



USDA Foreign Agricultural Service

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## Poland

### Product Brief

### Value-Added

### 2005

**Approved by:**

Charles Rush  
U.S. Embassy

**Prepared by:**

Natalia Koniuszewska, Elizabeth Minor

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**Report Highlights:**

Poland's food retail sector continues to develop as per capita incomes and standards of living increase. The impact of hypermarkets continues to expand; however, stiff Polish and EU competition hamper prospects for U.S. sales. Poland's real GDP grew 5.4 percent in 2004 and domestic demand is expect to increase 4.8 percent in 2005.

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Includes PSD Changes: No  
Includes Trade Matrix: No  
Unscheduled Report  
Warsaw [PL1]  
[PL]

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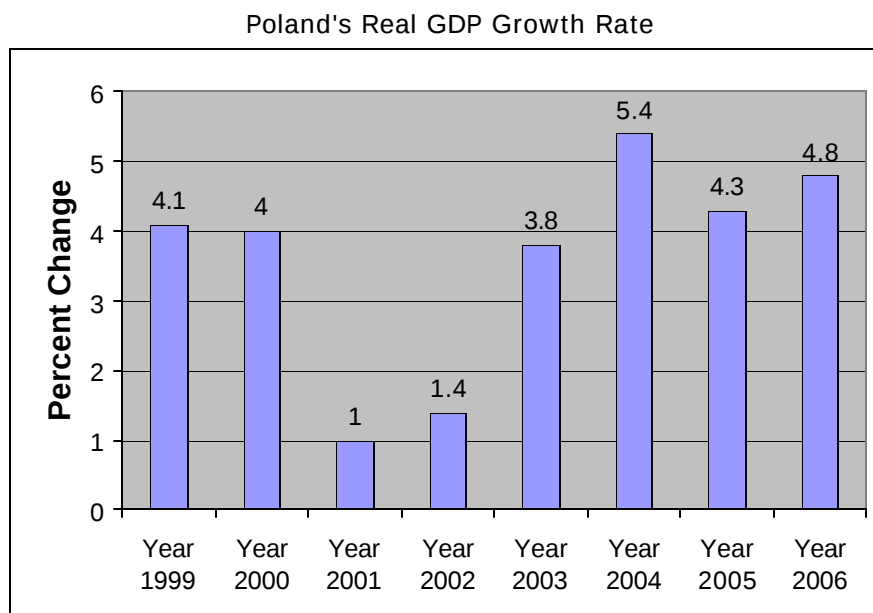
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## Section I. Poland's Demographics

The Republic of Poland is the ninth largest country in Europe and is located in its very heart; Germany, the Czech and Slovak Republics, Ukraine, Belarus, and Russia border it. Poland's northern coastline runs along the Baltic Sea, which supplies its productive seafood industry. The largest rivers include the Vistula, Odra, Warta, and Bug. Twenty-eight percent of the country is covered by forests, which support Poland's timber industry. Poland has a moderate climate with average summer temperatures of 60-75 degrees Fahrenheit and winter temperatures of 14-32 degrees Fahrenheit. The average rainfall per year is 24 inches.

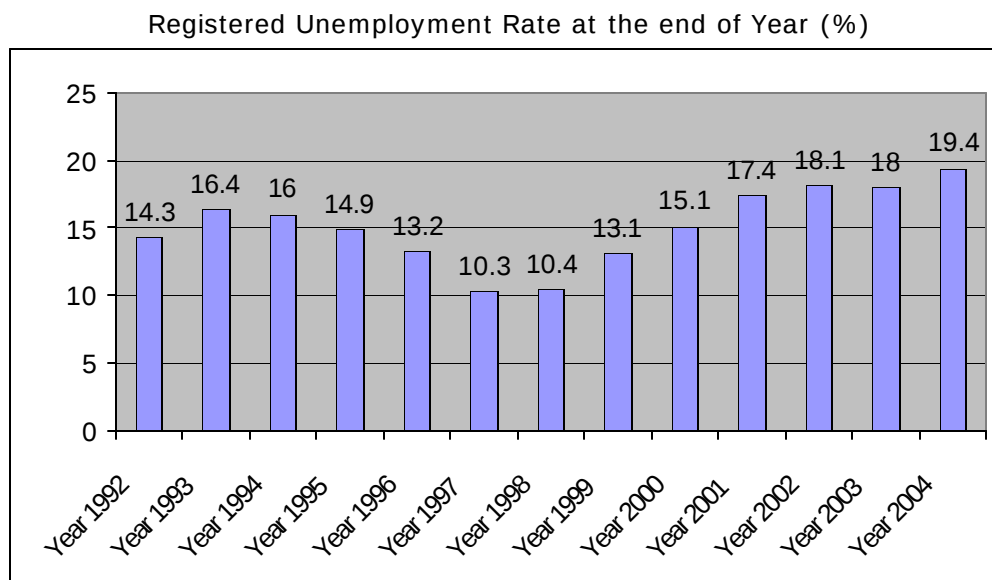
Poland's population of nearly 40 million represents 5 percent of the total population of Europe. Sixty-two percent of the population lives in urban areas. The average population density is 320 people per square mile. The population is split evenly between men and women. Poland's population is young with approximately 33 percent of the population under the age of 24, with an overall average age of 36.

Poland's real GDP has been growing, showing a 5.4 percent increase in 2004. In the second quarter of 2005 GDP growth is estimated at 3.1 percent and is expected to reach 4.8 percent in 2006. Domestic demand is expected to continue to grow rapidly, reaching 4.8 percent in 2005. The inflation rate rose in 2004 to 1.5 percent, up from 0.8 percent in 2003; however, this is still lower than 3.6 percent in 2002.



Source: Citibank and Polish Market Review

According to the national census, the number of unemployed exceeded 20 percent in 2003, while the official statistics estimated this number at 18 percent. Since then, unemployment had risen to 20.6 percent in February 2004, falling slightly to 19.6 percent in May 2004; the most recent unemployment figure is 18.1 percent. This could be attributed to a rise in labor productivity, coupled with a sizeable net increase in the working age population. The restructuring process continues in several key industries (steel, mining, agriculture, railways). Unemployment is expected to decrease in the following years as the effects of the economic recovery reach more sectors.



