USDA Foreign Agricultural Service
GAIN Report
Global Agriculture Information Network

Required Report - public distribution

Date: 9/30/2003

GAIN Report Number: PL3036

Poland

Exporter Guide

Annual

2003

Approved by:
Wayne Molstad, Agricultural Counselor
U.S. Embassy

Prepared by:
Jolanta Figurska, Natalia Koniuszewska

Report Highlights:
Poland's GDP rose 1.3 percent in CY 2002 and 1.1 percent in CY 2001. Experts predict 2003 GDP to increase approximately 2.8 percent. Inflation in CY 2002 dropped to 2 percent from 5.5 percent in 2001 while unemployment remained at 18 percent. Despite economic difficulties, the modernizing food retail sector continues to expand. Food trade, predominantly 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
Unscheduled Report
Warsaw [PL1]
[PL]

Table of Contents:

The retail industry food sector is the most vibrant sector of the economy since free-market restructuring and privatization began in the early 90s. 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 2002.

Poland's GDP growth of 1.3 percent in CY 2002 was up from 1.1 percent in CY 2001. Experts predict 2003 GDP growth at approximately 2.8 percent. Inflation in CY 2002 dropped to 2 percent from 5.5 percent in 2001. Unemployment rose from 17.4 percent in 2001 to 18.1 percent at the end of 2002. Total exports in CY 2002 are valued at $40.1 billion, up US $4 billion from the previous year, and showing a growth of US $10 billion since 2000. Imports in CY 2002 were valued at US $54.1 billion, increasing US $3.9 billion dollars from 2001. Import growth is expected to continue to increase over the next couple of years. Economists predict that imports will rise by 7.8 percent in 2003 while imports only rose by 3.2 percent in 2002.

The agriculture sector experienced an output decrease of an estimated 7.7 percent in 2002. Crop production decreased an estimated 17.3 percent due to reduced acreage of grain and potatoes and variable precipitation. Livestock production; however, increased 5.7 percent, mainly due to high pork and live cattle output. Lower harvests occurred in all grains and oilseeds, while sugar beet harvest slightly increased.

Estimates for MY 2003 show that red meat output will increase six percent, although beef production is expected to decline. The increase in output is contributed to higher pork production because of lower feed costs in 2002. Total grain output is expected to decrease about twelve percent from last year due to the reduced acreage and lower grain yields.

The negative agricultural trade balance for CY 2002 amounted to US$ 3 million with imports valued at US$ 3.6 billion and exports at US$ 3.3 billion. The EU continues to be the largest supplier of agricultural products to Poland (53 percent) and the largest market for Polish agricultural exports (49 percent).

Total US exports of agriculture, fishery, and forestry products to Poland in CY 2002 amounted to $71.9 million, decreasing from $94.8 million in CY 2001. Leading U.S. agricultural exports in 2002 were poultry meat ($32.7 million) followed by dairy products ($6.2 million), frozen or chilled red meat ($5 million), and other consumer-oriented products ($4.4 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.

A reduction on import duty rates for EU wine went into effect April 1, 2003. This allows the EU to export to Poland duty free, while duties on wine originating from the United States continue to carry a duty of 20-30 percent. This could affect U.S. exports to Poland; however, Polish importers say that U.S. wines have found a stable place on the Polish market.

Poland's EU accession (May 1, 2004) will result in lowering of current import duties for non-EU suppliers, thus U.S. exporters will face lower duties for many of the exported agricultural goods.

I. Market Overview

Foreign Direct Investment (FDI) into the food, drink and tobacco sectors of the economy decreased from USD 7.1 billion in CY 2001 to USD 6.06 billion in CY 2002. Even with this decrease in FDI inflow, there was a slightly higher GDP increase, at 1.3 percent in CY 2002, compared to 1.1 percent in CY 2001. Overall, the public finance situation appears to be improving. The state budget's revenue increased only 2 percent, while expenditures increased 5.6 percent in 2002. Expenditures decreased when compared to the 14.1 percent increase in 2001. This is the result of the Polish government's attempts to cut back on total state budget expenditures. A decrease in domestic demand due to strict monetary policy is commonly blamed for the slow down. With some experts predicting that the world economy will recover, Poland's GDP is expected to grow around 3.5 percent in 2003.

It was believed that recovery from the slowdown in the Polish economy would come about at the beginning of 2002; however, economists now believe that it will come in 2003. Out of the 10 EU candidates, Poland's economic growth was among the weakest in 2002. Even with an economic slowdown in 2001-2002, the Polish economy is one of the fastest growing among transition countries.

