Lisbon Strategy, the European Committee in the message of February 2005 stated that there is a need for stimulating innovativeness, especially in ecology, supporting education, new technologies, sustained use of resources and innovative potential of companies in this respect, as well as better cooperation of countries in the European Economic Area (1).

A major part in these enterprises falls on industry, including agricultural and food, focused in the broadest dimension in the sector of small and medium-size companies (2). The food industry gathers over 30 industries of production, such as meat, dairy, fruit and vegetables, distilling, etc. Thus, it plays a significant and important role in the national economy, including food economy, as well as in a broadly understood agricultural business (3).

The objective of this paper is to present major issues related to innovativeness of the food industry in Poland on the background of the European Union.

2. Innovatics, innovativeness, innovations, innovative strategy and policy

Innovatics is young scientific field which may and should affect innovative processes, bringing about benefits to the economy and to the community. Innovative solutions may result from own research and development activities of the company, cooperation with others, or from purchase of knowledge and ideas in the form of patents, software, know-how, as well as services of technical, technological, organisational, and marketing nature. In a different approach, the tangible one, it may be based on the use of machines and devices of enhanced parameters or on spreading new goods and services, improved in terms of use, quality and function. Innovativeness means implementation of novelties, i.e. a new or improved solution in reference to the process, organisation, product, service or marketing. Thus comes isolation of process and product innovations in technological innovations, and organisational, marketing and institutional innovativeness (4).

Innovativeness means also the skills, motivation and attitudes of commercial entities for scientific, research, technical, organisational, financial and commercial activities—aimed at development and implementation or improvement of methods, prod-

ucts, services—dedicated for the market or for another application in commercial practice (5).

The problem of innovativeness and innovations in economy and its entities is reflected in the theory of economics and management, among others with the work of Joseph Schumpeter, Peter Drucker, Michael Porter, Everett Rogers and others.

Schumpeter formulated the innovative process as a creative action which consists in creation, designing and executing the innovation. This process includes: research, implementation, diffusions of innovativeness, which means their dissemination (6).

Drucker considers innovations to be the basic driving power of entrepreneurship, which needs knowledge, ingenuity and predispositions of the persons who are distinguished in it (7).

Porter, in turn, believes that the condition for gaining competitive edge is achieving innovative capacity which contributes to increased effectiveness of company activities (8).

Everett Rogers defines innovation as a diffusion process through which it is delivered via specific channels of the social system (9).

In the European Union programmes and practice programming, innovativeness is also a means and a method which determines supplementary financing of development projects (10). It is commonly assumed that the basic source of innovativeness comes from investment expenditures, especially for the so-called advanced technologies, fixed assets, research and development (R&D), as well as increase in qualifications and knowledge of employees. Innovative objectives and processes are to ensure optimum effects for the companies in their executed business activities (2).

"Innovative management" is closely related to this issue, reacting to market challenges, cooperation of partners (clusters), and the network in information technology constitutes the basis for building management structures (11).

Another important issue is still development of strategy and adopting a specific innovative policy in both micro- (company level) and macroeconomic aspects, e.g. the European Union (12). The innovative strategy of companies shall be considered an ingredient of strategy in companies. In a broader approach, strategy constitutes the necessary item of creating the information society and comprehensive development based on knowledge (13).

The innovative policy in the EU countries results directly from the premises of the renewed Lisbon Strategy. Its objective is enhancing dynamics in the growth and development, increasing competitiveness with various financial instruments (EU funds), etc. It is reflected in programme solutions, such as the CIP programme mentioned earlier (the Framework Programme for Competition and Innovativeness, Innovative Economy Operational Programme 2007–2013), as well as in institutional solutions, such as the Council for Competition, the European Committee.

In the structure of the Polish economy based on knowledge, the strategic objective has been assumed—creating conditions for increasing competitiveness, entrepreneurship and innovativeness, written into the National Strategic Frames of References for

the years 2007–2013. In the Development Strategy of the Country in the same years, the growth and innovativeness of economy written in the Regional Operational Programmes based on regional Innovative Strategies were considered the priority.

Sectoral Operational Programme Improvement of the Competitiveness of Enterprises (SOP ICE, PL abbr.: SPOWKP) for the years 2004–2006 is currently continued for the years 2007–2013 in Operational Programme Innovative Economy.

The detailed objectives are entered here as follows:

- increasing innovativeness of enterprises;
- increase in competitiveness of the Polish science;
- increasing the role of science in economic growth;
- increasing the share of innovativeness of products of the Polish economy in the international market.

3. The level of innovativeness in the Polish industry under the conditions of European integration

Poland is one of these EU countries which invest into modern technology to a low degree only.

