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Poland

Exporter Guide

Annual

2005

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Report Highlights:
Poland's Gross Domestic Product (GDP) was 3.5 percent in 2005, 5.4 percent in 2004 and 3.8 percent in 2003. Experts predict 2006 GDP will increase to 4.2 percent in 2006. Despite economic difficulties, the food retail sector continues to be modernized and expand. Food trade, predominantly between Poland and the EU, has risen significantly in recent years and continued growth is expected. There are prospects for U.S. food and beverages sold directly to Poland or indirectly via Western Europe.

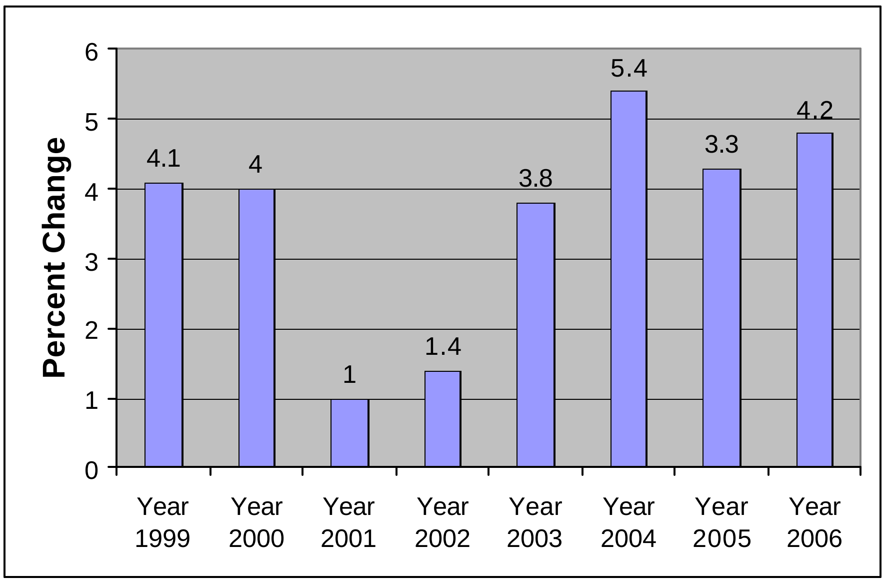
Includes PSD Changes: No
Includes Trade Matrix: No
Annual Report
Warsaw [PL1]
[PL]

Market Overview

The retail food sector is the most vibrant sector of the economy since free-market restructuring and privatization began in the early 90s. Agricultural products such as snack foods, beverages, fast food, and ice cream oriented toward young consumers below the age of 24 will remain in high demand, as this age group comprises 32.7 percent of the population. Food and beverage purchases accounted for 39 percent of total consumer spending in 2003.

In 2004 Poland experienced its highest GDP increase in seven years. GDP growth topped out at 5.4 percent in 2004, up from 3.8 percent in 2003 and 1.4 percent in 2002. The main factor affecting GDP growth was domestic demand, which increased 4.5 percent (compared to 2.5 percent in 2003). GDP growth in 2005 was 3.3 percent but it is expected to increase to 4.2 percent in 2006.

Poland's Real GDP Growth Rate



Source: Citibank and Polish Market Review

Final consumption expenditure grew 2.8 percent in 2004 up from 2.4 percent in 2003 and individual consumption expenditure grew 3.2 percent up from 3.1 percent in 2003. The situation on the labour market was still difficult in 2004; despite signs of improvement, unemployment increased from 18 percent in 2003 to 19.4 percent in 2004. Inflation in 2004 increased to 3.6 percent from a low of 0.7 percent in 2003. Total commodity exports in 2004 were valued at $74.8 billion showing an increase of approximately 39 percent over 2003. Imports in 2004 were valued at $89 billion, increasing over 30 percent from 2003. Continued import growth is expected over the next few years.

After two years of decline in agricultural output, 2004 gross agricultural output increased 7.6 percent due to a 3 percent increase in acreage of planted land and an estimated 20 percent increase in cereal yields. Beef production decreased in 2004 and is expect to continue into 2005 as a result of strong export demand for live cattle. Swine production increased in 2005 and is expected to continue into 2006 due to the high grain harvest of 2005.

In 2004 trade with the EU accounted for 79 percent of all Polish exports and 68 percent of Polish imports. The majority of Poland's exports are to Germany, Italy, the Czech Republic, France, Great Britain, and Russia. Imports are mainly from China, the Czech Republic, Italy, France, and Germany.

Total U.S. exports of agriculture, fishery, and forestry products to Poland in 2005 are estimated at between $96 and $100 million. Through November 2005, poultry and red meat accounted for one-third of U.S. exports.

According to official Polish statistics, the value of exports grew over 12 percent year-over-year in May 2005, while imports decreased 10.5 percent during the same period. Such low dynamics resulted mostly from the base effect (imports grew significantly in the pre-accession period).

When Poland became a member of the European Union in May 2004 all goods flowing between Poland and the EU became duty free and all imported goods became subject to EU external tariffs. EU accession has resulted in lower tariffs on several products, which has expanded market growth potential in many areas. However, given the existence of tariffs on many U.S. products, product origin and brand name emphasis in marketing will become even more critical in introducing new products and maintaining market-share.

