

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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Poland

Exporter Guide

Annual

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Report Highlights:

Poland is the largest market for food and beverages in Central and Eastern Europe. With its population of nearly 40 million people, it constitutes an attractive market for U.S. food and agricultural products. In 2016, Poland imported upwards of \$21 billion in food, agricultural, and fish and seafood products.

U.S. imports of these products accounted for \$463 million. Products from the United States with strong potential in Poland include tree nuts, fish and seafood products, dried fruits, processed and functional ingredients. The following report seeks to provide U.S. food and agriculture exporters with background information required to enter the Polish market.

Post:
Warsaw

SECTION I. MARKET SUMMARY

Poland is a modern European country with a population of nearly 40 million. It is a growing and increasingly attractive market for U.S. food and agricultural products. In 2016, total Polish food, agricultural, and fish imports were valued at \$21 billion, with U.S.-sourced imports accounting for \$463 million. Poland's 2017 real gross domestic product (GDP) growth is expected to be 4.6 percent, driven largely by increasing domestic demand. A slight slowdown in real GDP growth is expected in 2018, at 3.4 percent. Although some new government initiatives are likely to slow GDP growth, other Government of Poland (GOP) programs, like the Family Support Program, may result in higher disposable incomes.

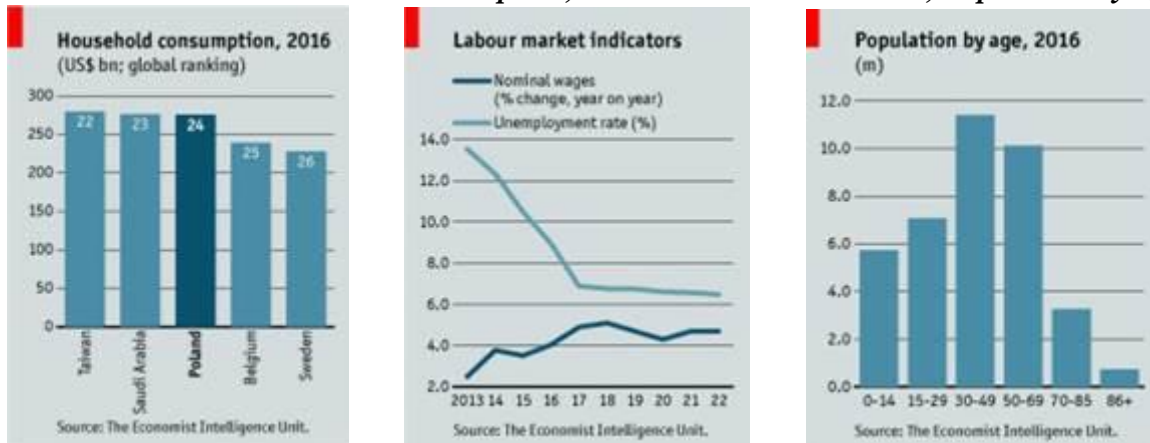
Table 1. Basic Economic Indicators

	2017 ^a	2018 ^b	2019 ^b	2020 ^b	2021 ^b	2022 ^b
Real GDP growth	4.6	3.4	3.3	2.6	3.7	3.4
Unemployment rate (av)	6.9	6.8	6.7	6.6	6.6	6.5
Consumer price inflation (av. National measure)	1.9	2.4	1.8	2.0	2.0	2.0
Exports of good fob (U.S. \$)	224.4	243.8	258.5	278.4	299.7	322.0
Imports of goods fob (U.S. \$)	223.8	245.9	265.8	287.0	311.2	332.8
Exchange rate Zł:U.S. \$ (av)	3.77	3.62	3.63	3.55	3.50	3.35

Source: Economist Intelligence Unit ^a estimates and ^b forecasts.

From 2011 through 2016, household disposable income increased by 10 percent. GOP initiatives such as Family 500+ Program provided millions of families with financial support. In addition, rising consumer spending should get an additional shot in the arm with increases in the minimum wage, which in early 2017 was PLN 2,000, up from PLN 1,850 in 2016.