Source: Polish Official Statistics

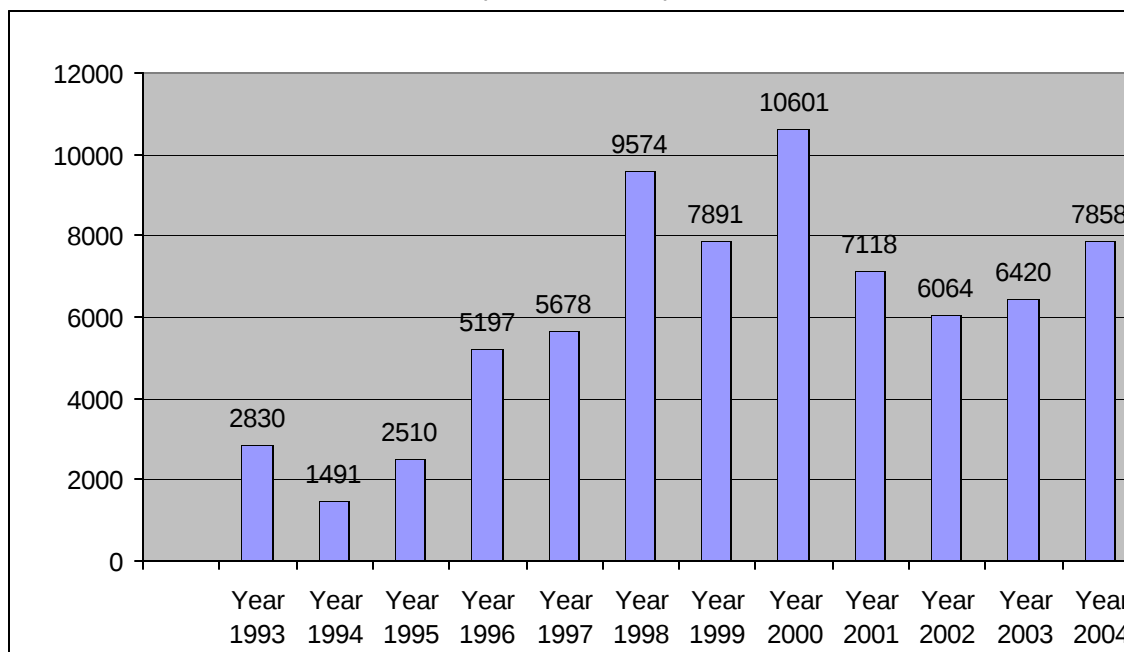
The sale of food and beverages was 6 percent higher in 2004 than 2003. Increases appeared in groups with a significant share in food production, among other things in manufacture of prepared animal feeds (12.1 percent), production of dairy products (10.5 percent), production of other food products (9 percent), and processing and preserving of fruits and vegetables (7 percent).

## Section II. Foreign Investment and Trade Summaries

Gross value added generated in the national economy in 2004 increased 5 percent in annual terms (compared to 3.7 percent in 2003). Its growth was higher in industry (9.7 percent, compared to 6.3 percent in 2003), and reached 5 percent in the market services sector (compared to 3.6 percent in 2003), while the decline in the construction sector (1.4 percent, compared to 2.9 percent in 2003) continued.

Poland continues to be an attractive destination for Foreign Direct Investment (FDI) inflows, although at a somewhat slower pace than during the peak years of 1998-2000. In aggregate, more than USD 72 billion of FDI has flowed into Poland since 1989. France, Poland's largest investor, has invested over USD 16 billion in Poland. Foreign Direct Investment increased from USD 6.42 billion in 2003 to 7.85 billion in 2004. Foreign investment is primarily being used to update transportation and food processing, these two sectors alone account for 18.5 percent of all FDI.

The Inflow of Foreign Capital into Poland between 1993-2004  
(in million USD)



Source: PALIZ

Ninety percent of investors choose Poland for its low labour costs. Since 2001, wages in Poland have been increasing very slowly due to high unemployment. As a result, the wage level in the Czech Republic and Hungary is now higher than in Poland. Average monthly wages in the enterprise sector in February 2004 in Poland were \$605. According to Cushman & Wakefield Healey & Baker Cities Monitor, Warsaw is the best capital city in Europe in terms of cost of staff.

Poland's external trade is primarily with developed countries. In 2004 trade with the EU accounted for 79 percent of all Polish exports and 68 percent of Polish imports. In 2004 Poland's main export partners were Germany, Sweden, Italy, the Czech Republic, Ukraine, France, Great Britain, and Russia. Poland's major import partners were China, the Czech Republic, Italy, France, and Germany.

Food and beverage purchases accounted for 39 percent of total consumer spending in 2003. With real GDP increasing every year consumers demand an ever-greater variety of products.

The Polish government works to ensure the safety and quality of food for Polish consumers through a number of regulatory measures. Information specifically pertaining to Poland may be obtained from FAS's Food and Agricultural Import Regulations and Standards (FAIRS) report for Poland, which is updated annually. Most regulations are the same as in the European Union. The most important EU regulations can be found in FAS's FAIRS report for the European Union, which can be found at the following address  
<http://www.useu.be/agri/usda.html>.

The development of tourism, increased female employment, and increased annual incomes has resulted in the expansion of the Hotel, Restaurant, and Institutional (HRI) Food Service Sector (see GAIN Report PL5016). For Poles living in urban areas, eating out is no longer a

rarity, as it was in the early 90's. Consumers are also developing an interest in food variety, ranging from Mediterranean to Asian, with a specific demand for fast food.

In 2003 processed foods accounted for 27 percent of all Polish agricultural imports.

Poland's food retail sector continues to undergo radical transformation as consumer incomes grow. This change is led by new hypermarkets, which account for 15 percent of all national modern grocery distribution. Prospects for U.S. sales are hampered by stiff Polish and EU competition, comparatively high import duties, stringent food ingredient regulations, and costly terms of business to get products into stores. Nevertheless, there are select opportunities outlined in section IV, "Best Prospects," in the Post's Food Sector report. These include, but are not limited to:

- Wine, beer, and various non-alcoholic beverages,
- Food for the HRI food service sector,
- Processed meat, fish, fruits, vegetables, and spices,
- Highly processed/ready-to-cook products and snacks,
- Health food produced from natural agricultural products with a low level of pesticides, mineral fertilizers, and other chemicals applied for their cultivation,
- Luxury food and drinks, produced from exotic raw materials for people with higher incomes,
- Food ingredients for special use, e.g. non-sugar sweeteners, protein, or vitamins for the production of diet foods.

