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Poland

Exporter Guide

2000

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Report Highlights:
Conditions in the Polish market are changing rapidly for agricultural and food exporters due to growing incomes and changing lifestyles. This guide has been prepared to assist exporters in identifying and taking advantage of opportunities for U.S. high value food products in Poland.

Includes PSD changes: No
Includes Trade Matrix: No
Scheduled Report
Warsaw [PL1], PL

Executive Summary

(UNTrade data is not available for 1999. As such, FAS-Warsaw has based the following analysis on the FAS Trade reports as well as Polish Trade Data for U.S. Exports of Agricultural, Fish & Forestry Products to Poland for the analysis.)

Poland experienced robust growth throughout most of the 1990s averaging over 6 % growth in GDP. In 1999 , economic growth slowed to approximately 4.1 % primarily due to a slowdown in trade with the former Soviet Union. Analysts estimate that GDP will increase by 5.0 percent in 2000. Inflation was 7.3 percent in 1999, down from 11.8 percent achieved in 1998 but is expected to increase to 10.1 percent in 2000. Unemployment remains relatively high despite the growth in the economy and, in fact, grew from 10 % in 1998 to 13 % in 1999. Analysts predict that with many of the former state owned companies going bankrupt the 2000 unemployment level could reach of 15 % .

The agricultural sector experienced mixed results in 1999. Production decreased in 1999 compared with the previous year. Overall output about 5.6 %, with crop production falling 8.4 % and livestock production decreasing 2.1 %. The decline in crop production reflected lower harvests of grains, potatoes, sugar beets, fruit and vegetables. In the case of animal products, there was lower production of beef and milk. Low profitability in the livestock sector resulted in a sharp decline in swine and cattle herds and a sharp increase in the price of pork and dairy products in 1999 compared with prices at the end of 1998. However average prices for agricultural products during 1999 were lower than in 1998. At the same time, however, prices of farm inputs and services farmers increased. In 2000, Polish agricultural production suffered from drought conditions during the spring. In some cases, grains crops were lower by as much as 15 percent. As a result, Poland experienced wide fluctuations in grain prices and forced the government to open up tariff-free quotas to meet demand.

Total Polish imports of agricultural commodities decreased during 1999 to $3.3 billion compared with $ 3.9 billion in 1998. Polish total exports of agricultural commodities decreased from $ 2.7 billion compared with $3.1 billion in 1998. Agricultural trade with the former Soviet Union continued to suffer the effects of the Russian crisis. The EU is to biggest supplier and market for Polish agricultural and food products.

The value of U.S. agricultural exports to Poland decreased to $107 mln in 1999 from $ 168 mln in 1998. Poultry products lead all U.S. exports to Poland followed by raw tobacco, soybean meal, red meats and wood products. The highest export levels were recorded in 1999 for wine and beer, processed fruits and juices and snack foods. Despite poorer quality and greater competition, U.S. grapefruit exports, shipped primarily through European traders, were over $ 2 mln.

With 29 percent of Poland's population between 1 and 19, the snack food, beverage, ice cream and fast food industry should experience an increase in demand for their products. Food and beverage purchases accounted for 34.5 % of consumer spending in 1999.

Poland and the EU reached agreement on agricultural trade liberalization in September 2000. This could eliminate or reduce tariffs on most EU products entering Poland. The agreement will come into force in 2001. Further negotiations with the EU on membership will occur in the coming year.

I. Market Overview

The Polish economy slowed somewhat in 1999 compared with previous years. Gross domestic product increased 4.1 % in 1999 compared with 4.8 % in 1998. The official estimate for 2000 GDP growth is 5.0 percent. Due to real depreciation of the Polish zloty and economic slowdown in its major trading partners, export growth has also slowed. Consequently, Poland's current account deficit increased slightly from 3.3 % of GDP in 1998 to 3.8 % in 1999.

At the end of 1999, foreign firms had invested over $34.3 billion in Poland's manufacturing sector of which $ 4.8 billion was invested in the production of food, drink and tobacco products. The largest investments to date in the food industry have been funded by Coca Cola, Pepsico, Mars and Nestle.

Improvement in the quality of Polish products and foreign capital has fostered the development of Polish-produced consumer- ready food products. Currently, though Polish shops are full of a wide variety of western style consumer- ready food products, the majority of these products are being produced locally.