Chart 1. Poland: Household Consumption, Labour Market Indicators, Population by age.



Source: The Economist Intelligence Unit

Table 2. Population Indicators

POLAND - Statistical Summary	2012	2013	2014	2015	2016
Birth rate (per '000)	10	9.6	9.7	9.6	9.5
Death rate (per '000)	10	10.1	9.8	10.3	10.3
No. of households ('000)	13,584.20	13,597.30	13,600.10	13,610.60	13,612.40
Urban population ('000)	23,385.80	23,336.30	23,257.90	23,216.40	23,166.40
Urban population (%)	60.7	60.6	60.4	60.3	60.3
Population aged 0-14 (%)	15.1	15	15	15	15
Population aged 15-64 (%)	71.1	70.7	70.3	69.8	69.1
Population aged 65+ (%)	13.8	14.2	14.7	15.3	15.9
Male population (%)	48.4	48.4	48.4	48.4	48.4
Female population (%)	51.6	51.6	51.6	51.6	51.6
Life expectancy male (years)	72.6	73	73.7	73.5	73.7
Life expectancy female (years)	81.1	81.2	81.7	81.6	81.7

Source: Euromonitor

Fish and seafood imports also continue to grow and reached \$2 billion in 2016, with \$64 million (3.2 percent market share) originating from the United States. Increased U.S. market share is due to larger sales of Alaskan pollock and sockeye salmon. Poland has one of the largest seafood processing industries in the EU.

Total 2016 imports of consumer-oriented food products were \$9 billion, with U.S. imports accounting for only 1.5 percent, at \$136 million. Polish consumers are becoming increasingly sophisticated and value more diverse food products. Imports are rising steadily to cater to such demands and compensate for Poland's seasonal production. Although EU Member States satisfy a large share of this demand, Poland also regularly sources products from non-EU member states including Ukraine, Argentina, and Turkey.

Table 3. Polish 2016 food, agricultural and fish imports (\$ billion)

Agricultural Total, total imports	21
Agricultural Total, imports from United States	0.4 (2.2%)
Intermediate Agricultural Products, total imports	4.5
Intermediate Agricultural Products, imports from United States	0.08 (1.8%)
Consumer-Oriented Agricultural Products, total imports	9
Consumer-Oriented Agricultural Products, imports from Unites States.	0.1 (1.5%)
Fish and Seafood Products, total imports	2
Fish and Seafood Products, imports from Unites States	0.6 (3.2%)

Source: Global Trade Atlas

Polish consumers tend to view the United States positively and U.S. products are considered to be of high quality. U.S. products imported into third-country EU Member States can be transshipped to Poland without additional tariffs or additional regulatory requirements, besides required labeling in the Polish language.

The food processing and catering industries in Poland are increasingly interested in sourcing processed baking ingredients such as tree nuts, fish and seafood products, dried fruit, flavors and aromas, sweeteners, food additives, food colors, and enzymes. The food processing industry is developing rapidly and is actively seeking high-quality inputs.

Table 4. Consumer expenditures and Annual Disposable income

Poland			
	2013	2014	2015
Consumer Expenditure (U.S. \$ million)	31	32	33
	8	7	4
Annual Gross Income (U.S. \$ million)	42	44	45
	8	3	5
Annual Disposable Income (U.S. \$ million)	32	33	34
	1	1	0

Source: Euromonitor 2015

Over 61 percent of Poland's population lives in urban areas and its median age is 38 years. Smaller family sizes are becoming more prevalent in Poland's 13 million households, with an average household size of three people. The typical Polish family eats together during meal times and tends to buy enough food stocks to last only a few days at a time. Over the past five years, per capita consumption of processed foods has remained stable. Per capital consumption of wine, animal fats, sugar, fruit and vegetables increased slightly in 2015.