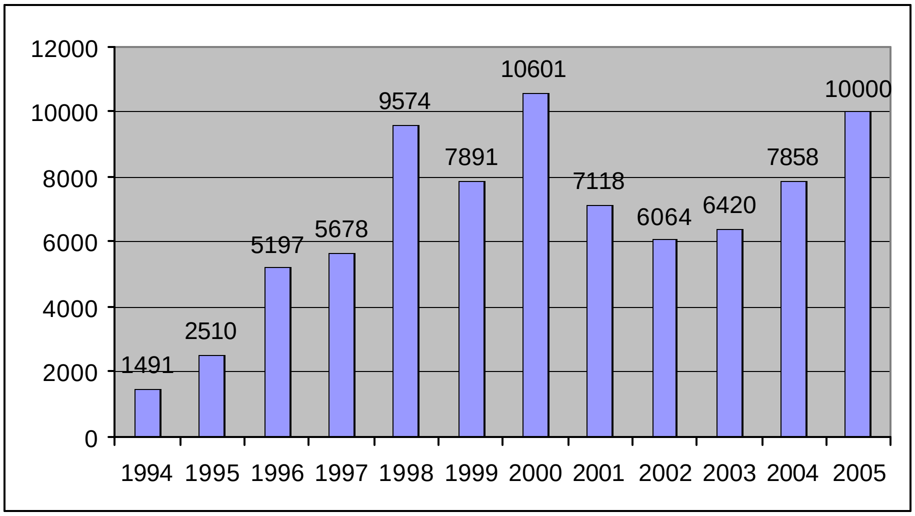
In the months, immediately after EU accession, a substantial increase in prices for consumer goods and services was reported as compared to the preceding year. In December 2004 prices were 4.4 percent higher than in the previous year. The average annual growth of consumer prices reached 3.5 percent and was higher than in the two previous years and greater than outlined in the budget law.

According to the Polish Ministry of Agriculture, overall food prices increased by an estimated 3 percent from the second quarter of 2003 to the second quarter of 2004. According to the Ministry, in spite of recent post-accession increases, food prices in Poland still remain amongst the lowest in the expanded EU-25.

After May 2004 most of the previously used product import certificates were amended to reflect EU regulations. For detailed information on product import certificates please refer to the Food and Agricultural Regulations and Standards Report available via Internet at the following address: www.fas.usda.gov at attaché reports link.

In 2005 Foreign Direct Investment (FDI) in Poland was $10 billion. Of total FDI, 1.7 percent was in food processing and 0.2 percent in agriculture. Poland ranks second among the 19 CEE countries, only after Russia, for the amount of FDI inflows in 2004. U.S. enterprises invested USD 1.43 billion (18 percent of total Polish FDI inflows) in 2004.

Foreign Direct Investment in Poland between 1993-2004 (Million $)



Source: PAIiIZ

Poland's public finance situation is improving even if slightly, as evidenced by the state budget's revenue increase to 44.3 percent of GDP up from 43.9 percent of GDP in 2003. Additionally, expenditures decreased from 48.9 percent of GDP in 2003 to 48.1 percent of GDP in 2004. This, coupled with Poland's continued GDP growth is good news for the overall Polish economy.

Economic growth has been rising as the Polish Zlotych (PLN) appreciates in relation to the Dollar. The 2005 average official exchange Dollar/PLN exchange rate was $1 = PLN 3.23 compared to 3.65 PLN in 2004 The Polish economy will increasingly become integrated with the new expanded EU internal market. Significant policy changes have been implemented to bring Poland's regulatory requirements in line with EU requirements.

Polish Exports

	2002		2003		2004	
	Mil EUR	%	Mil EUR	%	Mil EUR	%
Live Animals	147	4%	151	4%	218	4%
Animal Products	798	23%	141	26%	1429	27%
Fish and Products	240	7%	263	7%	364	7%
Unprocessed Food	371	11%	453	12%	602	12%
Processed Food	1583	46%	1746	40%	2097	40%
Drinks, Coffee, Tea, alcohol, and Tobacco	327	9%	349	9%	513	10%

Source: Foundation of Assistance Programs for Agriculture, Foreign Agricultural Markets Monitoring Unit

Polish Imports

	2002		2003		2004	
	Mil EUR	%	Mil EUR	%	Mil EUR	%
Live Animals	47	1%	39	1%	69	2%
Animal Products	295	8%	295	8%	493	11%
Fish and Products	342	9%	326	9%	391	9%
Unprocessed Food	905	24%	843	24%	986	23%
Processed Food	1409	37%	1349	38%	1602	37%
Drinks, Coffee, Tea, alcohol, and Tobacco	804	21%	704	20%	828	19%

Source: Foundation of Assistance Programs for Agriculture, Foreign Agricultural Markets Monitoring Unit

Polish Agricultural Product Trade by Country (in USD thousands)

