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Poland

Product Brief

Dried Fruit and Nuts

2005

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Report Highlights:

Market research shows that about 32 percent of Poles buy a variety of nuts and dried fruits throughout the year. Quick snacks and other easy foods are showing continued expansion in the Polish food industry. As a result, this sector shows overall growth. Total imports of dried fruits and nuts in 2004 increased 8.2 percent from 2003.

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Section I. Market Overview

Quick snacks and foods are showing continued expansion in the Polish food industry. Polish consumers perceive dried fruit and nuts as a positive, healthy form of food "on the go." As a result, this sector shows overall growth. Total imports of dried fruits and nuts in 2004 increased 8.2 percent from 2003. This developing market has brought forth a variety of changes, including bulk packaging. While bulk packaging brings in a higher quantity of product, it has proven to decrease overall quality. The lack of a tariff for raw shelled and unshelled peanuts and newly decreased tariffs for walnuts, pistachios, raisins, dried prunes, and mixed nuts due to Poland's EU accession, offers U.S. suppliers the opportunity to capture a larger market share in Poland.

Market research shows that about 32 percent of Poles buy a variety of nuts and dried fruits throughout the year. Nearly 65 percent purchase nuts once a month, 25 percent purchase nuts once a week, and 7 percent purchase nuts more than once a week. Among the nuts available on the Polish market, the following are the most popular: peanuts, walnuts, hazelnuts, almonds, and pistachios.

No detailed data on dried fruit consumption is available. The most popular dried fruits on the Polish market are: raisins, prunes, dates, apricots, figs, apples, and pears. Dried cranberries are occasionally offered in the market; however, due to the lifting of the ad valorem tariff the potential for expansion in this area has expanded.

Demand for these products is highest between January and May. This is stimulated by Carnival season, Easter holidays, and a decrease in the availability of fresh fruit during this period. Polish consumers, ages 15-19, are the largest consumers of dried fruit and nuts. This age group likes the health food aspect and uses nuts and dried fruit as snacks. Additionally, these products are popular with 20-49 year olds. Consumption by those over 50 is marginal, mainly due to low-income levels and no convention of eating nuts and dried fruits as a snack. Market research shows that these products are most popular with urban residents who have high school or college degrees and have medium to high-income levels.

Advantages	Challenges
Polish consumption of dried fruit and nuts is on the rise.	Competition with the snack food industry.
The market is opening to new products such as flavored and roasted peanuts and almonds. Further development of alcoholic beverage advertisement could be utilized to promote this new category.	EU member states are allowed duty free market access.
Tariffs on walnuts, pistachios, raisins, prunes, and mixed nuts have been significantly reduced.	Spanish producers currently dominate the market for almonds due to much lower product costs. Market promotions of U.S. products are required in order to convince Polish importers to switch to U.S. products.
Consumers consider U.S. products to be higher quality.	Getting fresh products to the consumer.

Section II. Market Sector Opportunities and Threats

1) Entry Strategy

Larger firms have traditionally distributed products in this sector through wholesalers. However, more dried fruit and nut importers are increasingly using direct distribution to the retail market. Direct distribution reduces overall cost and increases product freshness. Larger firms have also introduced sales representatives in the field to process orders and to collect market information for the firm. Smaller firms, with less access to capital, rely on wholesalers to link them to the market. These firms do not have the capital necessary to distribute their product internally.

Exporters of U.S. dried fruit and nuts may obtain a list of current Polish importers by contacting the Office of Agricultural Affairs at the U.S. Embassy in Warsaw (see Section V).

2) Market Size, Structure, Trends

The retail centers for dried fruit and nut sales are broken into several segments. They include hypermarkets, supermarkets, discount stores, convenience stores, traditional stores, and kiosks. Hypermarkets have been growing in number throughout Poland and offer the largest variety of and give the most shelf space to dried fruits and nuts. Supermarkets and discount stores also offer a large variety of and dedicate shelf space to these products. Convenience stores are a new and growing distribution channel located at railway, bus, and gas stations throughout Poland. The number of these stores is expected to double over the next few years and will likely offer the greatest potential for market growth in snack products. In addition, Poland's automotive sales continue to increase, although not at the levels seen in the 1990's, thus, gas stations with food stores are an increasingly attractive retail outlet. Traditional stores and kiosks offer the least amount of variety and shelf space for dried fruit and nuts but make up the largest percentage of stores.

