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Poland

Exporter Guide

Annual

2002

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Report Highlights:
Poland's GDP growth fell to 1.1 percent, unemployment rose to over 17 percent, and inflation dropped to below 5 percent in 2001. These trends continue into 2002, but expectations are for a modest turn around, particularly after EU accession which Poland's government hopes to achieve by 2004. Despite economic difficulties, the modernizing food retail sector continues to expand. Food trade, predominanetly between Poland and the EU, has risen significantly in recent years and is expected to continue to grow. There are select prospects for U.S. food and beverage products sold directly to Poland or indirectly via Western Europe.

Includes PSD changes: No
Includes Trade Matrix: No
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Executive Summary

(UNTrade data are not available for 2001. Consequently, FAS-Warsaw has based the following analysis on FAS Trade reports as well as Polish Trade Data for U.S. Exports of Agricultural, Fish & Forestry Products to Poland.)

The retail food industry has experienced the most dynamic growth among all sectors of the economy since free-market restructuring and privatization began in 1989. Agricultural products like snacks, beverages, fast food and ice cream oriented toward young consumers below age 19, will remain in high demand as this age group comprises 29 percent of the total population. Food and beverage purchases accounted for 30 percent of total consumer spending in CY 2001.

Poland's GDP growth of 1.1 percent in CY 2001 was down from 4.1 percent in CY 2000. Experts predict 2002 GDP growth to remain the same as in CY 2001. Inflation in CY 2001 dropped to 5 percent from 10 percent in 2000. Unemployment rose from 15 percent in 2000 to 17.4 percent at the end of 2001. Total exports in 2001 are valued at $36.1 billion, up $5 billion from last year, and showing a growth of 9 billion since 1999. Imports in CY 2001 were valued at $50.3 billion, increasing 1.4 billion dollars from 2000. Import growth is expected to continue to increase over the next couple of years.

The agriculture sector experienced an overall output increase of an estimated 5.7 percent in Marketing Year 2001. Crop production rose an estimated 7.8 percent due to good weather conditions. Livestock production also increased 0.9 percent, mainly due to increased poultry production. Higher harvests occurred in all grains and oilseeds, while sugar beet harvest decreased. Estimates for MY 2002 show record grains harvest, despite drought conditions in the summer of July of 2002.

The negative agricultural trade balance for CY 2001 amounted to $304 million with imports valued at $3.1 billion, and exports at $2.8 billion. Imports decreased while exports increased compared to CY 2000. The EU continues to be the largest supplier of agricultural products to Poland (51 percent) and the largest market for Polish agricultural exports (49 percent).

Total US exports of agriculture, fishery, and forestry products to Poland in CY 2001 amounted to $94.8 million, increasing from $58.1 million in CY 2000. Leading the U.S. agricultural exports in 2001 was poultry meat ($53.5 million) followed by: dairy products ($9.3 million), other intermediate agricultural products ($7.2 million), frozen or chilled red meat ($5 million), and panel products, including plywood ($3.9 million).

An agricultural "zero-zero" tariff trade agreement between Poland and the EU became effective January 1, 2001 and continues to reshape Poland's agricultural trade. The agreement has fully liberalized the import of nearly 500 commodities from the EU to Poland. Given the tariff rates on US products, product origin and brand name emphasis in marketing will become even more critical in introducing or maintaining market-share.

I. Market Overview

Foreign Direct Investment (FDI) inflow into the economy decreased from a record-high USD 10.6 bln in CY 2000 to USD 7.1 bln in CY 2001. This decrease contributed to a lower GDP increase, at 1.1 percent in CY 2001, compared to 4 percent in CY 2000. Overall, the public finance situation deteriorated considerably in 2001. The state budget's revenue increased only by 3.4 percent, while expenditures increased 14.1 percent. As a result, the deficit was 4.5 percent of GDP, over twice as much as in CY 2000. A decrease in domestic demand due to strict monetary policy is commonly blamed for the slow down. Prospects contributing to this slow down indicate that the economy will develop at a similar pace in CY 2002. As a result, the GDP is expected to remain at the same level, with a prediction of 1 percent in CY 2002.

Foreign companies have invested close to $56.83 billion dollars in Poland over the last decade, with the annual amount decreasing 3.5 million in CY 2001. The Polish Agency for Foreign Investment (PAIZ) indicates that 83.6 percent of the capital invested supported three economic sectors including "trade and repairs" (29.3%), manufacturing (27.6%), and financial advisory services (26.7%). In CY 2002, Foreign Direct Investment is expected to increase due to the introduction of new incentives for foreign investors in Poland. The largest foreign investors in the Polish food industry are: Coca-Cola, Phillip Morris (tobacco processing), Reemtsma (tobacco processing), Nestle, and Harbin (brewery).

