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**Date:** 11/18/2016

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## Poland

**Post:** Warsaw

### Poland – Dried Fruit and Nut Sector

**Report Categories:**

Dried Fruit

Tree Nuts

Product Brief

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**Report Highlights:**

Nuts demonstrated the highest levels of growth in sales at 6 percent value out of all sweet and savory snack foods in the Polish market over the period 2014-2015. Polish consumers are increasingly aware of the healthy benefits provided by dried fruit and nuts and value their convenience as a healthy form of food "on the go." Dried fruit and nuts are also widely used as traditional baking ingredients. U.S. nut commodities hold the largest individual market share for nuts in Poland, nearly one third, and dominate the almond, pistachio and walnut markets. U.S. walnuts and peanuts continue to gain exposure on the Polish market through successful marketing outreach conducted by California Walnut Commission and American Peanut Council. The most popular dried fruits in the market are: raisins, prunes, dates, apricots, figs, apples and pears. U.S. dried cranberries and prunes continue to gain interest on the market due to successful Cranberry Marketing Committee and California Prune Board marketing events promoting U.S. products on the Polish market.

## General Information:

### Section I. Market Overview

Sweet and savory snacks continue expansion on the Polish food market. Nuts demonstrated the highest levels of growth in sales at 6 percent value out of all sweet and savory snack foods in the Polish market over the period 2014-2015. Polish consumers are increasingly aware of the healthy benefits provided by dried fruit and nuts and value their convenience as a healthy form of food "on the go." Dried fruit and nuts are also widely used as traditional baking ingredients. While growth is expected to continue over the next five years, it will do so at a diminished rate with an expected 3.7 percent increase in volume within the time frame of 2016-2021.

According to industry experts, among the nuts available on the Polish market, in 2015 the following were most popular: almonds (43 percent), pistachios (24 percent), hazelnuts (15 percent), walnuts (10 percent) and macadamia nuts (2 percent), with all other nuts constituting the remaining 8 percent. U.S. nut commodities hold the largest individual market share for nuts in Poland, nearly one third, and dominate the almond, pistachio and walnut markets (significant transshipments arrive through Germany). However, U.S. commodities remain largely absent from the hazelnut (supplied mainly by Turkey) and macadamia (supplied mainly by South Africa and Kenya) nut markets.

While technically not nuts, peanuts and sunflower seeds are typically grouped with this category, and have a higher total of volume and sales than other nuts combined. As with hazelnuts and macadamia nuts, U.S. product offerings for these commodities are limited. In Poland during 2015 U.S. peanuts held a 9 percent market share, while U.S. sunflower seed held a market share of under 1 percent.

U.S. walnuts and peanuts continue to gain exposure on the Polish market through successful marketing and trade fair promotions conducted by California Walnut Commission and American Peanut Council.

The most popular dried fruits in the market are: raisins, prunes, dates, apricots, figs, apples and pears.

U.S. dried cranberries and prunes continue to gain interest in the market due to their perceived health benefit and exposure through successful Cranberry Marketing Committee and California Prune Board marketing events promoting U.S. products on the Polish market.

Advantages	Challenges
Polish consumption of dried	Increased competition with other products in the sweet and savory

fruit and nuts is on the rise.	snack food industry, especially popcorn and corn chips, as increasingly health conscious Poles substitute away from confectionary goods.
Increasingly health conscious consumers.	Competition from fresh products as year round high quality fruits and vegetables are widely available.
The U.S. is the leading supplier of almonds, pistachios and walnuts 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. agricultural commodities to be of higher quality.	E.U. member states face lower transportation costs due to geographical proximity and lower tariffs on commodities due to E.U. membership.

## 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 using direct distribution to the retail market. Direct distribution reduces overall cost and increases product freshness.

Larger firms have also introduced sales representatives in the field to process orders and to collect market information. Smaller firms, with less access to capital, rely on wholesalers to link them to the market. These firms do not have the capital necessary to distribute their product internally.

Exporters of U.S. dried fruit and 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*

Retail centers for dried fruit and nut sales are broken into several segments. They include hypermarkets, supermarkets, discount stores, independent small grocery and convenience stores.