Table 5. Poland - Consumption of selected consumer goods per capita

Consumer goods	Unit of	2013	2014	2015
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	measure			
Grain of cereals (processed products)	kg	10 8	10 8	10 6
Potatoes	kg	11 1	10 2	10 1
Vegetables	kg	10 3	10 2	10 4
Fruit	kg	46 .0	46 .0	47 .0
Meat and edible offal	kg	71 .0	67 .5	73 .6
of which meat:	kg	67 .3	63 .8	69 .5
beef	kg	1. 6	1. 5	1. 6
pork	kg	39 .2	35 .5	39 .1
poultry	kg	26 .1	26 .5	28 .2
Animal edible fats	kg	6. 0	5. 1	5. 5
Butter	kg	4. 1	4. 1	4. 2
Cow's milk	l	19 3	20 6	20 5
Hen eggs	units	14 0	14 8	15 5
Sugar	kg	42 .5	41 .9	44 .3
Vodkas, liqueurs, other alcoholic beverages in terms of 100%	l	3. 0	3. 6	3. 2
Wine and honey wine	l	5. 9	5. 8	6. 3
Beer from malt	l	99 .2	97 .7	98 .9

Source: Polish Statistical Office Data

During the last twenty years, the Polish food industry was largely restructured and privatized. Large multinational corporations like Coca-Cola, Nestle, Heineken, PepsiCo, Mars, Unilever, and Danone were active have been active since privatization began in the early 1990s. Multinationals now account for over 70 percent of confectionery production, over 50 percent of sugar market, own the largest beer breweries, meat processing plants, beverage bottling plants, and fruit and vegetable processing plants.

Table 6. Advantages and challenges for American products in the Polish market.

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Advantages	Challenges
Central Europe's most populous country with a domestic consumer market of nearly 40 million people.	U.S. products face high transportation costs as compared to many European competitors.
A strategic location within a dense, major international market offering re-export potential.	Complicated system of product registration in some cases delaying or even preventing products from entering the Polish market that are new to the EU.
Transshipment from other EU countries of import now possible with Poland's EU integration.	Poland's EU Accession puts United States products at a competitive disadvantage versus EU-28 duty-free EU internally traded products.
Skilled management pool offers good potential for finding trading partners and favorable conditions for establishing joint ventures.	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 United States products with good quality.	Food recalls in the EU have had a negative impact on Polish consumers' views of imported products, and GMO issues hamper imports of United States products.
Market niches exist in food ingredient categories - i.e. dried fruit, nuts, proteins, and other innovation, functional foods with health benefits and energy function.	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 – EXPORTER BUSINESS TIPS

The Polish market offers good opportunities for U.S. exporters of consumer-oriented agricultural products. U.S. suppliers of consumer-ready foods and beverages interested in developing their products in the Polish market should make sure that their products meet all Polish/EU food laws; including packaging and labeling requirements.

The best way to understand the Polish market is to visit and speak to importers and distributors to prepare the best entry strategy for your products. Trade shows organized within the EU regularly

feature a large U.S. presence. A listing of USDA/FAS endorsed shows can be located here: [Exporting Trade Shows link](#).

Personal contact is considered very important when conducting business in Poland, as most purchases are made after meeting an exporter or their representative in person. English is increasingly common as the language of commerce, but it is important to check in advance to see if translation services may be necessary. It is customary for business people to shake hands upon meeting.

Poland is a rather formal and hierarchical culture. As a result first names are rarely used initially in the business context. Address people with Pan (Mr.) and Pani (Mrs.) followed by their surname. A relationship may warm up to the degree where first names can be used but the Polish party signals that this is the case. Business cards are the norm and are generally given to each person at a meeting; therefore U.S. visitors should bring plenty of business cards to a meeting, although cards printed in Polish are not necessary. Standard business attire is recommended.

