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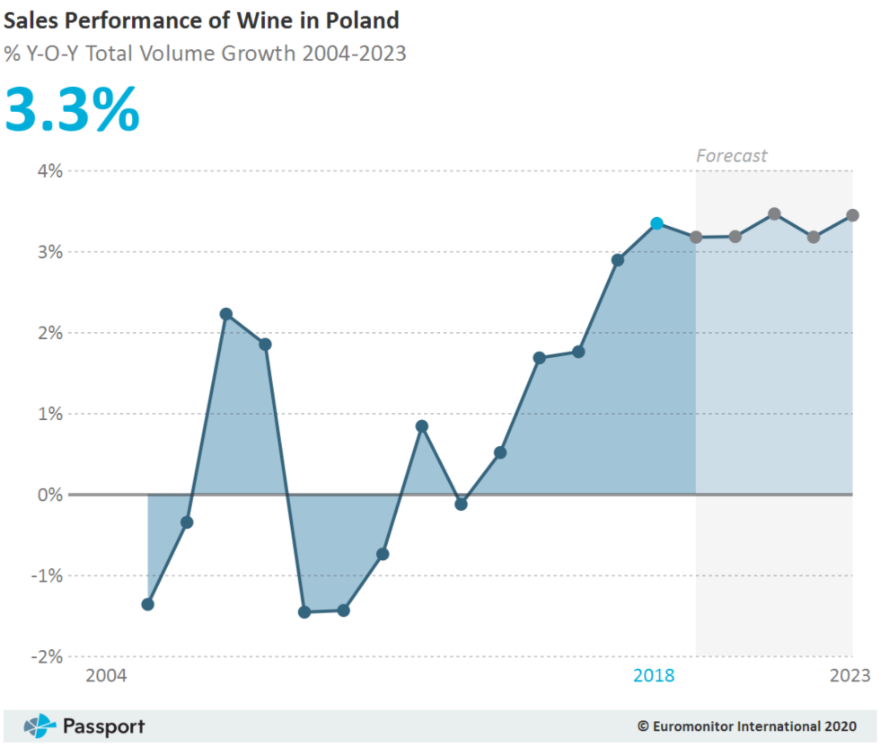
Report Highlights:

Poland's wine market, despite current market constraints resulting from the 2020 COVID-19 pandemic, is expected to continue growing over the next five years. According to Polish Customs data, 2019 U.S. wine imports exceeded $34 million, accounting for over 10 percent of Poland’s total wine market. As Polish consumer demand continues to grow, wine will increasingly displace beer and distilled spirits among Polish alcoholic beverage consumers.

I. Introduction

Polish wine consumption has steadily increased in recent years due to higher disposable incomes, easier access to higher quality products, and evolving consumer trends. Because Poland is a European Union (EU) Member State, Polish wine importers and distributors enjoy relatively easy access to wines available within the common market, including the many U.S. wines which generally enter the EU through Western European ports of entry.