Foreign companies have invested close to $534 billion dollars in Poland over the last decade, with the annual amount in CY 2002 decreasing 27% compared to CY 2001. The Polish Agency for Foreign Investment (PAIZ) indicates that 67.4 percent of the capital invested supported three economic sectors including manufacturing (34.3%), "trade and repairs" (17.4%), and financial intermediation (15.7%). The largest foreign investors in the Polish food industry in 2002 were Coca-Cola, Phillip Morris (tobacco processing), Imperial Tobacco, Nestle, Scandinavian Tobacco 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 will also be required to pay a property tax.

Table I: Poland Agricultural Imports

	2000	2001	2002	2003 (F)
	USD Million	USD Million	USD Million	USD Million
I. Animal Products	681.7	632.7	632.7	645
Live Animals	41	39.3	44.4	35
Meat & Products	88.1	64.9	110.9	125
Dairy Products	93.5	57.5	50.3	55
Fish and Products	295.2	355	320.9	325
Other Animal Products	163.9	105.9	106.3	105
II. Plant Products	2312.2	2525.3	2614.2	2631
Grains	327.8	282.5	218	215
Oilseed & Products	333.8	441.1	491.1	514
Fruit & Products	537.7	606.4	607	610
Vegetables & Products	125.6	158.4	160.5	148
Potatoes & Products	33.2	52.8	57.9	56

Sugar & Products	107.6	133.6	152.7	148
Coffee, Tea, Cocoa	352.8	314.8	346.5	350
Tobacco & Cigarettes	92.4	119.9	195.4	200
Alcohol	92.6	94.8	34.3	35
Other Plant Products	308.7	232.7	350.8	355
III. Other Ag Products	188.7	248.1	328.7	330
Total	3182.6	34.6.0	3575.7	3606

(F) - Forecast
Source: Calculations of Institute of Agricultural Economics based on data from the Central Institution of Foreign Trade

Table II: Polish Agriculture Product Trade by Country

USD Million						
	2001			**2002**		
Countries	**Total Agriculture Products**			**Total Agriculture Products**		
	Export	**Import**	**Balance**	**Export**	**Import**	**Balance**
Russia	220.6	52.1	168.5	284.4	41.3	243.1
Ukraine	141.9	36.6	105.3	122.7	35.7	87
Belarus	41.7	6.7	35.2	33.3	5.2	28
Baltic Countries	164	15.2	148.9	181.7	11.4	170.3
Germany	645.2	484	161.2	775	480.6	294.3
The Netherlands	179.2	365.6	-186.4	189.5	369.1	-179.6
Italy	152.6	173.6	-21	150.5	163	-12.4
Hungary	80.1	103.6	-23.5	87.3	119.6	-32.4
Czech Republic	158.2	122.8	35.4	178.4	127.9	50.5
Slovakia	34.7	60.2	-25.5	47.3	60.3	-13
United States	116.2	81.1	35.1	150.1	99.1	51

Source: Calculations of Institute of Agricultural Economics based on data from the Central Institution of Foreign Trade

Market indicators:

- Poland's population of 38.7 million is relatively dispersed. Although 62 percent of the population can be classified as urban, only 30 percent reside in cities of over 100,000 inhabitants. The population is very young with 63 percent under the age of 45. The age groups 30-44 and 45-64 are the largest population groups with 21 percent and 24 percent respectively.

- Average monthly gross wages in 2002 equal 2,100 PLN (USD 525.00)

- The household consumption expenditure rate in CY 2002 grew 3.3 percent from CY 2001 (constant prices). In 2001, the average monthly expenditures of households per capita was 610 PLN, of which food and non-alcoholic beverages consisted of 189 PLN.

- In 2002, food and non-alcoholic beverages accounted for 31 percent of household expenditures.

- Real gross average income between CY 2001 and CY 2002 decreased 0.1 percent compared to a 1.5 percent increase from CY 2000 to CY 2001.

- Unemployment continues to plague Poland with the figure reaching 18.1 percent at the end of 2002 with experts predicting a further increase in CY 2003. Unemployment is most probably increasing due to weaker foreign demand and overall economic slow down. Young people in the 15-24 age bracket constitute 35 percent of the total jobless workforce as of 2002.