For more information on Polish imports and exports to and from the world, the United States, and the European Union see Appendix A.

### **Section III. Office of Agricultural Affairs, Warsaw**

The Office of Agricultural Affairs, Warsaw represents the United States Department of Agriculture, Foreign Agricultural Service (FAS) in Poland. FAS supports U.S. food and agriculture exporters in the Polish market and can provide lists of Polish companies importing food and agricultural products.

FAS prepares several of the reports mentioned above annually. FAS also generates reports, which contain regulations on preparing goods for shipment, regulations concerning documentation which should accompany goods, and details on border/entry regulations. These include information about restrictions concerning food additives, veterinary procedures/mandates, and sanitary regulations for products.

#### **FAS Warsaw Contact Information:**

American Embassy

Al. Ujazdowskie 29/31

00-540 Warsaw Poland

E-Mail: [agwarsaw@usda.gov](mailto:agwarsaw@usda.gov) or [agwarsaw@poczta.onet.pl](mailto:agwarsaw@poczta.onet.pl)

Phone: 48 22 504 2336, Fax: 48 22 504 2320

For additional information/details on the Polish market, please see the FAS web site, [www.fas.usda.gov](http://www.fas.usda.gov), by clicking on the *Attaché Reports* link.

The following is a table of Polish imports and exports with the world, the United States, and the European Union. These reports are based on information obtained from FAPA. Also, updated BICO reports can be accessed at [www.fas.usda.gov/scripts/bico/bico\\_frm.asp](http://www.fas.usda.gov/scripts/bico/bico_frm.asp) and searching by country for Poland.

## Appendix A – Polish Agri-Food Trade

| Polish Agri-Food Trade with the World - Quantity |               |         |         |               |         |          |
|--------------------------------------------------|---------------|---------|---------|---------------|---------|----------|
| Group /Commodities                               | Export (Tons) |         |         | Import (Tons) |         |          |
|                                                  | 2002          | 2003    | 2004    | 2002          | 2003    | 2004     |
| <b>I. Animal Products</b>                        |               |         |         |               |         |          |
| <b>A. Live Animals (1-4)</b>                     |               |         |         |               |         |          |
| 1. Horses                                        | 16419         | 21407   | 22693   | 1745          | 1815    | 2200     |
| 2. Cattle                                        | 67277         | 66235   | 77527   | 5130          | 4206    | 7400     |
| 3. Sheep                                         | 2713          | 2641    | 2234    | 19            | 60      | 200      |
| 4. Other                                         | 1607          | 5145    | 17749   | 2381          | 1614    | 15500    |
| <b>B. Processed Products (5-11)</b>              |               |         |         |               |         |          |
| 5. Red Meat & Offals                             | 119344        | 270485  | 246908  | 53822         | 57300   | 117000   |
| 6. Poultry Meat & Offals                         | 51660         | 100691  | 114949  | 25548         | 20335   | 85200    |
| 7. Meat Products                                 | 42449         | 35718   | 45741   | 5704          | 7134    | 33000    |
| 8. Animal Fats                                   | 21513         | 32103   | 26381   | 12248         | 6456    | 27200    |
| 9. Milk, Cream, & Ice-Cream                      | 178853        | 176347  | 276893  | 30023         | 20584   | 228000   |
| 10. Butter                                       | 11849         | 9179    | 27101   | 4615          | 5345    | 44000    |
| 11. Cheeses & Curds                              | 41765         | 51965   | 80349   | 4818          | 5655    | 85000    |
| 12. Other Animal Products                        | 55082         | 69099   | 70764   | 100954        | 100184  | 947000   |
| <b>C. Other (13-14)</b>                          |               |         |         |               |         |          |
| 13. Fish & Crustaceans                           | 44155         | 49976   | 61610   | 199164        | 209804  | 239000   |
| 14. Fish Products                                | 42087         | 43634   | 77672   | 21129         | 24973   | 311000   |
| <b>Total I (1-14)</b>                            | 696773        | 934625  | 1148571 | 467300        | 465465  | 6597000  |
| <b>II. Crop Products</b>                         |               |         |         |               |         |          |
| <b>D. Raw Materials</b>                          |               |         |         |               |         |          |
| 15. Cereals                                      | 566654        | 574958  | 287077  | 617386        | 591939  | 838400   |
| 16. Oilseeds                                     | 37285         | 8927    | 296589  | 98731         | 108526  | 95000    |
| 17. Fresh Potatoes                               | 57544         | 153066  | 64318   | 66302         | 28249   | 386000   |
| 18. Fresh Fruits                                 | 428501        | 459691  | 641548  | 950610        | 918009  | 1006200  |
| 19. Fresh Vegetables                             | 256547        | 458916  | 464812  | 176993        | 181451  | 1988000  |
| 20. Flowers                                      | 43980         | 49161   | 53686   | 54723         | 75114   | 893000   |
| <b>E. Processed Products (21-29)</b>             |               |         |         |               |         |          |
| 21. Vegetable Fats & Oils                        | 33456         | 28185   | 59167   | 358115        | 352513  | 3931000  |
| 22. Cereal Milling Products                      | 21955         | 23878   | 24022   | 207467        | 234467  | 2381000  |
| 23. Cakes & Meals                                | 202482        | 157523  | 133779  | 1572700       | 1605462 | 16451000 |
| 24. Starch, Croups, Malt                         | 166334        | 183929  | 195608  | 181686        | 197280  | 2197000  |
| 25. White Sugar                                  | 207793        | 425598  | 432535  | 86046         | 75096   | 442000   |
| 26. Molasses                                     | 251819        | 292817  | 188730  | 5             | 15      | 1000     |
| 27. Confectionery                                | 89164         | 102863  | 152537  | 69525         | 68025   | 1083000  |
| 28. Fruit Products                               | 552734        | 557292  | 607263  | 137763        | 141824  | 1698000  |
| 29. Vegetable Products                           | 411719        | 493048  | 555442  | 87309         | 89824   | 1101000  |
| 30. Other Crop Products                          | 198842        | 246280  | 314958  | 180709        | 1697813 | 2066000  |
| <b>Total II (15-30)</b>                          | 3526809       | 4216132 | 4472071 | 4846070       | 6365607 | 54021000 |
| <b>III. Other Products (31-35)</b>               |               |         |         |               |         |          |
| 31. Coffee, Cocoa, Tea                           | 48597         | 52273   | 54678   | 236488        | 248365  | 2606000  |

