

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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Poland

EXPORTER GUIDE ANNUAL

Exporter Guide

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Report Highlights:

Poland is the largest country within Central and Eastern Europe. As a country with a population of nearly 40 million people it constitutes an attractive market for agri-food products from the United States. In 2015 Poland imported agricultural and fish products worth U.S. \$20 billion with U.S. sourced imports worth U.S. \$471 million. Products from the U.S. that have good sales potential on the Polish market include: nuts, fish and seafood products, dry fruit, highly processed and functional ingredients.

Post:
Warsaw

Executive Summary:

SECTION I. MARKET SUMMARY

During 2015 Poland's economy recovered from the 2012-13 economic slowdown, growing by 3.9 percent thanks to continuously increasing domestic demand. A slight slowdown in real GDP growth to 2.6 percent is expected for 2016. The forecast slowdown 2016-17 will result from unexpected deterioration in economic policies, applied by Poland's new Government, sworn in November 2015, as it tries to deliver on its costly populist election declarations. Policies of the newly elected government sworn in November 2015, could lead to decline in economic growth if the ruling party follows through on promises to provide support for larger families.

Table 1. Basic Economic Indicators

	2015	2016^a	2017^b	2018^b	2019^b
Real GDP growth	3.9	2.6	3.2	3.0	2.9
Unemployment rate (av)	10.5	9.4	9.2	8.9	9.2
Consumer price inflation (av. National measure)	-0.9	1.8	1.5	2.3	1.9
Exports of good fob (U.S. \$)	170.4	176.4	194.2	218	241.9
Imports of goods fob (U.S. \$)	161.9	173.3	195.5	219.1	245.9
Exchange rate Zl:U.S. \$ (av)	3.77	3.92	4.07	4.05	4.05

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

In 2015 Poland imported total agricultural and fish products worth U.S. \$20 billion, with imports originating from the United States worth U.S. \$471 million; a 2.25 percent share.

In 2015 Polish imports of consumer oriented food products amounted to U.S. \$9 billion, with imports originating from the United States worth U.S. \$133 million.

Poland's import of fish and seafood products also continues to grow and reached U.S. \$1.7 billion, with U.S. \$55 million (3.2 percent market share) originating from the United States. The first direct import of U.S. cod contributed to this positive result in 2015.

**Table 2. Poland - Imports of agricultural and fish products 2015,
in billion U.S. \$**

Agricultural Total, total imports	20
Agricultural Total, imports from U.S.A.	0.4 (2.2%)
Intermediate Agricultural Products, total imports	4.5
Intermediate Agricultural Products, imports from U.S.A.	0.1 (2.5%)
Consumer-Oriented Agricultural Products, total imports	9
Consumer-Oriented Agricultural Products, imports from U.S.A.	0.1 (1.4%)
Fish and Seafood Products, total imports	1.7
Fish and Seafood Products, imports from U.S.A.	0.5 (3.2%)

Source: Global Trade Atlas

Poland views the United States positively and U.S. products are considered to be of high quality. Product that has been imported into the EU can be transported to Poland without additional tariffs and without meeting additional regulatory requirements aside from required labeling in Polish language.

Food processing and catering industries in Poland are increasingly interested in importing processed baking ingredients such as: nuts, fish and seafood products, dry fruit as well as flavors and aromas, sweeteners, food additives, food colors and enzymes. The food processing industry is developing rapidly and successfully and there is a high demand for high quality inputs.

Poland's 38 million consumers constitute the single largest market for food and beverages within the Central Eastern Europe region. Annual disposable income in Poland continues to grow, yet constitutes just over 40 percent of that recorded in the western countries of the European Union.

Table 3. Consumer expenditures and Annual Disposable income

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

Source: Euromonitor 2015

Over 61 percent of Poland's population lives in urban areas. The median age, 38 years, is rising. A trend towards smaller families is becoming more apparent in Poland's 13 million households, with an average household size of 3 people. The typical Polish family eats together at meal times and households buy food stocks for only a few days at a time. Poland's GDP per capita increased from U.S. \$24,954 in 2014 to U.S. \$26,017 in 2015 according to Economist Intelligence Unit data.

Over the past five years per capita consumption of processed food products remains stable. Products such as wine, animal fats, sugar, fruit and vegetables noted a slight increase in per capita consumption in 2014.

