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Report Highlights:

Poland is Central and Eastern Europe's largest market for food and beverage products. With a population of 38 million people, Poland is a growing market for U.S. food and agricultural products. Russia's invasion of Ukraine, which started in February 2022, sent shock waves through the Polish economy, disrupting trade and contributing to sharp increases in energy, fuel and food prices. These factors also affected Poland's economy throughout 2023. Poland's total 2023 imports of food, agricultural, and related products were valued at over \$39 billion, with U.S. imports accounting for a record high \$733 million. U.S. products with strong sales potential – apart from soybeans – include distilled spirits, wine, tree nuts, fish and seafood, beef, dried fruit, condiments, and innovative food ingredients.

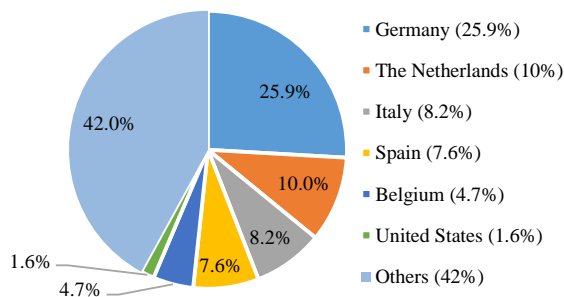
Market Fact Sheet: Poland

Executive Summary

Poland is the largest market for food and beverages in Central and Eastern Europe. With a population of 38 million people, it is an attractive and growing market for U.S. food and agricultural products. Poland's 2023 Gross Domestic Product (GDP) increased by 0.2 percent; in 2024 GDP growth is expected to reach 2.9 percent. In 2022, Poland's economy was returning to pre-pandemic levels when Russia invaded Ukraine, sending shock waves throughout the Polish economy. The disruption in trade, which followed the invasion, contributed to sharp increases in energy, fuel, and food prices. These factors also affected Poland's economy in 2023. In 2023, Poland imported over \$39 billion in food, agricultural, and related products. U.S. imports were valued at a record high of \$733 million. U.S. products with strong sales potential in Poland include distilled spirits, nuts, wine, fish, seafood, beef, dried fruit, and innovative food ingredient products.

Imports of Consumer-Oriented Products

Total 2023 Polish imports of consumer-oriented food products were \$21 billion, with U.S. imports accounting for a record \$342 million.



Food Processing Industry

Poland's food processing industry is one of the largest in the European Union (EU). In 2023, the food processing industry accounted for over nine percent of Poland's \$808 billion GDP. The most important sectors are meat, dairy, beverages, confectionery, baking, and processed fruit and vegetables.

Food Retail Industry

Poland's food retail sector is diverse and ranges from small family-operated stores to medium-sized stores and large distribution centers, comparable with those in the United States. Many of the hypermarkets, large discount stores, and convenience stores are foreign-owned, while small-scale stores are predominantly Polish-owned.

Quick Facts CY 2023

Imports of Consumer-Oriented Products
\$21 billion (U.S. imports \$342 million)

List of Top 10 Growth Products in Poland

- | | |
|----------------------|----------------|
| 1) Distilled Spirits | 6) Cranberries |
| 2) Pistachios | 7) Prunes |
| 3) Almonds | 8) Beef |
| 4) Wine | 9) Sauces |
| 5) Fish and Seafood | 10) Spices |

Top 10 Polish Retailers and Wholesalers

- | | |
|----------------------|-----------------------------|
| 1) Jeronimo Martins | 6) Auchan |
| 2) Lidl and Kaufland | 7) Dino |
| 3) Eurocash | 8) Polska Gr. Supermarketow |
| 4) Zabka | 9) Carrefour |
| 5) Grupa Specjal | 10) Macro C&C |

GDP/Population

Population (millions): 38
GDP (billions USD): \$808
GDP per capita: \$20,681

SWOT Analysis

Strengths

Central Europe's most populous country with a domestic consumer market of nearly 38 million people.

Weaknesses

U.S. products face high transportation costs compared to many European competitors.

Opportunities

Market niches exist for food ingredients, notably tree nuts, dried fruit, and functional ingredient products.

Threats

Foreign investments in food processing result in diverse and high-quality local products which compete with U.S. imports.

Data and Information Sources: Polish Central Statistical Office, Trade Data Monitor, World Bank

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I. MARKET SUMMARY

Poland is a modern European country with a population of 38 million people. Poland's 2023 Gross Domestic Product (GDP) growth of 0.2 percent is likely to pick up in 2024 and 2025, supported by a rebound in consumption and expansion of investment.