Table 1. Poland - Forecast Sales of Savory Snacks by Category: Volume 2016-2021.

'000 Tones	2016	2017	2018	2019	2020	2021
Nuts, Seeds and Trail Mixes	12.58	12.93	13.28	13.65	14.02	14.39
Salty Snacks	66.01	67.31	68.52	69.83	71.14	72.46
- Potato Chips	38.69	39.73	40.63	41.53	42.42	43.26
- Tortilla Chips	0.70	0.72	0.74	0.77	0.79	0.82
- Puffed Snacks	20.29	20.47	20.71	21.01	21.34	21.73
- Rice Snacks	5.82	5.88	5.93	5.99	6.06	6.11
- Vegetable, Pulse and Bread Chips	0.50	0.51	0.52	0.53	0.54	0.55
Savory Biscuits	13.27	13.46	13.68	13.95	14.24	14.54
Popcorn	1.06	1.08	1.11	1.15	1.19	1.23
Pretzels	19.48	19.77	20.17	20.61	21.09	21.65
Other Savory Snacks	0.00	0.00	0.00	0.00	0.00	0.00
Savory Snacks	112.41	114.56	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 over the past five years and these formats offer the largest variety of, and provide the most shelf space for, dried fruit and nuts. While independent small grocer distribution channels have greatly diminished over the past five years due to the growing trend toward supermarkets and hypermarkets, they remain an important distribution format for dried fruits and nuts in Poland.

The increased market share of supermarkets and hypermarkets has increased the demand for bulk packaging of products as customers want to make fewer trips to the store and receive more value for their money. Similar to major grocery chains in the U.S., international food retail stores such as Auchan, Tesco, Carrefour and E. Leclerc, require distributors to pay stocking fees, entry fees, and other obligatory fees (grand opening, birthday, and other promotional fees) for placing products on their shelves.

Convenience stores represent a new and growing distribution channel located in railway, bus, subway and gas stations throughout Poland. The number of these stores is expected to increase as the Polish highway system rapidly improves and expands, 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 on the Polish market such as Biedronka (owned by [Portuguese](#) company [Jerónimo Martins](#)) and Lidl (owned by German based Lidl Stiftung & Co. KG) remained an important sales outlets for savory snacks in 2016, accounting for an over 34 percent of value share. Convenience stores such as Zabka (owned by [Mid Europa Partners](#)) accounted for a 26 percent value share. These operators attracted customers by offering long opening hours and convenient locations. Savory snacks were often purchased during everyday shopping from all these outlets, as these products are complementary to soft drinks, beer and other alcoholic drinks; products attracting clients to discount and convenience stores operating in Poland.

The majority of dried fruit and nut products that enter Poland are finished products, meaning they are dried, shelled or otherwise processed before entry. U.S. suppliers prefer to make bulk shipments to

Other products in the sweet and savory snacks category compete heavily with dried fruits and nuts. Firms in this industry advertise heavily through internet, TV, radio and billboards. The increasing availability of year round high quality fresh fruit and vegetables also directly competes with dried fruits and nuts.

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

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

Poland (Customs) Import Statistics
<b>Commodity: 080212, Almonds, Fresh Or Dried, Shelled</b>
Year To Date: January – December

Partner Country	Unit	2013		2014		2015	
		USD	Quantity	USD	Quantity	USD	Quantity
World	KG	43,140,205	5,646,331	54,198,065	5,962,568	48,962,702	4,875,491
United States	KG	16,756,763	2,287,280	18,358,998	2,029,494	21,222,023	2,226,952
Spain	KG	10,383,918	1,341,001	15,192,548	1,619,922	10,033,519	960,315
Germany	KG	7,679,536	966,472	10,338,748	1,107,256	8,444,162	788,935
Australia	KG	4,047,390	540,604	5,138,031	606,842	4,562,693	456,948
Czech Republic	KG	2,195,534	262,904	2,669,798	273,651	2,507,068	220,489
United Kingdom	KG	326,858	20,060	740,821	48,127	1,217,424	80,721
Italy	KG	1,083,040	128,039	620,684	63,878	692,064	50,835
Netherlands	KG	54,977	5,719	84,333	40,635	118,592	8,471