Technical regulations including documentation, sanitary and phytosanitary requirements, and labeling have changed since Poland's EU-28 accession when Poland amended most of its import requirements to conform to EU regulations. For detailed information on product import certificates please refer to the EU 28 Food and Agricultural Regulations and Standards (FAIRS) Report available via [*www.fas.usda.gov*](http://www.fas.usda.gov) – *Data and Analysis link* – *GAIN Reports Category*.

For details on Poland specific regulations, such as labeling, refer to Poland's Food and Agricultural Regulations and Standards (FAIRS) Report available via [*www.fas.usda.gov*](http://www.fas.usda.gov) – *Data and Analysis link* – *GAIN Reports Category*.

To determine current tariffs and other measures applied to imports into Poland and the EU in general, please see the TARIC, the [Online Customs Tariff Database](#)

SECTION III – MARKET SECTOR STRUCTURE AND TRENDS

Wholesale Sector

Poland's wholesale market structure has five categories: national chains, regional chains, regional wholesalers, local wholesalers, and buyer groups (consisting of regional chains and regional wholesalers). National chains are the least numerous and operate several branches throughout Poland with central management. Buyer groups operate in several market segments and are increasing their integration with specific retailers.

Regional chains have recently grown through consolidation and cover specific areas, usually several provinces and supply mainly retailers. Regional wholesalers have a strong presence in local markets and offer a wide range of products and at times a better service than companies operating on nationwide scale. However, local wholesalers are feeling the pressure of larger firms that now primarily concentrate on cash-and-carry operations.

In Poland, the cash-and-carry format has gained popularity quickly, as small, traditional retailers (of which there are many) appreciate the wide selection of products sold at competitive prices. Indeed,

most of the major chains in the cash and carry channel target small, traditional retailers, HORECA outlets, and institutions. Consolidation of the market is likely to increase during coming years, but new entrants can also be expected. Jeronimo Martins Dystrybucja SA, the owner of the ubiquitous Biedronka discount supermarket chain, is considering launching a cash-and-carry outlet line. Major players are likely to strengthen their positions, as sales are predicted to rise due to the growing number of outlets. The main companies operating in the cash and carry market are: Makro Cash and Carry Polska SA, Selgros Cash & Carry Sp zoo and Eurocash SA.

Retail Sector

The distribution system for consumer ready food products, as with all other branches of the Polish economy, is still undergoing a rapid transformation and remains one of the most dynamic and fastest growing areas of the Polish economy. The retail sector is much diversified. It ranges from small family-operated stores, through medium-sized stores to large distribution centers which are easily comparable with those found in Western Europe and the United States. As Polish consumer income grows, Poles are becoming more fastidious buyers, which force retailers to pay more attention to issues such as quality of product and customer service, the availability of additional services as well as store design, to make shopping more pleasant and convenient.

Foreign investors are attracted to the retail sector. The vast majority of hypermarkets are foreign owned, with traditional small-scale and predominantly Polish-owned shops facing steadily decreasing sales. There are approximately 31 shops per 10,000 inhabitants. Large retail chains are projected to gain control of as much as 70 percent of the Polish market within the next five years. The largest retail chains in Poland are: Biedronka Jeronimo Martins Dystrybucja S.A., Tesco Polska Sp.z.o.o., Carrefour Polska Sp.z.o.o., Auchan Polska Sp.z.o.o., Lidl Polska Sp.z.o.o., and Netto Polska Sp.z.o.o. However, market analysis also shows that almost 40 percent of confectionary retail sales occur via distribution by small grocery retailers. The role of private labeling is increasing in Poland as consumers seek value. Their confidence in private label products is growing due to quality improvements made by retailers. Discounters remain the main distribution channel of private label goods.