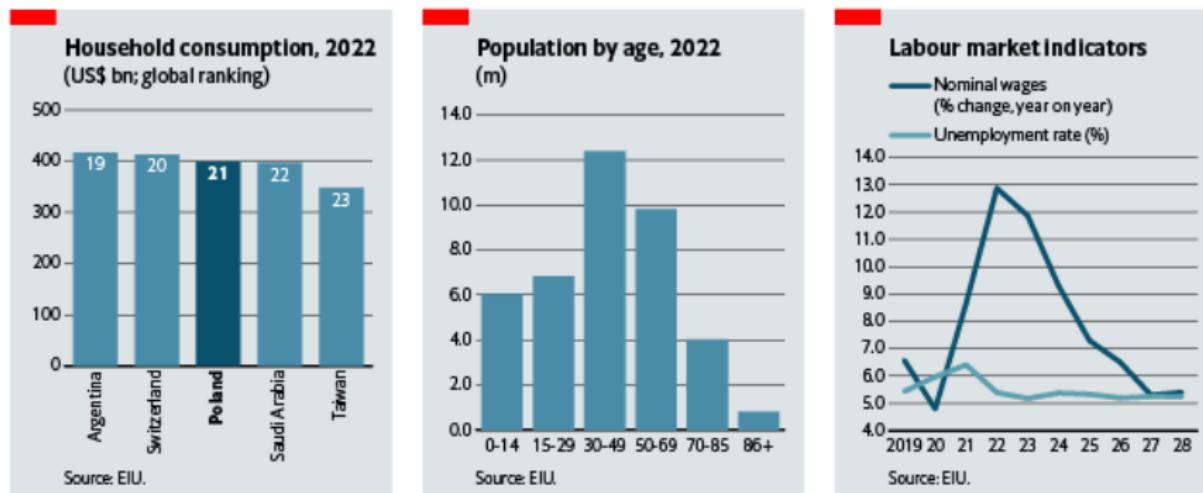
Table 1. Basic Economic Indicators

Poland	2023(a)	2024(f)	2025 (f)	2026 (f)
Real GDP Growth	0.2 (a)	2.9 (a)	3.5 (c)	3.8(c)
Consumer Price Inflation	11.4(a)	3.8 (a)	4 (c)	3.0(c)
Unemployment Rate	5.2 (a)	5.4 (a)	5.3 (c)	5.2(c)
Exchange Rate Zł: U.S. \$	4.20 (c)	3.96 (c)	3.78 (c)	3.73(c)

Source: (a) Eurostat, (b) National Bank of Poland, (c) Economist Intelligence Unit (d) World Bank (f) forecast

The Government of Poland's (GOP) social safety net initiatives, including Family Support Programs, provide additional income to millions of families. The minimum wage as of January 2024 is 4,242 PLN (\$1,054) per month and is set to increase to 4,626 PLN (\$1,150) by January 2025. Polish households spend over 26 percent of disposable household income on food and beverage purchases. There are considerable income disparities between the richest and poorest Poles, with the top 20 percent earning close to five times as much as the lowest 20 percent.

Chart 1. CY2022: Household Consumption, Population by Age, Labor Market



Source: Economist Intelligence Unit

Over 60 percent of Poland’s population lives in urban areas and its median age is 40 years. Family sizes have become smaller, with a current three-person average among Poland’s 13 million households. The typical Polish family eats meals together and generally buys groceries several times a week. Over the past four years, per capita consumption of processed foods has remained stable.

Table 2: Polish Per Capita Market Basket Consumption

Consumer Goods	Unit of Measure	2015	2018	2019	2020	2021	2022
Cereal grains (as processed Products)	kg	103.0	101.0	101.0	101.0	101	103
Potatoes	kg	100.0	95.0	92.0	93.0	94.8	94.2
Vegetables	kg	105.0	106.0	103.0	103.0	104	104
Fruit	kg	53.0	54.0	58.0	58.0	59	59
Meat and edible offal	kg	75.0	80.2	75.9	75.9	75.1	78.7
Animal edible fats	kg	5.8	6.6	6.0	6.0	6.3	6.7
Butter	kg	4.5	4.7	5.4	5.5	6.1	5.5
Cow’s milk	l	213.0	221.0	225.0	231.0	251	261
Sugar	kg	40.5	47.0	42.1	42.7	41.8	42.8
Vodka, liqueurs, other spirit beverages in terms of 100% alcohol	l	3.2	3.3	3.7	3.7	3.8	3.5
Wine and honey wine	l	6.3	6.0	6.2	6.4	6.7	6.3
Beer from malt	l	99.1	100.5	97.1	93.6	93.2	92.9

Source: Poland’s Central Statistical Office (CSO)

Polish consumers generally view the United States positively and consider U.S.-origin products to be of high quality. However, many Polish consumers prefer Polish products over imports, and retail chains commonly advertise that they offer Polish products. U.S. products are often shipped initially to third-country EU ports of entry, customs-cleared, and then re-exported to Poland. Except for language labeling, these products are not subject to additional tariffs or regulatory requirements (with an exception of some of the alcoholic beverages not customs cleared at the EU point of entry – which are assessed individual [excise tax](#) rates in each EU Member country).