- Poland's population is relatively dispersed. Although 62 % of the population is urban, only 16 % resides in the nine largest cities. The highest income levels in Poland are from residents in urban areas.

- Over 57 % of Poland's population are in the ages of 20-64. Nearly 4.5 million people are retired with the remaining 11.5 million people from the age of infant to 19.

- The 1999 average monthly disposable income for Poland's 12.5 million households is 540.50 zloty or $123.68 ($1.00=4.37zl). Employed and self-employed households disposable incomes were higher.

- In 1999, food expenditure made up 34.5 % of total consumer expenditures compared to 37.8 % in 1996.

- The decrease in food expenditures was due to an increase in real income and a slow rise in retail food prices. However, food remained the leading household expenditure category among all social groups.

- In 1999, Poland's real income level increased 5.7 % while disposable income increased 5.3 %. Forecasts for 2000 project income levels to increase by 4 % in real terms.

- As during the previous years, Poland's high custom tariffs will continue to encourage foreign companies to produce within Poland. Therefore, the volume and variety of domestically produced consumer ready food products is likely to increase.

- Almost 50 % of women in Poland are employed. However, many women are entering career positions for reasons other than financial need.

- Women traditionally do the shopping and children generally accompany their mothers. The average Polish housewife performing shopping is 30-50 years of age, married, has two children and employed either full-time or part-time.

- In smaller cities, shopping is generally done daily. In the bigger cities, shopping is becoming a weekly issue due to the ownership of vehicles and the emergence of large shopping centers.

‘ Almost all Polish households are equipped with modern cooking utilities, refrigerators with freezers and 20% of households with microwaves.

‘ Sales of semi-cooked, dry and frozen dishes, sauces, salad dressings, ice cream, cooking mixes (powered soups, cakes) have increased substantially during the past several years. Increasing use of microwave ovens, large freezers and the trend towards dual-income households has created a strong demand for easy to prepare or “fast” foods.

‘ In 1999, the total import market size for consumer foods and edible fish products was $ 2.6 bln.

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.	Recent food recalls in the EU could potentially have a negative impact on Polish consumers view 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 businesswomen 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

Food safety is a very sensitive issue, especially in Western Europe. Several incidents have occurred recently that have Polish consumers concerned about the safety of the food in their own countries along with the imports of food from other countries. The biotechnology/GMO issue has raised many concerns from consumers about the future of agricultural production as well as food safety. 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

- Due to the difficult economic situation for many Polish families, Poland remains a very price-sensitive market. Many shops take this into account and provide a relatively large variety of low-cost products and few high end products.

- Another important factor taken into consideration is the expiration dates and Polish norms for products.

- Advertising in Poland is crucial. Television, which reaches almost every home, is believed to be the best medium in Poland. Products advertised through television promotions show the greatest sales growth of all advertised products.

It is estimated that only 5 % of the Polish population can be considered rich while 25-30 % constitutes the emerging middle class. The remaining 65 % is considered poor or with little purchasing power. The urban population (62%) has a much higher level of purchasing power compared to the rural population.

Buyer Customs and Preferences

- Polish consumers and importers are very selective about the products they will buy. The western brand reputation is very important but Polish brands are challenging the eminence of western products.

- A Polish buyer generally will not make a purchase until he/she has met with the seller face-to-face and transactions are usually on a cash basis.

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

- 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. Some newer measures under consideration such as product labeling will be similar to those observed in the European Union. Others (e.g. list of approved additives) date back to an era when some of the products (hence also ingredients) were not present on the Polish market and on many occasions were not included in regulations. While changes are taking place, it is a slow process. In the case of new products, it is advisable to check whether all ingredients are permitted (especially coloring agents). 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 which, in case of products with a short shelf life, is a dangerous situation. 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," which is available via Internet at the following web site: www.fas.usda.gov - attache reports section.

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. Exports are advised to check with importers to ensure that all exported products are in compliance with these norms. For additional information, exporters should refer to the Post Country Market Brief on Polish norms which will be available shortly 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 voivodeships, and supply mainly retailers.
- Regional wholesalers have a strong presents in local markets offering 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. David Glaxton
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 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. Especially where hypermarkets and super-stores are concerned.