Significant policy changes have been taking place in light of free-market economic restructuring, including introduction of new regulations, in line with EU requirements, which promote product recycling. A new regulatory property tax taking effect in 2002 affects business entities and owners of private land. Investors should note that, despite strong lobbying, businesses operating in Special Economic Zones (SSE) will also be required to pay a property tax.

Market indicators:

- Poland's population of 38.7 million is relatively dispersed. Although 61.8 percent of the population can be classified as urban, only 21.8 percent reside in cities of over 200,000 inhabitants. The population is very young with over half under the age of 40. Children under the age of 15 make up 21 percent of the population (8.2 million).

- Average monthly gross income per capita is USD 506.

- The household consumption expenditure rate in CY 2001 grew 2.1 percent from CY 2000 (constant prices). From 1994-1999 the average annual growth rate in expenditures on household consumption was 5.4 percent.

- In 2000, food and non-alcoholic beverages accounted for 30 percent of household expenditures.

- Real gross average income between CY 2000 and CY 2001 increased 3.3 percent compared to a 1.9 percent increase from CY 1999 to CY 2000. In addition, the real average monthly disposable household income in 2001 rose approximately 1.5%, increasing from $121.75 in 2000 to $123.58 in 2001.

‘ Unemployment continues to plague Poland with the figure reaching 17.4 percent at the end of 2001 with experts predicting a further increase to 18.6% in CY 2002. Unemployment is most probably increasing due to weaker foreign demand and overall economic slow down. Young people in the 18-24 age bracket constitute 30 percent of the total jobless workforce.

‘ Of the approximately 15.6 million people employed in Poland, 27.5 percent work in the public sector and the remaining 72.5 percent in the private sector. The workforce is diversified with 32 percent of women working (this percentage could slightly decrease due to an increase in the overall unemployment rate during 2001/2002 period).

‘ Approximately 28 percent of the population work directly in the agriculture, forestry and fishery sectors.

‘ A trend toward smaller families is becoming more apparent in Poland’s 12.5 million households, 63 percent house three persons or less.

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. Hence higher transportation costs versus the 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.
Country continuously moving towards open market economy.	EU Association Agreement as well as certain free trade agreements signed by Poland put products originating from the U.S. at a disadvantage.
A very productive, young and skilled labor force. Potential for finding trading partners and favorable conditions for establishing joint ventures and local production.	Food recalls in the EU could potentially have a negative impact on Polish consumers views of imported products. GMO issues could damper imports of U.S. products as well.
Polish consumers associate U.S. products with good quality.	Protective measures by the Polish government of its industries through higher tariffs and lower quotas.
Market niches exists in semi-ready food products - i.e. microwavable products.	Relatively high value of the U.S. dollar against the Polish Zloty.

II. Exporter Business Tips

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 business man kisses her hand upon meeting or saying goodbye, 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 given to each person at a meeting. U.S. visitors should bring plenty of business cards to a meeting. Cards printed in Polish aren't necessary.

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

Consumer Tastes and Preferences

The issues of BSE and FMD along with GMO issues have more Polish consumers concerned about the safety of the food in their own country along with the imports of food from other countries. Until recently, Polish consumers did not focus on these issues and their concern has still not reached the level of their western European counterparts. However, this is not to say that the concern for food safety among Polish consumers is non-existent. Concerns over beef rose following Poland's first three confirmed BSE cases between May and September of 2002.

- Due to the difficult economic situation for many Polish families, 88 percent of Poles being price-sensitive, many shops provide a relatively large variety of low-cost products and few high end products.
- Consumers do consider expiration dates and Polish norms for products.
- Advertising in Poland is crucial. Television is believed to be the best medium in Poland, with products advertised through television promotions showing the greatest sales growth of all advertised products. Forty-two percent of students' purchasing decisions are influenced by advertising.
- Promotions on products influence the purchases of 50 percent of adult Poles.

It is estimated that only 5 percent of the Polish population can be considered rich while 20-25 percent constitutes the emerging middle class. The remaining 65-70 percent is considered poor or with little purchasing power. The urban population (62 percent) has a much higher level of purchasing power compared to the rural population.

Buyer Customs and Preferences

- A recent trend indicates improvement in the consumers' image of Polish produced products compared to Western imported products. Although country origin is not as influential on purchasing decisions as previous years; youth, people with higher education, and owners of companies tend to prefer western products. Products originating from the U.S. are especially favoured by Polish customers.
- Although becoming more liberal, Polish buyers generally prefer not to make a purchase until he/she has met with the seller face-to-face. Transactions are usually on term payments (extended), but prepayments are also accepted; i.e. at the onset of cooperation.
- With limited access to capital and high interest rates, Polish buyers seldom purchase products at an initial meeting and prefer to discuss the product's technical parameters before negotiating price.