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

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

Poland (Customs) Import Statistics							
<b>Commodity: 080222, Hazelnuts Or Filberts (Corylus Spp.) Fresh Or Dried, Shelled</b>							
Year To Date: January - December							
Partner Country	Unit	2013		2014		2015	
		USD	Quantity	USD	Quantity	USD	Quantity
World	KG	16,112,599	2,382,070	25,581,610	2,655,801	20,216,129	1,706,731
United Kingdom	KG	1,720,368	219,200	2,486,770	216,970	5,378,432	340,454
Germany	KG	1,994,760	245,969	3,421,701	325,968	3,628,723	258,126
Turkey	KG	3,899,306	543,452	3,323,373	355,638	3,268,239	287,021
Georgia	KG	4,301,368	702,678	4,744,181	484,228	2,645,608	286,117
Azerbaijan	KG	1,470,627	238,000	848,720	92,275	2,137,537	281,000
Czech Republic	KG	715,240	105,520	381,045	59,987	729,666	60,858
Spain	KG	746,964	116,530	1,734,129	167,174	573,471	42,633
France	KG	191,025	19,440	223,525	21,120	475,033	36,125
Italy	KG	867,936	153,731	7,775,592	871,000	343,692	36,009
Chile	KG	-	-	-	-	323,543	26,090
United States	KG	-	-	-	-	217,606	15,518

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							
Year To Date: January - December							
Partner Country	Unit	2013		2014		2015	
		USD	Quantity	USD	Quantity	USD	Quantity
World	KG	534,016	118,616	612,853	175,684	1,080,020	231,286
Germany	KG	5,900	2,800	2,363	518	520,526	108,998
Chile	KG	-	-	183,577	24,300	211,829	44,300
Slovakia	KG	161,557	34,440	135,512	23,944	172,820	23,567
United States	KG	332,485	59,712	158,489	26,375	131,049	31,090
Spain	KG	-	-	-	-	18,747	10,900
Netherlands	KG	1,492	254	9,020	7,579	13,415	6,281
Austria	KG	-	-	-	-	6,332	2,100
Italy	KG	-	-	67	8	5,302	4,050
Turkey	KG	1,618	50	-	-	-	-
Ukraine	KG	-	-	15,448	14,000	-	-
Czech Republic	KG	10,418	16,000	24,512	19,560	-	-
France	KG	20,529	5,350	-	-	-	-
Hungary	KG	17	10	83,865	59,400	-	-

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
<b>Commodity: 080251, Pistachios, In Shell, Fresh Or Dried</b>



Year To Date: January - December							
Partner Country	Unit	2013		2014		2015	
		USD	Quantity	USD	Quantity	USD	Quantity
World	KG	21,862,571	2,674,566	26,848,941	2,825,636	20,853,832	2,759,733
Iran	KG	6,312,025	703,768	7,614,937	769,766	11,880,865	1,284,181
United States	KG	6,695,397	674,547	10,418,257	966,725	5,509,790	508,066
Slovakia	KG	6,369,742	806,099	7,731,605	883,811	1,754,507	646,516
France	KG	2,429,607	484,400	967,877	196,176	1,381,596	282,192
Netherlands	KG	-	-	2,322	310	219,159	24,421
Germany	KG	3,769	82	81,799	7,327	66,696	6,984

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

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

Poland (Customs) Import Statistics	
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<b>Commodity: 080261, Macadamia Nuts, In Shell, Fresh Or Dried</b>							
Year To Date: January - December							
Partner Country	Unit	2013		2014		2015	
		USD	Quantity	USD	Quantity	USD	Quantity
World	KG	38,096	2,164	9,376	499	44,520	3,457
South Africa	KG	75	8	-	-	43,815	2,177
Kenya	KG	-	-	-	-	705	1,280
Netherlands	KG	38,021	2,156	252	11	-	-
Guatemala	KG	-	-	9,125	488	-	-
Source of Data: Central Statistical Office of Poland (GUS)							
<i>Source of Data: Central Statistical Office of Poland (GUS)</i>							