COVID-19 Impact: Retail and food processing sectors have recovered to near pre-pandemic levels of sales. However, according to experts, the hotels, restaurants, and institutions sector (HRI) may not fully recover until 2025.

Impact of Russia’s Invasion of Ukraine: The current strife in neighboring Ukraine has brought challenges to the Polish market. The war has disrupted the transportation of goods into Poland, affecting not only domestic consumption, but also certain processing industries. This has created a potential gap between consumer demand and supply in several sectors, such as processed fruit, pollock, and salmon. One of the most affected industries is Poland’s fish processing industry, which is one of the largest in the world. The imposition of sanctions by the EU and Poland on Russia and Belarus and the disruption of trade have contributed to a sharp rise in inflation, driven by energy/fuel and food prices. More than two million Ukrainian refugees have arrived in Poland since the start of the conflict, increasing demand for goods. Companies based in Poland are searching for new suppliers and supply chains to mitigate the externalities brought on by the conflict in Ukraine.

Table 3: Polish Market Advantages and Challenges

Advantages	Challenges
Central Europe’s most populous country with a domestic consumer market of over 38 million people.	U.S. products face higher transportation costs than many European competitors.
A strategic location offering re-export potential.	The EU’s complicated system of product registration can delay new-to-market products from entering the Polish market.
Transshipment from other EU countries of import is possible because of Poland’s EU membership.	Poland’s EU membership puts U.S. products at a competitive disadvantage compared to duty-free access for the other 27 EU Member States.
Market niches exist in food-ingredient categories, particularly dried fruit, nuts, baking mixes, functional foods, and organic components.	Despite rising incomes, Polish consumers are still price-sensitive when purchasing food and beverage products.
Polish consumers associate U.S. products with good quality.	Foreign investment in the Polish food processing industry results in a local production of many high-quality products that were previously imported.
Economic growth is rising and the growing Polish middle class is eager to try new products.	While market access for some U.S. products is not affected by EU trade barriers, some goods (e.g., poultry, beef, etc.) are limited due to EU sanitary and phytosanitary standards’ barriers.

SECTION II – EXPORTER BUSINESS TIPS

The Polish market offers good opportunities for U.S. exporters of consumer-oriented products. U.S. suppliers of consumer-ready foods and beverages interested in accessing the Polish market should ensure that their products meet all Polish/EU food laws, including packaging and labeling requirements. The best way to understand the Polish market is to visit and speak to importers and distributors to determine a good entry strategy. Trade shows within Poland and the region offer many unique networking opportunities. See the link for a list of U.S. Department of Agriculture [trade shows](#).

Personal contact is important when conducting business in Poland, as most purchases are made after in-person meetings with an exporter and/or their representative. English is increasingly common as the language of commerce, but translation services may also be necessary.

Polish business culture can be somewhat conservative, and first names are best avoided, at least initially, in a professional context. Address people with Pan (Mr.) and Pani (Ms. or Mrs.) followed by their surname. Relationships often develop to the point when first names can be comfortably used. Business card exchanges are routine and are generally given to each person present at a meeting. Cards printed in Polish are not necessary. Standard business attire is recommended, including jackets and ties for men and suits or dresses for women.

SECTION III - IMPORT FOOD STANDARDS AND REGULATIONS, IMPORT PROCEDURES

Poland follows EU regulations governing food and agricultural imports specified within [General Food Law EC/178/2002](#). For details on EU regulations, please see the U.S. Mission to the EU's Office of Agricultural Affairs' most recent [EU Food and Agricultural Import Regulations and Standards](#) (FAIRS) report. For additional information regarding import food standards and import procedures which are not yet harmonized with the EU legislation, please refer to [Poland's FAIRS](#) report. The EU is a customs union, and all Member States apply the same [import duties](#) on goods imported from outside the EU based on tariff classification of goods and the customs value. Inbound products at ports of entry are generally stored in bonded warehouses or at a freight forwarder's facility. Product storage and removal from storage are conducted under the supervision of a customs officer, who also ensures that all documents accompanying the products comply with EU and Polish requirements. Customs officers will also inspect products. They may take samples to check product ingredients (e.g. sugar, alcohol) to assess correct customs duty, and then issue the import duty invoice. Food safety inspectors at the port of entry storage do not routinely inspect packaged foods, but select products are checked. Once imported goods are cleared in one Member State, they are free to move throughout the EU. That means that U.S. products imported into Poland via another EU Member State are not subjected to additional import procedures or customs tariffs at the Polish border.