- Many companies with foreign participation have invested in human capital which has improved contract negotiation processes. However, the decision process by most Polish firms is lengthy; going through rounds of negotiations along with arranging financing before making a final decision.

- Many of the U.S. companies in Poland formed joint ventures with Polish companies which handle the trade but share the risks and rewards.

- Since the early 1990's, the popularity of trade fairs in Poland has evolved into a full year's schedule. Many companies utilize these fairs to introduce and demonstrate their products.

Food Standards/Regulations and Import/Inspection Procedures

The Polish government protects consumers in a variety of ways. It is essential for the products to be accompanied by the required documentation. A variety of licences, permits and special health certificates are required for agricultural products. Products not meeting these requirements will be detained at the Polish boarder and will be refused entry to the Polish market. Although the lack of proper labels or documentation can, in most cases, be corrected, it is a costly procedure and requires time. This puts products with a short shelf life in a dangerous situation.
Effective July 15, 1994 based on the Journal of Law no. 86 chapter 402, all packaged/canned food products for retail distribution are required to have Polish language labels. Multi-language labels are acceptable as long as they include Polish language. Labels must contain the following information:

- name of the product
- name and address of the producer
- date best before - the Polish phrase "najlepiej spozyc przed terminem XXX"
is most commonly used
- net content (weight/capacity)
- content of the product (ingredients, chemical additives etc.)

At of end of 2000, regulations from 1994-1997 concerning the labeling of alcoholic products started to be implemented, (Dziennik Ustaw no. 124 pos 783, dtd. Oct. 13,1997, Polska Norma N-A-79122 - Wino gronowe, Dziennik Ustaw 86 pos 402, July 15 1994). These regulation require that all imported bottled alcoholic beverages must have Polish language labeling.

Labels must contain the following information:

- name of the product (e.g. variety of wine) - name and address of the producer
- name and address of importer
- net content (capacity in Liters)
- alcohol content in %

Labeling must be applied in the form of a whole label or a permanent sticker before the product can enter Poland. More information on food standards and regulations along with general import and inspection procedures can be found in the latest FAS/Warsaw report on Poland- “Food and Agricultural Import Regulations and Standards”; online: www.fas.usda.gov -attache reports.

Polish Norms

In addition to the proper import documentation, phyto-sanitary or veterinary certificates, all food and agricultural products entering the Polish market, or even for transhipment, must comply with the relevant quality and production standards. Norms are set by the Polish Committee on Norms. However, each Polish ministry issues separate regulations which pertain to specific norms. For example, the norms may refer to temperature requirements for storage or sampling requirements for residues or pesticides. Exporters are advised to check with importers to ensure that all exported products are in compliance with these norms.

Poland's Ministry of Health and Social Welfare published new regulations (Dziennik Ustaw no. 9 pos. 72) concerning food additives on February 5, 2001. 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. The new list is much more compatible with the current EU regulations. The changes constitute a big step forward in modernizing the Polish regulations and enable the importation of many products currently not present on the Polish market.

For additional information, exporters should refer to the Post Country Market Brief on Polish Norms which is available via the internet at the following Web site: www.fas.usda.gov - attache reports directory.

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).

- The national chains, the least numerous group, operate several branches throughout Poland with central management.

- The regional chains have grown through the purchasing of bankrupt firms. They are territorial, usually in several voivodships, and supply mainly retailers.

- Regional wholesalers have a strong presence in local markets offering a wide range of products and improved service.

‘ Local wholesalers are feeling the pressure of the larger firms in the industry and mainly deal in cash and carry.

‘ Buyer groups operate in several market segments and are increasing their integration with many retailers.

‘ The larger businesses in this sector are firms with foreign or mixed capital. The largest is the Macro Cash and Carry formerly Dutch-owned but purchased by German Metro in 1997. Macro is followed by Eurocash JMB Polska (Portugese capital), Milo and McClane International (USA).

The fourth largest wholesaler on the Polish market is McClane International, formerly ABCO. ABCO was previously owned by R.J. Reynolds and was purchased by McClane International, which has headquarters in Temple, Texas. McClane International has been working closely with ABCO for the past several years prior to the acquisition. Appearance of this U.S. investor on the Polish market could enable U.S. exporters to have an easier access to the Polish market.

In order to get specific information on the Polish wholesale market and its potential for processed U.S. products McClane Polska can be contacted at the following address:

Mr. James Kilkenny
President
Ms. Dorota Skorupska
Purchasing Director
Distribution Center - Blonie
McClane Polska (former ABCO)
ul. Pas 20C
05-870 Blonie
ph/fax: 4822-7310200, 7310260
fax: 4822-7310299
email: dorota.skorupska@maclane.pl

Retail Sector

The distribution system for consumer ready food products, as with all other branches of the Polish economy, is still undergoing a rapid transformation. It should be noted that despite many obstacles (e.g., high cost of credit, high store rents, 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, through medium sized stores to big western style distribution centers.

‘ Foreign investors are very active in retailing. There are now over 140 hypermarkets nationwide along with many super-stores.

‘ Over the past five years the number of stores with foreign capital has increased from 330 to 950.

‘ According to Polish analysts big retailing chains will gain control of as much as 80 % of the Polish market within the next five years.

For more information on the Polish retail sector refer to Post Country report on Retail Food Sector, which is available via Internet at the following web site: www.fas.usda.gov - in attache report directory.

Food Processing Sector

Results of 2001 production show that the most dynamically growing sector of the food processing industry are products such as 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 Post Country report on Food Processing Sector, which is available via Internet at the following web site: www.fas.usda.gov - attache reports directory.

Hotel, Restaurant & Institutional Sector

Until the early 1990s, the Polish hotel and restaurant sector was dominated by the state-owned company, “Orbis”. 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 88 million visitors each year has maintained steady demand for this growing sector.

‘ With more Poles working longer hours, Polish eating habits have also been altered and eating out is not uncommon any more.

‘ Besides favoring traditional Polish cuisine; Poles like international cuisine. Italian, Chinese, Mexican and Indian restaurants can be found in almost any Polish city.

‘ American chains have also started to appear in larger cities like Warsaw e.g. T.G.I. Friday’s and Champions, besides Mc Donald’s, Pizza Hut, and KFC.

‘ Currently many of the international hotel chains such as the Marriott Hotel, Sheraton, Hyatt, Holiday Inn are present in larger Polish cities. Many local entrepreneurs have also invested in this sector.

‘ The catering sector has only been developing in Poland since early 1990s. HRI is one of the fastest growing branches of the Polish industry.

Several of the larger producers have set up separate distribution channels especially for this sector. While all the other sectors of Polish food distribution are already very competitive 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 into the Polish market.

For more detailed information on Poland's HRI Food sector please refer to Post Country report on Hotel, Restaurant & Institutional Food Service Sector Report, which is available via Internet at the following web site: www.fas.usda.gov - attache reports directory.

IV. Best High-Value Product Prospects

Food/Edible Fishery Products
Poultry Meat
Red Meat
Beef Offal
Almonds (Shelled)
Peanuts
Dried Prunes
Dried Raisins
Wine & Beer
Pet Foods
Fresh Fruit
Processed Fruits and Vegetables
Fruit and Vegetable Juices
Salmon
Snack Foods

It should be noted that poultry and red meat will essentially be blocked entry into Poland an estimated 3-6 months prior to EU accession. This is because of on-going U.S.-EU trade disputes about such U.S. products. These EU restrictions on such products will be adopted by Poland as part of its EU accession requirements.

V. Key Contacts and Further Information

U.S. EMBASSY TRADE PERSONNEL

Organization	Contact Name	Address	Phone/Fax
Foreign Agricultural Service USDA	Wayne Molstad, Counselor	American Embassy Al. Ujazdowskie 29/31 00-540 Warsaw, Poland E-mail: agwarsaw@fas.usda.gov Web page: www.usaemb.pl\usfas\front.htm	4822-621-3926/ 4822-628-1172

U.S. BASED MULTIPLIERS RELEVANT FOR POLAND

Organization	Contact Name	Address	Phone	Fax
Polish-U.S. Economic Council U.S. Chamber of Commerce	Mr. Garry Litman Poland, Central Europe Int. Division	1615 H Street, NW Washington DC 20062-2000	(202) 4635482	(202) 4633114 e-mail: eurasia@uschamber.com

POLAND GOVERNMENT AGENCIES

Organization	Contact Name	Address	Phone	Fax
Ministry of Agriculture and Rural Development	Mr. Jaroslaw Kalinowski Minister	ul.Wspolna 30 00-930 Warsaw	(4822) 6285745	(4822) 6292894
Ministry of Agriculture and Rural Development	Mr. Wanda Samborska Department of Foreign Cooperation	ul.Wspolna 30 00-930 Warsaw	(4822) 6282351	(4822) 6212326

Ministry of Health	Mr. Mariusz Lapinski Minister	ul. Miodowa 15 Warsaw	(4822) 8312324	(4822) 6358852
Ministry of Health	Mr. Andrzej Trybusz Director Public Health Department_	ul.Dluga 38/40 Warsaw	(4822) 6351559	(4822) 6354581
Ministry of Environment Protection Natural Resources and Forestry	Ms. Ewa Symonides Under Secretary of State Nature Conservation	ul.Wawelska 52/54 00-922 Warsaw	(4822) 5792406 5792353	(4822) 5792383
Ministry of Environmental Protection Natural Resources and Forestry	Mr. Jan Wrobel Director Nature Protection GMO	ul.Wawelska 52/54 00-922 Warsaw	(4822) 5792673	(4822) 5792555
Ministry of Environmental Protection Natural Resources and Forestry	Ms. Zofia Chrempinska Acting Director Department of Forestry	ul.Wwelska 52/54 00-922 Warsaw	(4822) 5792553	(4822) 5792555
The Agricultural State Property Agency	Dr. Miroslaw Helta Director	Plac Bankowy 2, Room 810 Warsaw	(4822) 6351000	(4822)
Ministry of Economy	Mr. Tadeusz Lisek Department of Foreign Economic Relations	Plac Trzech Krzyzy 5 Warsaw	(4822) 6935955	(4822) 6219714
Polish Center for Research and Certification	Mr. Janusz Berdowski Director	ul.Klobucka 23a 02-699 Warsaw	(4822) 6470742	(4822) 6471222

Polish Agency For Foreign Investment	Mr. Piotr Dabrowski	Aleja Roz 2 00-559 Warsaw	(4822) 3349841 3349810	(4822) 3349999

POLAND TRADE INSTITUTES/ASSOCIATIONS/CHAMBER OF COMMERCE

Organization	Contact Name	Address	Phone	Fax
Agricultural Economy Institute	Prof. Augustyn Wos	ul.Swietokrzyska 20 Warsaw	(4822) 8265031	(4822) 8271960
Plant Protection Institute	Prof. Stefan Pruszynski Director	ul.Miczurina 20 60-318 Poznan	(4861) 8649027	(4861) 8676301
Institute of Natural Fibre	Mr. Ryszard Kozlowski Director	ul.Wojska Polskiego 71B 60-630 Poznan	(4861) 8224815 8480061	(4861) 8417830 tlx 0413486
American Polish Home Builders Institute Foundation	Mr. Eligiusz Koniarek Director	ul.Chmielna 54/57 80-748 Gdansk	(4858) 3016851	(4858)301421 7
Polish Economic Chamber of Wood Industry	Mr. Kazimierz Jablonski Chairman	ul.Ratajczaka 19 61-814 Poznan	(4861) 8537172	(4861) 8537025
National Chamber of Commerce of Poland	Mr. Andrzej Arendarski	ul.Trebacka 4 00-074 Warsaw	(4822) 6309600	(4822) 8274673
National Polish Chamber of Commerce of Furniture Manufactures	Mr. Maciej Formanowicz Chairman Mr. Adam Burda Director	ul. Grunwaldzka 104 60-307 Poznan	(48-61) 8673188	(48-61) 8673188
American Chamber of Commerce in Poland (AmCham)	Ms. Dorota Dabrowska Executive Director	ul.Emilii Plater 53 00-113 Warsaw	(4822)5205999	(4822) 5205998

Institute of Wood Technology	Mr. Wladyslaw Strykowski	Ul.Winiarska 1 60-654 Poznan	(4861) 8224700	(4861) 8224372
Business Center Club	Mr. Marek Goliszewski President	Plac Zelaznej Bramy 2 00-136 Warsaw	(4822) 6253037	(4822) 6218420
Polish Bakers Association	Prof. Janusz Ratajczak President	ul.Krakowiakow 103 Warsaw	(4822) 8462065 8462066	(4822) 8461275
National Millers Association	Ms. Jadwiga Rothkaehl Chairman	ul.Miodowa 14, room 303 00-246 Warsaw	(4822) 8311461 x. 307	(4822) 6063845
Polish Grain-Feed Chamber	Mr. Bogdan Judzinski Chairman, Mr. Jerzy Wojciechowski Deputy	ul. Grzybowska 2/49 00-131 Warsaw	(4822) 3310800 cellular (48) 601371185	(4822) 3310802
Polish Association of Grain and Oilseeds Producers	Mr. Aleksander Szymanski	ul.Zurawia 22, room 102 00-515 Warsaw	(4822) 6220667 6291071	(4822) 6220667 6291071
National Association of Fish Producers	Mr. Zdzislaw Sobecki	ul.M.Kopernika 34 00-336 Warsaw	(4822) 8277421	(4822) 8277421
Polish Association of Swine Producers	Mr. Edmund Lozynski	ul.Siewierska 13 02-360 Warsaw	(4822) 8222832	(4822) 8220063

Polish Producers, Exporters and Importers of Meat	Mr. Przemyslaw Chrabowski, President Mr. Stanislaw Zieba, Secretary General Witold Choinski, Office Manager	ul.T.Chalubinskie-go 8 02-784 Warsaw	(4822) 8302656 8301664/48	(4822) 8302582 8301648
Polish Association of Producers of Agricultural Commodities	Mr.Jacek Kalinski	ul.Wspolna 30 00-930 Warsaw	(4822) 6232413	(4822) 6232357
National Association of Tobacco Industry	Mr. Sloma General Director	ul. Kasprzaka 29/31 01-234 Warsaw	(4822) 8360614 8366241	(4822) 8360614
National Association of Orchard Owners	Mr. Romuald Ozimek	ul.Warecka 11A 00-034 Warsaw	(4822) 8265281 ext. 382	(4822) 8265281
Polish Homebuilders Association	Mr. Jacek Dabrowski President	ul.Chmielna 54/57 80-748 Gdansk	(4858) 3016851	(4858) 3014217
Corporation of Construction Enterprises	Mr. Jan Mikoluszko President	ul.Kochanowskie-go 39 01-847 Warsaw	(4822) 6634857	(4822) 6634857
Polish Association of Sanitary, Heating, Gas and Air Conditioning Enterprises	Mr. Tomasz Malowany Director	ul.Sniadeckich 10 00-656 Warsaw	(4822) 6287582	(4822) 6287582
Polish Franchise Association (PFA)	Ms. Jolanta Kramarz President	ul.Koszykowa 54/138 00-659 Warsaw	(4822) 6308425	(4822) 6308467
Association of Leasing Companies in Poland	Mr. Andrzej Plochocki Director	ul.Filtrowa 71a /Apt. 3 02-055 Warsaw	(4822) 8251943	(4822) 8251943

Packaging Materials and Packaging Manufactures Association	Mr. Tadeusz Romanowicz President	ul.Czackiego 3/5 00-950 Warsaw	(48212) 8282715 8286426 7731932	(4822) 8286426 7731932
Direct Marketing Association	Mr. Andrzej Miekus President	ul.Marszalko-wska 87/85 00-683 Warsaw	(4822) 6280260	(4822) 6280260
Polish Chamber of Tourism	Mr. Wlodzimierz Sukiennik President	Al. Jana Pawla II 20 00-094 Warsaw	(4822) 6209049	(4822) 6209049
Polish Economic Chamber	Mr. Andrzej Arendarski President	ul.Trebacka 4 00-074 Warsaw	(4822) 6309600	(4822) 8274673
Warsaw Economic Chamber	Mr. Mieczyslaw Jakubowski President	ul.Nowowiejska 22/24 00-665 Warsaw	(4822) 6605458 6212972	(4822) 6212972
The National Chamber of Construction	Mr. Witold Zaraska President	ul.Zielna 49 00-108 Warsaw	(4822) 6207082 6207083	(4822) 8242172
Importers’and Exporters’ Economic Chamber	Mr. Witold Rebak President	ul.Lucka 11 00-842 Warsaw	(4822) 6563350	(4822) 6253600
The National Packages Chamber	Mr. Jan Lekszycki President	ul.Konstancinska 11 02-942 Warsaw	(4822) 8422011	(4822) 8422303
The All-Polish Economic Chamber of Meat	Mr. Marian Burek President	ul.Chocimska 28 Pek-POL , room 309, 00-791 Warsaw	(4822) 8497968	(4822) 8498338
The All-Polish Industrial and Commercial Chamber of Private Investors	Mr. Jerzy Rzymanek President	ul.Widok 12 00-023 Warsaw	(4822) 8275474 8274858	(4822) 8277788

The Polish Economic Chamber of Agricultural Producers and Exporters	Mr. Slawomir Niewiadomski President	ul.Swietokrzyska 20, room 508 00-002 Warsaw	(4822) 8262261 ext. 555 8260215	(4822) 8260215
Development and Environment Chamber	Mr. Zygfryd Nowak President	ul.Chmielna 15 00-021 Warsaw	(4822) 8270063	(4822) 8270063
The Federation of Associations Technical & Scientific Research	Mr. Andrzej Zielinski President	ul.T. Czackiego 3/5 00-950 Warsaw	(4822) 8277888 8268731	(4822) 8272949
Polish Construction Chamber of Industry and Commerce in Warsaw	Mr. Eugeniusz Budny President	ul.Wspolna 2 00-926 Warsaw	(4822) 210351 ext. 737,282 6283528	(4822) 6283528
The Craftman's and Small Enterprise Chamber in Warsaw	Mr. Boguslaw Wojcik President	ul.Smocza 27 01-048 Warsaw	(4822) 383211 380351 381610	(4822) 383553
The Polish Economic Chamber of Motor-car Transport And Forwarding	Mr. Krzysztof Gutowski President	Al.Jerozolimskie 144, room 8 02-305 Warsaw	(4822) 8224811 ext. 204 8236872	(4822) 8236872
The Producers and Consumers Association of Packing Materials and "PROPAK" Packages	Mr.Tadeusz Romanowicz President	Ul.T. Czackiego 3/5 00-950 Warsaw	(4822) 8267461 ext. 211 6226426	(4822) 6328975 7731932
The Scientific Society of Organizations and Management (The Main Board)	Mr. Stanislaw Rakowicz President	ul.Koszykowa 6 00-564 Warsaw	(4822) 6299973 6254485 6292127	(4822) 6292127

