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Prepared By: Jolanta Figurska

Approved By: Heidi Broekemeier

Report Highlights:

Experts estimate the value of Poland's Hotel, Restaurant, and Institution (HRI) market to be valued at over $17 billion in 2023. The number of catering establishments in Poland in 2023 reached over 85,000 units. International chains have a powerful position in the quick service segment. In 2023 2,580 hotels operated in Poland, a 0.5 percent increase compared to 2022. In 2023, Poland imported $39 billion of agricultural and related products, with U.S. imports accounting for a record high $733 million. Products from the United States that have good sales potential within the HRI Sector include fish and seafood products, wine, distilled spirits, nuts, dry fruit, and innovative food ingredient products.

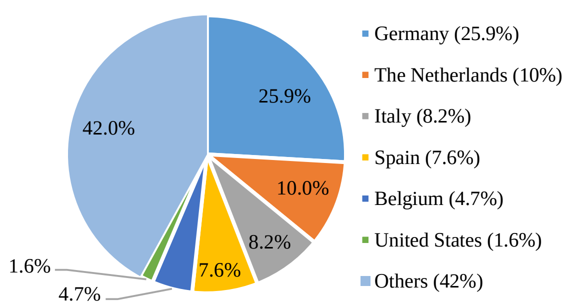
Market Fact Sheet: Poland

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 Hotel Chains operating in Poland include Accor, Polish Hotel Holding, Hilton Hotels & Resorts, Marriott International and Radisson Hotel Group.

Top Food Service operators in Poland include McDonald's, KFC, Pizza Hut, Burger King, and Starbucks.

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

SWOT Analysis

Strengths	Weaknesses
One of Central Europe's most populous country with a domestic consumer market of nearly 38 million people.	U.S. products face high transportation costs compared to many European competitors.
Opportunities	**Threats**
Market niches exist for food ingredients, notably tree nuts, dried fruit, and functional ingredient products.	Foreign investments in food processing result in diverse and high-quality local products which compete with U.S. imports.

Data and Information Sources: Statistics Poland (GUS), Trade Data Monitor, World Bank

Contact: FAS Warsaw, Poland, AgWarsaw@usda.gov

SECTION I. MARKET SUMMARY

Throughout 2023, consumer foodservices in Poland developed rapidly. Longer working hours and increasingly fast-paced lives drove more frequent dining out. Industry experts estimate that Poland's total 2023 HRI market was valued at over $17 billion, with over 85,000 catering establishments (permanent and seasonal). International chains are widely present in the quick service segment. Home delivery is also an important and growing trend in consumer food service in Poland, with online ordering growing particularly fast.

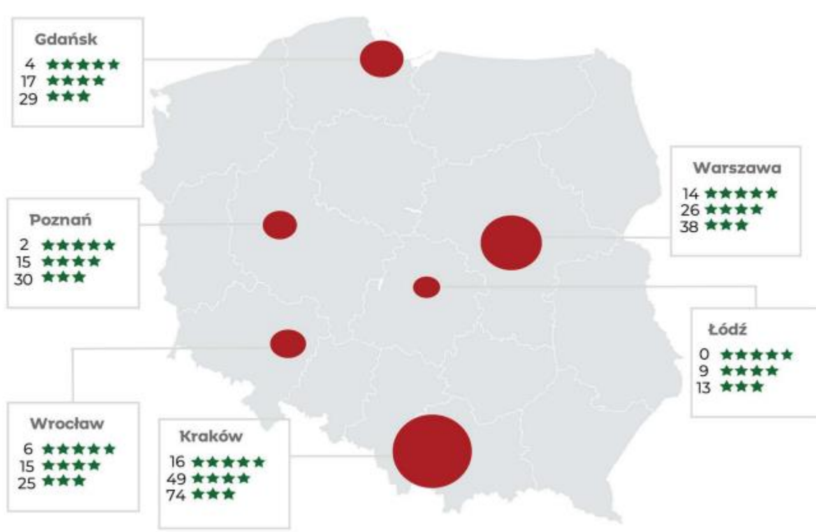
Table 1. Basic Economic Indicators

Poland	2024(a)	2025 (f)	2026 (f)	2027(f)
Real GDP Growth	3,2 [(a)]	3.5 [(c)]	3.7[(c)]	3.5[(c)]
Consumer Price Inflation	3.8 [(a)]	5.3 [(c)]	3.3[(c)]	2.5[(c)]
Unemployment Rate	5.1 [(a)]	4.9 [(c)]	4.5[(c)]	4.5[(c)]
Exchange Rate Zl: U.S. $	3.98 [(c)]	4.00 [(c)]	4.08[(c)]	4.16[(c)]

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

A strategic location in the middle of Europe and growing investments in the HRI sector make Poland an ideal host for business conferences, banquets, trade shows, and other business and culture events. In 2023, over 2,580 hotels operated in Poland, offering accommodations in over 145,000 rooms. For additional demographic and consumer information, please refer to FAS Warsaw's 2024 Exporter Guide.