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							
<b>Commodity: 1202, Peanuts (Ground-Nuts), Not Roasted Or Otherwise Cooked, Whether Or Not Shelled Or Broken</b>							
Year To Date: January - December							
Partner Country	Unit	2013		2014		2015	
		USD	Quantity	USD	Quantity	USD	Quantity
World	KG	60,429,160	35,563,879	65,179,534	40,539,466	58,773,740	42,069,373
Argentina	KG	37,540,855	20,938,736	39,526,793	24,218,583	37,104,575	26,461,433
Brazil	KG	7,361,111	4,643,786	12,585,93	7,517,242	10,589,05	7,460,164

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United States	KG	11,031,216	7,011,918	7,326,945	4,992,089	4,924,054	3,654,011
Nicaragua	KG	2,777,405	2,030,000	2,270,654	1,587,500	4,589,517	3,300,016
China	KG	715,490	343,577	2,176,564	1,453,964	836,054	523,106
Netherlands	KG	420,849	377,214	333,116	248,485	298,497	288,623
India	KG	31,410	21,000	174,122	72,726	142,804	106,334
United Kingdom	KG	-	-	24,639	21,250	92,623	89,500
Germany	KG	175,991	55,716	391,426	176,027	60,744	41,409
Israel	KG	32,938	13,500	91,597	39,900	36,184	20,650
Greece	KG	-	-	6,503	3,900	27,742	36,000
Vietnam	KG	7,718	2,700	14,010	5,806	21,025	7,160
Belgium	KG	17,632	10,027	15,282	7,775	18,222	20,409

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

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

Poland (Customs) Import Statistics							
Commodity: 120600, Sunflower Seeds, Whether Or Not Broken							
Year To Date: January - December							
Partner Country	Unit	2013		2014		2015	
		USD	Quantity	USD	Quantity	USD	Quantity
World	KG	41,648,320	48,249,022	33,557,629	43,859,986	38,518,998	61,750,216
Bulgaria	KG	10,986,151	9,630,216	14,086,972	15,676,406	16,813,909	21,382,387
Moldova	KG	5,045,371	7,640,375	4,598,097	8,046,780	7,595,113	14,452,450
Hungary	KG	8,832,512	10,577,53	5,581,381	6,575,513	6,077,599	10,816,63

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Slovakia	KG	3,782,082	7,845,277	1,812,534	5,061,799	2,400,772	5,966,102
Turkey	KG	1,601,595	645,416	827,532	322,156	1,355,638	753,880
Ukraine	KG	4,090,952	4,031,583	2,028,994	3,224,468	840,250	2,499,455
Czech Republic	KG	1,411,389	1,911,446	397,713	810,210	834,241	1,091,638
Romania	KG	134,505	120,529	11,887	21,550	423,883	1,201,119
Germany	KG	1,518,427	1,173,664	463,769	279,196	410,924	630,878
Lithuania	KG	559,308	1,555,010	-	-	394,788	1,007,780
Russia	KG	309,307	425,170	17,954	24,492	371,647	1,018,422
China	KG	1,130,141	669,750	1,113,505	548,849	311,706	147,584
Malta	KG	150,887	147,000	537,929	627,000	286,951	336,000
Argentina	KG	591,047	420,079	74,087	59,000	138,552	119,787
Iran	KG	-	-	-	-	74,927	31,552
Italy	KG	-	-	25,307	28,498	57,093	124,330
Netherlands	KG	164,920	337,523	246,123	468,269	43,040	95,727
France	KG	90,427	11,417	140,855	87,156	36,459	22,716
Sweden	KG	-	-	-	-	14,374	24,705
Austria	KG	437,066	421,801	122,257	203,047	8,587	6,894
Chile	KG	-	-	-	-	8,297	3,000
Latvia	KG	-	-	-	-	8,247	9,000
Slovenia	KG	-	-	-	-	5,914	6,750
Spain	KG	-	-	9,666	1,532	3,774	719
United States	KG	466,904	388,938	584,391	412,644	1,455	48