	2003			2004		
Countries	Total Agriculture Products			Total Agriculture Products		
	Export	Import	Balance	Export	Import	Balance
World	53,882	68,417	-14,535	74,840	89,062	-14,222
Germany	17,385	16,691	694	22,246	24,800	-2,554
Russia	15,189	5,249	9,940	2,901	6,351	-3,450
The Netherlands	2,420	2,319	101	3,202	4,741	-1,539
Czech Republic	2,183	2,354	-171	3,215	3,376	-161
United Kingdom	2,713	2,545	168	4,008	3,024	984
Italy	3,095	5,828	-2,733	4,490	6,633	-2,143
United States	1,205	2,545	-1,340	1,813	3,024	-1,211
Lithuania	1,332	306	1,026	1,278	518	760
Ukraine	1,568	749	819	2,056	1,064	992
France	3,296	4,835	-1,539	4,512	5,786	-1,274
Hungary	1,301	1,227	74	1,922	1,706	216
Denmark	1,273	1,009	264	1,669	1,470	199

Source: Calculations of FAS Warsaw based on data from the Global Trade Atlas

Market indicators:

- ❑ Enterprises selling food, alcoholic and non-alcoholic beverages, and tobacco products reported 14.2 percent sales growth in 2004.

- ❑ Poland's population of close to 40 million is relatively dispersed. Although 62 percent of the population can be classified as urban, only 42 percent reside in cities of over 100,000 inhabitants. The population is young with an average age of 36. The age groups 30-44 and 45-64 are the largest population groups with 21 percent and 24 percent respectively.

- Average monthly gross wage and salary in the national economy in 2004 was 2,289.57 PLN (USD 685), 4.8 percent higher than in 2003. In the public sector it amounted to 2,555.43 PLN (USD 765), a growth of 5.4 percent, while in the private sector it was 2,141.39 PLN (USD 641), a growth of 4.4 percent.

- Domestic demand increased 5 percent in 2004 and is expected to continue at a rate of 3.1 percent in 2005 and 4.6 percent in 2006. Additionally, the percentage of disposable income spent on food and non-alcoholic beverages has been increasing since 2002.

- The buying power of the average monthly gross wage and salary in the national economy was 1.5 percent higher in 2004 than in 2003.

- Of the approximately 15 million people employed in Poland, 26 percent work in the public sector and the remaining 74 percent in the private sector. The workforce is diversified with 42.9 percent of women economically active (38.2 percent are employed and another 9.7 percent are actively looking for work).

- Approximately 28.7 percent of the population works directly in the agriculture, forestry, and fishery sectors.

- The trend toward smaller families is continuing. In 2004 the population growth rate was 0.02 percent with an average family size of 2.748.

Supplier Strengths/Weaknesses - Market Opportunities and Competitive Threats

Advantages	Challenges
Central Europe's most populous country with domestic consumer market of nearly 40 million people.	Distance from the U.S. means higher transportation costs versus European suppliers.
A strategic location within a dense, major international market offering re-export potential.	Complicated system of product registration, in some cases delaying or even preventing the product from entering the Polish market.
Poland is continuously moving towards a more open market economy.	Poland's EU accession puts U.S. products at a competitive disadvantage versus duty free EU internally traded products.
Poland is home to a very educated, productive, young, and skilled labor force.	Food recalls in the EU could potentially have a negative impact on Polish consumers views of imported products.
Polish consumers believe U.S. products to be of high quality.	EU biotechnology regulations hamper imports of U.S. products.
Market niches exist in consumer-ready food products - i.e. microwavable products.	Foreign investment in the Polish food processing industry results in local

	production of many high quality products, which were previously imported.
There is high potential for finding trading partners and favorable conditions for establishing joint ventures and local production.	Polish importers are reluctant to use Letter of Credit and prepayments. Establishing a Letter of Credit with a bank in Poland is costly. In many cases, U.S. competitors (e.g. suppliers from the EU) are willing to give credit terms even to first time customers, at times, in cases of smaller Polish importers, the first order is done on prepayment terms.

II. Exporter Business Tips

Success on the Polish market requires establishing a local representative or agent and personal contacts with Polish businesses. A solid position in the market may only be achieved by exporters who have a thorough knowledge of current legal, tax and customs regulations, market structures, local exhibitions and trade fairs, implications of EU accession, and non-tariff trade barriers. These obstacles are best overcome by working with an experienced local representative. Relations between an exporter and local partner should be well established before contracts or long-term agreements are considered. Exporters should consider using consulting firms working within Poland for market research.

Local Business Customs/Practices

- It is customary for business people in Poland to shake hands upon meeting. An American businesswoman should not be surprised if a Polish businessman kisses her hand, however, it is not necessary for American businessmen to kiss the hand of Polish businesswomen.

- Business cards are the norm in Poland and are generally exchanged at meetings. Cards do not have to be printed in Polish.

- Business attire is suggested, including a suit and tie for men and a suit or dress for women. Casual wear is suitable for informal occasions, but more formal dress is customary for visiting or entertainment in the evenings.

Consumer Tastes and Preferences

The issues of Bovine Spongiform Encephalopathy and Foot-and-Mouth Disease along with Genetically Modified Organisms have Polish consumers concerned about the safety of their food, both domestic and imported. Until recently, Polish consumers did not focus on these issues. However, their concern has not reached the level of their Western European counterparts.