Graph 1: Polish Wine Sales 2004-2023*

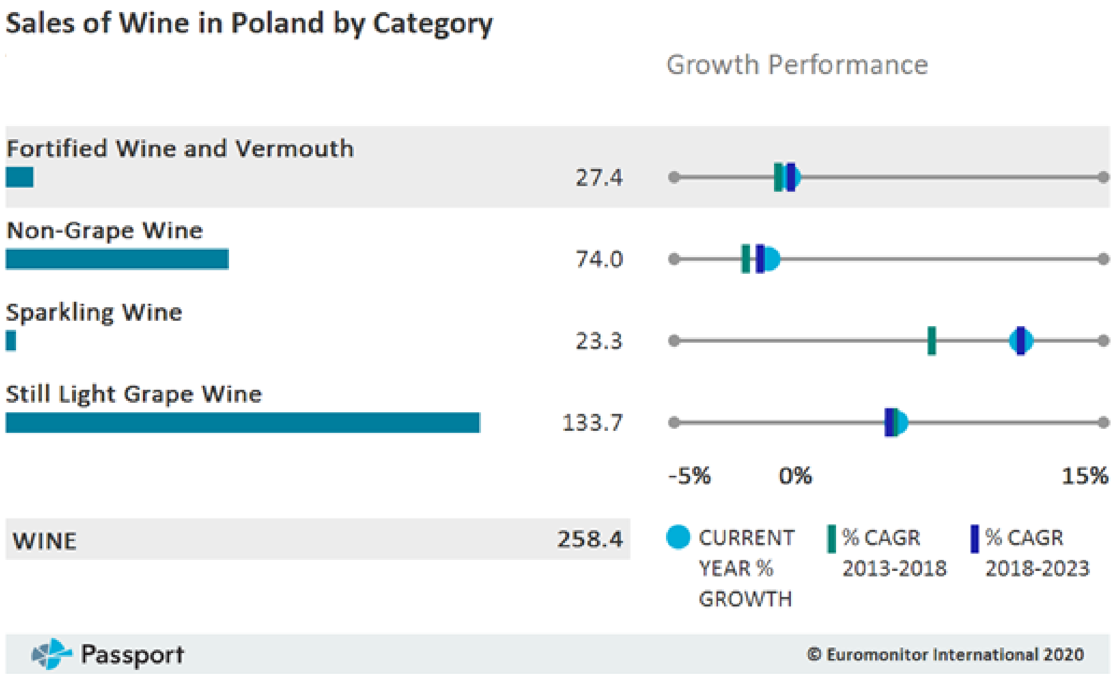


Source: Euromonitor International

*Actual 2004-2018 – projected 2019-2023 - pre Covid-19 pandemic estimates

Poles generally prefer red wines followed by sweeter whites, although consumer preferences are slowly trending away from sweet wines toward drier white varietals. Sparkling wines like prosecco and cava are growing in popularity, followed by still rosés, and champagne. The Polish wine market is dominated by low-cost table wines, but higher quality wines have made inroads among many consumers. Increasingly serious marketing efforts, on-line wine sellers, and a proliferation of wine shops, particularly in leading shopping centers, have all contributed toward popularizing higher-end wines, including U.S. imports.

Graph 2: 2018 Polish Wine by Category (million Liters)



Source: Euromonitor International

Although wine consumption is less seasonal than it was in the past, some seasonal trends persist. For example, sparkling wines, including champagne, are particularly popular during Christmas, New Years, Carnival in February, and during first communion season in May.

II. Market Sector Opportunities and Threats

Advantages	Challenges
Wine consumption will continue to increase in the future as will its market share in the alcoholic beverage category.	EU subsidies and close geographic proximity give EU winemakers a comparative advantage in accessing the low cost dominated Polish wine market.
Polish consumers are aware of country of origin and perceive imports as higher quality.	It is illegal to advertise alcoholic beverages (except beer) in general press and billboards.
Polish consumers are increasingly traveled and open to trying more New World wines.	The Polish consumer is very price oriented concerning wine consumption and may not retain brand (country) loyalty if wines of similar quality are differently priced.

Entry Strategy

Most large importers distribute products through their own wholesale operations located throughout Poland. Besides utilizing their own distribution channels, importers also sell their products to independent wholesale firms, which in turn distribute wine to hypermarkets, specialty shops, and small retail stores located in larger cities. Largest retail store chains import wines for their own distribution or obtain it from a local importer or wholesaler.

Each year FAS European Union and FAS Warsaw prepare Exporter Guides, which provide critical tips for market entry. See the Exporter Guide Europe and the Exporter Guide Poland reports for more information. Other important reports to consult for specific regulatory and standards information are Food and Agricultural Import Regulations and Standards EU-27and the Food and Agricultural Import Regulations and Standards Poland reports.

Market Size, Structure, Trends

In 2019, total Polish wine imports were valued at $360 million. 2019 U.S. wine imports were valued at $34 million, a $10 million decrease from $44 million in 2018. Post estimates that this decrease resulted from more limited available supplies due to lower 2019 grape crop in California. U.S. wines are generally not shipped directly to Poland, but arrive through western EU intermediaries like Germany, where they arrive bottled or in barrels to be bottled. According to Polish Customs data, top 2019 wine imports, based on country of origin import data, came from Italy, Germany, France and the United States.

Table 1: Poland's (Customs) Imports of Wine (HS 2204)

Commodity: 2204, Wine Of Fresh Grapes, Including Fortified Wines; Grape Must (Having An Alcoholic Strength By Volume Exceeding 0.5% Vol.) Nesoi								
Calendar Year: 2015-2019 and January-January: 2019, 2020								
Partner	Calendar Year (Value: 000 USD)					January-January		
	2015	2016	2017	2018	2019	2019	2020	%Δ 2020/19
World	245986	275228	317318	354186	360524	27971	28372	1.43
Italy	43265	51318	61735	76808	85526	4511	5616	24.50
Germany	30021	23302	37995	42839	50450	6841	4014	-41.33
France	30838	32420	33929	37776	41123	2050	2487	21.32
United States	**32662**	**39958**	**42243**	**44189**	**34415**	**2423**	**3126**	**29**
Spain	23144	26949	34709	35484	32713	2433	2519	3.52
Portugal	17136	22013	19894	23623	22623	2198	2654	20.72
Chile	16330	18167	18247	19146	21193	2455	2196	-10.56
Bulgaria	14029	15822	16293	15935	12329	943	827	-12.30
Moldova	7650	9205	9590	10416	10627	583	893	53.05