‘ It has been reported that over the past five years the number of stores with foreign capital has increased from 330 to 950.

‘ According to Polish analysts big networks 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

The food processing sector holds an important position in the Polish economy mainly due to the overall importance of agriculture in Poland. Results of 1999 production show that the most dynamically growing sector of the food processing industry is refined 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 will be available in November 2000 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. With a population of nearly 40 million people, and number of visitors reaching nearly 88 million each year there was a real need to expand infrastructure.

- 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.

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

- 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 the 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 will be available November 2000 via Internet at the following web site: www.fas.usda.gov - attache reports directory.

IV Best High-Value Product Prospects

Food/Edible Fishery Products	**Food/Edible Fishery Products**
Poultry Meat	Fresh Vegetables
Snack Foods(Excluding Nuts)	Almonds (Shelled)
Red Meat	Dried Raisins
Fresh Fruit	Processed Fruit
Beef Offal	Fruit and Vegetable Juices
Dried Prunes	Pecans
Wine & Beer	Ice Cream
Pulses	Eggs & Products

V Key Contacts and Further Information

U.S. EMBASSY TRADE PERSONNEL

Organization	Contact Name	Address	Phone	Fax
Foreign Agricultural Service	Jim Higgiston, Counselor Maggie Dowling, Attaché	American Embassy Al. Ujazdowskie 29/31 00-540 Warsaw, Poland E-mail: agwarsaw@fas.usda.gov Web page: www.usaemb.pl\usfas\front.htm	48-22 621-3926	48-22 628-1172

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

POLAND GOVERNMENT AGENCIES

Organization	Contact Name	Address	Phone	Fax

Ministry of Agriculture and Rural Development	Mr. Artur Balazs Minister	ul.Wspolna 30 00-930 Warsaw	(4822) 6285745	(4822) 6285746
Ministry of Agriculture and Rural Development	Mr. Robert Stepien Department of Foreign Cooperation	ul.Wspolna 30 00-930 Warsaw	(4822) 6282351	(4822) 6212326
Ministry of Health	Ms. Franciszka Cegielska Minister	ul. Miodowa 15 Warsaw	(4822) 8312324	(4822) 6358852
Ministry of Health	Ms. Janina Stefanska Director Public Health Department	ul.Miodowa 15 Warsaw	(4822) 8261521	(4822) 6358852
Ministry of Environment Protection Natural Resources and Forestry	Mr. Janusz Radziejowski Under Secretary of State Nature Conservation	ul.Wawelska 52/54 00-922 Warsaw	(4822) 8253346	(4822) 8253346
Ministry of Environmental Protection Natural Resources and Forestry	Dr. Zygmunt Krzeminski Deputy Director Nature Protection (GMO)	ul.Wawelska 52/54 00-922 Warsaw	(4822) 8256204	(4822) 8254705
Ministry of Environmental Protection Natural Resources and Forestry	Dr. Jacek Jaskiewicz Deputy Director Department of International Cooperation	ul.Wwelska 52/54 00-922 Warsaw	(4822) 8258829	(4822) 8253972
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 2	Plac Trzech Krzyzy 5 Warsaw	(4822) 6935955	(4822) 6219714
Central Housing Office	Mr. Slawomir Najnigier President	ul.Wspolna 2 00-926 Warsaw	(4822) 6618111	(4822) 6295389
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) 6216261 6210706	(4822) 6218427

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
National Assotiation of Home Builders (US Flood Prgm)	Mr. Jakub Otwinowski Director	ul.Trawiasta 4 Warsaw	(4822) 120749	(4822) 120749
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. 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) 8260221	(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)	Mr. Tony Housh Director	ul.Swietokrzyska 36, Room 6 00-116 Warsaw	(4822) 6225525 6202698	(4822) 6225525 6202698
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. Zygmunt Ambroziak President	ul.Krakowiakow 103 Warsaw	(4822) 462065 462066	(4822) 461275
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.Obozna 7 m 64 00-845 Warsaw	(4822) 8281475 cellular (48) 608445612	(4822) 8281476
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) 8222723	(4822) 8220063