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
<b>Commodity: 200893, Cranberries (Vaccinium Macrocarpon, Vaccinium Oxycoccos, Vaccinium Vitis-Idaea), Prepared Or Preserved, Nesoi</b>
Year To Date: January - December

Partner Country	Unit	2013		2014		2015	
		USD	Quantity	USD	Quantity	USD	Quantity
World	KG	17,893,119	8,522,096	17,754,109	5,199,507	18,967,710	5,877,641
United States	KG	10,077,190	2,799,738	12,386,592	3,618,947	11,810,087	3,401,953
Chile	KG	391,119	108,490	748,824	240,318	2,683,863	848,340
Germany	KG	1,982,970	886,507	1,499,996	616,921	1,146,108	667,755
Canada	KG	2,591,713	578,766	1,846,613	413,550	1,086,309	265,652
Czech Republic	KG	-	-	-	-	614,424	196,207
Austria	KG	351,021	80,800	213,917	47,000	530,795	164,460
Netherlands	KG	120,152	22,109	394,434	86,899	410,410	119,193
United Kingdom	KG	-	-	423,900	102,143	320,644	71,830
Turkey	KG	-	-	7,441	500	191,816	56,337
Italy	KG	63,561	4,554	77,654	6,895	68,122	18,541
Ecuador	KG	1,994,572	3,801,575	47,878	47,430	47,291	36,470

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							
Year To Date: January - December							
Partner Country	Unit	2013		2014		2015	
		USD	Quantity	USD	Quantity	USD	Quantity
World	KG	22,697,838	9,337,550	26,454,072	7,483,924	27,752,313	8,317,679
Chile	KG	13,547,758	5,702,676	14,198,179	4,001,356	16,004,086	5,068,139
United States	KG	4,234,602	1,818,284	4,706,793	1,428,952	6,167,438	1,788,300
Germany	KG	524,497	128,098	929,813	178,918	1,217,293	195,029
Moldova	KG	242,002	117,051	910,837	296,540	1,096,111	406,586
Serbia	KG	57,944	20,000	1,300,335	378,400	844,705	272,640
Argentina	KG	2,233,199	842,395	602,418	139,318	480,575	137,164
Czech Republic	KG	337,202	99,792	300,812	101,884	374,017	87,761
France	KG	928,882	377,698	1,879,409	491,211	323,529	84,594
Netherlands	KG	25,570	34,857	8,159	2,296	268,511	40,466
Slovakia	KG	438,189	144,245	1,304,188	376,666	244,067	60,402

Austria	KG	10,513	6,582	17,403	3,300	218,463	35,937
Turkey	KG	47,791	22,469	15,265	3,725	179,737	54,410

*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)							
Year To Date: January - December							
Partner Country	Unit	2013		2014		2015	
		USD	Quantity	USD	Quantity	USD	Quantity
World	KG	32,418,998	14,892,473	33,024,611	15,878,152	26,159,553	14,048,304
Turkey	KG	5,897,606	2,545,036	8,934,339	4,942,899	5,008,068	2,772,849
Iran	KG	9,177,833	5,062,021	4,656,654	2,361,681	4,756,534	2,912,583
Chile	KG	4,385,593	1,415,458	3,917,467	1,413,579	3,787,020	1,516,653
Germany	KG	3,722,581	1,365,339	3,235,929	1,267,068	2,635,629	1,200,309
Uzbekistan	KG	748,320	417,125	1,143,249	669,210	2,110,678	1,367,443
Czech Republic	KG	55,608	8,400	537,459	206,880	1,267,394	556,772
United Kingdom	KG	560,417	193,230	1,269,299	442,576	1,253,475	495,436
India	KG	1,303,062	942,880	1,198,644	828,500	1,098,465	940,380
China	KG	2,940,423	1,602,625	2,783,373	1,471,662	876,202	590,000
Latvia	KG	36,934	21,000	175,241	107,744	714,160	491,123
United States	KG	1,761,499	574,314	3,268,707	1,238,031	572,530	222,773
Netherlands	KG	753,706	293,286	721,003	319,499	368,891	161,562

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

### Market Preferences

Flavored peanuts, almonds, and hazelnuts have recently become popular among Polish consumers.