- Of the approximately 14.9 million people employed in Poland, 25.1 percent work in the public sector and the remaining 74.9 percent in the private sector. The workforce is diversified with 48.8 percent of women economically active.

- Approximately 29.2 percent of the population works 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 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.

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 confirmed BSE cases between 2002 and 2003.

- 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. Billboards and in-store promotions are also proving very effective.

- Promotions on products influence the purchases of 50 percent of adult Poles. Advertising influences forty-two percent of students' purchasing decisions.

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 favored 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.

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 licenses, 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 to be consumed by - the Polish phrase "najlepiej spozyc do"
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 transshipments, must comply with the relevant quality and production standards. As of January 1, 2003 Poland implemented usage of norms in accordance with Codex Alimentarius. Current regulations require the producers to provide dates by which a particular product is to be used.

Additives

Poland's Ministry of Health and Social Welfare published a new regulation (Journal of Law no. 87 dtd. May 19, 2003) on food additives on June 3, 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. The new list is in line with the current EU regulations. Please note: 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.

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, owned by German Metro. Macro is followed by Eurocash JMB Polska, Milo and McClane International (USA).

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. There are approximately 32.6 shops per 10,000 inhabitants.

- The number of shops with foreign capital continues to increase every year. In 2002, there were 3,250 shops with foreign capital, a six percent increase from 2001.

- 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 2002 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 *
Beef Tripe
Wine & Beer
Dried Prunes
Peanuts
Almonds (shelled)
Dried Cranberries
Fresh Fruit (grapefruit)
Processed Fruits and Vegetables
Fruit and Vegetable Juices
Salmon
Snack Foods

* It should be noted that poultry and red meat may essentially be blocked entry into Poland an estimated 3-6 months prior to EU accession in May 2004. 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 Charles Rush, Attache	American Embassy Al. Ujazdowskie 29/31 00-540 Warsaw, Poland E-mail: agwarsaw@usda.gov Web page: http://www.usinfo.pl/agri/	4822-504-2336 4822-504-2320

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

Contact Name	Address	Phone	Fax	web page; e-mail address
Mr. Wojciech Olejniczak, Minister of Agriculture and Rural Development	ul.Wspolna 30, 00-930 Warsaw	(4822) 6285745	(4822) 6292894	
Mr. Wanda Samborska; Department of Foreign Cooperation	ul.Wspolna 30, 00-930 Warsaw	(4822) 6282351	(4822) 6212326	
Mr. Piotr Kolodziej, Chief Veterinary Inspector Ministry of Agriculture and Rural Development	ul. Wspolna 30, 00-930 Warsaw	(48-22) 628 8511	(48-22) 6231408	www.wetgiv.gov.pl; wet@minrol.gov.pl
Mr. Leszek Sikorski; Minister Ministry of Health and Social Welfare	ul. Miodowa 15 Warsaw	(4822) 8312324	(4822) 6358852	
Mr. Andrzej Trybusz, Chief Sanitary Inspector	ul.Dluga 38/40 Warsaw	(4822) 6351559	(4822) 6354581	www.gis.mz.gov.pl; inspektorat@gis.mz.gov.pl
Ms. Ewa Symonides; Under Secretary of StateNature Conservation Ministry of Environment	ul.Wawelska 52/54 00-922Warsaw	(4822) 5792406, 5792353	(4822) 5792383	www.mos.gov.pl; Chief.Nature.Conservator@mos.gov.pl
Mr. Jan Wrobel; Director Nature Protection GMO Ministry of Environment	ul.Wawelska 52/54 00-922Warsaw	(4822) 5792673	(4822) 5792555	
Ms. Zofia Chrempinska Acting Director Department of Forestry Ministry of Environment	ul.Wawelska 52/54 00-922 Warsaw	(4822) 5792553	(4822) 5792555	
Mr. Zdzislaw Siewierski, Chairman Agency of Agricultural State Properties	ul.Dolanskiego 2,00-215 Warsaw	(4822) 6351000	(48-22) 635 0060	www.awr.gov.pl
Mr. Tadeusz Lisek; Department of Foreign Economic Relations Ministry of Economy	Plac Trzech Krzyzy 3/5; 00-507 Warsaw	(4822)6935955	(4822) 6219714	www.mg.gov.pl
Mr. Janusz Berdowski Director Center for Research and Certification	ul.Klobucka 23a, 02-699 Warsaw	(4822) 6470742	(4822) 6471222	
Mr. Piotr Dabrowski Polish Investment Agency	Aleja Roz 2, 00-559 Warsaw	(4822) 3349841, 3349810	(4822) 3349999	