Polish Producers, Exporters and Importers of Meat	Mr. Stanislaw Zieba	ul.T.Chalubinskie-go 8 02-784 Warsaw	(4822) 8302656 8301664	(4822) 8302582
Polish Association of Producers of Agricultular Commodities	Mr.Jacek Kalinski	ul.Wspolna 30 00-930 Warsaw	(4822) 6232413	(4822) 6232357
National Association of Tobacco Industry	Mr. Arthur Dmochowski 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
Pro-Marka Polish Association of Branded goods Producers (PABGP) E.Wedel S.A.	MR. Zbigniew Wrobel Chairman	ul.Zamojskiego 28/30 03-801 Warsaw	(4822) 6707511 6707070	(4822) 6707071

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 Polish Union of Gelatin and Gelatine Products Producers and Processors	Mr. Kazimierz Grabek President	Plac Grzybowski 12/16 00-104 Warsaw	(4822) 6241067 6241135	(4822) 6242238
The Polish Union of Producers, Exporters and Importers of Meat	Mr. Witold Pereta President	ul.T. Chalubin-skiego 8 00-613 Warsaw	(4822) 8300734 8301665 8302670	(4822) 8302675
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	Mr. Stefan Lewandowski President	Krakowskie Przedmiescie 47/51 00-071 Warsaw	(4822) 8272234 8260570	(4822) 8272234

TRADE SHOWS IN POLAND

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

Polagra: The largest agro-food fair in central/eastern Europe, organized annually in Poznan, Polagra attracts about 2,000 exhibitors including foreign exhibitors from 37 countries. The Fair attracts about 140,000 visitors each year. Please note that the show is closed to general public during first two days, when it is reserved for business visitors only. Exhibitors range from firms trading/producing food products, ingredients, to agricultural production inputs and agricultural machinery. As during the previous year, Fas/Warsaw is planning to organize a U.S. exposition at Polagra 2000.

Please note that starting from 2001 Polagra will be 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 2001.

Show dates:
October 5-10, 2000
September 11-14, 2001 Polagra Food
October 4-7, 2001 Polagra Farm

Organizer:

Poznan International Fair
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. 1999 edition hosted 140 firms - 100 polish, 40 foreign. 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 June 5-8, 2001

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:

Polfood: Agricultural Fair in Gdansk. Over 400 exhibitors, (including 60 from abroad during the 2000 edition), the show attracts about 20,000 visitors. Exhibitors range from firms trading/producing food products, ingredients for industry and agricultural machinery.

Show dates:	**Organizer**:
May 22-26, 2001 end of May 2002	International Gdansk Fair ul. Beniowskiego 5 80-382 Gdansk ph: 4858-5549200 fax: 4858-5522243

Krakfood: organized in Krakow every year. Over 164 exhibitors, including 65 from abroad, the show attracts about 12,500 visitors. Exhibitors range from firms trading/producing food products and wholesalers.

Show dates:	**Organizer**:
March 22-24, 2001 March 2002	Krakow expo center - together with Hungarian International Fairs ul. Basztowa 23/4 31-156 Krakow Ph: 4812-4230183, 4230189 fax: 4812-4230156

National Livestock Show: Largest livestock exposition in Poland. Located in Warsaw. Organized on annual bases the show attracts about 450 exhibitors, utilizing exposition area of 7,000 m2.

Show dates:	**Organizers**:
August 2001 August 2002	Ministry of Agriculture and Rural Development Trade Show Department ul. Wspolna 30 00-930 Warsaw ph/fax: 4822-6288784

EXPORTER GUIDE
APPENDIX 1. STATISTICS

A. KEY TRADE & DEMOGRAPHIC INFORMATION

Agricultural Imports From All Countries ($Mil)/U.S. Market Share (%)[1/]	4,640*/4%*
Consumer Food Imports From All Countries ($Mil)/U.S. Market Share (%)[1/]	1,665*/4%*
Edible Fishery Imports From All Countries ($Mil)/U.S. Market Share (%)[1/]	92*/0.44*
Total Population (Millions)/Annual Growth Rate (%)	38.7/9%
Urban Population (Millions)/Annual Growth Rate (%)	62%
Number of Major Metropolitan Areas [2/]	1
Size of the Middle Class(Millions)/Growth Rate (%)[3/]	10.4/1-2%
Per Capita Gross Domestic Product (U.S. Dollars)	4,080
Unemployment Rate (%)	10%
Per Capita Food Expenditures (U.S. Dollars)	1,408
% of Female Population Employed[4/]	50%
Exchange Rate (US$1 = X.XX zl)[5/]	4.37

