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## Poland

**Post:** Warsaw

### Dried Fruit and Nut Sector

**Report Categories:**

Dried Fruit

Tree Nuts

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**Report Highlights:**

Sales growth in Poland for tree nuts, seeds, and trail mix achieved five percent in 2017, the strongest year-on-year growth of all sweet and savory snack foods in the market. Much of this growth can be attributed to increasingly health-conscious consumers and a preference for convenience foods which can be consumed "on the go." Dried fruits and tree nuts are also widely used in traditional baking. U.S. tree nuts maintain the largest share by country of origin in the Polish market, at nearly 25 percent. U.S. almonds and pistachios dominate the Polish market. The most popular dried fruits in Poland are raisins, cranberries, prunes, dates, apricots, figs, apples and pears. Popularity of U.S. dried cranberries and prunes continue to grow due to successful Cooperator promotional activities.

## General Information:

### Section I. Market Overview

Sweet and savory snack-food sales continue to expand in Poland. In this segment, sales of tree nuts, seeds, and trail mixes saw the highest growth in 2017, at five percent. Polish consumers are increasingly choosing these products because they are perceived as healthful and convenient. Dried fruit and tree nuts are also widely used as traditional baking ingredients.

According to industry sources, the most popular tree nuts among Polish consumers in 2016 were almonds (43 percent), pistachios (24 percent), hazelnuts (15 percent), walnuts (10 percent), and macadamia nuts (two percent). All other nuts constituted the remaining six percent. U.S. tree nuts maintain the largest share for nuts in Poland by country of origin, at 25 percent. Although U.S. almonds, pistachios, and walnuts were significant sellers in their respective categories, U.S. trade data may not adequately convey the importance of the Polish market for these products, as most were transshipped through Germany. Some U.S. tree nuts are largely absent from the Polish market, including hazelnuts (sourced mostly from Italy) and macadamia nuts (mostly from South Africa).

Although not tree nuts, peanuts and sunflower seeds are often grouped along with this category. In Poland, peanuts and sunflower-seed sales are higher in volume and terms than all tree nuts combined. Currently U.S. market share in Poland for these products is limited. In 2016, U.S. peanuts accounted for six percent of market share, while U.S. sunflower seeds maintained less than one percent.

The most popular dried fruits include raisins, prunes, cranberries, dates, apricots, figs, apples, and pears. U.S. dried cranberries and prunes continue to gain market share due to their perceived health benefit and exposure through successful Cranberry Marketing Committee and California Prune Board marketing events.

*Products containing U.S. cranberries available on the Polish market.*



*Products containing U.S. prunes available on the Polish market.*



Advantages	Challenges
Polish consumption of dried fruit and nuts is increasing.	Increased competition with other products in the sweet and savory snack food sector, especially popcorn and corn chips.
Increasingly health conscious consumers re often willing to pay a premium for high quality products.	Competition from fresh products as high-quality fruits and vegetables are widely available throughout the year.
The U.S. is the leading supplier of almonds and pistachios in Poland.	Limited to no U.S. market presence for peanuts, sunflower seeds, hazelnuts, and raisins. Polish importers source these products from producers offering competitive pricing.
Polish consumers perceive U.S. food and agricultural products as high quality.	EU Member States face lower transportation costs and have a tariff advantage.

## Section II. Market Sector Opportunities and Threats

### *Entry Strategy*

Larger firms have traditionally distributed products in this sector through wholesalers. However, more dried fruit and nut importers are increasingly doing direct distribution to retailers. Larger firms have also introduced sales representatives to process orders and to collect market date in the field. Smaller firms, with less access to capital, rely on wholesalers, as these firms do not have the capacity to distribute their product internally.

Exporters of U.S. dried fruit and tree nuts may obtain a list of current Polish importers by contacting the Office of Agricultural Affairs at the U.S. Embassy in Warsaw (see Section IV).

### *Market Size, Structure, Trends*

Dried fruit and nut retailers are broken into several segments, including hypermarkets, supermarkets, discount stores, independent small grocery, and convenience stores.

Table 1. Poland - Forecast Sales of Savory Snacks by Category: Volume 2018-2021.