Chart 1. Hotels in Major Polish Cities Ranked by Category in CY2023



Source: 2023 mBank.pl report based on data from Statistics Poland (GUS).

Polish consumers dine out at well-known chains like McDonald's, KFC, Pizza Hut, as well as independent restaurants and food trucks. Meeting points, including breakfast or night markets and seasonal establishments in tourist destinations, are also popular.

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 HRI operators commonly advertise that they offer Polish products.

Table 2. Units, Transactions and Value Sales in Consumer Foodservice 2018-2023

	2019	2020	2021	2022	2023	2024(f)
Units	70,374.0	66,697.0	73,669.0	83,049.0	85,544.0	87,556.0
Transactions	2,064.6	1,492.6	1,729.0	1,985.4	2,072.1	2,179.5
USD million*	11,254.3	8,195.1	10,581.8	14,584.9	17,047.6	18,237,3

**The exchange rate used is the USD/Polish Zloty Average exchange quoted by Polish National Bank on 12/10/2024 Table nr. 239/A/NBP*

Source: © Euromonitor International

Table 3. Consumer Foodservice by Independent vs Chain by Type: Units/Outlets 2023

Outlets	Independent	Chain	Total
Cafés/Bars	11,854.0	870.0	12,724.0
Full-Service Restaurants	23,446.0	692.0	24,138.0
Limited-Service Restaurants	8,818.0	18,921.0	27,739.0
Self-Service Cafeterias	6,952.0	176.0	7,128.0
Street Stalls/Kiosks	11,312.0	2,503.0	13,815.0
Consumer Foodservice by Type	62,382.0	23,162.0	85,544.0

Source: © Euromonitor International

Table 4. Advantages and Challenges of the Polish Food Service Sector

Advantages	Challenges
One of Central Europe's most populous country with a market of nearly 40 million people.	U.S. products face high transportation costs compared to many European competitors.
A strategic location within a dense, major international market offering re-export potential.	EU product registration can be onerous and cause delays or even prevent products from entering the Polish market that are new to the EU.
Transshipment from other EU countries of import is now possible with Poland's EU integration.	Poland's EU membership puts American products at a competitive disadvantage compared to EU-27 duty-free EU internally traded products.

Market niches exist in food ingredient categories - i.e. dried fruit, nuts, baking mixes, functional foods with health benefits and energy function, organic components.	Despite rising incomes, Polish consumers indicate that price is still the primary purchasing factor for food and beverage products in at least 75 percent or more of their retail food purchases.
Polish consumers associate American products with good quality.	Foreign investment in the Polish food processing industry results in local production of many high-quality products that were previously imported.
Economic growth has been rising and growing Polish middle class is eager to try new products.	While the export of some U.S. goods has been encouraged by EU trade regulations, some goods (namely poultry and beef) are limited due to EU sanitary restrictions.

Section II. ROAD MAP FOR MARKET ENTRY

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). For additional market entry information, please refer to FAS Warsaw's 2024 Exporter Guide.

Most HRI establishments in Poland do not directly import and rely on local importers and wholesalers to obtain products. In this segment, the successful introduction of new products depends to a large extent on local representatives, importers, and distributors.

- Products may be imported either by an importer or a representative office, which may also be a wholesaler and/or a distributor;
- The representative office deals only with your product, and so it pays much more attention to the promotion, advertising, and marketing activities than an importer who buys many, sometimes even competitive, products;
- Importers are distinctly separated into dry goods, refrigerated items, fruits and vegetables, alcohol, etc.;
- Importers or representative offices may use nation-wide logistic organizations for the storage and distribution of imported products; and
- Importers also have their own distribution networks.

Attending European trade fairs (like ANUGA and SIAL) as well as visiting Polish HRI trade fairs and industry events (like HORECA/GASTROFOOD and Eurogastro World Hotel) are good ways to reach key decission makers and learn about the Polish market.