|                                  |                |                |                |                |                 |               |
|----------------------------------|----------------|----------------|----------------|----------------|-----------------|---------------|
| 32. Tobacco & Preparations       | 11547          | 16052          | 24914          | 54405          | 22316           | 480           |
| 33. Spirits & Alcoholic Drinks   | 42300          | 47127          | 59016          | 122862         | 104545          | 727           |
| 34. Water & Non-Alcoholic Drinks | 106056         | 112663         | 118274         | 3606871        | 3485654         | 43164         |
| 35. Other                        | 77531          | 83342          | 130155         | 99090          | 102724          | 1265          |
| <b>Total III (31-35)</b>         | <b>286031</b>  | <b>311457</b>  | <b>387037</b>  | <b>4119716</b> | <b>3963604</b>  | <b>48243</b>  |
| <b>Total (I+II+III)</b>          | <b>4509613</b> | <b>5462214</b> | <b>6007679</b> | <b>9433086</b> | <b>10794676</b> | <b>108863</b> |

| Polish Agri-Food Trade with the World – Value (EUR 1 = USD 1.24) |                        |                |                |                        |               |               |
|------------------------------------------------------------------|------------------------|----------------|----------------|------------------------|---------------|---------------|
| Group/Commodities                                                | Export (EUR thousands) |                |                | Import (EUR thousands) |               |               |
|                                                                  | 2002                   | 2003           | 2004           | 2002                   | 2003          | 2004          |
| <b>I. Animal Products</b>                                        |                        |                |                |                        |               |               |
| <b>A. Live Animals (1-4)</b>                                     | 147326                 | 150975         | 218134         | 46824                  | 38624         | 69383         |
| 1. Horses                                                        | 33967                  | 37258          | 38240          | 2664                   | 3661          | 3841          |
| 2. Cattle                                                        | 100557                 | 95982          | 146654         | 10532                  | 8101          | 16954         |
| 3. Sheep                                                         | 5276                   | 5075           | 4583           | 33                     | 163           | 539           |
| 4. Other                                                         | 7557                   | 12660          | 28658          | 33594                  | 26699         | 48049         |
| <b>B. Processed Products (5-11)</b>                              | 718240                 | 919546         | 1309293        | 176130                 | 161435        | 320011        |
| 5. Red Meat & Offals                                             | 175360                 | 269947         | 363035         | 79676                  | 76502         | 157480        |
| 6. Poultry Meat & Offals                                         | 132339                 | 213695         | 244156         | 23115                  | 17229         | 65889         |
| 7. Meat Products                                                 | 96529                  | 97790          | 131334         | 10779                  | 9035          | 10843         |
| 8. Animal Fats                                                   | 8547                   | 11417          | 15908          | 9225                   | 8296          | 21580         |
| 9. Milk, Cream, & Ice-Cream                                      | 191870                 | 190245         | 300790         | 28980                  | 22866         | 26049         |
| 10. Butter                                                       | 18863                  | 18983          | 65199          | 7000                   | 9103          | 10523         |
| 11. Cheeses & Curds                                              | 94733                  | 117469         | 188871         | 17355                  | 18404         | 27646         |
| 12. Other Animal Products                                        | 79269                  | 121284         | 120128         | 118892                 | 134026        | 172702        |
| <b>C. Other (13-14)</b>                                          | 239608                 | 262938         | 363546         | 341754                 | 326302        | 391380        |
| 13. Fish & Crustaceans                                           | 132258                 | 158891         | 247839         | 299988                 | 285370        | 345312        |
| 14. Fish Products                                                | 107350                 | 104047         | 115708         | 41767                  | 40932         | 46068         |
| <b>Total I (1-14)</b>                                            | <b>1184474</b>         | <b>1454743</b> | <b>2011101</b> | <b>683599</b>          | <b>660386</b> | <b>953476</b> |
| <b>II. Crop Products</b>                                         |                        |                |                |                        |               |               |
| <b>D. Raw Materials</b>                                          | 370689                 | 452965         | 602152         | 905232                 | 842858        | 986073        |
| 15. Cereals                                                      | 66045                  | 64737          | 35809          | 123753                 | 106455        | 176439        |
| 16. Oilseeds                                                     | 9994                   | 3167           | 65652          | 55249                  | 57376         | 59116         |
| 17. Fresh Potatoes                                               | 4487                   | 11175          | 5349           | 14324                  | 6829          | 10085         |
| 18. Fresh Fruits                                                 | 115214                 | 134955         | 203751         | 510657                 | 489494        | 514068        |
| 19. Fresh Vegetables                                             | 126849                 | 181783         | 226234         | 106684                 | 89808         | 112204        |
| 20. Flowers                                                      | 48101                  | 57149          | 65356          | 94565                  | 92896         | 114160        |
| <b>E. Processed Products (21-29)</b>                             | 1196798                | 1303226        | 1493152        | 1008084                | 963284        | 1133659       |
| 21. Vegetable Fats & Oils                                        | 19046                  | 16912          | 38034          | 205364                 | 212266        | 243612        |
| 22. Cereal Milling Products                                      | 8224                   | 11064          | 11028          | 30414                  | 31323         | 49448         |
| 23. Cakes & Meals                                                | 25169                  | 19430          | 17061          | 342989                 | 314955        | 356619        |
| 24. Starch, Croups, Malt                                         | 39047                  | 43394          | 51352          | 57010                  | 55230         | 61518         |
| 25. White Sugar                                                  | 51006                  | 86997          | 163916         | 28128                  | 19130         | 20473         |
| 26. Molasses                                                     | 26782                  | 22233          | 13556          | 9                      | 32            | 32            |
| 27. Confectionery                                                | 232466                 | 239708         | 335505         | 134218                 | 130572        | 164894        |
| 28. Fruit Products                                               | 498222                 | 559009         | 528559         | 135026                 | 130628        | 151747        |