- Due to the difficult economic situation for many Polish families, 88 percent of Poles are price-sensitive; many shops provide a relatively large variety of low-cost products and few high end products.

- Consumers consider expiration dates for products.

- Advertising in Poland is crucial. Television is believed to be the most effective advertising medium. Products advertised through television promotions show the greatest sales growth of all advertised products. Billboards and in-store promotions are also very effective.

- Product promotions influence the purchases of 50 percent of adult Poles. Advertising influences 42 percent of students' purchasing decisions.

- It is estimated that 5-10 percent of Poles are considered rich while 20-25 percent constitute the emerging middle class. The remaining 65-75 percent is considered poor or having limited purchasing power.

Consumer Preferences

- Recent trends indicate improvement in the image of Polish products compared to Western imports. Although country of origin is not as important for purchasing decisions as in previous years youth, higher education, and company owners tend to prefer Western products. Polish customers especially favor products originating from the U.S.

- Although becoming more liberal, Polish importers generally prefer to meet exporters face-to-face before buying the product. Transactions are usually on term payments (extended), but prepayments are also used, usually at the onset of cooperation.

- With limited access to capital and high interest rates, Polish importers seldom purchase products at an initial meeting and prefer to discuss the product's technical parameters before negotiating price.

- Many U.S. and Polish firms form joint ventures, which share both the risks and rewards of doing business in Poland.

Food Standards/Regulations and Import/Inspection Procedures

LABELING REQUIREMENTS

General requirements

General rules on the labeling, presentation, and advertising of foodstuffs marketed in the EU can be found in the European Parliament and Council Directive 2000/13/EC + corrigendum (English version of Annex III). This directive consolidates general labeling directive 79/112/EEC and all its amendments in a single text. It applies to food products intended for supply to food retail and foodservice. (www.useu.be/agri/label.html)

Polish legislation closely follows EU legislation. The basic law on food labeling was published in the December 16, 2002 Polish Journal of Law (Link in Polish language only) and can be located at http://www.abc.com.pl/serwis/du/2002/1856.htm
The basic law was updated in order to reflect additional EU regulations (Journal of Law no. 58 pos. 563 dated. April 18, 2004) on March 29, 2004 and can be located at http://www.abc.com.pl/serwis/du/2004/0563.htm

All food products entering the Polish market must have Polish language labeling. Normally all pre-packaged foods intended for final consumer or catering establishments must be labeled according to the general rules prior to entering the Polish market.

Name and address

Name and address of the producer.

Country of origin

Country of origin must be declared if exclusion of that information can mislead the consumer as to where the product originates.

Product designation

The product designation must describe the product accurately. A fantasy name or a trademark cannot replace the product designation. Pictures or claims regarding a certain component as well as identifying specific ingredients in the product designation requires a quantitative declaration of that ingredient either in accordance with the product designation or on the ingredients list.

Composition

The composition of a food item must be indicated on the ingredients list. Ingredients must be identified according to falling weight at the time of production. Some groups of ingredients, e.g. vegetable oils, can be declared by a group name. Allowed group names are defined in the labeling regulations. Composite ingredients well known to consumers, e.g. margarine, need not be specified if the content is below 25 percent of the total weight of the product.

Some categories of foods are exempt from declaring a list of ingredients e.g. alcoholic beverages.

Net weight

Net content (weight or volume) must be stated in the metric system. Drained net weight should be stated as well when appropriate. The number of pieces may be stated as well.

Durability

The durability must be stated by best before/best before end date ("najlepiej spozyc przed"). Perishable foods must be marked with last day of consumption ("nalezy spozyc do"). Durability statements must be followed by storage instructions and instructions for use, if necessary in order to ensure correct use and storage.

Other labeling requirements

The Polish label or stick-on label must be applied prior to retail sale or sale to catering establishments. Before that, there are no labeling requirements.

More information on food standards and regulations along with general import and inspection procedures can be found in the latest FAS/Warsaw Food and Agricultural Import Regulations and Standards (FAIRS) report online at www.fas.usda.gov (market and trade data).

FOOD ADDITIVES REGULATIONS

Polish food additive regulations are primarily based on EU regulations. Poland, as in other EU countries, is allowed to conduct a separate procedure for approval of particular ingredients within its territory. Currently, there is only one such case of a new sweetener "neotame", which is allowed in Poland but not in the rest of the EU.

Four major EC-directives on the use of additives and the labeling rules are implemented in Polish food additive regulations. These directives govern colors, sweeteners, flavors, and miscellaneous food additives and as well as the labeling directive. This EC regulation also requires the identity and purity of approved food additives.

1. European Parliament and Council Directive 94/35/EC on sweeteners for use in foodstuffs. The annex to this directive lists maximum usable doses for sweeteners in selected foodstuffs.

2. European Parliament and Council Directive 94/36/EC on colors for use in foodstuffs.
Annex I: List of permitted food colors. Only substances listed in this annex may be used
Annex II: Foodstuffs, which may not contain added colors.
Annex III: Foodstuffs to which only certain permitted colors may be added.
Annex IV: Colors permitted for certain uses only.
Annex V: Colors permitted in general and the conditions of use. Colors permitted following the "quantum satis" principle (no maximum specified) are listed in the Appendix.