Industry reports indicate that since 2014, e-commerce has developed at a pace of over 45 percent annually. Consumers appreciate the convenience of shopping, lower prices, and home delivery. The expansion of various internet retailers and increasing number of internet users (in 2014 the share of households equipped with internet access was 66 percent) translates to growing opportunities in this market channel. In 2016, e-retail in Poland increased by 30 percent, and was among the fastest growing sectors in Europe. Online sales constitute about 4 percent of overall retail revenue. Mostly young people shop on-line now. Older consumers are the brake on more rapid expansion in e-commerce as they remain wary of this form of shopping. However, with greater familiarity with the internet and the competitiveness of products offered on-line versus traditional outlets, future prospects appear bright. What is interesting, 44 percent of villages' habitants use the internet for shopping. That is the second biggest group, just after E-consumers from big cities (46 percent). Internet retail sales rose by 16.5 percent in 2014 and are expected to increase in the future. The new trend of using smart phones for shopping can be observed in Poland. It is expected that mobiles in Poland will play very important role in shopping: informing about products, discounts, giving possibility to compare prices and pay. The discount supermarket chain Biedronka has already introduced the system of payments with mobile phones.

As of September 1, 2016, the GOP introduced a new law obligating retailers operating on the Polish market to pay an additional tax on retail sales. The new tax imposed on retailers had two application rates: 0.8 percent in case of revenue ranging from 17 million Polish Zloty (U.S. \$4.4 million) per month to 170 million Polish Zloty (\$44 million) per month and 1.4 percent when sales exceed 170 million Polish Zloty (\$44 million) per month. Sales under 17 million Polish Zloty (\$4.4 million) per month were tax-free. Revenue taken into account when calculating the new tax excluded Value Added Tax and sales between businesses. On September 19, 2016, the European Commission opened an in-depth investigation into Poland's tax on the retail sector requiring Poland to suspend the application of the tax until the Commission concludes its assessment. In reply, the GOP suspended the implementation of the tax on September 20, 2016 and vowed to press on with some form of a new tax against big supermarkets. On October 14, 2016, a Polish Ministry of Finance spokesman postponed attempts to introduce retail tax until January 1, 2018. For additional information on the Polish retail sector please refer to the FAS/Warsaw GAIN report available via www.fas.usda.gov – *Data and Analysis* link – *GAIN Reports Category*.

Food Processing Sector

The sector is varied with both domestic and international companies represented on the market. There are also a number of small companies operating in the fruit, vegetable, meat processing, and baking sectors located throughout Poland. The most important sectors of the food processing industry are meat, dairy, and alcohol, followed by confectionery, food concentrates, sugar, fruits and vegetables, juices and non-alcoholic beverage production. The proportion of food industry products considered to be value-added increases constantly.

The confectionary sector can be viewed as an example of the trends associated with the modernization of the Polish market. It has been reported that almost 42 percent per cent of Poles consume at least one chocolate bar a day, and at least 36 percent have one or more wafer bars. Chocolate confectionary is expected to grow at constant value of two percent and it will reach over \$2.0 billion in 2017. More Poles, particularly affluent ones, are reaching for sophisticated products that offer additional value and excellent quality. Sugar confectionery fared well even during times of economic slowdown as such products are seen as affordable indulgences. The demand for chocolate may be hampered by trends for healthy lifestyles and reducing sugar consumption. This may result in increase of consumer interest in dark chocolate and lighter versions of chocolate products.

Poland ranks among the most attractive business locations within the European Union. Poland attracts companies and foreign investors because of its good macroeconomic climate, a developed financial sector, availability of well-educated, productive and wage competitive labor force. Some potential investment boundaries in attracting foreign direct investments include heavy administrative burdens.

Foreign investments have played a significant role in developing and modernizing the Polish food processing industry. The largest global players such as PepsiCo, Nestle, Mondelez, Coca-Cola, Danone and Mars have their plants in Poland. Within period of 2004-2014 polish Investment Agency reported foreign investments within food processing sector valued at \$1.7 billion. American companies are the largest foreign investors in this sector.