Mr. Zbigniew Izdebski Agricultural Markets Agency	ul. Nowy Swiat 6/12, 00-400 Warsaw	(48-22) 6617203	(4822) 628 9353	
Agency for Restructuring and Modernizing Agriculture	Al. Jana Pawla II 70, 00-175 Warsaw	(48-22) 860 2950	(48-22) 860 2980	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
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	www.ior.poznan.pl; S.Pruszynski@ior.poznan.pl
National Institute of Hygiene	Prof. Jan Krzysztof Ludwicki, Director	ul. Chocimska 24, 00-791 Warsaw	(4822) 542 1400, 849 7612, 542 1202	(48-22) 849 7484, 849 3513	www.pzh.gov.pl
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)3014217	
Polish Economic Chamber of Wood Industry	Mr. Longin Graczkowski, Chairman	ul. Winiarska 1, 60-654 Poznan	(4861) 822 47 52	(4861) 849 2468	www.pol-wood-chamber.drewno.pl; pigpd@drewno.pl
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 FormanowiczChairman; Mr. Adam Burda	ul. Grunwaldzka 10460-307 Poznan	(48-61) 8673188	(48-61) 8673188	

	Director				
American Chamber of Commerce in Poland (AmCham)	Ms. Dorota Dabrowska, Executive Director	ul.Emilii Plater 53, 00-113 Warsaw	(4822) 5205999	(4822) 5205998	director@amcham.com.pl
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 RatajczakPresident	ul.Krakowiakow 103 Warsaw	(4822) 8462065, 8462066	(4822)8461275	
National Millers Association	Ms. Jadwiga RothkaehlChairman	ul.Miodowa 14,room 30300-246 Warsaw	(4822) 8311461 ext. 307	(4822)6063845	
Polish Grain-Feed Chamber	Mr. Bogdan Judzinski, Chairman, Mr. Maciej Tomaszewicz, Director	ul. Grzybowska 2/4900-131 Warsaw	(4822) 3310800 (48)601371185	(4822)3310802	
Polish Association of Grain and Oilseeds Producers	Mr. Aleksander Szymanski	ul.Zurawia 22,room 10200-515 Warsaw	(4822) 6220667, 6291071	(4822)6220667, 6291071	
National Association of Fish Processors	Mr. Zdzislaw Safader	ul. Slowianska 5, 75-846 Koszalin	(48-94) 347 1328	(48-94) 347 1328; mobile 0601 643 666	spr@bptnet.pl
Polish Federation of Food Producers	Prof. Andrzej Blikle, Chairman, Mr. Jacek Czarnecki	ul. Zurawia 22, Warsaw	(48-22) 627 1080	(48-22) 627 1080; mobile 0608 392 715	www.pfpz.pl; j.czarnecki@pfpz.pl
Polish Association of Swine Producers	Mr. Edmund Lozynski	ul.Siewierska 1302-360 Warsaw	(4822) 8222832	(4822)8220063	
Polish Producers, Exporters and Importers of Meat	Mr. Przemyslaw Chabowski, President; Mr.	ul.T.Chalubinskie-go 8 02-784 Warsaw	(4822) 8302656, 8301664/48	(4822)8302582, 8301648	www.polskie-mieso.pl