Table 4. Poland - Consumption of selected consumer goods per capita

Consumer goods	Unit of measure	2012	2013	2014
Grain of 4 cereals				
(in terms of 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: Euromonitor

Table. 5 Poland Production of selected products of the Polish food industry ^a

Goods	Unit of measure	Deliveries absolute numbers		2013=100
		2013	2014	
Raw meat from animals for slaughter	thousand tons	1920	2038	106.2
of which meat:				
pork	thous. t	1814	1898	104.6
beef and veal	thous. t	105	140	133.3
Poultry meat	thous. t	1497	1528	102
Variety meat products from poultry	thous. t	235	208	88.5
Meat and variety meat products from animals for slaughter ^b	thous. t	897	869	96.9
Frozen sea fish	thous. t	271	247	91.2
Margarine and spreads ^c (excluding liquid margarine)	thous. t	342	341	99.7
Butter and dairy spreads	thous. t	153	157	103.1
Cheese and curd	thous. t	674	657	97.5
of which:				
rennet ripening cheese	thous. t	244	243	99.4
processed (melted) cheese	thous. t	45.2	38.4	85
Wheat flour	thous. t	2207	2222	100.7
Sugar	thous. t	1612	1708	105.9
Chocolate (including white) ^d	thous. t	216	248	114.6
Pasta	thous. t	217	207	95.3
Vodkas, liqueurs, other alcoholic beverages in terms of 100%	thousand hectoliters	1433	1104	77.1
of which pure vodka	thous. hl	1063	810	76.2
Wine and honey wine	thous. hl	2272	2335	102.8
of which grape wine	thous. hl	1224	1256	102.6
Beer from malt	thous. hl	37751	38095	100.9
Mineral waters and soft drinks	thous. hl	59601	61049	102.4
of which natural mineral waters	thous. hl	17810	20829	117

Source: Euromonitor

a Quantity of products produced domestically (data concern economic entities employing more than 9 persons), minus their exports and plus their imports corrected by the balance of changes

- of stocks at producers (data concern economic entities employing more than 49 persons).
- b Including: canned food, cured meat products and other products.
- c Reduced and low fat.
- d Including sweet and chocolate goods.

During the last twenty years the Polish food industry has been restructured and privatized to a large extent. Large multinational corporations were active from the very beginning of privatization process in Poland: Coca-Cola, Nestle, Heineken, PepsiCo, Mars, Unilever, Danone. Over 70 percent of production of confectionery, over 50 percent of sugar market, most beer manufacturing companies, meat processing plants, beverage bottling plants, fruit and vegetable processing plants are currently owned by foreign investors.

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

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.
A very productive, young and skilled labor force therefore, 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 Polish market should make sure that their product meets Polish/EU food law; including packaging and labeling requirements.

The best way to understand the Polish market is to visit and speak to importers and distributors in order to prepare the best entry strategy for your products. Trade Shows organized within the European Union which have large U.S. Company presence turn to attract many regional buyers and offer great introductory opportunity for U.S. exporters. A listing of USDA/FAS endorsed shows can be located at www.fas.usda.gov – [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 service 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. Business attire is formal, including a suit and tie for men and a suit or dress for women.

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 – *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 – *Data and Analysis* link – [GAIN Reports Category](#).

Polish consumers are becoming more sophisticated and increasingly value variety and availability of food products. Imports are rising steadily to cater to such demands and compensate for Poland's seasonal production. EU Member States satisfy the majority of this demand. Poland sources products from Non-EU member states including Ukraine, Argentina and Turkey.

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 buying groups (consisting of regional chains and regional wholesalers). The national chains are the least numerous and operate several branches throughout Poland with central management.

Regional chains have recently grown through consolidation and purchase of bankrupt firms; they 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.

Buyer groups operate in several market segments and are increasing their integration with specific retailers.

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, HRI outlets, and institutions. Consolidation of the market is highly likely in coming years but new entrants should be expected given its attractiveness to small retailers. 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 can be easily compared with those found in other countries 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.

During the 2015/2016 period, the Polish retail chain Marcpol went out of business, while a leading Polish high end retailer Alma experienced major financial difficulties resulting in closure of its retail operations in leading mall locations. Currently Alma Company is undergoing legal restructuring operation aimed at saving remaining stores.

Industry reports indicate that since 2010, 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 is expected to rise by 30 percent, among the fastest growth in Europe. Online sales will 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 2012 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 Polish Government 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 (U.S. \$44 million) per month and 1.4 percent when sales exceed 170 million Polish Zloty (U.S. \$ 44 million) per month. Sales under 17 million Polish Zloty (U.S. \$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 Poland's Government 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 Polish Ministry of Finance spokesman announced that attempts to introduce retail tax in Poland are postponed till 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 beverages 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 2 percent and it will reach U.S. \$2 billion in 2016. 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 U.S. \$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 & Institutional Sector (HRI)

According to a survey conducted by MAKRO Cash & Carry, 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-travelled 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 additional 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 2015 Polish imports of consumer oriented food products amounted to U.S. \$9 billion with imports worth U.S. \$133 million originating from the United States. The decrease in U.S. imports is attributed to high unfavorable exchange rate of U.S.\$ to Polish Zloty noted throughout 2015.