Foreign companies which have invested in the Polish food processing sector include:

- Coca Cola Beverages
- Pepsico: production of beverages, snacks, confectionery products

- Smithfield: meat processing
- Mars Incorporated (Master Foods): production of confectionery products/animal feeds
- McDonalds, Burger King: quick service
- Cargill Inc: production of animal feeds
- H.J. Heinz Company: Processing and preserving of fruit and vegetables
- Wrigley: confectionery

For additional information on Poland’s processing sector please refer to FAS/Warsaw GAIN report available via www.fas.usda.gov – *Data and Analysis* link – *GAIN Reports Category*.

Hotel, Restaurant, & Catering (HORECA) Sectors

According to a survey conducted by MAKRO Cash & Carry in 2016, almost 77 percent of Poles do not dine out. This tendency is slowly changing in urban areas where employees work longer hours and eating out has become more common. Polish, Italian, Chinese, Mexican, and Indian restaurants can be found in almost every city. American chains have also started to appear in larger cities like Warsaw. These chains include T.G.I. Friday’s, Champions, McDonald’s, Pizza Hut, and KFC. In addition, many of the international hotel chains such as Marriott, Radisson, Sheraton and Hilton are present in Polish cities. Many local entrepreneurs have invested heavily in this sector.

Despite the fact that Poles still prefer home-made meals, they are gradually moving towards ready meals and American-style, quick-service outlets. This is particularly true for the young professional crowd. A hectic lifestyle combining intensive professional duties with household chores allows little free time which is preferred to be spent in leisure rather than in the kitchen. Consequently, sales by food outlets offering traditional meals are increasing. Furthermore, exotic meals offered by restaurants and other food outlets are gaining in popularity as an outcrop of the increasing interest in foreign cuisine by well-traveled Poles.

Several larger domestic producers have set up separate distribution channels specifically for this sector. While the other sectors of Polish food distribution are already very competitive, the HRI sector still holds excellent opportunity for growth. An HRI-targeted promotion campaign may offer U.S. exporters good opportunities for sales to Poland.

For addition information on Poland’s HRI sector please refer to FAS/Warsaw reports available via www.fas.usda.gov – *Data and Analysis* link – *GAIN Reports Category*.

Import of High Value Products

In 2016 Polish imports of consumer oriented food products amounted to U.S. \$9 billion with imports worth \$136 million originating from the United States. The increase in U.S. imports is attributed to higher disposable income noted throughout 2016 in Poland.

Table 7. Poland Import of consumer oriented food products (thousand dollars)

Poland (Customs) Import Statistics							
Commodity: Consumer Oriented Agric. Total, Group 32 (2012)							
Calendar Year: 2014 - 2016							
Partner Country	Thousands United States Dollars			% Share			% Change
	2014	2015	2016	2014	2015	2016	2016/2015
World	10438343	9364011	9257803				- 1.13

				100.00	100.00	100.00	
United States	136132	133484	136549	1.30	1.43	1.47	2.30

Source: Global Trade Atlas

Domestic producers and exporters from the European Union (mainly Germany, France, Italy, Great Britain, Spain, Finland, and the Netherlands, which make up 50 percent of total Polish food imports) are the main competitors for American food exporters. Dynamic development of Polish producers and foreign investors in the Polish food industry resulted in an increased variety of high quality product being produced locally. Even classic American products like chewing gum, Coca-Cola or Pepsi are produced in Poland. It should also be noted that Polish customers prefer Polish products over imported ones, influencing shoppers to purchase products made in Poland. Many chains advertise the fact that they offer Polish vegetables or other products to increase sales.

Table 8. Examples of import of consumer food products and ingredients to Poland in 2016.

Product Category (in USD million)	Total Polish Imports 2016	Polish Imports from the U.S.	U.S. Import Growth (2011-2016)	Market attractiveness for USA
Fish and Seafood Products	2,059	64	63%	Polish market offers excellent opportunities for fish and seafood products. Fish consumption is growing as consumers associate fishery products with a healthy diet. Best prospects for U.S. and seafood exports are Pollock, salmon, cod and scallops.
Tree Nuts	157	23	+16%	The United States is the second top supplier of tree nuts to Poland. Most tree nuts are used as ingredients by the food processing sector. Almonds are the most key product within this category.
Wine	251	39	28%	Poland produces boutique quantities of domestic wine. Excellent prospects exist for U.S. wines.