3. European Parliament and Council Directive 95/2/EC, as amended, the so-called miscellaneous additives directive on food additives other than colors and sweeteners.
Annex I: List of food additives permitted for use in foodstuffs (excl. those listed in Annex II) following the "quantum satis" principle.

Annex II: List of foodstuffs in which only a limited number of additives of Annex I may be used. These include cocoa and chocolate products, fruit juices and nectars, jam and jelly, dehydrated milk and cream, fruits and vegetables, rice, oils and fats, certain cheeses, minced meat, bread and pasta, wines and beer.
Annex III: List of conditionally permitted preservatives and antioxidants.
Annex IV: List of other permitted additives.
Annex V: List of permitted carriers and carrier solvents.
Annex VI: List of additives permitted in foods for infants and young children.

All three of these directives and their lists can be downloaded from the FAS/USEU web page www.useu.be/agri/additive.html.

Labeling requirements for additives and flavorings are laid down in Directive 2001/13/EC (general labeling directive), Regulation 50/2000/EC (GM additives) and Directive 89/107/EEC.

- The Polish Positive Additive

Poland uses a positive-additives list, which identifies additives that are permitted for use in foodstuffs. Poland's Ministry of Health and Social Welfare approved a new regulation (Journal of Law no. 94 dated April 30, 2004) on food additives on April 23, 2004. This particular regulation has been one of the most difficult obstacles facing imported products. According to the Polish authorities the new list is in line with the current EU regulations. **Please note:** As each EU member state at times introduces slight variations to allowable food additives it is vital for all U.S. exporters to check with the potential Polish importers whether the product intended for the Polish market meets all the ingredient requirements.

The following institutions are directly involved in inspecting food additive levels in imported products:

Ministry of Health and Social Welfare - preparation of legal documentation

Warsaw Sanitary Station - SANEPID - tests & check ups
National Food and Nutrition Institute - legal work & check ups

Labeling additives in foods shall consists of a category designation followed by the specific name or the E-number of the additive used. The category designations are defined in the labeling directive and implemented in the Polish labeling regulation. The specific names and E-numbers of the food additives are specified in the directives and on the Polish Positive Food Additives List.

III. Market Sector Structure and Trends
Wholesale Sector

The wholesale market has changed over the last several years including consolidation, strengthening of large buyers, companies with national coverage, and a strengthening of ties between wholesaler and retailer.

Poland's wholesale market structure has five categories: national chains, regional chains, regional wholesalers, local wholesalers, and buying groups (consisting of regional chains and regional wholesalers).

- ❑ National chains are the smallest group. They operate several branches throughout Poland.
- ❑ Regional chains have expanded through the acquisition of bankrupt firms. They are territorial, usually operating in several provinces, and supply mainly retailers.
- ❑ Regional wholesalers have a strong presence in local markets where they offer a wide range of products and better service.
- ❑ Local wholesalers are primarily cash and carry operations.
- ❑ Buyer groups operate in several market segments and are increasingly integrated with many retailers.
- ❑ Larger businesses in this sector are multi-national. The largest is Macro Cash and Carry, owned by Metro (German firm). Eurocash JMB Polska, Milo and McClane International (USA) follow Macro in market share.

Retail Sector

The distribution system for consumer ready food products, as with all other branches of the Polish economy, is still undergoing rapid transformation. In spite of many obstacles (e.g., high cost of credit, high store rental fees, late payments from retailers), it remains one of the most active areas of the Polish economy. The distribution system for consumer ready products in Poland is very diversified. It ranges from small family operated stores, to medium sized stores, to large western style distribution centers.

- ❑ Foreign investors are very active in retail sector. There are now over 186 hypermarkets nationwide along with many super-stores.
- ❑ There are approximately 30.9 shops per 10,000 inhabitants.
- ❑ According to Polish analysts, large retail chains will gain control of as much as 80 percent of the Polish market within the next four years.

For more information on the Polish retail sector refer to FAS Warsaw Post Country report on the Retail Food Sector, which is available via the Internet at the following web site: www.fas.usda.gov - once there click on Market and Trade Data then the attaché reports link.

Food Processing Sector

Results of 2003 production indicate that the most dynamically expanding products in the food processing industry include beverages, fruit juices and drinks, confectionary, food concentrates, oils and margarine, processed poultry, cheeses, milk drinks, and beer. The proportion of food industry products considered to be “value added” is constantly increasing.

For more detailed information on Poland’s processing sector refer to FAS Warsaw’s Food Processing Sector report, which is available via Internet at the following web site: www.fas.usda.gov - once there click on Market and Trade Data then Attache Reports.

Hotel, Restaurant & Institutional Sector

Until the early 1990s, the state-owned company Orbis dominated the Polish hotel and restaurant sector. The transition to a market economy saw the emergence of many new private hotels and restaurants. Poland’s population of nearly 40 million people along with nearly 14 million visitors each year has maintained steady demand for this growing sector.