In 2006, only 0.57% of GDP was allocated on the works in the scope of new technologies and products, while this index was 3.87% in Sweden and the average of 1.87% in the EU. Expenditures of companies for R&D in the same 2006 year were, respectively (in m Euro): United Kingdom 15.9, Sweden 5.9, Germany 2.9, Poland 0.04. Only 3% of our export was in high-tech products, with 29% in Ireland and 18% in Germany (14). In terms of innovativeness, the EU lags behind the United States and Japan. Expenditures for R&D in these countries currently are 2.6% and 3.4%, while the average EU value is less than 2% of GDP. The necessity of increasing the share of this index to at least 3% is assumed to ensure innovative jump in the EU (15).

The generally low level of innovativeness of the Polish economy is confirmed with the "General index of innovativeness" prepared for the European Committee. It listed (2009) 0.317 for Poland, with the average EU index at 0.478, 0.636 for Sweden, 0.596 for Germany, 0.575 for the United Kingdom, 0.516 for Belgium, 0.501 for France, 0.481 for Estonia, and 0.479 for Cyprus (16).

The share of innovative companies in the total number of industrial companies is the measure used to determine the level of innovativeness in the industry. Eurostat in the EU and GUS in Poland determine within a pre-set period of 3 years how many companies introduced into the market at least one technical innovation, that is a new or improved technological process or a new product. The results of this research by GUS on a large sample of ca 15,000 companies in the years 2002–2008 are given in Table 1.

Table 1

The percentage share of innovative companies in the Polish industry in the years 2002–2008

Description	2002–2004	2004–2006	2006–2008
The total % of innovative companies	25.9	23.2	21.3
% of companies in the section "Industrial processing"	25.6	23.1	21.2
Including: the total number of companies:			
– small (10–49 employees)	17.7	13.9	14.6
– medium-size (50–249 employees)	41.3	37.4	32.7
– large (250 and more employees)	67.5	65.5	60.7

Source: (17).

For the next three research periods, Table 1 presents a declining trend of the share of innovative companies in the Polish industry. This decrease applies to all the groups: small, medium-size and large companies.

Another measure to determine the share of the industry in the development of innovative activities is the innovativeness intensity coefficient which reflects the relation of expenditures for innovative activities in the industry to the value of industry production sold (Table 2).

Table 2

Intensity and cost intensity of innovativeness in the Polish industry in the years 2000–2008

Year	Expenditures for innovative activities in the industry (PLN m)	Expenditures for innovations in % of the value of	
		production sold in the industry	added gross in the industry
2000	12,235	2.50	7.71
2004	15,417	2.27	7.44
2005	14,670	2.10	6.85
2006	16,558	2.11	7.20
2007	20,223	2.29	8.03
2008	24,271	2.60	8.92

Source: (18).

It follows from the calculations in Table 2 that the charges on our industry with expenditures for innovative activities are low as they were only 2.5 to 2.6% of the value of production sold in the years 2000–2008.

This index for added gross production of the Polish industry was at the level 7.71–8.92% in the same years and was lowest in 2005 at 6.86%.

The situation was similar in the same years, expressed with the index of participation of the value of goods production sold on account of implementation of technical innovations and their introduction into the market within the last 3 years to the total value of production sold in the given year.

The production renewal level throughout the Polish industry has been low, with the declining trend from 20.9% in 2004 to 15.8% in 2008. And a similar direction of changes to an even higher degree comes for the "industrial processing" section, with decrease from 23.8% to 18% (18).

It follows from the findings of Mikołajewicz (17) that in the 5-year period of Polish membership in the EU:

- the number of research units dropped by 20, from 300 to 269;
- the number of employed in these units dropped by 12.5%;
- the share of budget funds in the R&D expenditures decreased from 61.7% to 56.1%;
- the share of the state budget in financing innovative activities in the industry dropped to a very low level at ca 6.5%.

The GUS research shows that only 19% of the companies introducing innovations in the industry in the years 2006–2008 considered innovative activities as favourable for them due to cooperation with the science. The view is common that high intensity of innovativeness depends on progress in science. Analysis of structural transformations in our industry indicates unfavourable changes from the point of view of innovative processes throughout the period of economic transformation (18).

4. The food industry in the EU and in Poland

This industry plays a major role in the EU countries as the total value of its production is larger than compared with the USA, Canada or Australia. It employs ca 13.5% of employees in total and generates ca 2% GDP in the European Union. It also constitutes an important element of trade exchange in the world, remaining the largest exporter and importer of food and maintaining positive result in this trading, e.g. 3.7 m Euro in 2008 (19).

The food industry in Poland is one of the fastest developing areas of economy. Its share in the sales volume of the entire industry is almost 24% and is 9% higher than in 15 EU countries where its average is 15%. A higher share is only in 2 countries, i.e. Denmark with 28% and Greece with 27%. The generated gross added value (including the tobacco and beverage industries) is ca 6 B ZUS, that is over 4% of the value in the whole economy. The food industry employs ca 430,000 people, i.e. almost 5% of the total number of employees in the economy, and about 20% in the industry in total.