Source: Global Trade Atlas

Table 9. Import of Agricultural, Fish and Forestry products from the U.S. to Poland 2014-2016.

Poland (Customs) Import Statistics From United States								
Commodity: ALL Ag, Fish, Forestry (HS4), BICO + WTO								
Calendar Year: 2014 - 2016								
Commodity	Description	Thousands United States Dollars			% Share			% Change
		2014	2015	2016	2014	2015	2016	2016/2015
ALL Ag, Fish, Forestry (HS4)	BICO + WTO	456311	470589	463490	100	100	100	-1.51

3302	Odoriferous Mixture; Raw Mat'L For Indus & Bev Mfg	60746	54382	80267	13.31	11.56	17.32	47.6
0304	Fish Fillets & Oth Fish Meat, Fresh, Chill Or Froz	45268	55011	49653	9.92	11.69	10.71	-9.74
2204	Wine Of Fresh Grapes; Grape Must Nesoi	35679	32500	39760	7.82	6.91	8.58	22.34
2208	Ethyl Alcohol, Udenat, Und80% Alc; Spirit Beverag	29600	31285	27570	6.49	6.65	5.95	-11.88
0802	Nuts Nesoi, Fresh Or Dried	31899	29931	23566	6.99	6.36	5.08	-21.27
0303	Fish, Frozen (No Fish Fillets Or Other Fish Meat)	4119	3675	21614	0.9	0.78	4.66	488.09
2008	Fruit, Nuts Etc Prepared Or Preserved Nesoi	13333	13163	14099	2.92	2.8	3.04	7.11
2304	Soybean Oilcake & Oth Solid Residue, Wh/Not Ground	29854	35826	11122	6.54	7.61	2.4	-68.96
4301	Raw Furskins Nesoi (Incl Pcs For Fur Use)	4910	7698	10539	1.08	1.64	2.27	36.91
2309	Preparations Used In	8132	13482	7034	1.78	2.86	1.52	-47.83

	Animal Feeding							
2915	Sat Acyclic Nonocarbox Acid & Anhyd, Halogen Etc	6796	7167	5880	1.49	1.52	1.27	-17.96
2905	Acyclic Alcohols & Halogenat, Sulfonatd	2209	3869	4971	0.48	0.82	1.07	28.49
1202	Peanuts (Ground-Nuts), Raw	7327	4924	4255	1.61	1.05	0.92	-13.58
1302	Veg Saps & Extracts; Pectates Etc; Agar-Agar Etc.	8042	3723	3902	1.76	0.79	0.84	4.82
3504	Peptones, Other Proteins & Deriv Etc; Hide Powder	3324	3435	3517	0.73	0.73	0.76	2.39
0813	Fruit Dried Nesoi; Mixtures Of Nuts Or Dried Fruit	4990	7326	3440	1.09	1.56	0.74	-53.04
3507	Enzymes; Prepared Enzymes Nesoi	1569	3137	3269	0.34	0.67	0.71	4.21
2205	Vermouth & Oth Wine Of Fresh Grapes Spec Flavored	1	2120	3169	0	0.45	0.68	49.45

Source: Global Trade Atlas

SECTION IV. BEST HIGH-VALUE PRODUCT PROSPECTS

Products in the market that have good sales potential

- Fish and Seafood: salmon, cod, pollock, lobster and other miscellaneous fish products
- Nuts: almonds, peanuts, pecans, pistachios, walnuts

- Wine
- Distilled Spirits
- Highly processed ingredients: protein concentrates dextrin, peptones, enzymes, lecithin
- Dried & Processed Fruit: cranberries, prunes
- Fruit juice concentrates: Cranberry, prune
- Organic products