SECTION IV – MARKET SECTOR STRUCTURE AND TRENDS

Wholesale Sector

Sector structure and trends: Poland's wholesale market structure has three categories: (1) national chains, (2) regional wholesalers, and (3) buyer groups. National chains are the smallest in number and

operate branches throughout Poland with central management. Regional wholesalers have grown, consolidated, and cover specific areas, usually several provinces. Regional wholesalers have a strong presence in local markets and offer a wide range of products, and at times, a better service than companies operating on a nationwide scale. Buyer groups operate in several market segments and are increasingly integrated with specific retailers.

In Poland, the cash-and-carry format has gained popularity quickly, as small, traditional retailers – of which there are many – rely on them as distributors. Most leading cash-and-carry chains target small, traditional retailers and hotel, restaurant, and institution (HRI) outlets. While market consolidation is likely to increase, new market entrants can also be expected in the long term. The main stakeholders in the cash-and-carry segment are [Makro Cash and Carry Polska SA](#), [Selgros Cash & Carry Sp. z o.o.](#), and [Eurocash SA](#).

Retail Sector

Sector structure and trends: Large retail chains control as much as 70 percent of the Polish market. The largest retail chains in Poland include [Biedronka](#), [Lidl Polska](#), [Netto Polska](#), [Eurocash](#) (owner of Delikatesy Centrum, Lewiatan, Euro Sklep, ABC, Gama, Groszek), [Auchan Polska](#), [Kaufland Polska](#), and [Carrefour Polska](#). Market analysis shows that almost 30 percent of confectionary retail sales occur through convenience chains such as [Zabka](#) and small grocery retailers.

Food Processing Sector

Sector structure and trends: The Polish food processing sector includes both domestic and international companies. Many small companies also operate meat and bakery processing plants throughout Poland. The largest food processing sectors are meat, dairy, and alcoholic beverages, followed by confectionery, food concentrates, sugar, fruits and vegetables, juices, and non-alcoholic beverages.

An example of Polish market modernization is the confectionary sector. According to industry reports, about 44 percent of Poles consume at least one chocolate bar per day, and about 33 percent have one or more wafer bars. More Poles, particularly among the expanding middle classes, seek higher-end products. Poland attracts foreign companies and foreign investors because of its macroeconomic climate, developed financial sector, and its well-educated, productive, and wage-competitive labor force. Foreign investors have played a significant role in developing and modernizing the Polish food processing industry. Multinationals now account for over 70 percent of confectionery production and own the largest breweries, meat processing plants, bottling plants, and horticultural processing plants. Coca-Cola, PepsiCo, Nestle, Mondelez, Danone, and Mars have significant production plants in Poland and American companies are among the largest foreign investors in the food processing sector. These stakeholders produce a broad range of high-quality consumer-ready products, which often compete directly with locally available U.S. consumer-ready exports. Polish processors are increasingly interested in sourcing fish and seafood products, bakery ingredients, tree nuts, dried fruit, flavoring agents, aromas, sweeteners, food additives, food coloring agents, and enzymes.

HRI Sector

Sector structure and trends: According to a survey conducted by leading Polish cash-and-carry operators in 2023, 30 percent of Poles do not regularly dine out. This is changing in urban areas where employees work longer hours and dining out is a more common social activity. Despite Poles'

preference for homemade meals, they are gradually moving towards ready-made meals, particularly among young urban professionals. Busy personal lives coupled with professional lives provide less free time. International cuisines are also gaining in popularity due to increased demand by well-traveled Poles. Italian, Chinese, Mexican, and Indian restaurants can be found in almost every city. American casual dining and quick-service chains are common in larger cities. International hotel chains such as Marriott, Sheraton, Radisson, Intercontinental, and Hilton are also present in Polish cities.

SECTION V. AGRICULTURAL AND FOOD IMPORTS

Poland’s total 2023 imports of food and agricultural-related products were valued at over \$39 billion, with U.S. trade accounting for new record high \$733 million.