Spicy flavors, as well as chocolate coatings, tend to be the most appealing. Coated peanuts, referred to as double crunch peanuts, are also popular, and are available in salted or flavored varieties. Energy bars produced from grains, nuts, and dried fruits are becoming more visible on the market as society becomes more health conscious. Products from foreign companies that produce products in Poland dominate the energy bar market; however, Polish companies are starting to produce these bars in Poland too.

Chocolate manufacturers are also starting to look for high quality ingredients to ensure longer shelf life for their products. This has led to an increased demand for high quality nuts as raw materials. Due to increased 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:**

Polish government 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'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 E.U. regulations can be obtained from [E.U. 28 FAIRS Report](#).

#### *Registration of a new imported product*

All imported products must be approved for sale or use on the Polish market. Registration and approval of imported products is much simpler if the product has already received approval for sale in another E.U. country. In order to test or register a new product or start procedures for receiving approval of a new additive (not specified on the approved additives list) the following procedure should be followed:

The appropriate Voivod Sanitary Station should be contacted. In Warsaw - [Wojewodzka Stacja Sanitarna](#) (SANEPID – link includes English language list of tests performed) is the appropriate contact. Please note that only firms registered in Poland (e.g. the potential importer) can order product testing. Additionally, each region has its own sanitary station (a list is available from Warsaw SANEPID) and only firms registered in Warsaw or neighboring areas can conduct product testing in the Warsaw Sanitary Station.

A local sanitary station must be supplied with a product sample for testing. The tests can take between two weeks and two months. The cost is difficult to estimate but may amount to U.S. \$250 per product. An estimate of the cost can be obtained from the SANEPID station when it is presented with product details. The lab tests for product ingredients to determine whether they are permitted on the Polish market.

If it is determined that all the ingredients are allowed on the Polish market, SANEPID test results are sufficient for the product to be sold in Poland. However, should some ingredients be questioned, additional requests must be submitted to [State Hygiene Office](#) (Panstwowy Zaklad Higieny).

#### *Labeling Requirements*

All packaged/canned food products are required to have Polish language labels. Multi-language labels are acceptable as long as they include Polish.

On December 13, 2014, the EU's new "[Food Information to Consumers \(FIC\)](#)" Regulation

1169/2011 was implemented.

Specific rules on the use of stickers to provide mandatory labeling information are not included in FIC regulation 1169/2011. On this issue, the European Commission refers to point 2.1.1 of their Questions and Answers on the Application of Regulation 1169/2011 document, which says that “labels should not be easily removable so as to jeopardize the availability or the accessibility of the mandatory food information to the consumer”. Polish sanitary authorities allow for use of stickers on products distributed on the Polish market.

The key changes introduced by the FIC Regulation are listed below:

- Nutrition labeling becomes mandatory on December 13, 2016
- Minimum font size for printing mandatory information
- New format for allergen labeling (allergens must be highlighted in the list of ingredients – “allergen boxes” are no longer allowed)
- Voluntary front-of-pack labeling has to follow a set format
- Country of origin labeling is extended to more products
- Durability date and “frozen on” date must be indicated on frozen products
- “Use by date” must be indicated on individual pre-packed portions
- Specific treatments such as “refrozen”, “concentrated”, “smoked”, “powdered” must be added to the product name
- Alcoholic strength by volume for beverages containing more than 1.2 percent by volume of alcohol must appear in the same field of vision as the product name
- Proteins added to meat products that are of a different animal origin must be declared in the list of ingredients
- Presence of added water must be declared on meat and fishery products if the added water makes up more than 5 percent of the finished product
- Vegetable origin of oils and fats must be indicated in the list of ingredients

Additional information regarding E.U. labelling issues can be obtained from Poland’s “[Food and Agricultural Import Regulations and Standards](#)” (FAIRS) as well as [E.U. 28 FAIRS Report](#).