[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 (In Millions of Dollars)	Imports from the World			Imports from the U.S.			U.S Market Share		
	1996	1997	1998	1996	1997	1998	1996	1997	1998
CONSUMER-ORIENTED AGRICULTURAL TOTAL	1,339	1,536	1,665	64	75	68	5%	5%	4%
Snack Foods (Excl. Nuts)	131	121	117	1	1	1	0.32%	1%	1%
Breakfast Cereals & Pancake Mix	5	5	7	1	1	0	2%	1%	0%
Red Meats, Fresh/Chilled/Frozen	126	99	90	6	5	4	5%	5%	5%
Red Meats, Prepared/Preserved	12	23	9	1	0	0	0.67%	0%	0%
Poultry Meat	51	60	43	29	37	25	57%	61%	58%
Dairy Products (Excl. Cheese)	54	70	88	2	2	3	4%	4%	3%
Cheese	18	23	19	0	0	0	0%	0%	0%
Eggs & Products	13	12	14	1	1	1	0.58%	2%	8%
Fresh Fruit	269	299	393	1	2	2	0.35%	0.55%	0.48%
Fresh Vegetables	44	80	99	1	1	1	0.38%	0.23%	0.08%
Processed Fruit & Vegetables	105	139	145	5	8	9	5%	6%	6%
Fruit & Vegetable Juices	51	51	66	1	1	2	2%	3%	2%
Tree Nuts	21	30	30	2	1	3	7%	4%	9%
Wine & Beer	48	59	70	1	1	2	2%	2%	2%
Nursery Products & Cut Flowers	31	41	54	1	1	1	1%	1%	0.50%
Pet Foods (Dog & Cat Food)	12	17	17	1	2	2	11%	10%	15%
Other Consumer-Oriented Products	349	407	406	14	15	14	4%	4%	3%
FISH & SEAFOOD PRODUCTS	242	254	325	1	1	1	0.11%	0.51%	0.31%
Salmon	5	6	17	1	1	1	6%	5%	0.99%
Surimi	61	51	52	0	0	0	0%	0%	0%
Crustaceans	13	10	15	0	0	0	0%	0%	0%
Groundfish & Flatfish	80	90	148	0	0	1	0%	0%	0.29%
Molluscs	1	1	1	0	0	0	0%	0%	0%
Other Fishery Products	82	96	92	0	1	1	0%	1%	0.44%
AGRICULTURAL PRODUCTS TOTAL	4,190	3,954	3,931	282	216	186	7%	5%	5%
AGRICULTURAL, FISH & FORESTRY TOTAL	4,691	4,542	4,640	305	237	201	7%	5%	4%

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

TABLE C. Top 15 Suppliers of Consumer Foods & Edible Fishery Products - POLAND IMPORTS							
CONSUMER-ORIENTED AGRICULTURAL TOTAL - in 1000$				FISH & SEAFOOD PRODUCTS - in 1000$			
	1996	1997	1998		1996	1997	1998
Germany	161755	175260	223552	Norway	98317	106889	114791
Spain	88153	113837	171770	Russian Fed.	25259	35293	59373
Netherlands	117253	136969	151640	China (Peo Rep)	558	2847	18465
Italy	101768	100985	104770	Germany	21233	16291	18091
Hungary	73481	86376	77453	Denmark	13724	13587	15046
Denmark	58751	59170	75429	Ireland	11019	12488	13484
France	64611	76338	72408	Netherlands	10002	5968	12153
United States	63909	75303	68320	Canada	10965	13637	10665
Ecuador	76931	88074	66060	Thailand	3663	8685	9653
Colombia	28831	43495	51907	Spec Cats	0	0	9322
Brazil	31826	38680	42246	United Kingdom	10009	4752	8539
Spec Cats	0	0	39559	Argentina	13544	8850	5790
Greece	21717	30723	39501	Iceland	4327	3286	3627
Costa Rica	32414	17435	39384	Spain	2157	1717	3095
United Kingdom	28842	39931	39093	Cyprus	0	0	2352
Other	388594	453173	402088	Other	16876	19695	20806
World	1338836	1535749	1665180	World	241653	253985	325252

Source: United Nations Statistics Division