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Report Highlights:

Poland's retail market is very dynamic adjusting to the ever changing consumer desire to advance their lifestyle. Discount stores are an important force on the market given the soft economy, while convenience stores, hypermarkets, supermarkets are becoming stronger. U.S suppliers face stiff competition for the consumer's attention from products of local and other EU countries. U.S. food products holding best near-term prospects include: wines, distilled spirits, seafood, prunes, and cranberries etc.

The presented information provides a general overview of the internal retail market and enables analysis of activities of trade entities. Basic information includes economic indicators, retail sales, structure of retail sales, prevailing organizational forms on the market, and major retailers in the market. Data presented in the publication are obtained from credible sources, such as Polish Statistical Office or from prominent press publishers, carrying out their independent researches.

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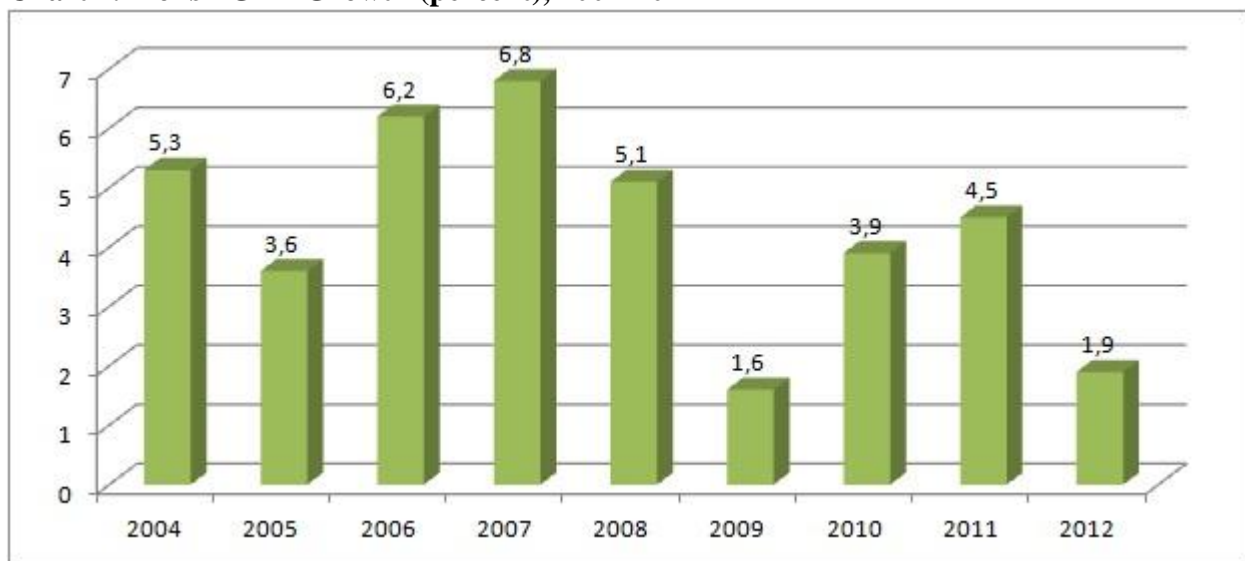
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Section One: Market Overview

The Polish economy has been growing constantly since the country's initial transformation towards democracy starting in the early 1980s through to today. Even the 2008/09 global economic crisis did not interrupt the positive expansion in the country's Gross Domestic Product (GDP) over this period making Poland an exception and a phenomenon among EU countries that did not fare as well in recent years.

The Polish GDP has been growing successively since 1991 which is reflected in increasing demand for a broad array of consumer goods.

Chart 1. Polish GDP Growth (percent), 2004-2012



Data source: Eurostat

For 2012 Poland's GDP value exceeded 1.5 bln PLN placing the country ninth among the EU countries, just behind Belgium and Sweden. Furthermore, Poland's GDP as measured by purchasing power parity (to current US Dollar) has shown steady growth with the World Bank reporting a 4.45 percent increase for the period 2011-2012.

Poland's population of 38.54 million is concentrating increasingly in urban areas with 61 percent living in towns and cities. The median age, 38 years, is going up. A trend toward smaller families is becoming more apparent in Poland's 13.3 million households, with an average household size of 3.07 people. What is relevant from the retail market analysts' point of view is that the typical Polish family eats together and that households buy food stocks for only a few days at a time. Aggregate consumer expenditures on food are predicted to decrease from 49,959.8 million USD in 2012 to 48,998.4 million USD in 2013.