<b>'000 Tones</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>
Nuts, Seeds and Trail Mixes	13.28	13.65	14.02	14.39
Salty Snacks	68.52	69.83	71.14	72.46
- Potato Chips	40.63	41.53	42.42	43.26
- Tortilla Chips	0.74	0.77	0.79	0.82
- Puffed Snacks	20.71	21.01	21.34	21.73
- Rice Snacks	5.93	5.99	6.06	6.11
- Vegetable, Pulse and Bread Chips	0.52	0.53	0.54	0.55
Savory Biscuits	13.68	13.95	14.24	14.54
Popcorn	1.11	1.15	1.19	1.23
Pretzels	20.17	20.61	21.09	21.65
Other Savory Snacks	0.00	0.00	0.00	0.00
Savory Snacks	116.77	119.19	121.70	124.27

*Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources*

Distribution through supermarkets and hypermarkets has rapidly expanded during the last five years. These formats offer the largest variety and provide the most shelf space for dried fruit and tree nuts. While distribution to independent grocers has declined in recent years, due to supermarket and hypermarket growth, these small stores continue to remain an important distribution format for dried fruits and nuts in Poland.

Supermarket and hypermarkets operating in Poland are driving demand for some bulk products, as customers want to decrease trips to the store and maximize value. Similar to major grocery chains in the United States, international retailers like Auchan, Tesco, Carrefour, etc. require distributors to pay stocking fees, entry fees, and other obligatory fees like fees for product launches, anniversaries, and other promotions.

Convenience stores are a new and growing retail channel and are often located in railway, bus, subway, and gas stations throughout Poland. The number of these stores is expected to increase as the Polish highway system continues to rapidly improve and expand, increasing the number of gas stations with food stores, demonstrating great potential for market growth in dried fruit and nut product distribution.

Discount stores operating in Poland such as Biedronka (owned by Portuguese company Jerónimo Martins) and Lidl (owned by German-based Lidl Stiftung & Co. KG) remained important outlets for savory snacks in 2016, accounting for an over 34 percent of sales. Convenience stores such as Zabka

(owned by CVC Capital Partners) accounted for a 26-percent market share. These operators attract customers by offering long operating hours and convenient locations. Savory snacks purchased during everyday shopping from these outlets are often marketed as complementary to soft drinks and beer.

Most imported dried fruits and tree nuts products are bound for retail, meaning they are dried, shelled, or otherwise processed before entry. Some U.S. suppliers may prefer to make bulk shipments to Polish importers to reduce transportation costs. Smaller stakeholders usually ship through third-country European agents and/or consolidators. As a result, many U.S. dried fruits and tree nuts enter Poland through a western E.U. intermediary.

Other products in the sweet and savory-snacks category compete with dried fruits and nuts. Marketing firms advertise heavily through internet, broadcast media, and billboards. The increasing availability of year-round, high-quality fresh fruit and vegetables also directly competes with dried fruits and nuts.

The following tables show a breakdown of dried fruit and nuts imported to Poland between 2014 and 2016.

Table 2. Poland Customs Import Statistics - 080211, **Almonds**, Fresh Or Dried, In Shell

Poland (Customs) Import Statistics							
Commodity: 080211, Almonds, Fresh Or Dried, In Shell							
Calendar Year: 2014 - 2016							
Partner Country	Thousands United States Dollars			% Share			% Change 2016/2015
	2014	2015	2016	2014	2015	2016	
World	642	1254	219	100.00	100.00	100.00	- 82.50
Spain	102	334	82	15.84	26.63	37.22	- 75.55
United Kingdom	81	99	63	12.54	7.91	28.57	- 36.79
United States	387	381	58	60.21	30.35	26.22	- 84.88
Austria	12	3	7	1.83	0.27	3.10	104.25
Germany	17	13	6	2.68	1.01	2.94	- 48.98
Moldova	0	0	4	0.00	0.00	1.84	0.00
Italy	3	222	0	0.54	17.71	0.11	- 99.89
Netherlands	1	202	0	0.17	16.12	0.00	- 100.00
Slovakia	40	0	0	6.19	0.00	0.00	0.00

*Source of Data: Central Statistical Office of Poland (GUS)*

Table 3. Poland Customs Import Statistics - 080212, **Almonds**, Fresh Or Dried, Shelled

Poland (Customs) Import Statistics							
Commodity: 080212, Almonds, Fresh Or Dried, Shelled							
Calendar Year: 2014 - 2016							
Partner Country	Thousands United States Dollars			% Share			% Change 2016/2015
	2014	2015	2016	2014	2015	2016	

World	54198	48963	39860	100.00	100.00	100.00	- 18.59
United States	18359	21222	14810	33.87	43.34	37.16	- 30.21
Spain	15193	10034	11230	28.03	20.49	28.17	11.93
Germany	10339	8444	4353	19.08	17.25	10.92	- 48.45
United Kingdom	741	1217	3166	1.37	2.49	7.94	160.04
Australia	5138	4563	3018	9.48	9.32	7.57	- 33.87
Czech Republic	2670	2507	1799	4.93	5.12	4.51	- 28.26
Italy	621	692	676	1.15	1.41	1.70	- 2.37
Slovakia	226	19	311	0.42	0.04	0.78	1556.84
Netherlands	84	119	169	0.16	0.24	0.42	42.82
France	29	69	128	0.05	0.14	0.32	86.67

*Source of Data: Central Statistical Office of Poland (GUS)*

Table 4. Poland Customs Import Statistics - 080222, **Hazelnuts**, Filberts Fresh, Dried, Shelled

Poland (Customs) Import Statistics							
Commodity: 080222, Hazelnuts Or Filberts (Corylus Spp.) Fresh Or Dried, Shelled							
Calendar Year: 2014 - 2016							
Partner Country	Thousands United States Dollars			% Share			% Change 2016/2015
	2014	2015	2016	2014	2015	2016	
World	25582	20216	25309	100.00	100.00	100.00	25.19
Italy	7776	344	9840	30.40	1.70	38.88	2763.03
United Kingdom	2487	5378	3580	9.72	26.60	14.15	- 33.43
Azerbaijan	849	2138	2959	3.32	10.57	11.69	38.42
Germany	3422	3629	1961	13.38	17.95	7.75	- 45.95
Turkey	3323	3268	1891	12.99	16.17	7.47	- 42.15
Georgia	4744	2646	1742	18.55	13.09	6.88	- 34.14
Spain	1734	573	1547	6.78	2.84	6.11	169.72
Czech Republic	381	730	476	1.49	3.61	1.88	- 34.74
France	224	475	395	0.87	2.35	1.56	- 16.83
Chile	0	324	390	0.00	1.60	1.54	20.64
Austria	68	100	246	0.27	0.50	0.97	145.97

*Source of Data: Central Statistical Office of Poland (GUS)*

Table 5. Poland Customs Import Statistics - 080231, **Walnuts**, Fresh Or Dried, In Shell

Poland (Customs) Import Statistics							
Commodity: 080231, Walnuts, Fresh Or Dried, In Shell							
Calendar Year: 2014 - 2016							
Partner Country	Thousands United States Dollars			% Share			% Change 2016/2015
	2014	2015	2016	2014	2015	2016	
World	613	1080	770	100.00	100.00	100.00	- 28.75
Germany	2	521	374	0.39	48.20	48.56	- 28.21
United States	158	131	182	25.86	12.13	23.68	39.05
Chile	184	212	128	29.95	19.61	16.66	- 39.48

Ukraine	15	0	44	2.52	0.00	5.66	0.00
Slovakia	136	173	27	22.11	16.00	3.51	- 84.38

*Source of Data: Central Statistical Office of Poland (GUS)*

Table 6. Poland Customs Import Statistics - 080251, **Pistachios**, In Shell, Fresh Or Dried

Poland (Customs) Import Statistics							
Commodity: 080251, Pistachios, In Shell, Fresh Or Dried							
Calendar Year: 2014 - 2016							
Partner Country	Thousands United States Dollars			% Share			% Change 2016/2015
	2014	2015	2016	2014	2015	2016	
World	26849	20854	20027	100.00	100.00	100.00	- 3.96
Iran	7615	11881	12360	28.36	56.97	61.71	4.03
United States	10418	5510	5842	38.80	26.42	29.17	6.03
Slovakia	7732	1755	749	28.80	8.41	3.74	- 57.33
France	968	1382	732	3.60	6.63	3.65	- 47.04
Netherlands	2	219	218	0.01	1.05	1.09	- 0.63

*Source of Data: Central Statistical Office of Poland (GUS)*

Table 7. Poland Customs Import Statistics--080252, **Pistachios**, Shelled, Fresh Or Dried

Poland (Customs) Import Statistics								
Commodity: 080252, Pistachios, Shelled, Fresh Or Dried								
Calendar Year: 2014 - 2016								
Partner Country	Unit	Thousands Quantity			% Share			% Change 2016/2015
		2014	2015	2016	2014	2015	2016	
World	KG	96	101	96	100.00	100.00	100.00	- 5.71
United States	KG	91	89	84	94.74	87.74	88.13	- 5.30
Denmark	KG	0	0	6	0.00	0.00	6.78	0.00

*Source of Data: Central Statistical Office of Poland (GUS)*

Table 8. Poland Customs Import Statistics--080261, **Macadamia Nuts**, In-shell, Fresh, Dried