In terms of substitutes, the potato chip/snack food industry competes heavily with the dried fruit and nuts sector. Firms involved in this industry advertise heavily through TV and billboards. Fresh fruits and vegetables also compete with dried fruit and nuts during the summer. Consumption of dried fruit and nuts is the highest between September and May when fresh fruits are not as widely available.

While overall imports of dried fruits and nuts have grown 8.2 percent, new trends in market development have promoted an increase in bulk packaging from grams to kilograms, which has decreased quality. Additionally, foreign retail outlets often demand the same product terms and prices as those used in their Western European stores. The following tables show a break down of dried fruits and nuts imported to Poland.

Dried Fruit & Nuts Import Tables (In Thousands)

Almonds, Fresh or Dried, In Shell, 080211

Partner Country	Unit	2002		2003		2004		% Share			% Change
		USD	Quantity	USD	Quantity	USD	Quantity	2002	2003	2004	2004/2003
World	T	695	0	575	0	105	0	100	100	100	-81.83
United States	T	660	0	569	0	77	0	95	99	73.4	-86.52
Germany	T	1	0	0	0	24	0	0.15	0	23.3	0
Spain	T	32	0	6	0	2	0	4.56	0.96	1.67	-68.52
Slovakia	T	0	0	0	0	2	0	0	0	1.51	0
Netherlands	T	0	0	0	0	0	0	0	0	0.05	0

Almonds, Fresh or Dried, Shelled, 080212

Partner Country	Unit	2002		2003		2004		% Share			% Change
		USD	Quantity	USD	Quantity	USD	Quantity	2002	2003	2004	2004/2003
World	T	5798	2	8017	2	11968	2	100	100	100	49.29
United States	T	2537	1	3666	1	4608	1	43.8	45.7	38.5	25.69
Spain	T	3132	1	3965	1	4217	1	54	49.5	35.2	6.36
Germany	T	15	0	2	0	1284	0	0.25	0.02	10.7	8
Netherlands	T	0	0	0	0	621	0	0	0	5.19	0
Greece	T	0	0	57	0	601	0	0	0.71	5.02	952.02
Italy	T	1	0	322	0	288	0	0.01	4.01	2.41	-10.46
France	T	0	0	0	0	176	0	0	0	1.47	0
Lithuania	T	0	0	0	0	86	0	0	0	0.71	0
Denmark	T	0	0	0	0	32	0	0	0	0.27	0
Czech Republic	T	0	0	0	0	23	0	0	0	0.19	0
United Kingdom	T	0	0	0	0	13	0	0	0	0.11	0
Sweden	T	60	0	4	0	9	0	1.03	0.05	0.08	111.49
Austria	T	0	0	0	0	4	0	0	0	0.03	0
Norway	T	0	0	0	0	3	0	0	0	0.02	0