Georgia	4031	4754	6197	7540	9584	742	978	31.85
Australia	4556	4398	5928	6087	7209	578	648	12.23
Hungary	4585	7119	7567	8081	7021	283	279	-1.32
New Zealand	2100	2511	2913	3701	4977	357	357	-0.05
United Kingdom	3354	3960	4887	6305	4246	426	417	-2.27
Argentina	2776	2960	2536	2575	3236	194	189	-2.66
South Africa	2507	2757	2964	3469	3213	241	286	18.70
Israel	921	1219	1294	1301	1809	205	206	0.53
Romania	654	336	155	1553	1173	133	116	-12.63
North Macedonia	223	359	587	702	906	64	63	-1.77
Netherlands	327	792	545	625	742	17	34	98.43
Sweden	630	655	665	737	707	22	41	87.20
Greece	1309	726	966	833	578	100	116	15.86
Austria	316	322	534	590	554	11	48	347.40
Denmark	2	176	300	690	521	67	12	-82.05
Lithuania	18	21	46	298	500	8	45	450.08
Slovenia	72	152	217	503	490	32	55	74.33
Croatia	4	669	499	317	403	0	25	0
Belgium	23	687	441	465	370	0	4	989.11
Ukraine	63	167	155	309	301	4	8	99.13
Uruguay	106	153	261	244	181	11	0	-100
Armenia	23	27	62	35	141	0	7	0
Czech Republic	1516	897	2232	176	137	9	10	11.03

Source: Polish Customs Office Data published by Trade Data Monitor

Table 2: Total Wine Imports (HS 2204): By HS Code Type (Value: 000 USD)

HS Code	Description	2017	2018	2019
2204	Wine, grape	317318	354186	360524
2204.21	Wine, grape, less than 2 Liters	263316	296475	291265
2204.10	Sparkling Wine, grape	38489	41545	51882
2204.29	Wine, grapes, greater than 2 Liters	13851	13743	13960

Source: Polish Customs Office Data published by Trade Data Monitor

Table 3: Total U.S. Wine Imports (HS 2204): By HS Code Type (Value: 000 USD)

HS Code	Description	2017	2018	2019
2204	Wine, grape	42243	44189	34415
2204.21	Wine, grape, less than 2 Liters	40985	43140	32828
2204.10	Sparkling Wine, grape	6	0	0
2204.29	Wine, grapes, greater than 2 Liters	1253	1050	1586

Source: Polish Customs Office Data published by Trade Data Monitor

Company Profiles

By some estimates, there are as many as 700 Polish wine importers. Beyond the leading top 50 companies, these importers tend to be small and informal operations and there is little reliable data exists for this market segment.

Market Promotion Constraints

While direct alcoholic beverage promotions in hypermarkets and specialty shops are prohibited, importers and wholesalers can actively promote their products in restaurants and hotels, at wine tastings, and through professional periodicals available through subscriptions.

Wine in Poland is commonly marketed through targeted trade events, where organizers work with sommeliers and selected audience. FAS Warsaw has conducted several successful examples of these outreach activities under our *Ameryka od Kuchni* program (for additional information on the program please contact agwarsaw@fas.usda.gov).

III. Costs & Prices

While most wine consumed in Poland are lower-cost, market share for higher end wines is growing. However, most households remain unwilling to spend more than $15 on a bottle of wine purchased from a hyper/supermarket for home consumption, and are more likely to spend in the $5 to $10 range.

Cost in USD	% of Market by Value
$0.00 - $9.00	45%
$9.01 - $15.00	30%
$15.01 - $30.00	15%
$30.01 +	10%

Source: FAS Warsaw Estimates

Retail prices for wine vary by varietal, region, country of origin, and perceived quality, which is correlated with the other price determining factors. Store formatting can also determine the retail price for a bottle of wine. Specialty wine stores offer customers more information about wines and often charge a premium over hyper/supermarkets. EU accession fomented substantially more interest among Polish consumers for wine, as easy travel to other Member States exposure more people to more wine, further spread through word of mouth, and increased consumer interest in nontraditional Polish foods. Wine has also gained popularity through international television and the popularity of cooking shows.

IV. Market Access

Tariffs
All wines which enter Poland are charged an excise tax. Prior to importing bottled wines, Polish importers must provide the U.S. suppliers with excise bandoliers, which need to be applied on all bottles prior to arrival and constitute partial payment of the excise tax. Products entering bonded storage facilities many be subject to other requirements.

Poland's value-added tax for wine products is 23 percent. Poland applies EU external duty rates, which can easily be checked at TARIC Database.

Post always recommends that U.S. wine shippers consult their Polish importers prior to product shipment about any new regulations or other specific requirements.

V. Key Contacts and Further Information

For additional information concerning market entry and a current importer list, U.S. exporters of wine can contact:

USDA/FAS Warsaw
U.S. Embassy Warsaw, Poland
Tel: (48-22) 504 2336
e-mail: Jolanta.Figurska@usda.fas.gov

Attachments:

No Attachments.