Products not present in significant quantities, but which have good sales potential

- High quality spices and mixes (tex-mex)
- Beef: Hormone-free beef
- Ingredients for the natural and healthy foods industry
- Dairy products (whey)
- Vegetable fats for bakery industry

Products not present because they face significant boundaries

- Food additives not approved by the European Commission

SECTION V. KEY CONTACTS AND FURTHER INFORMATION

One of the goals of the Foreign Agricultural Service (FAS) office in Warsaw is to assist in market development and promotion of U.S. food and agricultural products in Poland. There are a wide variety of ways in which to approach this market and many key contacts such as importers, distributors and retailers. Suppliers of U.S. food products and ingredients can contact FAS Warsaw if additional information regarding selling U.S. food and beverage products to Poland is required.

There are several U.S. commodity groups, called cooperators/regional groups, who partner with FAS to promote U.S. agricultural products in Poland. Those cooperators who are particularly active in Poland include: Wine Institute (California), U.S. Meat Export Federation, Cranberry Marketing Committee, California Prune Board, American Soybean Association and Food Export USA Northeast. The California Wine Institute, Cranberry Marketing Committee, California Prune Board and American Soybean Association have representatives based in Warsaw.

For additional information regarding the Polish market please contact:

American Embassy
 Foreign Agricultural Service
 Al. Ujazdowskie 29/31
 00-540 Warsaw, Poland
 Phone number: +48 22 504 23 36
 E-mail: AgWarsaw@fas.usda.gov
 Website: <http://polish.poland.usembassy.gov/Poland-pl/agric.html>

Please also visit the Foreign Agricultural Service home page (www.fas.usda.gov – *Data and Analysis* link – *GAIN Reports Category*) for more information about exporting U.S. food products to Poland, including “The HRI Food Service Sector Report”, ”Food Processing Sector”, “Retail Sector”, product briefs on the market potential for the U.S. wine, dried fruit, nuts and other agricultural products.

For information on exporting U.S agricultural products to other countries please visit the Foreign Agricultural Service home page: <http://www.fas.usda.gov> – *Countries and regions* link.

Appendix A. Additional contacts in Poland:

Polish Food Processing Associations

- [Polish Federation of Food Producers](#)
- [Association of Milk Producers](#)
- [Union of Producers of Meat Industry](#)
- [Association Polish Meat "POLSKIE MIĘSO"](#)

Other leading food processing companies in Poland:

[ARYZTA POLSKA Sp. z o.o.](#)

[COCA COLA HBC Sp. z o.o.](#)

[COCA COLA POLAND SERVICES Sp. z o.o.](#)

[CARGILL POLAND Sp. z o.o.](#)

[DANONE POLSKA Sp. z o.o.](#)

[DEVELEY POLSKA](#)

[FARM FRITES POLAND S.A.](#)

[FERRERO POLSKA Sp. z o.o.](#)

[FRITO LAY POLAND Sp. z o.o.](#)

[„GRANA” Sp. z o.o.](#)

[GRUPA MASPEX Sp. z o.o.. S.K.A.](#)

[HOOP POLSKA Sp. z o.o.](#)

[HERBAPOL LUBLIN S.A.](#)

[JACOBS DOUWE EGBERTS PL Sp. z o.o.](#)

[MONDELEZ POLSKA S.A.](#)

NESTLE POLSKA S. A.
NUTRICIA POLSKA Sp. z o.o.
ORANGINA SCHWEPPE POLSKA
PEPSI-COLA GENERAL BOTTLERS POLAND Sp. z o.o.
RED BULL Sp. z o.o.
SM GOSTYŃ
SÚDZUCKER POLSKA S.A.
UNILEVER POLSKA S.A.
WRIGLEY POLAND Sp. z o.o.
Z.T. BIELMAR Sp. z o.o.
Z.T. KRUSZWICA S.A.
ŻYWIEC ZDRÓJ S.A.