Poland (Customs) Import Statistics							
Commodity: 080261, Macadamia Nuts, In Shell, Fresh Or Dried							
Calendar Year: 2014 - 2016							
Partner Country	Thousands United States Dollars			% Share			% Change 2016/2015
	2014	2015	2016	2014	2015	2016	
World	9	45	40	100.00	100.00	100.00	- 9.68
South Africa	0	44	40	0.00	98.42	100.00	- 8.23
Guatemala	9	0	0	97.32	0.00	0.00	0.00

Source of Data: Central Statistical Office of Poland (GUS)

Table 9. Poland Customs Import Statistics--1202, **Peanuts** (Ground-Nuts), Not Roasted Or Otherwise Cooked, Whether Or Not Shelled Or Broken

Poland (Customs) Import Statistics							
Commodity: 1202, Peanuts (Ground-Nuts), Not Roasted Or Otherwise Cooked, Whether Or Not Shelled Or Broken							
Calendar Year: 2014 – 2016							
Partner Country	Thousands United States Dollars			% Share			% Change 2016/2015
	2014	2015	2016	2014	2015	2016	
World	65180	58774	65842	100.00	100.00	100.00	12.03
Argentina	39527	37105	53009	60.64	63.13	80.51	42.86
Brazil	12586	10589	4964	19.31	18.02	7.54	- 53.13
United States	7327	4924	4255	11.24	8.38	6.46	- 13.58
China	2177	836	1666	3.34	1.42	2.53	99.22
Nicaragua	2271	4590	1491	3.48	7.81	2.26	- 67.51
Netherlands	333	298	170	0.51	0.51	0.26	- 43.19
Greece	7	28	148	0.01	0.05	0.22	432.94
United Kingdom	25	93	78	0.04	0.16	0.12	- 15.71

Source of Data: Central Statistical Office of Poland (GUS)

Table 10. Poland Customs Import Statistics - 120600, **Sunflower Seeds**, Broken/Not Broken

Poland (Customs) Import Statistics							
Commodity: 120600, Sunflower Seeds, Whether Or Not Broken							
Calendar Year: 2014 - 2016							
Partner Country	Thousands United States Dollars			% Share			% Change 2016/2015
	2014	2015	2016	2014	2015	2016	
World	33558	38519	31206	100.00	100.00	100.00	- 18.98
Bulgaria	14087	16814	15818	41.98	43.65	50.69	- 5.92
Moldova	4598	7595	5741	13.70	19.72	18.40	- 24.41
Hungary	5581	6078	2228	16.63	15.78	7.14	- 63.35
Turkey	828	1356	1851	2.47	3.52	5.93	36.51
Ukraine	2029	840	1364	6.05	2.18	4.37	62.36
Slovakia	1813	2401	1256	5.40	6.23	4.03	- 47.66



Czech Republic	398	834	612	1.19	2.17	1.96	- 26.63
Russia	18	372	585	0.05	0.96	1.87	57.42
Romania	12	424	344	0.04	1.10	1.10	- 18.87
Malta	538	287	316	1.60	0.74	1.01	10.19
China	1114	312	223	3.32	0.81	0.71	- 28.43
Macedonia	0	0	192	0.00	0.00	0.61	0.00
Germany	464	411	176	1.38	1.07	0.56	- 57.10
Italy	25	57	171	0.08	0.15	0.55	199.36
Argentina	74	139	152	0.22	0.36	0.49	9.50
France	141	36	101	0.42	0.09	0.32	176.67
United States	584	1	18	1.74	0.00	0.06	1160.56

*Source of Data: Central Statistical Office of Poland (GUS)*

Table 11. Poland Customs Import Statistics - 200893, **Cranberries** (Vaccinium Macrocarpon, Vaccinium Oxycoccos, Vaccinium Vitis-Idaea), Prepared Or Preserved

Poland (Customs) Import Statistics							
Commodity: 200893, Cranberries (Vaccinium Macrocarpon, Vaccinium Oxycoccos, Vaccinium Vitis-Idaea), Prepared Or Preserved, Nesoi							
Calendar Year: 2014 - 2016							
Partner Country	Thousands United States Dollars			% Share			% Change 2016/2015
	2014	2015	2016	2014	2015	2016	
World	17754	18968	20321	100.00	100.00	100.00	7.13
United States	12387	11810	13177	69.77	62.26	64.85	11.58
Chile	749	2684	2438	4.22	14.15	12.00	- 9.16
Netherlands	394	410	1526	2.22	2.16	7.51	271.93
Germany	1500	1146	1077	8.45	6.04	5.30	- 5.99
Canada	1847	1086	752	10.40	5.73	3.70	- 30.81
Austria	214	531	403	1.20	2.80	1.98	- 24.09