- With more Poles working longer hours, Polish eating habits have changed and eating out is not uncommon.

- In addition to a preference for traditional Polish food, Poles are increasingly open to international cuisines. Italian, Chinese, Mexican, and Indian restaurants can be found in most large Polish cities.

- American chains are also visible in larger cities. These include T.G.I. Friday’s, Champions, Mc Donald’s, Pizza Hut, and KFC.

- Currently, many international hotel chains such as the Marriott Hotel, Radisson, Sheraton, Hyatt, and Holiday Inn are present in larger Polish cities.

- Poland’s catering sector began developing in the early 1990s.

- HRI is one of the fastest growing sectors of the Polish economy.

Several of the larger producers have set up separate distribution channels especially for this sector. HRI is probably one of the few existing market niches, which if supported with the proper promotion campaign, could offer U.S. exporters a chance to enter the Polish market.

For more detailed information on Poland’s HRI Food sector please refer to FAS Warsaw’s report on the Hotel, Restaurant & Institutional Food Service Sector, which is available at the following web site: www.fas.usda.gov - click Market and Trade Data, then attaché reports.

IV. Best Consumer Oriented Product Prospects

Product category	2004 Imports	2-Yr. Avg. Annual Import Growth	Import Tariff Rate	Key Constraints Over Market Development	Market Attractiveness for USA
Salmon	$ 77.3 M	63.70%	2% & 8%	Price competition from local producers and European countries, lack of promotion	Growing seafood consumption and increased restaurant market
Sunflower Seeds	$15.1 M	24.80%	0%	Competitively priced quality product available from Hungary	Growing market, insufficient local production of high quality product
Wine	$95.6 M	28.20%	9.9-32€ /hl depending on alcohol content	Strong position of French, Italian and other suppliers	Good reputation of Californian wines, growing market
Grapefruit	$23 M	12.60%	1.5-2.4% depending on season	Competitively priced imports available, esp. from Turkey	Strong position of American suppliers, growing market

Whiskies	$11.9 M	76.60%	0%	Traditional consumption of Scottish Whiskey	Increasing consumption due to prestige associated with product
Dried grapes, including raisins	$16 M	19.70%	2.40%	Price competition from other suppliers	Developing market for cakes and sweets, opportunities for further development of this segment
Dried prunes	$7.3 M	30.50%	9.60%	Price competition from local and other foreign suppliers	High quality and strong position of California prunes, opportunity for further growth
Pistachios	$5.5 M	30.60%	1.60%	Increasing activity of other suppliers, relatively high prices compared to other nuts	Growing snacks and ingredient market
Peanuts	$26 M	12.80%	0%	Lower prices offered by competitors	Growing snacks and ingredient market

Almonds (shelled)	$11.9 M	43.80%	3.50%	Competitively priced imports available from Spain	Growing snacks and ingredient market

Source: FAS Warsaw calculations based on Global Trade Atlas statistics

Annual Consumption per capita of Staple Foodstuffs, 1995-2003						
Specification	unit	1995	2000	2001	2002	2003
Processed Cereals	kg	120	119	119	120	120
Potatoes	kg	138	132	130	131	130
Vegetables	kg	120	120	121	111	110
Fruit	kg	40.9	51.1	57.1	56.7	54.5
Meat and Offals	kg	63.4	65.4	65.9	69.5	72.4
~Total Meat	kg	59.4	61.4	61.8	65.3	67.7
~Pork	kg	39.1	38	38.2	39.2	41.2
~Beef	kg	8.7	6.8	5.5	5.2	5.8
~Poultry	kg	10.2	14.1	17	19.8	19.7
Edible Oils	kg	25.3	28.4	29.5	30.8	29.2
~Animal Fats	kg	7.2	6.6	6.7	6.7	6.9
~Vegetable Oils	kg	14.4	17.6	18.5	19.5	17.6
~Butter	kg	3.7	4.23	4.3	4.6	4.7
Cow's Milk	liter	195	191	187	182	181
Hen Eggs	(units)	154	186	198	211	214
Sugar	kg	41.9	41.2	41.2	43.6	40.3

source: GUS, Statistical Yearbooks

KEY TRADE & DEMOGRAPHIC INFORMATION

Agricultural Imports From All Countries ($Mil)/U.S. Market Share (%)	89/1.61%
Consumer Food Imports From All Countries ($Mil)/U.S. Market Share (%)[1]	2,724/2%
Edible Fishery Imports From All Countries ($Mil)/U.S. Market Share (%)[2]	369/1.9%
Total Population (Millions)/Annual Growth Rate (%)	38.6/0.02%
Urban Population (Millions)/Annual Growth Rate (%)[3]	23.9/1-2%
Number of Major Metropolitan Areas[4]	1
Size of the Middle Class (Millions)/Growth Rate (%)[5]	3.9/1%
Gross Domestic Product Increase (%)	5.4%
Unemployment Rate (%)	19.4%
Average Monthly Food Expenditures (Zloty)[6]	225.00
Percent of Employed Females[7]	38.2%
Exchange Rate (USD 1 = PLN)	3.44

[1]Foundation of Assistance Programs for Agriculture (FAPA) and Foreign Agricultural Markets Monitoring Unit (FAMMU)/Warsaw, 2004.
[2]*Ibid*
[3]Statistics from 2003
[4]Population in excess of 1,000,000.
[5]These are unofficial estimates due to the lack of reliable statistics.
[6]Statistics from 2003
[7]Percent against total number of women (18-59 years old).