|                                    |                |                |                |                |                |                |
|------------------------------------|----------------|----------------|----------------|----------------|----------------|----------------|
| 29. Vegetable Products             | 296835         | 304479         | 334140         | 74927          | 69146          | 82316          |
| 30. Other Crop Products            | 386121         | 442878         | 603864         | 400895         | 385737         | 468292         |
| <b>Total II (15-30)</b>            | <b>1953608</b> | <b>2199069</b> | <b>2699168</b> | <b>2314211</b> | <b>2191879</b> | <b>2588024</b> |
| <b>III. Other Products (31-35)</b> |                |                |                |                |                |                |
| 31. Coffee, Cocoa, Tea             | 124775         | 126542         | 132381         | 386108         | 427998         | 431282         |
| 32. Tobacco & Preparations         | 51770          | 73271          | 128283         | 206396         | 59581          | 135130         |
| 33. Spirits & Alcoholic Drinks     | 61327          | 61046          | 82986          | 110342         | 113999         | 137454         |
| 34. Water & Non-Alcoholic Drinks   | 22868          | 24753          | 72419          | 13803          | 19523          | 28921          |
| 35. Other                          | 66301          | 63781          | 96681          | 87414          | 83319          | 95572          |
| <b>Total III (31-35)</b>           | <b>327041</b>  | <b>349393</b>  | <b>512749</b>  | <b>804063</b>  | <b>704421</b>  | <b>828357</b>  |
| <b>Total (I+II+III)</b>            | <b>3465123</b> | <b>4003205</b> | <b>5223018</b> | <b>3801873</b> | <b>3556686</b> | <b>4369858</b> |

## Polish Agri-Food Trade with the U.S. - Quantity

| Group/Commodities                    | Export (Tons) |              |              | Import (Tons) |              |              |
|--------------------------------------|---------------|--------------|--------------|---------------|--------------|--------------|
|                                      | 2002          | 2003         | 2004         | 2002          | 2003         | 2004         |
| <b>I. Animal Products</b>            |               |              |              |               |              |              |
| <b>A. Live Animals (1-4)</b>         |               |              |              |               |              |              |
| 1. Horses                            | 2             | 6            | 8            | 3             | 1            | 2            |
| 2. Cattle                            |               |              |              | 11            |              |              |
| 3. Sheep                             |               |              |              |               |              |              |
| 4. Other                             | 3             | 1            | 3            | 1             | 3            | 6            |
| <b>B. Processed Products (5-11)</b>  |               |              |              |               |              |              |
| 5. Red Meat & Offals                 | 46            | 59           | 40           | 4248          | 8440         | 1213         |
| 6. Poultry Meat & Offals             |               |              | 25           | 2376          | 732          | 227          |
| 7. Meat Products                     | 7748          | 6871         | 7628         |               | 5            |              |
| 8. Animal Fats                       | 2             |              | 1            | 12            | 44           | 21           |
| 9. Milk, Cream, & Ice-Cream          | 353           | 661          | 276          | 60            | 20           |              |
| 10. Butter                           | 190           | 112          | 1241         |               |              | 78           |
| 11. Cheeses & Curds                  | 3685          | 4748         | 2758         |               | 3            | 1            |
| 12. Other Animal Products            | 300           | 374          | 410          | 8806          | 6047         | 2894         |
| <b>C. Other (13-14)</b>              |               |              |              |               |              |              |
| 13. Fish & Crustaceans               | 1684          | 1060         | 2064         | 2316          | 4057         | 9497         |
| 14. Fish Products                    | 2887          | 1952         | 2795         |               | 1            | 15           |
| <b>Total I (1-14)</b>                | <b>16900</b>  | <b>15844</b> | <b>17249</b> | <b>17833</b>  | <b>19353</b> | <b>13954</b> |
| <b>II. Crop Products</b>             |               |              |              |               |              |              |
| <b>D. Raw Materials</b>              |               |              |              |               |              |              |
| 15. Cereals                          | 26            | 38           | 54           | 5622          | 1914         | 4947         |
| 16. Oilseeds                         | 10            | 13           | 15           | 5628          | 1673         | 2236         |
| 17. Fresh Potatoes                   |               |              |              |               |              |              |
| 18. Fresh Fruits                     | 14            | 4            | 2            | 9178          | 8198         | 9478         |
| 19. Fresh Vegetables                 | 145           | 294          | 240          | 147           | 64           | 69           |
| 20. Flowers                          | 33            | 12           | 66           | 205           | 140          | 92           |
| <b>E. Processed Products (21-29)</b> |               |              |              |               |              |              |
| 21. Vegetable Fats & Oils            | 262           | 404          | 491          | 6498          | 2394         | 372          |
| 22. Cereal Milling Products          | 659           | 1014         | 1469         | 23            | 22           | 1            |
| 23. Cakes & Meals                    |               | 5            |              | 104           | 188          |              |