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 world's largest. 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 5. Company Shares in Chain Consumer Foodservice: % Value 2019-2023

% value	2019	2020	2021	2022	2023
McDonald's Corp	31.2	34.0	35.0	35.3	37.2
Yum! Brands Inc	12.5	12.7	12.7	12.7	12.6
Zabka Polska Sp zoo	2.1	4.8	5.3	5.3	5.9
PKN Orlen SA	8.4	7.7	7.2	7.9	5.8
BP Plc	2.8	2.5	2.2	2.1	1.9
Orkla Group	-	-	-	2.1	1.8
Restaurant Brands International Inc	2.8	2.2	2.0	1.8	1.6
Sweet Gallery Sp zoo Sp k	0.8	1.2	1.3	1.5	1.6
Shell Plc	-	-	-	1.7	1.6
Doctor's Associates Inc	1.3	1.1	1.2	1.2	1.2
Inter IKEA Systems BV	1.6	1.3	1.1	1.3	1.2
MOL Group	-	-	-	-	1.2
Cukiernia Sowa sp j	1.6	1.4	1.3	1.4	1.2
Anwim SA	1.0	1.1	1.0	1.0	1.0
Starbucks Corp	1.3	1.0	1.0	0.9	1.0
Sfinks Polska SA	1.9	1.0	0.8	1.1	0.9
Alimentation Couche-Tard Inc	1.2	1.2	1.0	1.0	0.9
Domino's Pizza Inc	0.6	0.7	1.1	1.0	0.9
Zahir & Zahid Sp zoo Sp k	0.2	0.4	0.9	0.9	0.8
Italian Coffee Holdings Ltd, The	0.8	0.6	0.6	0.7	0.7
Max Burgers AB	0.2	0.4	0.5	0.7	0.7

% value	2019	2020	2021	2022	2023
More Sp zoo	0.7	0.7	0.7	0.7	0.7
Coca-Cola Co, The	1.2	1.0	0.9	0.9	0.7
Lodziarnie Firmowe Sp zoo Sp k	0.8	0.7	0.9	0.8	0.7
Mastergrupa Marcin Ciesielski	0.5	0.8	0.7	0.6	0.6
Roxana Sp zoo	0.3	0.4	0.4	0.5	0.6
Multi Ice Radoslaw Charubin	0.8	0.9	0.8	0.6	0.5
Wroclawska Akademia Kulinarna Sp zoo Sp k	0.6	0.3	0.3	0.5	0.5
T - Pizza Sp zoo	-	-	0.6	0.5	0.4
Gastromall Group Sp zoo	0.8	0.5	0.4	0.5	0.4
Others	22.0	19.3	18.2	12.8	13.1
Total	100.0	100.0	100.0	100.0	100.0

Source: © Euromonitor International

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

Table 6. Polish 2022-2023 Agriculture, Consumer-Oriented Products ($ 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 7. 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**
Fish & Seafood **(HS 03)** **$3 billion**	1. Norway – 48% 2. Russia – 9% 3. Sweden – 8% **8. United States – 2.2%**	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.	Poland is one of the world's largest salmon processors.
Wine **(HS 2204)** **$425 million**	1. Italy – 27% 2. Germany – 13% 3. France – 11% 5. **United States – 7%**	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.	Domestic production is minimal. Poland's dynamic restaurant industry is an ideal partner for U.S. suppliers.
Distilled spirits **(HS 2208)** **$589 million**	1. United Kingdom –34% **2. United States – 11%** 3. Ireland – 9% 4. Germany – 6%	Great Britain remains the largest whisky supplier to Poland.	Poland's restaurants are increasingly interested in distilled spirits originating from the United States.
Nuts **(HS 0802)** **$205 million**	**1. United States –42%** 2. Germany – 15% 3. Italy – 14% 4. Spain – 5%	Germany is a large re-exporter of nuts. The United States is the leading supplier of almonds and pistachios. Italy leads in hazelnuts.	Poland does not produce any almonds or pistachios, and only limited quantities of walnuts and hazelnuts.
Dried Prunes	1. Chile – 64%	Chilean product has a tariff advantage based on the EU-Chile Free Trade	There is limited local production. The product is mostly smoked and

(HS 081320) **$28 million**	**2. United States – 15%** 3. Moldova – 7% 4. Germany – 3%	Agreement. U.S. product is gaining popularity among Polish importers.	traditionally used for home cooking as a traditional drink ingredient.

Source: Trade Data Monitor

Section IV. BEST 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 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 V. KEY CONTACTS AND FURTHER INFORMATION

For additional information regarding the Polish market please contact:
The Office of Agricultural Affairs
Al. Ujazdowskie 29/31
00-540 Warsaw, Poland
Phone number: +48 22 504 23 36
E-mail: AgWarsaw@usda.gov
Website: Office of Agricultural Affairs Warsaw, Poland

No Attachments

Attachments: