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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 and viable market for U.S. food and agricultural products. Poland, in 2025, has officially entered the ranks of the world's 20 largest economies by nominal GDP. This development marks a historic milestone in the country's post-communist transformation and reflects its growing economic influence on the global stage. Over 100,000 stores offering food and beverages operate in Poland. In 2024, Poland imported over \$42 billion in food, agricultural, and related products. U.S. imports were valued at a \$730 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.

Market Fact Sheet: Poland

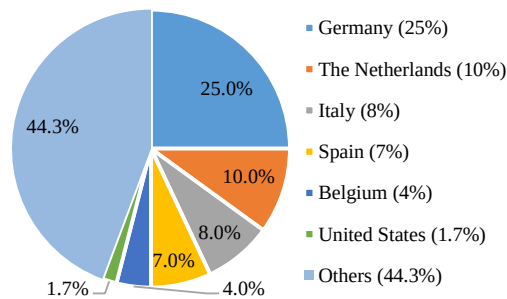
Executive Summary

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 2024 Gross Domestic Product (GDP) increased by 2.9 percent; in 2026 GDP growth is expected to reach 3 percent. Russia invaded Ukraine in 2022, sending shock waves throughout the Polish economy. This caused disruptions in trade, and sharp increases in energy, fuel, and food prices. Despite these continuing obstacles, Poland, in 2025, officially entered the ranks of the world’s 20 largest economies by nominal GDP. This development marks a historic milestone in the country’s post-communist transformation and reflects its growing economic influence on the global stage.

In 2024, Poland imported over \$42 billion in food, agricultural, and agricultural related products. U.S. imports were valued at a \$730 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 2024 Polish imports of consumer-oriented food products were at \$24 billion, with U.S. imports accounting for a record \$427 million.



Food Processing Industry

Poland’s food processing industry is one of the largest in the European Union (EU). In 2024, the food processing industry accounted for over 9 percent of Poland’s \$914 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 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 2024
Imports of Consumer-Oriented Products
\$24 billion (U.S. imports \$427 million)

List of Top 10 Growth Products in Poland

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

Top 10 Polish Retailers and Wholesalers

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

GDP/Population
Population (millions): 38
GDP (billions USD): \$914.7
GDP per capita: \$25,022

SWOT Analysis	
Strengths	Weaknesses
Central Europe’s most populous country with a domestic, consumer market of 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 a wide range of high-quality local products.

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

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SECTION 1. MARKET SUMMARY

Poland is a modern European country with a population of 38 million people. Poland’s 2024 GDP increased by 2.9 percent; in 2026 GDP growth is expected to reach 3 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 2024. Despite these obstacles, in 2025, Poland has officially entered the ranks of the world’s 20 largest economies by nominal GDP. This development marks a historic milestone in the country’s post-communist transformation and reflects its growing economic influence on the global stage.

Table 1. Basic Economic Indicators

Poland	2023(a)	2024(a)	2025 (f)	2026 (f)
Real GDP Growth	0.1	2.9	3.0	3.0
Consumer Price Inflation	11.4	3.8	4.3	2.3
Unemployment Rate	5.2	5.1	4.9	4.8
Exchange Rate Zl: U.S. \$	4.20	3.98	4.01	4.01

Source: The Economist Intelligence Unit (actual), (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 2025 is PLN 4,666 (\$1,085.57) per month. Polish households spend over 27 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.