Although Poland has a strategic position at the heart of Europe, the poor state of its roads, as well as financial pressures, have hindered the country's ability to fully capitalize on its geographical position. Overreliance on a few trade partners is a significant concern: in 2012, 76.8 percent of all exports went to the EU. The current account deficit was 3.6 percent of GDP in 2012 but is set to decrease to 3.1 percent in 2013.

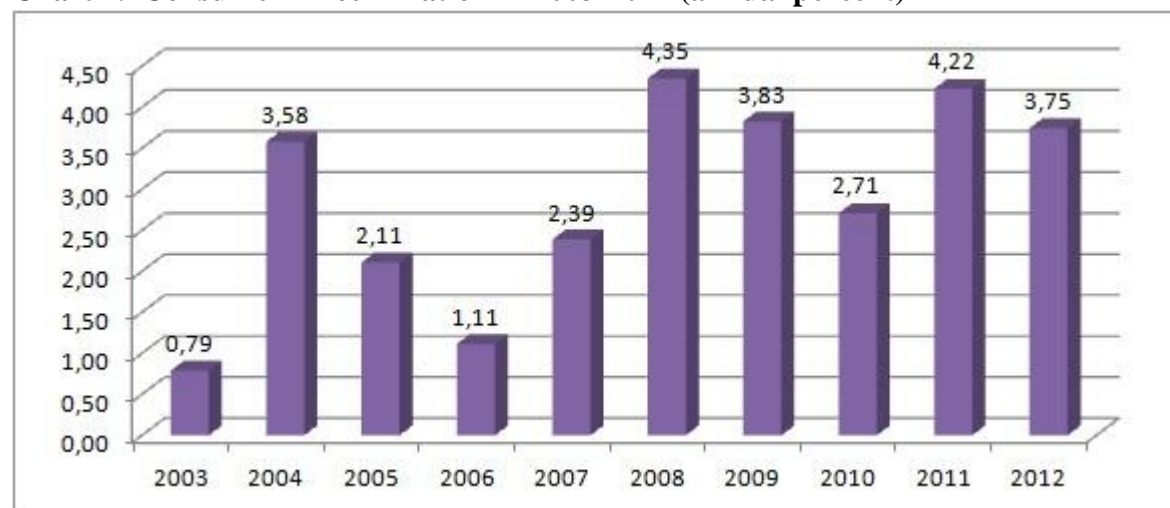
Table 1. Basic Economic Indicators

| | POLAND | | |
|-------------------------------------|---------|---------|---------|
| | 2011 | 2012 | 2013f |
| Population, mln | 38.3 | 38.54 | 38.3 |
| Nominal GDP, PLN bln | 1,524.7 | 1,622.1 | 1,678.3 |
| GDP per capita, US \$ | 13,430 | 13,012 | 13,969 |
| Real GDP growth, % change y-o-y | 4.3 | 2.0 | 1.9 |
| Budget balance % of GDP | (5.1) | (3.9) | (3.6) |
| Consumer prices % y-o-y, eop | 4.6 | 3.5 | 1.6 |
| Exchange rate PLN/US\$, eop | 3.45 | 3.09 | 3.23 |
| Exchange rate PLN/EUR, eop | 4.46 | 3.81 | 4.30 |
| Goods Imports, EUR bln | 149.4 | 150.1 | 157.9 |
| Goods Exports EUR bln | 139.3 | 143.8 | 152.5 |
| Balance of Trade in Goods, EUR bln | (10.1) | (6.3) | (5.4) |
| Current account, % of GDP | (4.3) | (3.6) | (3.1) |
| Foreign reserves ex gold, US\$ bln | 92.7 | 102.7 | 105.8 |
| Total external debt stock, % of GDP | 62.3 | 72.1 | 73.2 |

**Source: Emerging Europe Monitor: Central Europe and Baltics, Macroeconomic Forecast Poland 2013*

The Consumer Price Index (CPI) remains in a fluctuating state year-over-year.