Key Contacts

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Mr. Stanislaw Kowalczyk, Chairman, Agricultural Property Agency	ul.Dolanskiego 2,00-215 Warsaw	(4822) 8606545	(48-22) 860 6577	http://www.anr.gov.pl/index.html e-mail: anr@anr.gov.pl
Mr. Jerzy Drewniak; Department for International Bilateral Cooperation, Ministry of Economic Affairs and Labor	Plac Trzech Krzyzy 3/5; 00-507 Warsaw	(4822) 693 5955	(4822) 621 4019	www.mg.gov.pl
Mr. Wojciech Henrykowski, Chairman, Center for Research and Certification	ul.Klobucka 23a, 02-699 Warsaw	(4822) 647 0742	(4822) 647 1222	http://www.pcbc.gov.pl/index1.htm
Mr. Piotr Dabrowski, Polish Investment Agency	Aleja Roz 2, 00-559 Warsaw	(4822) 334 9841, 334 9810	(4822) 334 9999	http://www.paiz.pl/index/
Mr. Roman Wenerski, Chairman, Agricultural Markets Agency	ul. Nowy Swiat 6/12, 00-400 Warsaw	(4822) 661 7272	(4822) 628 9353	http://www.eng.arr.gov.pl/
Mr. Adam Zych, Director of Plant Protection and Seed Inspection	ul. Wspolna 30 Warsaw	(4822) 623 2302	(4822) 623 2304	http://www.piorin.gov.pl/ gi@piorin.gov.pl

Ms. Elzbieta Kaufman-Suszko, Chairman, Agency for Restructuring and Modernizing Agriculture	Al. Jana Pawla II 70, 00-175 Warsaw	(4822) 318 4220 48-800 380 084	(4822) 318 5330	www.arimr.gov.pl ; info@arimr.gov.pl

POLAND TRADE INSTITUTES/ASSOCIATIONS/CHAMBER OF COMMERCE

Organization	Contact Name	Address	Phone	Fax	web page,e-mail address
American Chamber of Commerce in Poland (AmCham)	Ms. Dorota Dabrowska, Executive Director	ul.Emilii Plater 53, 00-113 Warsaw	(4822) 520-5999	(4822) 520-5998	http://www.amcham.com.pl director@amcham.com.pl
Business Center Club	Mr. Marek Goliszewski, President	Plac Zelaznej Bramy 2 00-136 Warsaw	(4822) 6253037	(4822) 621-8420	http://www.bcc.org.pl/english.htm
Institute of Agricultural and Food Economics	Prof. Augustyn Wos	ul.Swietokrzyska 20 Warsaw	(4822) 827-6189	(4822) 827-1960	http://www.ierigz.waw.pl/old/ier_uk.htm ierigz@ierigz.waw.pl
National Chamber of Commerce of Poland	Mr. Andrzej Arendarski	ul.Trebacka 4 00-074 Warsaw	(4822) 630-9600	(4822) 827-4673	http://www.kig.pl alachowicz@kig.pl
National Institute of Hygiene	Prof. Jan Krzysztof Ludwicki, Director	ul. Chocimska 24, 00-791 Warsaw	(4822) 5421400, 8497612, 542-1202	(4822) 8497484, 8493513	www.pzh.gov.pl
Plant Protection Institute	Prof. Stefan Pruszynski, Director	ul.Miczurina 20 60-318 Poznan	(4861) 864-9001	(4861) 867-6301	www.ior.poznan.pl ; S.Pruszynski@ior.poznan.pl
Federation of Polish Associations of Producers of Agricultural Commodities	Mr. Jacek Kalinski	ul.Wspolna 30, 00-930 Warsaw	(4822) 623-2413	(4822) 623-2357	
Polish Federation of Food Producers	Ms. Malgorzata Skonieczn, Chairman, Mr. Andrzej Gartner, General Director	ul. Mokotowska 49, 00-542 Warsaw	(4822) 3544373,	(4822) 3544374	www.pfpz.pl biuro@pfpz.pl
Polish Franchise Association (PFA)	Ms. Jolanta Kramarz President	ul.Kasprowicza 41c, 34-520 Poronin	(4818) 200 1010	(4818) 200 1012	http://www.franchise.com.pl info@franchise.pl