Raisins, 080620

Partner Country	Unit	2002		2003		2004		% Share			% Change
		USD	Quantity	USD	Quantity	USD	Quantity	2002	2003	2004	2004/2003
World	T	11229	14	12846	14	16043	15	100	100	100	24.88
Iran	T	4713	7	6953	8	8957	10	42	54.1	55.8	28.82
Greece	T	3107	3	2352	2	2338	2	27.7	18.3	14.6	-0.62
Chile	T	284	0	761	1	1150	1	2.53	5.92	7.17	51.11
Turkey	T	1808	2	1504	2	1099	1	16.1	11.7	6.85	-26.9
Germany	T	2	0	0	0	915	1	0.02	0	5.71	0
United States	T	1069	1	859	1	718	1	9.52	6.68	4.48	-16.35
Argentina	T	15	0	0	0	220	0	0.13	0	1.37	0
Belgium	T	0	0	0	0	212	0	0	0	1.32	0
South Africa	T	101	0	105	0	131	0	0.9	0.82	0.82	24.45
Netherlands	T	0	0	0	0	68	0	0	0	0.42	0
Australia	T	0	0	79	0	51	0	0	0.62	0.32	-35.41
France	T	16	0	0	0	33	0	0.14	0	0.21	0
Czech Republic	T	0	0	0	0	29	0	0	0	0.18	0
Thailand	T	0	0	0	0	21	0	0	0	0.13	0
United Kingdom	T	33	0	109	0	18	0	0.29	0.84	0.12	-82.96
Lithuania	T	0	0	0	0	18	0	0	0	0.11	0
Italy	T	0	0	17	0	16	0	0	0.14	0.1	-5.51
Slovakia	T	0	0	0	0	15	0	0	0	0.09	0
Spain	T	0	0	6	0	13	0	0	0.05	0.08	130.32
Sweden	T	2	0	2	0	11	0	0.02	0.01	0.07	524.94
Denmark	T	0	0	0	0	4	0	0	0	0.02	0
Austria	T	0	0	0	0	2	0	0	0	0.01	0
Moldova	T	0	0	0	0	2	0	0	0	0.01	0

Peanuts, In Shell, Not Roasted or Cooked, 120210

Partner Country	Unit	2002		2003		2004		% Share			% Change
		USD	Quantity	USD	Quantity	USD	Quantity	2002	2003	2004	2004/2003
World	T	4778	9	3988	6	4680	5	100	100	100	17.36
China	T	4519	8	3932	6	3246	4	94.6	98.6	69.4	-17.44
Germany	T	1	0	0	0	917	0	0.01	0	19.6	0
Argentina	T	192	0	0	0	264	0	4.03	0	5.64	0
Netherlands	T	0	0	0	0	233	0	0	0	4.98	0
India	T	0	0	0	0	16	0	0	0	0.34	0
Vietnam	T	2	0	2	0	2	0	0.04	0.04	0.05	42.67
France	T	0	0	0	0	2	0	0	0	0.04	0
Cameroon	T	10	0	0	0	0	0	0.21	0	0	0
Switzerland	T	54	0	54	0	0	0	1.14	1.35	0	-100
United States	T	0	0	0	0	0	0	0.01	0	0	0

Peanuts, Shelled, Not Roasted or Cooked, 120220

Partner Country	Unit	2002		2003		2004		% Share			% Change
		USD	Quantity	USD	Quantity	USD	Quantity	2002	2003	2004	2004/2003
World	T	15445	22	19422	25	21258	24	100	100	100	9.45
Netherlands	T	0	0	0	0	6827	7	0	0	32.1	0
China	T	7517	11	11367	15	5975	7	48.7	58.5	28.1	-47.43
India	T	388	1	215	0	3857	5	2.51	1.11	18.2	1693.3
Argentina	T	3331	5	5817	7	2447	3	21.6	30	11.5	-57.93
Brazil	T	156	0	817	1	1560	2	1.01	4.21	7.34	90.89
United States	T	2984	3	682	1	327	0	19.3	3.51	1.54	-52.03
Ghana	T	0	0	37	0	104	0	0	0.19	0.49	181.7
Austria	T	96	0	78	0	45	0	0.62	0.4	0.21	-41.88
Cote d Ivoire	T	0	0	0	0	33	0	0	0	0.16	0
Latvia	T	0	0	0	0	24	0	0	0	0.11	0
Turkey	T	0	0	0	0	20	0	0	0	0.1	0
South Africa	T	612	1	128	0	15	0	3.96	0.66	0.07	-88.16
Greece	T	0	0	28	0	11	0	0	0.15	0.05	-60.58
Lithuania	T	0	0	0	0	5	0	0	0	0.02	0
Vietnam	T	2	0	6	0	5	0	0.01	0.03	0.02	-17.12
Germany	T	0	0	0	0	2	0	0	0	0.01	0

Mixture of Nuts or Dried Fruits, 081350

Partner Country	Unit	2002		2003		2004		% Share			% Change
		USD	Quantity	USD	Quantity	USD	Quantity	2002	2003	2004	2004/2003
World	T	129	0	225	0	962	0	100	100	100	326.82
Germany	T	104	0	154	0	812	0	80.5	68.4	84.3	426.42
Latvia	T	0	0	0	0	52	0	0	0	5.4	0
France	T	0	0	0	0	37	0	0.23	0.01	3.84	8
Czech Republic	T	2	0	0	0	30	0	1.56	0	3.11	0
Austria	T	12	0	17	0	16	0	9.39	7.35	1.65	-3.91
Italy	T	1	0	7	0	9	0	0.43	2.94	0.96	39.21
United Kingdom	T	0	0	8	0	3	0	0	3.61	0.31	-62.83
South Africa	T	4	0	4	0	1	0	2.71	1.82	0.14	-67.8
Netherlands	T	1	0	0	0	1	0	0.99	0	0.12	0
Vietnam	T	1	0	0	0	0	0	0.54	0	0.02	0
Turkey	T	1	0	5	0	0	0	0.47	2.03	0.02	-96.44

Pistachios, Fresh or Dried, 080250

Partner Country	Unit	2002		2003		2004		% Share			% Change
		USD	Quantity	USD	Quantity	USD	Quantity	2002	2003	2004	2004/2003
World	T	3248	1	3734	1	5457	1	100	100	100	46.17
Germany	T	3	0	3	0	2836	1	0.09	0.07	52	8
Iran	T	3023	1	3465	1	1429	0	93.1	92.8	26.2	-58.77
Spain	T	0	0	7	0	498	0	0	0.19	9.13	7050.55
United States	T	0	0	74	0	159	0	0	1.97	2.91	115.62
Luxembourg	T	0	0	0	0	159	0	0	0	2.91	0
Netherlands	T	0	0	0	0	150	0	0	0	2.74	0
Slovakia	T	0	0	0	0	119	0	0	0	2.19	0
Lithuania	T	0	0	0	0	94	0	0	0	1.72	0
Hungary	T	0	0	0	0	8	0	0	0	0.15	0
Italy	T	85	0	62	0	3	0	2.61	1.66	0.05	-95.5

Prunes, Dried, 081320

Partner Country	Unit	2002		2003		2004		% Share			% Change
		USD	Quantity	USD	Quantity	USD	Quantity	2002	2003	2004	2004/2003
World	T	4279	3	5548	4	7283	4	100	100	100	31.28
Chile	T	1455	1	1330	1	2273	1	34	24	31.2	70.88
United States	T	1735	1	1527	1	1656	1	40.5	27.5	22.7	8.5
Germany	T	0	0	0	0	1027	1	0	0	14.1	8
Argentina	T	855	1	2454	2	913	1	20	44.2	12.5	-62.81
France	T	5	0	113	0	824	1	0.12	2.03	11.3	631.77
Moldova	T	7	0	12	0	129	0	0.15	0.21	1.76	983.04
Netherlands	T	1	0	0	0	89	0	0.02	0	1.22	0
Spain	T	0	0	0	0	83	0	0	0	1.13	0
Lithuania	T	0	0	0	0	76	0	0	0	1.05	0
Yugoslavia	T	0	0	0	0	71	0	0	0	0.97	0
Canada	T	0	0	21	0	63	0	0	0.38	0.87	197.7
Slovakia	T	42	0	40	0	37	0	0.99	0.72	0.5	-7.8
Denmark	T	0	0	0	0	31	0	0	0	0.43	0
Czech Republic	T	169	0	0	0	8	0	3.95	0	0.11	0
Turkey	T	5	0	9	0	2	0	0.11	0.15	0.03	-76.56