The value of the food market in our country is assessed at over 100 B PLN (without tobacco and beverages), that is ca 49 B Euro, with the value of production in this industry in the UE at ca 626 B Euro. Employment in the EU in this industry is 28 million people. Added value in the UE is ca 145 B Euro (with 11 B Euro in Poland). The number of companies (without microcompanies): 27,000, including 93% small business units (20).

Before Poland joining the EU, the food industry faced a major progress, and the result is that its larger part is one of the most modern branches in Europe. It was confirmed with the dynamically increasing export of our agricultural and food articles to countries in the European Union and other. In the years 1994–1997, the food industry was increasing production by ca 10% per year, at the same time maintaining high investment rate (with international investments). After 2000, the level of investing in general expenditures was lowered. However, no decrease in production and consumption of food was recorded in 2001. In absolute numbers against 2001 it is ca 30%. Beginning with 2000, the food industry has been recording gradual improvement in financial results.

Proceeds and profitability of the food industry companies according to the *Rzeczpospolita* daily paper ranking List 2000 are given in Table 3.

Table 3

Proceeds and profitability of companies in the food industry, agriculture and forestry in the years 2005–2006

Description	Total	Industry	
		Food industry	Agriculture and forestry
1. Number of companies	2000	202	4
Proceeds in PLN thou.	1,186,673,237	70,846,178	5,332,965
Share in List 2000	100.0	5.97	0.45
2. Analysed companies	1337	141	4
Proceeds in PLN thou.	831,327,156	50,767,863	5,332,965
Dynamics 06/05 in %	113.3	106.3	105.6
3. Net profitability			
2006 in %	5.0	4.8	4.4
2005 in %	4.9	4.6	4.6
Change in points	0.1	0.2	–0.2
4. Investment rate			
2006 in %	0.2	5.3	9.3
2005 in %	7.1	5.7	10.4
Change in points	–0.9	–0.4	–1.1

Source: (21).

5. Innovativeness in the Polish food industry

The possibilities of development of agricultural and food processing in Poland at present depend mostly on higher innovativeness with high segmentation markets (ecological food, diet food, semi-finished products for catering and restaurants) and changes in consumer preferences (22).

The interest of companies in innovativeness is the main measure of entrepreneurship and increase in competitiveness of companies.

Significant growth of innovative activities in the Polish food industry comes for the 1990s, when the process of adjusting companies to requirements of the market economy was started. Intense activities were undertaken to improve quality of goods, safety of work and protection of the natural environment. The result of these transformations was a fast rate of increase in investment expenditures in the years 1992–1997 for innovative activities. In recent years, the transformation was focused mostly on machines, technical equipment and means of transport. The value of these investment expenditures in the years 1997–2000 exceeded the amount of 800 m PLN, that is ca 60% expenses for innovations in total. Expenditures for R&D were low and amounted to as little as 30 m PLN, with even smaller amounts allocated for purchase of technologies and training events related to innovative activities (20).

The renewal index in production of food articles and beverages in percentage of the total production sold was 12.5% in 2004, and was systematically dropping down to the level of 8.4% in 2008 (18).

Innovativeness mostly refers to the technological point and process and in a lesser degree to company management, which means certification and quality, logistics, distribution, marketing, company image and brand. The need of innovativeness usually results from the general needs of the market and developing knowledge and application of IT sciences.

In the ranking by *Rzeczpospolita* in 2006, 12 out of 100 best innovative companies were in the agricultural and food sector and in the agricultural business, including 6 companies in the food industry (23).

In the next, seventh ranking of innovative companies, only 2 out of the selected 60 companies represent the agricultural business, i.e. Małopolska Hodowla Roślin sp. z o.o., Krakow (ranked 8) and Sokołów S.A., the meat industry (ranked 52).

The tables below present the economic and financial results of Sokołów S.A., the food industry company distinguished in the *Rzeczpospolita* ranking List 2000 (Table 4 and Table 5).

Table 4

General economic and financial characteristics
of Sokołów S.A. (the food industry) in the years 2008–2009

Description	Sokołów S.A. Capital Group	Sokołów S.A.
	2008	2009
1. Proceeds from sales (PLN thou.)	2,179,339	2,106,028
2. Dynamics of proceeds = 100; 2007	18.2	14.4
3. Operational result (PLN thou.)	80,188	81,870
4. Net result (PLN thou.)	47,091	62,586
5. Depreciation (PLN thou.)	59,961	51,954
6. Assets (PLN thou.)	874,551	1,033,237
7. Equity (PLN thou.)	447,177	636,191
8. Investments (PLN thou.)	69,548	63,891
9. Employment (PLN thou.)	5569	4957
10. ROE (%)	10.5	9.8
11. Rank in List 2000	153	127

Source: (21).