Polish Organization of Trade and Distribution	Mr. Maria Andrzej Walinski, Secretary General, Ms. Dorota Antochow, Communication Specialist	ul. Krzywickiego 34, 02-078 Warsaw	(4822) 625 12 48, 625 49 41	(4822) 622 95 33	http://www.pohid.pl pohid@pohid.pl
National Association of Orchard Owners	Mr. Miroslaw Maliszewski, Chairman	ul. J. Pilsudskiego 59, 05-600 Grojec	(4848) 664 37 79	(4848) 664 37 79	http://www.polskiesadownictwo.pl/ biuro@polskiesadownictwo.pl
National Millers Association	Ms. Jadwiga Rothkaehl, Chairman	ul. Rakowiecka 36, room 178, 02-532 Warsaw	(48) 6063845	(4822) 606 3845,	sltpipz@wp.pl
Polish Federation of Grain Producers	Mr. Zbigniew Kaszuba	ul. Wspola 30, 00-930 Warsaw	(4822) 6232351	(4822) 6232752	julita.dziendziel@wp.pl
Polish Bakers Association	Mr. Lech Jedryka, Chairman	ul. Miodowa 14, 00-246 Warszawa	(4822) 635 89 68		polishbaker@zrp.pl
Polish Grain-Feed Chamber	Mr. Bogdan Judzinski, Chairman, Mr. Maciej Tomaszewicz, Director	Al. Jerozolimskie 146D, 02-305 Warsaw	(4822) 5702181	(4822) 570-2180	
Polish Union of Feed Producers	Mr. Leszek Iracki, Chairman	ul. Nowogrodzka 22 p. 416, 00 - 511 Warszawa	(4822) 622 15 93	(4822) 622 15 93	http://www.pzppasz.pl prezes1@pzppasz.pl
Association of Fish Importers	Mr. Stanislaw Mrozinski, Chairman		(48) 508-141 500, (4891) 462-4902	(4891) 462 4902	stow.sir@wp.pl
National Association of Fish Processors	Mr. Zdzislaw Safader	ul. Slowianska 5, 75-846 Koszalin	(4894) 347-1328, mobile: (48) 606 307 238		http://www.pspr.pl/ pspr@pspr.pl
National Council of Poultry, Economic Chamber	Mr. Leszek Kawski, President	ul. Czackiego 3/5, 00-043 Warsaw	(4822) 336-1338	(4822) 828-2389	www.krd-ig.com.pl krdig&pro.onet.pl

Polish Association of Swine Producers	Mr. Jan Biegniewski, President	Opacz, ul. Centralna 10c, 05-816 Michalowice	(4822) 723 0217	(4822) 723 0083	polsus@polsus.pl
Polish Producers, Exporters and Importers of Meat	Mr. Witold Choinski, Office Manager	ul.T.Chalubinskie-go 8, 00-613 Warsaw	(4822) 830-2656,	(4822) 830-1648	www.polskie-mieso.pl info@polskie-mieso.pl
National Association of Tobacco Industry	Mr. Sloma,General Director	ul. 17 Stycznia 56, 02-146 Warsaw	(4822) 868 3710	(4822) 868 3711	http://www.kspt.org.pl/ kspt@kspt.org.pl
Polish Association of Tobacco Industry	Mr. Piotr Szafranski, Chairman	ul. Smoluchowskiego 1, 20-474 Lublin	(4881) 745 2623	(4881) 441 8731	http://www.pspt.org.pl pspt@pspt.org.pl
American Polish Home Builders Institute Foundation	Mr. Eligiusz Koniarek Director	ul. Chmielna 54/57, 80-748 Gdansk	(4858) 301-6851	(4858)301-4217	
Association of Wooden Joinery Manufacturers	Mr. Jozef Duzynski, Chairman	ul. Laskowa 4, 05-200 Wolomin	(4822)787-3502,787-2474	(4822)787-3502	spsb@spsb.com.pl
National Association of Wooden House Builders	Mr. Przemyslaw Dobraniecki, Managing Director	ul. Chmielna 54/57, 80-748 Gdansk	(4858)301-6854	(4858)301-5722	www.domydrewniane.org biuro@domydrewniane.org
National Chamber of Commerce of Furniture Manufactures	Mr. Maciej Formanowicz, Chairman	ul. Grunwaldzka 104, 60-307 Poznanul. Marokanska 16, 03-977 Warszawa	(4861) 867-3188(4822) 671-5203	(4861) 867-3188 (4822) 671 52 03	www.oigpm.org.pl oigpm@oigpm.org.pl
Polish Economic Chamber of Wood Industry	Mr. Bogdan Czemko, Director	ul. Winiarska 1, 60-654 Poznan	(4861) 822-4752	(4861) 849-2468	www.pol-wood-chamber.drewno.pl ; www.przemysldrzewny.pl pigpd@drewno.pl
Polish Homebuilders Association	Mr. Adam Szewczyk, President, Mr. Zbigniew Koryl, Office Director	ul. Foksal 2, 00-366 Warsaw	(4822) 827 7750, 828 3043	(4822) 827 7750, 828 3043	http://www.psbd.com.pl/index.htm psbd@psbd.com.pl

Wood Technology Institute	Mr. Wladyslaw Strykowski, Director	ul.Winiarska 1 60-654 Poznan	(4861) 849-2401	(4861) 822-4372	http://www.itd.poznan.pl/ office@itd.poznan.pl
Wooden House Association	Mr. Wojciech Nitka, Chairman	ul. Chmielna 54/57, 80-748 Gdansk	(4858) 301 68 54	(4858) 305 57 22	http://www.domydrewniane.org/index_en.php biuro@domydrewniane.org