Chart 2. Consumer Price Inflation in 2003-2012 (annual percent)

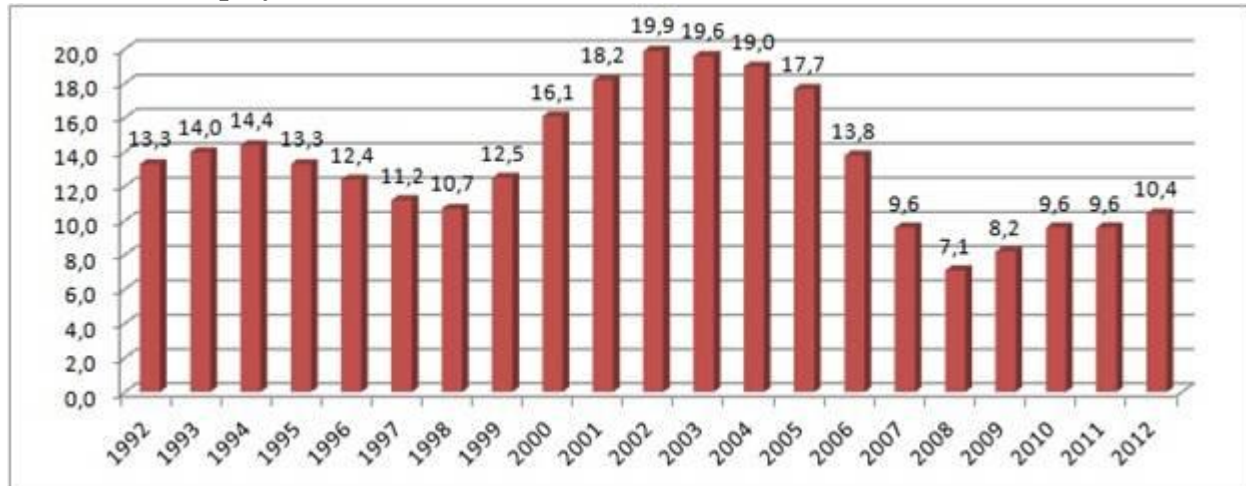


Data source: The World Bank

Unemployment

Since 2010 the unemployment rate has remained stable, fluctuating near 10 percent.

Chart 3. Unemployment rate in Poland (in %), 1992-2012



Data source: The World Bank

In 2004 Poland joined the EU and the western European labor markets opened to Poles. This explains the steady decrease in the unemployment rate in the years 2004-2008, interrupted by the global crisis which indirectly disrupted the polish economy.

Section Two: Retail Market

General Information

Although the retail market in Poland has been developing rapidly over the past two decades, it is still a challenge to compete on the polish market, since many regulations are still very unclear and deviate from a regular open market.

There are 13 days throughout a year, when the trade is forbidden. On those days' hypermarkets, supermarkets and medium size stores must be closed. These are the following public holidays:

- New Year (January 1st)
- Epiphany (January 6th)
- Easter (Easter Sunday and Monday)
- Labor Day (May 1st)
- Constitution Day (May 3rd)
- Pentecost Sunday (7th Sunday after Easter)
- Corpus Christi (9th Thursday after Easter)
- Assumption Day (August 15th)
- All Saints Day (November 1st)
- Polish Independence Day (November 11th)
- Christmas (December 25th and 26th)

However, owners and contract employees can conduct sales during that time. Gas stations and pharmacies are exempt from this restriction.

Table 2. Top 15 Retailers on the Polish Market in 2012

(Considering 2012 yearly average exchange rate 1 USD = 3.26 PLN)