Due to the crisis situation in the years 2008–2009, the proceeds were lower, however their dynamics against 2007 dropped from 18.2% to 14.4% in the years 2008–2009. The operational result in these years increased by 2%, and net result increased by 33%. The assets increased by 18%, and equity by 42%. The investment expenditures decreased by 8%, and employment by 11%.

ROE, the return on equity as a ratio of the net result to the equity of the company at the end of the accounting year decreased from 10.5% to 9.8% in the years 2008–2009.

According to the adopted methodology for determination of ranking of innovative companies, the general index was used with the maximum value of 6 points. Up to 3 points were assigned for R&D activities, the ratio of employees in R&D against all the employees, and the ratio of R&D work completed in the unit to the total proceeds. For every positive answer to five questions about quality, the total of one point could be gained (24).

Table 5 presents the obtained results of innovative activities in 2009 in Sokołów S.A. in Sokołów Podlaski.

Table 5

Economic and financial results of Sokołów S.A.
in the ranking list of the best innovative companies in 2009

Description	Sokołów S.A. 2009
1. Score	0.2585
2. Proceeds from sales (PLN thou.)	2,106,028
3. Expenditures for R&D (PLN thou.)	2429
4. R&D expenditures to proceeds	0.1
5. Employment in total	4957
6. Employment in R&D	27
7. Employment in R&D to employment in total	0.5
8. Rank in the list of 60 best innovative companies	52

Source: (20).

In the scoring system, the difference between Sokołów S.A. and the first best company, Comarch S.A. Kraków (services and trade) is 41513 points, and between it and the last 60 company (Holding Węglowy S.A. Katowice) it is 0.2179. The result was thus 0.2585 points and 52 rank in the list of innovative companies.

The company allocated almost 2.5 m PLN for research and development in 2009, with relatively low employment in R&D, i.e. 27 persons, which gives 0.5 person to the total employment.

6. Conclusion

The generally low level of innovativeness in the Polish industry is apparent, including the food industry. There are many reasons for this, especially insufficient financial means and lack of capital, specifically in the sector of small and medium-size companies whose number in the analysed industry is very large. However, a major restructuring continued throughout the transformation period in the food industry, with beneficial effects in economy and finances of these companies. They result, among others, from the opening high export possibilities, along with Poland gaining the full membership in the European Union. Due to the crisis situation in the years 2008–2009, the situation of food companies worsened, including the area of innovativeness, which is confirmed with unfavourable rankings in the 2000 *Rzeczpospolita* List. In 2009, only one company was included in this ranking: Sokołów S.A., ranked 52 among the 60 selected companies.

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Innowacyjność w przemyśle spożywczym Unii Europejskiej i Polski

S t r e s z c z e n i e: W opracowaniu przedstawiono ważniejsze kwestie związane z innowacyjnością polskiego przemysłu spożywczego na tle całego przemysłu oraz Unii Europejskiej: Program ramowy UE na rzecz konkurencyjności oraz skorygowana Strategia Lizbońska, za cel strategiczny stawiają stymulowanie innowacji w Europejskim Obszarze Gospodarczym (EOG).

W kolejności tematycznej i merytorycznej artykułu – po omówieniu kwestii teoretycznych związanych z innowatyką i innowacjami – przeanalizowano poziom innowacyjności polskiego przemysłu. Na podstawie omówionych mierników w konkluzji autor stwierdza niski poziom innowacyjności przemysłu, zwłaszcza widoczny w kontekście porównań z wieloma innymi krajami. Podobnie sytuacja przedstawia się w przemyśle spożywczym, chociaż należy zauważyć, że w okresie transformacji systemowej dokonała się tutaj istotna jego restrukturyzacja i modernizacja. Potwierdza to przeprowadzona analiza zmian w tej gałęzi przemysłu w latach 90. i później.

W świetle badań rankingowych „Rzeczpospolitej" – Lista 2000 – i porównań innowacyjności w przedsiębiorstwach naszego przemysłu spożywczego w latach 2006 i 2009 zauważa się niekorzystne tendencje zachodzące w tej dziedzinie. Należy wszak mieć na uwadze wpływ na tę sytuację pojawienia się kryzysu finansowego w skali światowej, jak również recesji gospodarczej w latach 2008–2009. Równocześnie warto w tym miejscu stwierdzić, że po wejściu do UE Polska z tych zagrożeń wyszła obronną ręką, między innymi dlatego, że stała się liczącym się eksporterem artykułów rolnych i żywności w Europie i w świecie.

S ł o w a k l u c z o w e: innowacyjność, innowacje, przemysł spożywczy, agrobiznes, wyniki ekonomiczno-finansowe, ranking, firma Sokołów S.A.