|                                  |               |               |               |              |              |              |
|----------------------------------|---------------|---------------|---------------|--------------|--------------|--------------|
| 24. Starch, Croups, Malt         | 13482         | 21289         | 20939         | 520          | 67           | 327          |
| 25. White Sugar                  | 105           | 165           | 40            | 1            | 21           | 24           |
| 26. Molasses                     | 26578         | 37049         | 23603         |              | 4            |              |
| 27. Confectionery                | 3669          | 3350          | 3221          | 933          | 1416         | 351          |
| 28. Fruit Products               | 18290         | 12911         | 9687          | 2142         | 2198         | 3977         |
| 29. Vegetable Products           | 6776          | 10903         | 11736         | 603          | 408          | 181          |
| 30. Other Crop Products          | 3892          | 4887          | 6719          | 2155         | 1422         | 2139         |
| <b>Total II (15-30)</b>          | <b>73941</b>  | <b>92338</b>  | <b>78282</b>  | <b>33759</b> | <b>20129</b> | <b>24194</b> |
| <b>III. Other Products</b>       |               |               |               |              |              |              |
| 31. Coffee, Cocoa, Tea           | 769           | 545           | 627           | 689          | 599          | 498          |
| 32. Tobacco & Preparations       | 48            |               |               | 3504         | 1593         | 2933         |
| 33. Spirits & Alcoholic Drinks   | 15733         | 19626         | 20458         | 1755         | 2042         | 2517         |
| 34. Water & Non-Alcoholic Drinks | 10083         | 13654         | 18126         | 65           | 81           | 114          |
| 35. Other                        | 2             | 50            |               | 3032         | 2869         | 2761         |
| <b>Total III (31-35)</b>         | <b>26635</b>  | <b>33875</b>  | <b>39211</b>  | <b>9045</b>  | <b>7184</b>  | <b>8823</b>  |
| <b>Total (I+II+III)</b>          | <b>117476</b> | <b>142057</b> | <b>134742</b> | <b>60637</b> | <b>46666</b> | <b>46971</b> |

| Polish Agri-Food Trade with the U.S. – Value (EUR 1 = USD 1.24) |                        |              |              |                        |              |              |
|-----------------------------------------------------------------|------------------------|--------------|--------------|------------------------|--------------|--------------|
| Group / Commodities                                             | Export (EUR thousands) |              |              | Import (EUR thousands) |              |              |
|                                                                 | 2002                   | 2003         | 2004         | 2002                   | 2003         | 2004         |
| <b>I. Animal Products</b>                                       |                        |              |              |                        |              |              |
| <b>A. Live Animals (1-4)</b>                                    | 714                    | 520          | 631          | 117                    | 331          | 138          |
| 1. Horses                                                       | 690                    | 507          | 596          | 17                     | 189          | 14           |
| 2. Cattle                                                       |                        |              |              | 25                     |              |              |
| 3. Sheep                                                        |                        |              |              |                        |              |              |
| 4. Other                                                        | 24                     | 13           | 35           | 75                     | 141          | 124          |
| <b>B. Processed Products (5-11)</b>                             | 45934                  | 42352        | 41304        | 9891                   | 17433        | 3260         |
| 5. Red Meat & Offals                                            | 70                     | 45           | 32           | 6723                   | 15525        | 2032         |
| 6. Poultry Meat & Offals                                        |                        |              | 18           | 2374                   | 732          | 237          |
| 7. Meat Products                                                | 33646                  | 28910        | 30456        | 1                      | 5            |              |
| 8. Animal Fats                                                  | 6                      | 1            | 3            | 731                    | 1139         | 873          |
| 9. Milk, Cream, & Ice-Cream                                     | 541                    | 877          | 430          | 61                     | 23           |              |
| 10. Butter                                                      | 307                    | 268          | 1807         |                        |              | 115          |
| 11. Cheeses & Curds                                             | 11364                  | 12250        | 8558         | 1                      | 9            | 3            |
| 12. Other Animal Products                                       | 3077                   | 2758         | 8876         | 7951                   | 4598         | 2424         |
| <b>C. Other (13-14)</b>                                         | 15950                  | 9067         | 15166        | 4816                   | 6003         | 13966        |
| 13. Fish & Crustaceans                                          | 7240                   | 3791         | 8359         | 4804                   | 6000         | 13940        |
| 14. Fish Products                                               | 8710                   | 5276         | 6806         | 12                     | 3            | 25           |
| <b>Total I (1-14)</b>                                           | <b>65675</b>           | <b>54696</b> | <b>60477</b> | <b>22775</b>           | <b>28364</b> | <b>19788</b> |
| <b>II. Crop Products</b>                                        |                        |              |              |                        |              |              |
| <b>D. Raw Materials</b>                                         | 868                    | 770          | 924          | 16346                  | 11376        | 16050        |
| 15. Cereals                                                     | 19                     | 30           | 45           | 2416                   | 1088         | 2168         |
| 16. Oilseeds                                                    | 23                     | 22           | 23           | 4870                   | 1197         | 1543         |
| 17. Fresh Potatoes                                              |                        |              |              |                        | 1            |              |
| 18. Fresh Fruits                                                | 18                     | 8            | 5            | 8170                   | 8629         | 11888        |
| 19. Fresh Vegetables                                            | 108                    | 213          | 225          | 143                    | 62           | 60           |

|                                      |        |        |        |        |       |       |
|--------------------------------------|--------|--------|--------|--------|-------|-------|
| 20. Flowers                          | 699    | 497    | 625    | 747    | 400   | 392   |
| <b>E. Processed Products (21-29)</b> | 47872  | 49751  | 43895  | 9838   | 8262  | 7656  |
| 21. Vegetable Fats & Oils            | 376    | 508    | 598    | 3544   | 1586  | 750   |
| 22. Cereal Milling Products          | 403    | 626    | 856    | 17     | 19    | 18    |
| 23. Cakes & Meals                    |        | 7      |        | 127    | 73    |       |
| 24. Starch, Croups, Malt             | 11102  | 16710  | 14167  | 350    | 66    | 200   |
| 25. White Sugar                      | 42     | 53     | 17     | 5      | 20    | 27    |
| 26. Molasses                         | 2596   | 3031   | 1439   |        | 1     |       |
| 27. Confectionery                    | 10992  | 9810   | 9723   | 1204   | 2818  | 488   |
| 28. Fruit Products                   | 16080  | 10819  | 8451   | 3877   | 3063  | 5762  |
| 29. Vegetable Products               | 6280   | 8186   | 8644   | 714    | 615   | 408   |
| 30. Other Crop Products              | 9579   | 10878  | 14336  | 23066  | 18993 | 22381 |
| <b>Total II (15-30)</b>              | 58319  | 61399  | 59154  | 49250  | 38631 | 46087 |
| <b>III. Other Products (31-35)</b>   |        |        |        |        |       |       |
| 31. Coffee, Cocoa, Tea               | 1855   | 1425   | 2030   | 897    | 666   | 606   |
| 32. Tobacco & Preparations           | 10     |        |        | 23650  | 4440  | 11567 |
| 33. Spirits & Alcoholic Drinks       | 30071  | 31068  | 35172  | 4462   | 4801  | 5694  |
| 34. Water & Non-Alcoholic Drinks     | 2511   | 3079   | 4081   | 191    | 188   | 374   |
| 35. Other                            | 13     | 28     |        | 3673   | 3918  | 3469  |
| <b>Total III (31-35)</b>             | 34460  | 35600  | 41283  | 32873  | 14013 | 21710 |
| <b>Total (I+II+III)</b>              | 158454 | 151695 | 160914 | 104898 | 81008 | 87585 |