Walnuts, Fresh or Dried, In Shell, 080231

Partner Country	Unit	2002		2003		2004		% Share			% Change
		USD	Quantity	USD	Quantity	USD	Quantity	2002	2003	2004	2004/2003
World	T	270	0	309	0	394	0	100	100	100	27.31
Netherlands	T	0	0	0	0	218	0	0	0	55.4	0
France	T	210	0	225	0	108	0	77.7	72.7	27.4	-52.01
Germany	T	0	0	1	0	61	0	0	0.16	15.6	8
Austria	T	0	0	0	0	5	0	0	0	1.2	0
Slovakia	T	0	0	0	0	1	0	0	0	0.35	0
United States	T	58	0	79	0	0	0	21.3	25.7	0	-99.98
Spain	T	0	0	4	0	0	0	0	1.41	0	-100

Walnuts, Fresh or Dried, Shelled, 080232

Partner Country	Unit	2002		2003		2004		% Share			% Change
		USD	Quantity	USD	Quantity	USD	Quantity	2002	2003	2004	2004/2003
World	T	140	0	155	0	195	0	100	100	100	25.64
France	T	91	0	15	0	47	0	65.3	9.54	23.9	215.11
Netherlands	T	0	0	0	0	46	0	0	0	23.3	0
Ukraine	T	0	0	7	0	44	0	0	4.61	22.4	511.6
Moldova	T	1	0	52	0	36	0	0.36	33.4	18.6	-29.95
Italy	T	1	0	1	0	11	0	0.77	0.59	5.54	1087.76
Germany	T	6	0	43	0	6	0	4.33	27.6	3.06	-86.06
Austria	T	0	0	0	0	4	0	0	0	2.18	0
Sweden	T	1	0	2	0	1	0	0.93	1.55	0.58	-52.75
Australia	T	0	0	1	0	1	0	0.23	0.56	0.3	-33.89
Kyrgyzstan	T	0	0	0	0	0	0	0	0	0.04	0
India	T	19	0	24	0	0	0	13.6	15.5	0	-100

Sunflower Seeds, Whether or Not Shelled and in Grey and White Striped Shell (Excl. For Sowing), 12060091

Partner Country	Unit	2002		2003		2004		% Share			% Change
		USD	Quantity	USD	Quantity	USD	Quantity	2002	2003	2004	2004/2003
World	T	5999	12	6792	12	7350	11	100	100	100	8.21
Hungary	T	3883	9	3833	8	3353	5	64.7	56.4	45.6	-12.53
China	T	704	1	2216	3	2498	3	11.7	32.6	34	12.72
United States	T	1160	1	459	1	751	1	19.3	6.76	10.2	63.67
Slovakia	T	62	0	55	0	249	1	1.04	0.8	3.38	355.26
Czech Republic	T	63	0	136	0	172	0	1.05	2	2.34	26.34
Germany	T	0	0	0	0	138	0	0	0	1.88	0
Argentina	T	17	0	36	0	47	0	0.29	0.53	0.64	30.2
Netherlands	T	0	0	0	0	44	0	0	0	0.6	0
Bulgaria	T	0	0	0	0	44	0	0	0	0.6	0
India	T	14	0	15	0	31	0	0.24	0.22	0.42	101.29
Ukraine	T	11	0	26	0	12	0	0.19	0.38	0.17	-52.29

Source: Global Trade Atlas

3) Market Preferences

Flavored peanuts, almonds, and hazelnuts have recently become popular among Polish consumers. Spicy flavors tend to be most appealing. Coated peanuts, referred to as double crunch peanuts, are also popular and are available in salted or flavored varieties. Energy bars produced from grains, nuts, and dried fruits are becoming more visible on the market as society becomes more health conscious. Products from companies outside of Poland primarily dominate the energy bar market; however, Polish companies are starting to produce these bars themselves. Chocolate manufacturers are also starting to look for high quality ingredients to ensure longer shelf life for their products. This has led to an increased demand for high quality nuts as raw materials. Due to increased local demand, Polish importers have become more interested in larger orders, increasing the demand for direct shipments from the United States.

III. Costs & Prices

Costs of dried fruits and nuts depend on the brand and the market in which they are sold (upper, middle, lower income). However, overall price fluctuation is moderate. The following depicts retail prices for dried fruit and nuts in June 2005.

Retail Prices

Product	Price	Quantity	Brand
Double Crunch Peanuts, Flavors:			
Chili, BBQ, and Paprika	7.45	260g	Felix
Double Crunch Peanuts, Plain	4.09	125g	Lorenz
Double Crunch Peanuts, Plain	4.19	150g	Felix
Honey Roasted Peanuts	3.07	150g	Abo-Nuss
Honey Roasted Peanuts	5.50	150g	Felix

Honey Roasted Peanuts	9.99/kg		
In-Shell Salted Peanuts	3.90	300g	Euroshopper
In-Shell Peanuts	10.36/kg		
Shelled Peanuts	13.35/kg		
Picante Peanuts	5.35	300g	Felix
Paprika (Picante) Peanuts	4.19	150g	Felix
Lightly Salted Peanuts	10.80	500g	Felix
Salted Peanuts	3.20	100g	Felix
Salted Peanuts	13.99	1000g	Aromat
Unsalted Peanuts	4.29	150g	Felix
Unsalted Peanuts	8.49	500g	Felix
Pistachios	5.39	100g	Felix
Pistachios	17.69	500g	Gurillas
Almonds	5.50	100g	Bakal
Almonds	3.31	100g	Uno Quality
Sliced Almonds	2.32	60g	Uno Quality
Walnuts	2.03	100g	Uno Quality
Walnuts	3.15	80g	Bakalland
Dried Bananas	15.20/kg		
Dried Pineapple	20.30/kg		
Dried Apples	6.99	200g	Uno Quality
Dates	0.99	150g	Uno Quality
Dates	1.52	180g	Bakal
Dried Apricots	12.80	250g	Uno Quality
Dried Apricots	4.70	100g	Bakalland
Prunes	9.99	300g	Uno Quality
Prunes	4.20	150g	Bakalland

Prunes	2.40	200g	Kresto
Raisins	2.25	100g	Bakalland
Raisins	5.69	300g	Uno Quality
Raisins	2.85	200g	Bakal
Mixed Fruits and Nuts	2.60	50g	Uno Quality
Mixed Nuts and Raisins	8.37	300	Felix

Source: FAS Warsaw Field Research

Poland's import tariffs on dried fruit and nuts were drastically reduced when Poland joined the EU.

Dried Fruits and Nut Tariffs

CN Code	Name of Product	EU Tariff
08021110	Almonds, in shell, bitter	0%
08021190	Almonds, in shell, other	5.6%*
08021210	Almonds, shelled, bitter	0%
08021290	Almonds, shelled, other	3.5%*
080231	Walnuts, in shell	4%
080232	Walnuts, shelled	5.1%
080250	Pistachios	1.6%
080620	Raisins	2.4%
081320	Prunes, dried	9.6%
08134095	Cranberries, dried	2.4%
08135031	Mixture of nuts	4%
120210	Peanuts, in shell	0%
120220	Peanuts, shelled	0%
12060091	Sunflower Seeds	0%

*Other Almonds, in shell and shelled, have a quota of 900,000 tons, with a tariff quota of 2%.

For more information on EU tariffs please refer to:

http://europa.eu.int/comm/taxation_customs/dds/en/tarhome.htm

Section IV. Market Access

The Polish government works to ensure the safety and quality of food for Polish consumers through a number of regulatory means. Information specifically pertaining to Poland may be obtained from FAS's Food and Agricultural Import Regulations and Standards (FAIRS) report for Poland. Most measures are the same as those observed in the European Union. The most important EU regulations can be found in FAS's FAIRS report for the European Union, which can be found at the following address <http://www.useu.be/agri/usda.html>.