*Source of Data: Central Statistical Office of Poland (GUS)*

Table 12. Poland Customs Import Statistics - 081320, **Prunes**, Dried

Poland (Customs) Import Statistics							
Commodity: 081320, Prunes, Dried							
Calendar Year: 2014 - 2016							
Partner Country	Thousands United States Dollars			% Share			% Change 2016/2015
	2014	2015	2016	2014	2015	2016	
World	26454	27752	18183	100.00	100.00	100.00	- 34.48
Chile	14198	16004	11637	53.67	57.67	64.00	- 27.29
United States	4707	6167	3092	17.79	22.22	17.00	- 49.87
Germany	930	1217	897	3.51	4.39	4.93	- 26.33
Moldova	911	1096	518	3.44	3.95	2.85	- 52.77
Netherlands	8	269	383	0.03	0.97	2.11	42.59
Serbia	1300	845	378	4.92	3.04	2.08	- 55.24
Czech Republic	301	374	318	1.14	1.35	1.75	- 14.92

Argentina	602	481	293	2.28	1.73	1.61	- 39.02
Bulgaria	31	39	251	0.12	0.14	1.38	543.85
Austria	17	218	173	0.07	0.79	0.95	- 20.79
Slovakia	1304	244	73	4.93	0.88	0.40	- 69.92
Italy	3	48	71	0.01	0.17	0.39	47.59
France	1879	324	70	7.10	1.17	0.39	- 78.32

*Source of Data: Central Statistical Office of Poland (GUS)*

**Table 13. Poland Customs Import Statistics - 080620, Grapes, Dried (Including Raisins)**

Poland (Customs) Import Statistics							
Commodity: 080620, Grapes, Dried (Including Raisins)							
Calendar Year: 2014 - 2016							
Partner Country	Thousands United States Dollars			% Share			% Change 2016/2015
	2014	2015	2016	2014	2015	2016	
World	33025	26160	28829	100.00	100.00	100.00	10.21
Turkey	8934	5008	10358	27.05	19.14	35.93	106.82
Iran	4657	4757	3200	14.10	18.18	11.10	- 32.73
Chile	3917	3787	3071	11.86	14.48	10.65	- 18.92
India	1199	1098	2325	3.63	4.20	8.07	111.67
United Kingdom	1269	1253	1999	3.84	4.79	6.93	59.44
Germany	3236	2636	1971	9.80	10.08	6.84	- 25.23
China	2783	876	1208	8.43	3.35	4.19	37.92
Uzbekistan	1143	2111	888	3.46	8.07	3.08	- 57.91
Czech Republic	537	1267	787	1.63	4.84	2.73	- 37.93
United States	3269	573	754	9.90	2.19	2.62	31.70
Netherlands	721	369	603	2.18	1.41	2.09	63.46
Latvia	175	714	364	0.53	2.73	1.26	- 48.97
Greece	243	262	306	0.73	1.00	1.06	16.68

*Source of Data: Central Statistical Office of Poland (GUS)*

### *Market Preferences*

Flavored peanuts, almonds, and hazelnuts are popular among Polish consumers. Spicy flavors and chocolate-coated products are currently popular. Coated peanuts, referred to as ‘double-crunch’ peanuts, are also prevalent and are available in salted or flavored varieties. Energy bars produced from grains, nuts, and dried fruits are becoming more visible as consumers become more health conscious. Products from foreign companies that produce locally dominate the energy bar market. However, more and more Polish companies are also starting to successfully produce these products.

Chocolate manufacturers are also starting to look for high quality ingredients to ensure longer shelf life for their products. This has increased demand for high-quality nuts as raw materials. Due to higher local demand, Polish importers have become more interested in larger orders, increasing the demand for direct shipments from the United States.

### **Section III. Market Access:**

The Government of Poland works to ensure the safety and quality of food for Polish consumers through a number of regulatory means. Information specifically pertaining to Poland may be obtained from FAS Warsaw's [Food and Agricultural Import Regulations and Standards](#) (FAIRS) report for Poland. Most measures are the same as those observed in the European Union. Additional EU regulations can be obtained from [EU-28 FAIRS Report](#).

Additional information regarding exporting to Poland can be obtained from FAS\Warsaw's Poland GAIN Report: [Annual Exporter Guide](#)

#### **Section IV. Key Contacts and Further Information**

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