Table 8. Poland Import of consumer oriented food products (U.S. \$ Millions)

Poland (Customs) Import Statistics							
Commodity: Consumer Oriented Agric. Total, Group 32 (2012)							
Year To Date: January - December							
Partner Country	Millions United States Dollars			% Share			% Change
	2013	2014	2015	2013	2014	2015	2015/2014
World	9969	10438	9364	100.00	100.00	100.00	- 10.29
United States	128	136	133	1.28	1.30	1.43	- 1.95

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 9. Examples of import of consumer food products and ingredients to Poland in 2015.

Product Category	HS code	Total imports of agri-food products by Poland (U.S. \$ million)	Direct imports from the USA (U.S. \$ million)	Share of US imports in total imports (%)	Main Foreign competitors	Strengths of Key Supply Countries	Advantages and disadvantages of Local Suppliers
Frozen Fish	0303	182	4	2.02	1.Norway, 2.Russia, 3.The Netherlands, 4. Faoroe Islands, 5.Denmark	1-3.Distance, availability and regional products. 4-5.Price/quality	Developed fish processing industry.

Fish Fillets	0304	564	55	9.75	1.China, 2.Norway, 3.Germany, 4.Iceland, 5.Chile, 6.Russia. 7.Denmark	1.5Price/quality. 2,3,4,6,7. Distance, availability and regional products.	Developed fish processing industry.
Almonds	080212	49	21	44	1.Spain, 2.Germany, 3.Australia	1.Distance, availability and regional products. 2.Traditional re-exporter. 3. Flexibility of suppliers – aiming to gain new market.	No local production due to unfavorable climate conditions.
Dried Grapes, Raisins	080620	26	1	2.19	1.Turkey, 2.Iran, 3.Chile, 4.Germany 5.Uzbekistan	1.2.3.5. Price/quality. 4.Traditional re-exporter.	No local production due to unfavorable climate conditions.
Prunes	081320	28	6	22	1.Chile, 2.Germany, 3.Moldova, 4.Serbia, 5.Argentina	1.5.Price/quality. 2. Traditional re-exporter. 3.4.Distance, availability and regional products.	Local production of different type of prune – not competing with imported varieties.
Peanuts	1202	59	5	8	1.Argentina, 2.Brazil, 3.Nicaragua, 4.China	1.2.3.4. Price/quality.	No local production due to unfavorable climate conditions.
Mucilage & Thickeners	130239	24	1	5	1.China, 2.Philippines, 3.Germany, 4.Denmark, 5.Belgium, 6.Spain	1.2. Price/quality. 3.4.5.6. Distance, availability and regional products.	Developed food processing industry.

Cranberries	200893	19	12	63	1.Chile, 2.Germany, 3.Canada	1.3. Price/quality. 2. Traditional re-exporter.	Local production of different type of cranberry – not competing with imported varieties.
Food Preparation	210690	451	31	7	1.Germany, 2.France, 3.Netherlands, 4.Italy, 5.Spain	Distance, availability and regional products.	Developed food processing industry.
Wine	2204	237	33	14	1.Italy, 2.Germany, 3.France, 4.Spain	Distance, availability and regional products.	Limited local production due to unfavorable climate conditions.
Alcohol Beverages	2208	214	31	14	1.UK, 2. Finland, 3.Germany	Distance, availability and regional products.	Developed local production industry – e.g. vodka production.
Mixtures of Odoriferous Substances	3302	447	54	13	1.Germany 2. Ireland	Most of the product is imported through Germany.	Increasing production of high quality Polish components.
Synthetic Organic Coloring Matter	3204	113	2	2	1.Germany 2.Italy 3.India	U.S. product is considered to be expensive. Active competition exists from Hungary and China.	Increasing production of high quality Polish components.
Food enzymes	3507	69	3	5	1.Denmark 2.France 3.Finland	U.S. product is considered to be expensive.	Polish food processing industry is

					4.The Netherlands	Active competition exists from E.U. Member States.	becoming increasingly interested in using high quality product from the U.S.
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Source: Global Trade Atlas Data

SECTION IV. BEST HIGH-VALUE PRODUCT PROSPECTS

Products in the market that have good sales potential

- Fish and Seafood: salmon, 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), Cranberry Marketing Committee, California Prune Board, California Walnut Commission and Food Export USA Northeast. The California Wine Institute, Cranberry Marketing Committee, California Walnut Commission and California Prune Board 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 MIEŚO"](#)

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
SÜDZUCKER 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.

End of Report.