Table 4: Polish 2022-2023 Agriculture, Consumer-Oriented (\$ million)

Poland	2022	2023
Total imports	\$39,273	\$39,916
Imports from the United States	\$585 (1.5%)	\$733* (1.8%)
Consumer-oriented Agricultural Products, total imports	\$19,550	\$21,885
Consumer-Oriented Agricultural Products, imports from the United States	\$309 (1.6%)	342* (1.6%)

*Source: Trade Data Monitor (*A new record)*

Domestic and EU products, which account for over 50 percent of total food imports, are the main competitors for U.S. exports. The growth of Poland’s food processing industry has led to a wider variety of locally made products, including Polish-produced iconic American products. Polish fish and seafood imports continued to grow in 2023 and reached over \$3 billion, with a \$72 million (2.2 percent market share) originating from the United States. Poland is now one of the world's largest salmon processors.

Table 5. Examples of Imports of Consumer Food Products to Poland in 2023

Product Category Total Poland's Imports	Main Suppliers in Percentage	Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers/Market Situation
<p>Fish & Seafood (HS 03)</p> <p>\$3 billion</p>	<p>1. Norway – 48%</p> <p>2. Russia – 9%</p> <p>3. Sweden – 8%</p> <p>8. United States – 2.2%</p>	<p>Norway's proximity as well as intensive promotional efforts, create competition for other suppliers. The United States holds a strong position as Alaska pollock and sockeye salmon suppliers also continue to deliver significant volumes.</p>	<p>Poland is one of the world's largest salmon processors.</p>
<p>Wine (HS 2204)</p> <p>\$425 million</p>	<p>1. Italy – 27%</p> <p>2. Germany – 13%</p> <p>3. France – 11%</p> <p>5. United States – 7%</p>	<p>Italy remains the top wine supplier. U.S. wines are becoming increasing popular, due in part to successful promotions conducted by the U.S. industry.</p>	<p>Domestic production is minimal. Poland's dynamic restaurant industry is an ideal partner for U.S. suppliers.</p>

<p>Distilled spirits (HS 2208)</p> <p>\$589 million</p>	<p>1. United Kingdom – 34%</p> <p>2. United States – 11%</p> <p>3. Ireland – 9%</p> <p>4. Germany – 6%</p>	<p>Great Britain remains the largest whisky supplier to Poland.</p>	<p>Poland’s restaurants are increasingly interested in distilled spirits originating from the United States.</p>
<p>Nuts (HS 0802)</p> <p>\$205 million</p>	<p>1. United States –42%</p> <p>2. Germany – 15%</p> <p>3. Italy – 14%</p> <p>4. Spain – 5%</p>	<p>Germany is a large re-exporter of nuts. The United States is the leading supplier of almonds and pistachios. Italy leads in hazelnuts.</p>	<p>Poland produces limited quantities of walnuts and hazelnuts.</p>
<p>Dried Prunes (HS 081320)</p> <p>\$28 million</p>	<p>1. Chile – 64%</p> <p>2. United States – 15%</p> <p>3. Moldova – 7%</p> <p>4. Germany – 3%</p>	<p>Chilean product has a tariff advantage based on the EU-Chile Free Trade Agreement. U.S. product is gaining popularity among Polish importers.</p>	<p>There is limited local production. The product is mostly smoked and traditionally used for home cooking as a compote ingredient.</p>

Source: Trade Data Monitor

BEST HIGH-VALUE PRODUCT PROSPECTS

Products present in market which have good sale potential:

- Distilled spirits and wine
- Fish and seafood: salmon, pollock, cod, lobster, and other miscellaneous fish products
- Nuts: almonds, pistachios, peanuts, pecans, walnuts
- Dried and processed fruit: prunes and cranberries
- Organic products
- Highly processed ingredients: protein concentrates, dextrin, peptones, enzymes, lecithin.

Products not present in significant quantities but which have good sales potential:

- Vegetable fats
- High quality hormone-free beef
- Ingredients for the natural and healthy foods industry
- Innovative high-quality sauces, spices, condiments, and confectionary product

Product not present because they face significant barriers:

- Poultry (non-tariff barrier)
- Processed food with GMO ingredients (non-tariff barrier)
- Food additives not approved by the European Commission

SECTION VI. KEY CONTACTS AND FURTHER INFORMATION

For additional information regarding the Polish market please contact:

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Website: [Office of Agricultural Affairs Warsaw, Poland](#)

Key Polish Food Processing Associations:

- [Polish Federation of Food Producers](#)
- [Association of Milk Producers](#)
- [Union of Producers of Meat Industry](#)
- [Association Polish Meat "POLSKIE MIĘSO"](#)
- [The Polish Association of Fish Processors](#)

Attachments:

No Attachments