Table 2: Polish Market Advantages and Challenges

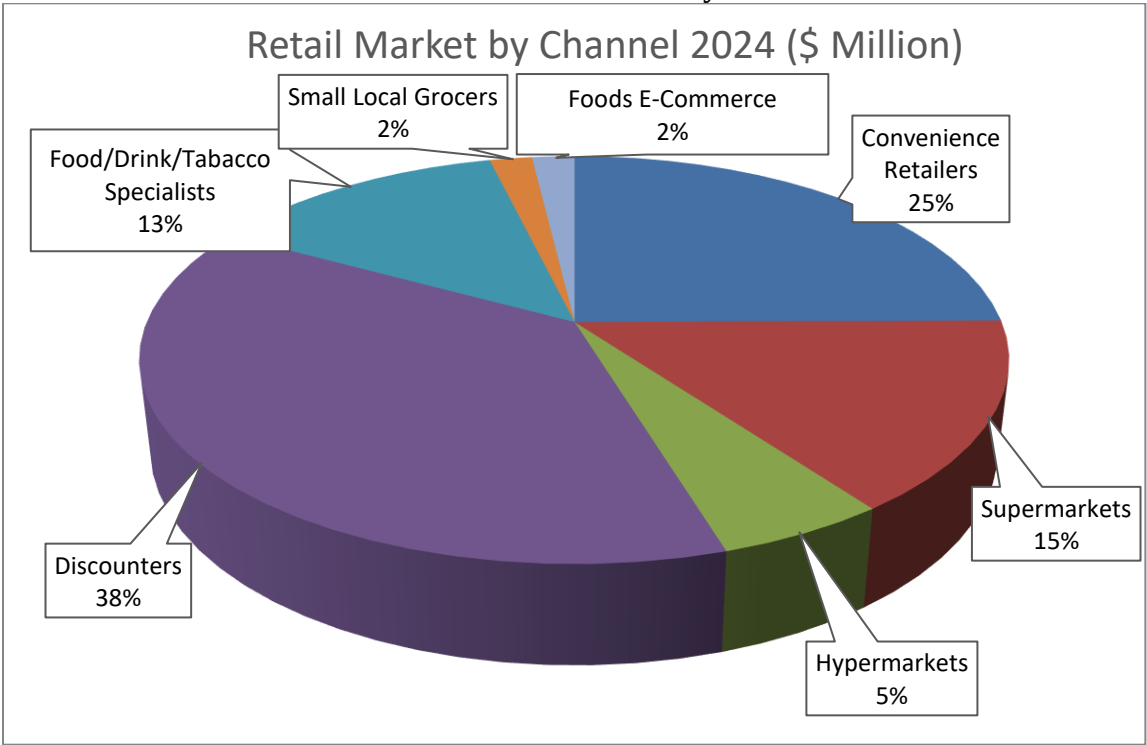
Advantages	Challenges
Central Europe’s most populous country with a domestic consumer market of 38 million people.	U.S. products face higher transportation costs than many European competitors.
A strategic location offering re-export potential.	The EU’s complicated system of product registration can 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.

Retail Sales by Channel

The Polish retail market in 2024 remains highly fragmented and dominated by discounters and convenience outlets. According to *Euromonitor* data, discounters account for nearly 38 percent of total food retail sales, while convenience outlets account for over 25 percent. This makes these channels the backbone of the distribution sector across the country. These market shares reflect Polish consumer preferences for convenience and long opening hours. Hypermarkets at about 5 percent and supermarkets at 15 percent, both serve mainly urban middle class consumers, attracting customers with the largest variety of goods, including imported products. Small grocery stores, at about 2 percent, are diminishing in importance, as they face stiff competition from well-developed franchise operators.

Chart 1: Polish Retail Sales by Channel



Source: Euromonitor, 2025 data

Polish consumers are becoming increasingly sophisticated and value more diverse food products. Although Polish importers often source from other EU countries, they also regularly seek products from outside the EU, including the United States, Ukraine, Argentina, and China.

In 2024, Poland imported over \$42 billion in food, agricultural, and related products. U.S. imports were valued at a \$730 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.

Table 3: Polish 2022-2024 Agriculture, Consumer-Oriented (\$ million)

Poland	2022	2023	2024
Total imports	\$39,273	\$39,916	\$42,535
Imports from the United States	\$585 (1.5%)	\$733* (1.8%)	\$730 (1.8%)
Consumer-oriented Agricultural Products, total imports	\$19,550	\$22,024	\$24,682
Consumer-Oriented Agricultural Products, imports from the United States	\$309 (1.6%)	346* (1.6%)	427 (1.7%)

*Source: Trade Data Monitor based on Polish Customs Statistics (*A record).*

Polish consumers tend to view the United States positively and U.S. products are considered to be high quality. U.S. products are often shipped to third-country EU ports of entry and, except for language labeling, are re-exported to Poland without tariffs or regulatory requirements.

Key market drivers and consumption trends:

- Discounters and convenience stores gained the most in terms of offline grocery sales during the last five years.
- Consumers continue to shop locally and have moved away from making bulk purchases in hypermarkets, trends which have benefited both neighborhood convenience stores and discounters.
- Consumer use of e-commerce continues to expand for both essential and nonessential goods and is expected to increase as more consumers become more confident in placing online orders.
- The number of outlets and independent stores is expected to drop as a result of consumer shopping preferences, driven by search for impulse shopping (convenience stores), as well as price sensitivity of consumers (discounter stores),
- Independent stores have struggled to adopt multiple channels of retail shopping methods for their consumers, which has negatively affected their competitiveness among other retail options.
- Retailers are likely to respond to growing consumer interest in health trends.
- Food delivery companies experience increased demand and partnerships with large grocery chains in delivering groceries directly to consumers’ homes.
- Stores are about to face a new requirement: Starting October 1, 2025, a deposit-refund system will be implemented in Poland, covering single-use plastic (PET) bottles, glass (reusable) bottles, and metal cans. Stores with an area exceeding 200 m² will be required to accept these containers and refund the deposit, which will be receipt-less. Smaller stores will be able to join the system voluntarily.

Impact of the Russia-Ukraine War: 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. The imposition of sanctions by the EU and Poland on Russia and Belarus and the disruption of trade have contributed to increased inflation, driven by energy/fuel and food prices. More than two million Ukrainian refugees have arrived in Poland since the start of the conflict (nearly one million still remain in 2025), 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.

Please refer to www.fas.usda.gov Data and Analysis Section, GAIN reports section for additional information and reports on the Polish market.

SECTION 2. ROAD MAP FOR MARKET ENTRY

Hypermarkets, Supermarkets, Discount Stores

Most retail chains in Poland do not import directly and therefore rely on local importers and wholesalers. Retailers such as Auchan have their own import departments but often continue to rely on independent importers for niche market products. In this segment, the successful introduction of new products depends largely on local representatives, importers, and distributors.

- Products may be imported by an importer or a representative office, which may also be a wholesaler and/or distributor;
- Representative offices deal only with products and tend to focus more on promotions, advertising, and marketing activities;
- Importers tend to buy many and often competing products;
- Some hypermarkets/supermarkets are direct importers (e.g. Auchan);
- Importers are 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;
- Importers also have their own distribution networks.

Typical Supplier Conditions When Entering Retail Chains Operating on the Polish Market:

- Entry fees (amounting to tens of thousands of Polish zlotys) are not refunded if an agreement is canceled;
- Term of payment is 30-60 days;
- Considerable price discount – up to 10 percent of regular price;
- Obligatory participation in promotional activities, which are held 3-5 times a year and last for 1-3 weeks;
- Obligatory participation in covering the cost of advertising of promoted products;
- Slotting fees (\$250-\$5,000) for placing each type of product on the shelf;
- Fees for the “display area;”
- Limited opportunity to influence the shelf price;
- Very strict delivery terms (exact date and timeframe e.g. November 2, 2025, 12:00-14:00);

- Supplier contracts may vary and depend on negotiations of the interested parties.

Company Profiles

This sector is dominated by multinationals, including [Auchan](#) (France), [Carrefour](#) (France), and discounters [Biedronka](#) (Portugal) and [Lidl](#) (Germany). Major chains face slim margins due to fierce competition. Poland's [Dino](#) is one of the fastest growing retailers – with 2,835 stores currently and plans to open 147 stores in 2025, including in major cities. Industry experts expect further sector consolidation this year.

The market is currently undergoing a major change as retail sector experts confirm plans for the Polish branch of the Carrefour retail chain to be sold.

Table 4: Top 10 Retailers on the Polish Market in 2024

No.	Operator's Name	Store Name/Main Product	Country of Origin/Ownership
1	Jeronimo Martins	Biedronka	Portugal
2	Schwarz-Gruppe	Lidl and Kaufland	Germany
3	Eurocash	ABC, IGA, Delikatesy Centrum	Poland
4	Zabka	Zabka	CVC Capital Partners
5	Grupa Specjal	Nasz Sklep, Delikatesy Premium, Delikatesy Sezam, Nasz Sklep Express, Livio	Poland
6	Auchan	Auchan	France
7	Dino	Dino	Poland
8	Polska Grupa Supermarketow	Top Market	Poland
9	Carrefour	Carrefour	France
10	Metro Group - Macro C&C	Makro	METRO AG Germany

Source: Euromonitor and FAS Warsaw research

Convenience Stores, Gas Marts, Kiosks

Convenience stores, gas stations, and kiosks tend to be fragmented with different owners due to franchising and licenses. Kiosks/small convenience stores mostly carry newspapers, cigarettes, snacks, drinks and other convenience products. This sector consists of small units which employ up to five people.

Convenience stores in Poland are increasingly popular. Leading players in convenience store and small grocery store sectors include: [Zabka](#), Chata Polska, Chorten, and PSH Nasz Sklep. Zabka is one of the

largest convenience store operators with over 11,793 stores operating on a franchising basis. Zabka has pursued innovative methods of shopping in its stand-alone Nano self-service stores – where customers use a phone-based mobile application to carryout purchases, with cameras identifying which products are removed from the shelves, and the customer being appropriately charged. Currently, Eurocash is the largest wholesale distributor in Poland which allows its stores (ABC, Delikatesy Centrum, and Groszek) to remain competitive. Eurocash’s e-commerce platform, Eurocash.pl, allows customers to purchase goods online.

Convenience stores are gaining customers from hypermarkets, as hypermarkets have recently been declining.

Traditional Markets: Small, Independent Grocery Stores, and Wet Markets

Exporters should contact importers, wholesalers, or company representatives when seeking to enter the market. Wholesalers often service several regional wholesale units, whereas smaller wholesalers and retailers procure from them. Independent “mom and pop” shops are very common in Poland, although they face growing competition from supermarkets that are now opening in smaller cities and towns. Small shops are present throughout the county, in both small towns and large cities. Independent stores often struggle to compete with supermarkets and hypermarket chains.

SECTION 3. COMPETITION

In 2024, Poland imported over \$42 billion in food, agricultural, and related products. U.S. imports were valued at a \$730 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.

The continued growth of U.S. market share is largely attributed to higher disposable incomes. Domestic and EU member state products are the main U.S. competitors. Domestic food producers are consistently evolving, innovating, and producing high-quality products. Even iconic American brands such as Coca-Cola, PepsiCo, Mondelez, and Mars are now produced in Poland. Many Polish consumers prefer Polish products over imports and therefore chains commonly advertise that they offer Polish products.

Table 5. Examples of Imports of Consumer Food Products to Poland in 2024

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)	1. Norway – 48% 2. Russia – 9% 3. Sweden – 8% 8. United States – 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	Poland is one of the world’s largest salmon processors.

\$3 billion		suppliers also continue to deliver significant volumes.	
Wine (HS 2204) \$425 million	1. Italy – 27% 2. Germany – 13% 3. France – 11% 5. United States – 6%	Italy remains the top wine supplier. U.S. wines are becoming increasingly 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) \$692 million	1. United Kingdom – 34% 2. United States – 12% 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) \$265 million	1. United States – 43% 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 produces limited quantities of walnuts and hazelnuts.
Dried Prunes (HS 081320) \$30 million	1. Chile – 64% 2. United States – 12% 3. Moldova – 7% 4. Germany – 3%	Chilean product has a tariff advantage based on the EU-Chile Free Trade Agreement. U.S. product is gaining popularity among Polish importers.	There is limited local production. The product is mostly smoked and traditionally used for home cooking as a compote ingredient.

Source: Trade Data Monitor

SECTION 4. BEST HIGH-VALUE PRODUCT PROSPECTS

Products present in the 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

Products 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 5. KEY CONTACTS AND FURTHER INFORMATION

For additional information regarding the Polish market please contact:

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Attachments:

No Attachments