	Stanislaw Zieba, Secretary General; Mr. Witold Choinski, OfficeManager				
Polish Association of Producers of Agricultural Commodities	Mr.Jacek Kalinski	ul.Wspolna 3000-930 Warsaw	(4822) 6232413	(4822)6232357	
National Association of Tobacco Industry	Mr. SlomaGeneral Director	ul. Kasprzaka 29/3101-234 Warsaw	(4822) 8360614, 8366241	(4822) 8360614	
National Association of Orchard Owners	Mr. Romuald Ozimek	ul.Warecka 11A00-034 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	
Association of Wooden Housing Producers	Mr. Wojciech Elbanowski, Chairman	ul. Chmielna 54/57, 80-748 Gdansk	(48-58) 301 6851	(48-58) 305 5722	www.fard.pl, p.dobraniecki@szkielet.com.pl
Association of Wooden Joinery Manufacturers		ul. Laskowa 4, 05-200 Wolomin	(48-22) 787 3502, 787 2474	(48-22) 787 3502	www.spsb.com.pl; spsb@spsb.com.pl
Polish Franchise Association (PFA)	Ms. Jolanta Kramarz President	ul.Koszykowa 54/13800-659 Warsaw	(4822) 6308425	(4822)6308467	
Association of Leasing Companies in Poland	Mr. Andrzej Plochocki Director	ul.Filtrowa 71a /Apt. 302-055 Warsaw	(4822) 8251943	(4822)8251943	
Packaging Materials and Packaging Manufactures Association	Mr. Tadeusz Romanowicz President	ul.Czackiego 3/500-950 Warsaw	(48212) 8282715, 8286426, 7731932	(4822)8286426, 7731932	
Direct Marketing Association	Mr. Andrzej Miekus President	ul.Marszalko-wska 87/8500-683 Warsaw	(4822) 6280260	(4822)6280260	
Polish Chamber of Tourism	Mr. Jan Korsak, Chairman	ul. Astronomow 3, Warsaw	(48-22) 836 9971	(4822) 836 9973	www.pit.org.pl

Polish Economic Chamber	Mr. Andrzej Arendarski President	ul.Trebacka 400-074 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 4900-108 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 1500-021 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) 6210351 ext. 737, 6283528	(4822)6283528	
The Craftman's and Small Enterprise Chamber in Warsaw	Mr. Boguslaw Wojcik President	ul.Smocza 2701-048 Warsaw	(4822) 6383211, 6380351, 6381610	(4822)383553	

The Polish Economic Chamber of Motor-car Transport And Forwarding	Mr. Krzysztof Gutowski President	Al.Jerozolimskie 144, room 802-305 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	
National Councicl of Poultry, Economic Chamber	Mr. Rajmund Paczkowski, Chairman	ul. Czackiego 3/5, 00-043 Warsaw	(48-22) 336 1338	(48-22) 828 2389	www.krd-ig.compl/; krdig&pro.onet.pl

Trade Shows in Poland:

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

International Food, Drink, and Hospitality Exhibition (IFE) Poland:
This second edition of the fair in Warsaw is expected to be for trade visitors only, not open to the general public. Exhibitors included firms dealing in food products, non-alcoholic beverages, alcoholic drinks, condiments, technical devices, cooking devices and services.

FAS/Warsaw will organize a U.S. pavillion at the 2004 IFE Fair.

Show dates:
May 18-20, 2004

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

Polagra-Food: Organized in Poznan every year. As of 2001, Polagra is being organized as two separate trade fairs Polagra - Food (mostly food processing equipment but also 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 2003.

During the 2003 show, Polagra-Food hosted about 771 exhibitors (940 in 2002) including foreign exhibitors from 35 countries. The fair attracted about 35,000 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 2004 edition of the show.

Show dates
Polagra Food - September, 2004

Polagra Farm - October, 2004
National Livestock Show

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 2003 edition hosted 140 firms - 100 polish, 40 foreign (160 in 2001 edition). The fair was visited by about 4,000 visitors (mostly professional, versus general public which usually also visits agricultural fairs).

Show dates:
- organized every other year
Next show May 2005

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

Eurogastro: International Trade Fair - Everything for Gastronomy. International Fair attracting companies dealing within the HRI sector. The 2003 show attracted 170 exhibitors (180 in 2002 edition), 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, HRI accessories, food products, non-alcoholic beverages, alcoholic drinks, condiments, services and furniture.

Dates:	**Organizer:**
	Miedzynarodowe Targi -Polska Sp.z.o.o.
March 2004	ul. Koszykowa 24/12
March 2005	00-553 Warsaw
	ph: 4822-6223179, 6223180
	fax:4822-6223176, 6225789
	e-mail: mtpolska@mtpolska.com.pl
	Http://www.mtppolska.com.pl

APPENDIX 1. STATISTICS

A. KEY TRADE & DEMOGRAPHIC INFORMATION

Agricultural Imports From All Countries ($Mil)/U.S. Market Share (%)[1]	3,576/2.7%
Consumer Food Imports From All Countries ($Mil)/U.S. Market Share (%)	1,450/4%
Edible Fishery Imports From All Countries ($Mil)/U.S. Market Share (%)	321/1.5%
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%
Gross Domestic Product (%)	1.3%
Unemployment Rate (%)	18.1%
Average Monthly Food Expenditures (Zloty)	300.00
% of Employed Females[4]	48.5%[5]
Exchange Rate (US$1 = X.XX zl)[6]	3.93

[1]Foundation of Assistance Programs for Agriculture (FAPA) and ForeignAgricultural Markets Monitoring Unit (FAMMU)/Warsaw, 2003.