- Registration of a new imported product:

All imported products must be approved for sale or use on the Polish market. Registration and approval of imported products is much simpler if the product has already received approval for sale in another EU country. In order to test or register a new product or start

procedures for receiving approval of a new additive (not specified in the approved additives list) the following procedure should be followed:

Appropriate Voivod Sanitary Station should be contacted. In Warsaw - the Wojewodzka Stacja Sanitarna (SANEPID) is the appropriate contact. Please note that only firms registered in Poland (e.g. the potential importer) can order product testing. Additionally, each region has its own sanitary station (a list is available from Warsaw SANEPID) and only firms registered in Warsaw or neighboring areas can conduct product testing in the Warsaw Sanitary Station.

A local sanitary station must be supplied with a product sample for testing. The tests can take between two weeks and two months. The cost is difficult to estimate but may amount to US\$250 per product. An estimate of the cost can be obtained from the SANEPID station when it is presented with product details. The lab tests for product ingredients determine whether they are permitted on the Polish market.

If it is determined that all the ingredients are allowed on the Polish market, SANEPID test results are sufficient for the product to be sold in Poland. However, should some ingredients be questioned, additional requests must be submitted to State Hygiene Office (Panstwowy Zaklad Higieny).

All packaged/canned food products are required to have Polish language labels. Multi-language labels are acceptable as long as they include Polish. The label must contain:
The name of the product,
The name and address of the producer,
The date to be consumed before - the Polish phrase "należy spozyc do XXX" is commonly used,
The net content (weight/capacity), and
The content of the product (ingredients, chemical additives, etc.).

Labeling must be applied in the form of a whole label or a permanent sticker before the product can enter Poland. Products arriving in Poland without appropriate labels will be detained at the border until appropriate labels are applied.

Poland's Ministry of Health and Social Welfare published a new regulation (Journal of Law no. 87 dtd. May 19, 2003) on food additives in June 2003. Poland uses a positive-additives list, which identifies additives that are permitted for use in foodstuffs. This particular regulation has been one of the most difficult obstacles facing imported products. As each EU member state has a different list of allowable food additives it is vital for all U.S. exporters to check with the potential Polish importers about whether the product intended for the Polish market meets all the ingredient requirements.

If you would like to contact authorities directly involved in preparing regulations on food additives and inspection of additive levels for imported products, please contact the National Food and Nutrition Institute (see section V for contact information).

V. Key Contacts and Further Information

Embassy of the United States of America
Office of Agricultural Affairs, Warsaw, Poland
e-mail: agwarsaw@usda.gov or agwarsaw@poczta.onet.pl
tel: 48 22 504 2336, fax: 48 22 504 2320

Mazowiecka Sanitary Station - SANEPID - actual tests & check ups
Mr. Krzysztof Dziubinski, Acting Voivodship Sanitary Inspector
ul. Zelazna 79
00-875 Warsaw
ph: 4822-6201656, 6209001 ext. 42
fax: 4822-6248209
www.wsse-wawa@supermedia.pl

Institute of Food and Nutrition
-Dr. Lucjan Szponar, Director
Ms. Katarzyna Stos, Section for Food and Nutrition Manager
ul. Powsinska 61/63
02-903 Warsaw
ph: 4822-5509677, 8420571, 8422171
fax: 4822-8421103
fax: 4822-423742

For aflatoxin information please contact:

State Hygiene Office- (Panstwowy Zaklad Higieny)
PZH Prof. Jan Krzysztof Ludwicki, Director, ph: 4822-8497084
Ms. Katarzyna Czaja, chemical residue lab, ph: 4822-8493332
Ms. Krystyna Rybinska, Food Testing Unit, ph: 4822-8494051 ext. 359, 339
fax: 4822-8493513, 8497441
ul. Chocimska 24
Warsaw

Main Sanitary Inspection (Glowny Inspektor Sanitarny - GIS)
Mr. Andrzej Trybusz
ph: 4822-6351559
fax: 4822-6356194
ul. Długa 38/40
00-238 Warsaw

Polish Center for Research and Certification Ms. Ewa Slowinska
Manager Food Department
ph: 4822-6470722, 8579916
fax: 4822-6471109
e-mail: cert.wyr@pcbc.gov.pl
ul. Klobucka 23A
02-699 Warsaw
www.pcbc.gov.pl