## Polish Agri-Food Trade with the EU-25 - Quantity

| Group/Commodities                   | Export (Tons) |       |        | Import (Tons) |       |        |
|-------------------------------------|---------------|-------|--------|---------------|-------|--------|
|                                     | 2001          | 2002  | 2003   | 2001          | 2002  | 2003   |
| <b>I. Animal Products</b>           |               |       |        |               |       |        |
| <b>A. Live Animals (1-4)</b>        |               |       |        |               |       |        |
| 1. Horses                           | 16337         | 21270 | 22599  | 768           | 615   | 700    |
| 2. Cattle                           | 33120         | 39971 | 57181  | 5067          | 4141  | 7443   |
| 3. Sheep                            | 2671          | 2639  | 2234   | 1             | 29    | 203    |
| 4. Other                            | 666           | 2001  | 3189   | 2264          | 1516  | 15504  |
| <b>B. Processed Products (5-11)</b> |               |       |        |               |       |        |
| 5. Red Meat & Offals                | 34123         | 62803 | 117289 | 46225         | 47262 | 115360 |
| 6. Poultry Meat & Offals            | 36225         | 65620 | 84046  | 22902         | 18053 | 76328  |
| 7. Meat Products                    | 11179         | 16813 | 25787  | 5627          | 4001  | 3311   |
| 8. Animal Fats                      | 5880          | 4213  | 3205   | 12109         | 6297  | 26767  |
| 9. Milk, Cream, & Ice-Cream         | 45077         | 44171 | 170408 | 20466         | 16242 | 21105  |
| 10. Butter                          | 6990          | 9025  | 22993  | 3992          | 4170  | 2418   |
| 11. Cheeses & Curds                 | 23073         | 28141 | 51693  | 4115          | 4485  | 7910   |
| 12. Other Animal Products           | 36217         | 55630 | 54319  | 61962         | 56936 | 52071  |
| <b>C. Other (13-14)</b>             |               |       |        |               |       |        |
| 13. Fish & Crustaceans              | 29066         | 36962 | 45301  | 41449         | 42261 | 70792  |
| 14. Fish Products                   | 36086         | 38382 | 71535  | 11979         | 12987 | 19775  |
| <b>Total I (1-14)</b>               | 65152         | 75344 | 116836 | 53428         | 55248 | 90567  |
| <b>II. Crop Products</b>            |               |       |        |               |       |        |

|                                      |         |         |         |         |         |         |
|--------------------------------------|---------|---------|---------|---------|---------|---------|
| <b>D. Raw Materials (15-20)</b>      |         |         |         |         |         |         |
| 15. Cereals                          | 150805  | 48429   | 126148  | 465765  | 361796  | 493349  |
| 16. Oilseeds                         | 14657   | 8329    | 225199  | 45061   | 50801   | 39927   |
| 17. Fresh Potatoes                   | 1614    | 11955   | 17781   | 64312   | 23885   | 34804   |
| 18. Fresh Fruits                     | 179015  | 186168  | 280410  | 560025  | 504980  | 590614  |
| 19. Fresh Vegetables                 | 196031  | 285881  | 333158  | 160983  | 157791  | 183623  |
| 20. Flowers                          | 34485   | 38638   | 38610   | 53137   | 73158   | 87119   |
| <b>E. Processed Products (21-29)</b> |         |         |         |         |         |         |
| 21. Vegetable Fats & Oils            | 23149   | 23052   | 54579   | 270747  | 255630  | 271239  |
| 22. Cereal Milling Products          | 6591    | 8720    | 12188   | 202492  | 230627  | 226962  |
| 23. Cakes & Meals                    | 201795  | 157463  | 133779  | 1249872 | 897812  | 537949  |
| 24. Starch, Croups, Malt             | 108430  | 113103  | 90378   | 176279  | 193067  | 216964  |
| 25. White Sugar                      | 45463   | 106337  | 208236  | 75930   | 74243   | 42003   |
| 26. Molasses                         | 222072  | 204604  | 165127  | 5       | 10      | 34      |
| 27. Confectionery                    | 53867   | 60920   | 105316  | 65500   | 63330   | 102811  |
| 28. Fruit Products                   | 483872  | 497134  | 535034  | 55824   | 47268   | 55974   |
| 29. Vegetable Products               | 324130  | 370791  | 397417  | 67347   | 72880   | 87318   |
| 30. Other Crop Products              | 138965  | 171091  | 220847  | 153514  | 144927  | 169360  |
| <b>Total II (15-30)</b>              | 2184941 | 2292615 | 2944207 | 3666793 | 3152205 | 3140050 |
| <b>III. Other Products (31-35)</b>   |         |         |         |         |         |         |
| 31. Coffee, Cocoa, Tea               | 29321   | 31756   | 33641   | 52231   | 61203   | 70839   |
| 32. Tobacco & Preparations           | 3948    | 5252    | 10953   | 8428    | 4889    | 11787   |
| 33. Spirits & Alcoholic Drinks       | 13029   | 14566   | 22422   | 104696  | 89200   | 60597   |
| 34. Water & Non-Alcoholic Drinks     | 90162   | 90870   | 82641   | 3605962 | 3484776 | 4315008 |
| 35. Other                            | 53895   | 47513   | 82259   | 92797   | 94918   | 117802  |
| <b>Total III (31-35)</b>             | 190355  | 189957  | 231916  | 3864114 | 3734986 | 4576033 |
| <b>Total (I+II+III)</b>              | 2440448 | 2557916 | 3292959 | 7584335 | 6942439 | 7806650 |