[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 population. (For further information refer to section I)

[4]Percent against total number of women (18-59 years old).

[5]Statistical Yearbook of the Republic of Poland, 2001. (Data from 2002)

[6] Note, if necessary, any significant exchange rate movements since the previous year.

Poland Imports (In Millions of Dollars)	Imports from the World			Imports from the U.S.			U.S Market Share		
	1999	2000	2001	1999	2000	2001	1999	2000	2001
CONSUMER-ORIENTED AG TOTAL	**1,577**	**1,500**	**1,643**	**36**	**31**	**43**	**2**	**2**	**3**
Snack Foods (Excl. Nuts)	103	92	115	1	0	0	0	0	0
Breakfast Cereals & Pancake Mix	5	4	3	0	0	1	0	0	4
Red Meats, Fresh/Chilled/Frozen	64	60	37	1	1	2	2	1	5
Red Meats, Prepared/Preserved	8	10	8	0	0	1	0	0	1
Poultry Meat	11	11	22	5	6	7	42	54	33
Dairy Products (Excl. Cheese)	111	116	110	0	1	1	0	0	1
Cheese	11	19	15	0	0	0	0	0	0
Eggs & Products	8	7	7	1	1	1	5	1	3
Fresh Fruit	400	374	440	3	1	3	1	0	1
Fresh Vegetables	77	87	102	1	1	1	0	0	0
Processed Fruit & Vegetables	122	132	132	6	6	6	5	5	5
Fruit & Vegetable Juices	83	68	58	2	1	1	2	1	1
Tree Nuts	27	24	26	3	2	3	9	10	10
Wine & Beer	86	77	76	2	3	3	3	3	4
Nursery Products & Cut Flowers	62	63	76	1	1	1	1	1	1
Pet Foods (Dog & Cat Food)	14	19	21	2	1	2	16	7	8
Other Consumer-Oriented Products	386	337	396	11	9	15	3	3	4
FISH & SEAFOOD PRODUCTS	**251**	**293**	**347**	**1**	**1**	**1**	**1**	**0**	**0**
Salmon	24	27	23	1	1	1	1	1	1
Surimi	40	41	61	1	0	0	0	0	0
Crustaceans	17	15	14	0	0	0	0	0	0
Groundfish & Flatfish	90	124	150	1	1	1	1	0	1
Molluscs	1	1	1	0	0	0	0	0	0
Other Fishery Products	79	85	98	1	0	1	0	0	0
AG PRODUCTS TOTAL	**3,381**	**3,252**	**3,372**	**113**	**79**	**93**	**3**	**2**	**3**
AG, FISH & FORESTRY TOTAL	**3,981**	**3,941**	**4,135**	**124**	**89**	**102**	**3**	**2**	**2**

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office

Poland-Top 15 Suppliers

CONSUMER-ORIENTED AGRICULTURAL IMPORTS ($1,000)	1999	2000	2001	FISH & SEAFOOD PRODUCTS IMPORTS ($1000)	1999	2000	2001
Spain	170289	177822	223251	Norway	120398	116214	140270
Germany	227980	184420	185549	Russian Federation	34958	48324	45548
Netherlands	138116	124685	156064	China	15814	29307	38549
Italy	116435	114523	140463	Germany	12681	18075	18006
Ecuador	101216	87054	88099	Iceland	1079	2477	12640
Hungary	92630	77855	77360	Denmark	9170	9856	12268
France	67514	62827	71329	Netherlands	14306	10609	11670
Greece	44491	46637	64606	Thailand	7963	8687	11049
Czech Republic	26990	46804	48815	Canada	661	7330	8766
Ukraine	13284	25043	46955	Peru	687	3142	7932
Denmark	51253	53027	45981	Ireland	9195	7692	7667
United States	35683	30905	42708	Argentina	4379	3050	4440
Brazil	44854	34572	33792	Spain	2534	2673	3136
Turkey	12406	19378	29329	Faroe Islands	0	1699	3004
United Kingdom	29488	20665	27007	United Kingdom	1925	3041	2883
Other	404455	393597	361313	Other	15248	21060	19100
World	1577084	1499814	1642621	World	250998	293236	346928

Source: United Nations Statistics Division