The Society Supporting Economic Initiatives	Mr. Krzysztof Czeszejko-Sochacki	ul.Krucza 38/42 00-521 Warsaw	(4822) 6290483 6290651	(4822) 6290651
Foreign Investors Chamber of Industry and Commerce	Director	Krakowskie Przedmiescie 47/51 00-071 Warsaw	(4822) 8272234 8260570	(4822) 8272234

Trade Shows in Poland:

Warsaw Agricultural Trade Office recommends the following two trade fairs organized in Poland:

Polagra-Food: One of the largest food fairs in central/eastern Europe, organized in Poznan every year. As of 2001, Polagra is being organized as two separate trade fairs Polagra - Food (food products, ingredients) organized in September and Polagra Farm (agricultural machinery and farm supplies) organized in October. The following attendance/exhibition data pertains to the last Polagra-Food show organized in 2002.

During the 2001 show, Polagra-Food hosted about 850 exhibitors including foreign exhibitors from 31 countries. The fair attracted about 37,000 visitors. Please note that the show is closed to the general public during the first two days when it is reserved for business visitors only. Exhibitors range from firms trading/producing food products, ingredients, to food processing and packaging equipment.

FAS/Warsaw will only be visiting the 2003 edition of the show. FAS/Warsaw might be organizing a U.S. exposition at Polagra-Food Fairs during 2004.

Show dates:
Polagra Food - September 16-19, 2003

Polagra Farm - October 9-12, 2003

Organizer:
Ms. Jadwiga Chlapowska
Manager Project team b-1
ul. Glogowska 14
60-734 Poznan
ph: 4861-8692592, 8692303
fax: 4861-8660675, 8665827

Polfish: Largest fish and fish products fair in Poland and central/eastern Europe attracting various companies from the fish industry - fishing companies, importers-exporters, wholesalers, retailers, transportation companies as well as consulting firms. The 2001 edition hosted 140 firms - 100 polish, 40 foreign. The fair was visited by about 4,000 visitors (mostly professional, versus general public which usually also visits agricultural fairs).

Show dates:
- organized every year
Next show May 27-29, 2003
May 2004

Organizer:
International Gdansk Fair
Ms. Anna Lasocinska
Polfish Coordinator
ul. Beniowskiego 5
80-382 Gdansk
ph: 4858-5549117, 5520071-6
fax: 4858-5549207, 5522168

Other shows of interest:

Eurogastro: International Trade Fair - Everything for Gastronomy. International Fair to be organized for the 6th time in Warsaw. The largest fair attracting companies dealing within the HRI sector. The 2002 show attracted 170 exhibitors, including 25 foreign firms from 7 countries. Area of exposition amounted to 4,332 sqm. This show attracts HRI buyers but is also open to the public.

Exhibitors included firms dealing in: technical devices, accessories, food products, non-alcoholic beverages, alcoholic drinks, condiments, services and furniture.

Dates:
March 6-8, 2003
March 2004

Organizer:
Miedzynarodowe Targi -Polska Sp.z.o.o.
ul. Koszykowa 24/12
00-553 Warsaw
ph: 4822-6223179, 6223180
fax:4822-6223176, 6225789
e-mail: mtpolska@mtpolska.com.pl
Http://www.mtppolska.com.pl

National Livestock Show: Largest livestock exposition in Poland. Located in Warsaw. Organized annually or alternative years. The show attracts about 430 exhibitors, utilizing exposition area of 7,000 square meters.

Show dates:
August 2004

Organizers:
Ministry of Agriculture
and Rural Development
Trade Show Department
ul. Wspolna 30
00-930 Warsaw

ph/fax: 4822-6288784

International Food, Drink, and Hospitatliy Exhibition (IFE) Poland:
This first time event in Warsaw is expected to be for trade visitors only, not open to the general public.

Show dates:
May 14-16, 2003

Organizers:
David Ashdown, Montgomery International Ltd
11 Manchester Square, London W1U 3PL, UK
Tel: 44 (0)20 7886 3114
Fax: 44 (0)20 7886 3101
E-mail: international@montex.co.uk
www.ifepoland.com

APPENDIX 1. STATISTICS

A. KEY TRADE & DEMOGRAPHIC INFORMATION

Agricultural Imports From All Countries ($Mil)/U.S. Market Share (%)[1/]	3,406*/2.6%*
Consumer Food Imports From All Countries ($Mil)/U.S. Market Share (%)[1/]	1,388*/6%*
Edible Fishery Imports From All Countries ($Mil)/U.S. Market Share (%)[1/]	355*/0.09%*
Total Population (Millions)/Annual Growth Rate (%)	38.7/0.1%
Urban Population (Millions)/Annual Growth Rate (%)	23.9/1-2%
Number of Major Metropolitan Areas [2/]	1
Size of the Middle Class(Millions)/Growth Rate (%)[3/]	4/1-2%
Per Capita Gross Domestic Product (U.S. Dollars)	4,559
Unemployment Rate (%)	17.4%
Per Capita Food Expenditures (U.S. Dollars)	1,367
% of Female Population Employed[4/]	30%
Exchange Rate (US$1 = X.XX zl)[5/]	4.12

1/ Use FAS' Web-enabled UNTrade database (HS 6-digit option; Import Market Share BICO 3-year format) (*1999 Data)
2/ Population in excess of 1,000,000.
3/ These are unofficial estimates due to the level of equality of incomes among 95% of the pop'l. (For further information refer to section I)
4/ Percent against total number of women (18-59 years old).
5/ Note, if necessary, any significant exchange rate movements since the previous year.

Table B. Consumer Food and Edible Fishery Products

Poland - Top 15 Ranking

CONSUMER-ORIENTED AGRICULTURAL IMPORTS

($1,000)	1998	1999	2000
Germany	223552	227980	184420
Spain	171770	170289	177822
Netherlands	151640	138116	124685
Italy	104770	116435	114523
Ecuador	66060	101216	87054
Hungary	77453	92630	77855
France	72408	67514	62827
Denmark	75429	51253	53027
Czech Republic	26019	26990	46804
Greece	39501	44491	46637
Areas NES	0	0	36769
Brazil	42246	44854	34572
United States	68320	35683	30905
Russian Federa	11919	12733	29151
Ukraine	8828	13284	25043
Other	525265	433616	367720
World	1665180	1577084	1499814

FISH & SEAFOOD PRODUCTS IMPORTS

($1,000)	1998	1999	2000
Norway	114791	120398	116214
Russian Federa	59373	34958	48324
China (Peoples	18465	15814	29307
Germany	18091	12681	18075
Netherlands	12153	14306	10609
Denmark	15046	9170	9856
Thailand	9653	7963	8687
Ireland	13484	9195	7692
Canada	10665	661	7330
Areas NES	0	0	5182
Peru	2244	687	3142
Argentina	5790	4379	3050
United Kingdom	8539	1925	3041
Spain	3095	2534	2673
Iceland	3627	1079	2477
Other	30236	15248	17577
World	325252	250998	293236

Source: United Nations Statistics Division

Poland Imports (In Millions of Dollars)	Imports from the World 1998	1999	2000	Imports from the U.S. 1998	1999	2000	U.S Market Share 1998	1999	2000
CONSUMER-ORIENTED AGRICULTURAL TOTAL	1665	1577	1500	68	36	31	4	2	2
Snack Foods (Excl. Nuts)	117	103	92	1	1	0	1	0	0
Breakfast Cereals & Pancake Mix	7	5	4	0	0	0	0	0	0
Red Meats, Fresh/Chilled/Frozen	90	64	60	4	1	1	5	2	1
Red Meats, Prepared/Preserved	9	8	10	0	0	0	0	0	0
Poultry Meat	43	11	11	25	5	6	58	42	54
Dairy Products (Excl. Cheese)	88	111	116	3	0	1	3	0	0
Cheese	19	11	19	0	0	0	0	0	0
Eggs & Products	14	8	7	1	1	1	8	5	1
Fresh Fruit	393	400	374	2	3	1	0	1	0
Fresh Vegetables	99	77	87	1	1	1	0	0	0
Processed Fruit & Vegetables	145	122	132	9	6	6	6	5	5
Fruit & Vegetable Juices	66	83	68	2	2	1	2	2	1
Tree Nuts	30	27	24	3	3	2	9	9	10
Wine & Beer	70	86	77	2	2	3	2	3	3
Nursery Products & Cut Flowers	54	62	63	1	1	1	1	1	1
Pet Foods (Dog & Cat Food)	17	14	19	2	2	1	15	16	7
Other Consumer-Oriented Products	406	386	337	14	11	9	3	3	3
FISH & SEAFOOD PRODUCTS	325	251	293	1	1	1	0	1	0
Salmon	17	24	27	1	1	1	1	1	1
Surimi	52	40	41	0	1	0	0	0	0
Crustaceans	15	17	15	0	0	0	0	0	0
Groundfish & Flatfish	148	90	124	1	1	1	0	1	0
Molluscs	1	1	1	0	0	0	0	0	0
Other Fishery Products	92	79	85	1	1	0	0	0	0
AGRICULTURAL PRODUCTS TOTAL	3,931	3,381	3,252	186	113	79	5	3	2
AGRICULTURAL, FISH & FORESTRY TOTAL	4,640	3,981	3,941	201	124	89	4	3	2

Source: FAS' Global Agricultural Trade System using da