| <b>Polish Agri-Food Trade with the EU-25 – Value (EUR 1 = USD 1.24)</b> |                               |             |             |                               |             |             |
|-------------------------------------------------------------------------|-------------------------------|-------------|-------------|-------------------------------|-------------|-------------|
| <b>Group /Commodities</b>                                               | <b>Export (EUR thousands)</b> |             |             | <b>Import (EUR thousands)</b> |             |             |
|                                                                         | <b>2002</b>                   | <b>2003</b> | <b>2004</b> | <b>2002</b>                   | <b>2003</b> | <b>2004</b> |
| <b>I. Animal Products</b>                                               |                               |             |             |                               |             |             |
| <b>A. Live Animals (1-4)</b>                                            | 101385                        | 115886      | 169720      | 44206                         | 35837       | 66002       |
| 1. Horses                                                               | 32498                         | 36047       | 36780       | 1613                          | 2230        | 2252        |
| 2. Cattle                                                               | 59555                         | 67620       | 120325      | 10470                         | 8015        | 16932       |
| 3. Sheep                                                                | 5205                          | 5061        | 4583        | 2                             | 113         | 539         |
| 4. Other                                                                | 4128                          | 7158        | 8032        | 32122                         | 25479       | 46279       |
| <b>B. Processed Products (5-11)</b>                                     | 350204                        | 490280      | 926687      | 148225                        | 128782      | 293270      |
| 5. Red Meat & Offals                                                    | 87568                         | 112472      | 241         | 68982                         | 58589       | 153603      |
| 6. Poultry Meat & Offals                                                | 118507                        | 189116      | 214923      | 20485                         | 13607       | 52290       |
| 7. Meat Products                                                        | 34406                         | 54733       | 86391       | 10565                         | 8716        | 10774       |
| 8. Animal Fats                                                          | 1801                          | 1235        | 2187        | 8253                          | 6706        | 19382       |
| 9. Milk, Cream, & Ice-Cream                                             | 41657                         | 49923       | 191788      | 18283                         | 17515       | 23699       |
| 10. Butter                                                              | 13017                         | 18590       | 58429       | 6073                          | 7497        | 7145        |
| 11. Cheeses & Curds                                                     | 53249                         | 64212       | 131016      | 15583                         | 16153       | 26378       |
| 12. Other Animal Products                                               | 54296                         | 100295      | 91736       | 40988                         | 38494       | 56661       |

|                                      |         |         |         |         |         |         |
|--------------------------------------|---------|---------|---------|---------|---------|---------|
| <b>C. Other (13-14)</b>              | 201839  | 231299  | 313426  | 75739   | 72739   | 107986  |
| 13. Fish & Crustaceans               | 110667  | 140931  | 213025  | 51932   | 52207   | 80387   |
| 14. Fish Products                    | 91172   | 90368   | 100401  | 23392   | 20532   | 27598   |
| <b>Total I (1-14)</b>                | 707726  | 937761  | 1259857 | 308743  | 275853  | 523919  |
| <b>II. Crop Products</b>             |         |         |         |         |         |         |
| <b>D. Raw Materials (15-20)</b>      | 241759  | 269014  | 437818  | 598019  | 545768  | 648923  |
| 15. Cereals                          | 20260   | 6581    | 18380   | 86114   | 67660   | 117858  |
| 16. Oilseeds                         | 4100    | 2759    | 50336   | 21449   | 19739   | 21355   |
| 17. Fresh Potatoes                   | 134     | 924     | 1808    | 13860   | 5855    | 9094    |
| 18. Fresh Fruits                     | 64240   | 80860   | 121809  | 290285  | 287412  | 292825  |
| 19. Fresh Vegetables                 | 112228  | 155146  | 193874  | 98412   | 78857   | 101329  |
| 20. Flowers                          | 40788   | 49743   | 51611   | 87899   | 86245   | 106462  |
| <b>E. Processed Products (21-29)</b> | 867431  | 956286  | 1123526 | 778394  | 672391  | 709750  |
| 21. Vegetable Fats & Oils            | 10868   | 13061   | 33486   | 161928  | 166105  | 184492  |
| 22. Cereal Milling Products          | 4003    | 6136    | 5632    | 28855   | 29975   | 46731   |
| 23. Cakes & Meals                    | 25094   | 19413   | 17061   | 283307  | 185684  | 125705  |
| 24. Starch, Croups, Malt             | 12419   | 11702   | 11785   | 54625   | 53443   | 60392   |
| 25. White Sugar                      | 12347   | 23232   | 120929  | 24704   | 18764   | 19581   |
| 26. Molasses                         | 23869   | 15079   | 12117   | 9       | 30      | 24      |
| 27. Confectionery                    | 138119  | 150247  | 232768  | 124206  | 120229  | 154377  |
| 28. Fruit Products                   | 422452  | 492323  | 456196  | 47436   | 45026   | 55180   |
| 29. Vegetable Products               | 218261  | 225094  | 233551  | 53324   | 53135   | 63269   |
| 30. Other Crop Products              | 238291  | 278634  | 402313  | 332732  | 324638  | 395714  |
| <b>Total II (15-30)</b>              | 1347473 | 1530934 | 1963656 | 1709145 | 1542797 | 1754388 |
| <b>III. Other Products (31-35)</b>   |         |         |         |         |         |         |
| 31. Coffee, Cocoa, Tea               | 73586   | 77080   | 80380   | 156364  | 184305  | 199391  |
| 32. Tobacco & Preparations           | 13595   | 14830   | 53493   | 29831   | 16942   | 44469   |
| 33. Spirits & Alcoholic Drinks       | 17310   | 17336   | 31628   | 94338   | 97751   | 118073  |
| 34. Water & Non-Alcoholic Drinks     | 18410   | 19322   | 61858   | 13252   | 18303   | 26488   |
| 35. Other                            | 49516   | 39899   | 66608   | 79478   | 74919   | 87454   |
| <b>Total III (31-35)</b>             | 172417  | 168467  | 293967  | 373263  | 392220  | 475875  |
| <b>Total (I+II+III)</b>              | 2227616 | 2637162 | 3517480 | 2391151 | 2210870 | 2754182 |