*E.U. Tariffs*

[TARIC](#), the integrated Tariff of the European Union, is a multilingual database in which are integrated all measures relating to EU customs tariff, commercial and agricultural legislation.

*Phytosanitary requirements*

Official Aflatoxin Controls on U.S. Products

As of April 2015, the E.U. approved the pre-export checks (PEC) program for U.S. almonds; which were included in the Annex to [Commission Implementing Regulation](#) (EU) 2015/949 which lists all EU approved Pre-export Check programs. The acceptance of the U.S. program reflects the EU’s recognition of aflatoxin controls performed at U.S. origin in line with Article 23 of the EU Regulation on Official Food and Feed Controls ([Regulation \(EC\) No 882/2004](#)). The USDA Agricultural marketing Service implemented PEC almond certificates on August 1, 2015. The almond PEC program builds on and



replaces the Voluntary Aflatoxin Sampling Plan (VASP) program, which stopped being required in September 2014 when the EU voted to remove California Almonds from Special Measures.

With the publication of Commission Implementing Regulation (EU) [2015/949](#), all EU accepted programs have been combined in the one regulation.

The U.S. peanut program which was approved in 2009 is now also covered by the general provisions of [Commission Implementing Regulation \(EU\) 2015/949](#). Under the regulation, import authorities are directed to subject consignments of U.S. almonds and peanuts with a PEC certificate to a less than 1% control level at the border. The PEC program is voluntary; a PEC certificate is not a requirement for import into the EU. Shipments without a PEC certificate do not benefit from the reduced inspection levels upon import in the EU.

For additional information on aflatoxin PEC certification, refer to:

<http://www.almonds.com/newsletters/handle/almond-industry-flexes-its-pecs>

<http://www.peanutsusa.org.uk/eu-food-aflatoxin-legislation> <http://www.ams.usda.gov/services/lab-testing/aflatoxin>

On April 1, 2015, U.S. pistachios were included in the list of products/origins subject to increased import controls under Commission Regulation (EC) No [669/2009](#). Member states have to test 20 percent of all incoming shipments until the list in the Annex of the regulation is amended. This regulation does not impose any requirements on exporters.

### *Additives*

Additives that are authorized in food and their conditions of use are listed in Annex II to the [Food Additives Regulation 1333/2008](#). The authorized uses of additives are listed according to the category of food to which they may be added. [Annex I](#) to regulation 1333/2008 lists the definitions of 26 different categories of food additives. Only additives included in the EU's positive list are authorized under specific conditions. An important difference from U.S. legislation is that the use of flour bleaching agents chlorine, bromates and peroxides is not allowed in the EU.

### *Regulation on Permitted Additives*

The Polish Minister of Health regulation on permitted additives was published on April 22, 2011 ([Rozporządzenie Ministra Zdrowia z dnia 22 kwietnia 2011 r. zmieniające rozporządzenie w sprawie dozwolonych substancji dodatkowych](#)) in the Polish Journal of Law 2011, No. 91, pos. 525. Regulation on Specifications and Criteria of Purity of Additives The Polish Minister of Health regulation on specifications and criteria of purity of additives: [Rozporządzenie Ministra Zdrowia z dnia 12 października 2007 r. w sprawie specyfikacji i kryteriów czystości substancji dodatkowych](#) (Polish Journal of Law 2011, No. 2, pos. 3) which was published on October 12, 2007, was amended on December 23, 2010 and changed on April 22, 2011 (“[Rozporządzenie Ministra Zdrowia z dnia 22 kwietnia 2011 r. zmieniające rozporządzenie w sprawie specyfikacji i kryteriów czystości substancji dodatkowych](#)”) (Polish Journal of Law 2011, No. 91, pos. 526).

These particular regulations continue to be difficult obstacles facing imported products. As each EU member state has a different list of allowable food additives it is vital for all U.S. exporters to check with the potential Polish importers about whether the product intended for the Polish market meets all the ingredient requirements.

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

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End of Report.