| No. | Operator's Name | Name | Sales revenue in thousands PLN | Number of employees |
|-----|---|--|--------------------------------|---------------------|
| 1 | Jeronimo Martins Dystrybucja SA | Biedronka | 28,907,849 | 39,341 |
| 2 | Grupa Eurocash SA | ABC, IGA, Delikatesy Centrum | 16,575,781 | 12,055 |
| 3 | Metro Group w Polsce | Real, Makro Cash&Carry | 14,960,000 | 2,100 |
| 4 | Carrefour Polska Sp. z o.o. | Carrefour, Carrefour Market, Carrefour Express | 7,570,665 | n.i. |
| 5 | Auchan Polska Sp. z o.o. | Auchan, Simply Market | 6,550,000 | n.i. |
| 6 | GK Specjał | PSH Nasz Sklep, Delikatesy Sezam | 4,761,631 | 3,466 |
| 7 | Grupa Muszkieterów | Intermarché | 4,650,000 | 11,000 |
| 8 | POLOmarket Sp. z o.o. | POLOmarket | 3,570,000 | 11,000 |
| 9 | Selgros Sp. z o.o. | Selgros Cash&Carry | 3,375,174 | 3,984 |
| 10 | Żabka Polska, Sp. z o.o. | Żabka | 3,306,554 | 611 |
| 11 | E. Leclerc Polska | E. Leclerc | 2,771,500 | 6,871 |
| 12 | Netto Sp. z o.o. | Netto | 2,381,345 | 3,928 |
| 13 | Polska Grupa Supermarketów Sp. z o.o. | Top Market, Delica, Minuta8 | 2,010,000 | 7,100 |
| 14 | Emperia Holding SA | Stokrotka, Delima, Maro Market, Społem Tychy | 1,948,879 | 7,310 |
| 15 | GK Alma Market SA | Delikatesy Alma | 1,529,530 | 3,180 |

Data source: Polityka Magazine, List of 500 biggest firms and companies in 2012

Marketing Research

Market research conducted by *Kondej Marketing* follows. The research assessed a variety of factors, mostly concerning direct attitude towards the customer and reacting to the market demand.

Table 3. Marketing Retail Networks Ranking

| Position (previous year) | Name | Operator's name | Format | Overall rating 19th Feb 2013 | Overall rating 8th Oct 2013 |
|--------------------------------|-----------------------|----------------------------|--------------|---------------------------------------|--------------------------------------|
| 1 (1) | Biedronka | Jeronimo Martins Polska | discounts | 79.41 | 80.00 |
| 2 (2) | Tesco hypermarkets | Tesco Polska | hypermarkets | 78.99 | 78.53 |
| 3 (4) | Lidl | Lidl Polska | discounts | 76.37 | 77.15 |
| 4 (3) | Auchan | Grupa Auchan | hypermarkets | 76.45 | 77.09 |
| 5 (5) | Kaufland | Kaufland Markety | hypermarkets | 74.53 | 74.92 |
| 6 (8) | Intermarché | Grupa Muszkieterów | supermarkets | 73.92 | 74.63 |
| 7 (7) | Netto | Netto | discounts | 73.97 | 74.30 |
| 8 (6) | Carrefour | Carrefour Polska | hypermarkets | 74.34 | 73.82 |
| 9 (9) | Piotr i Paweł | Piotr i Paweł | supermarkets | 72.81 | 73.33 |
| 10 (11) | POLOmarket | Polomarket | supermarkets | 71.83 | 72.70 |
| 11 (12) | E.Leclerc | Grupa E.Leclerc | hypermarkets | 71.02 | 72.37 |
| 12 (10) | Tesco supermarkets | Tesco Polska | supermarkets | 71.87 | 71.73 |
| 13 (13) | Żabka | Żabka Polska | convenience | 70.68 | 71.47 |
| 14 (14) | Alma Delikatesy | Alma Market | supermarkets | 69.81 | 70.92 |
| 15 (17) | Delikatesy Centrum | Grupa Eurocash | food shops | 68.03 | 69.02 |

Source: *Kondej Marketing*

Of the discount stores, Biedronka is the leader followed by: Lidl, Netto and Aldi.

Among the hypermarkets, according to *Kondej Marketing's* ranking, Tesco is the most customer-oriented service provider followed by: Auchan, Kaufland, Carrefour, E. Leclerc and Real, respectively.

Table 4. Marketing Supermarkets Ranking

| Position | Name | Operator's name | Overall rating 19th Feb 2013 | Overall rating 8th Oct 2013 |
|----------|------------------|--------------------|---------------------------------|--------------------------------|
| 1 | Intermarché | Grupa Muszkieterów | 73.92 | 74.63 |
| 2 | Piotr i Paweł | Piotr i Paweł | 72.81 | 73.33 |
| 3 | POLOmarket | Polomarket | 71.83 | 72.70 |
| 4 | Tesco | Tesco Polska | 71.87 | 71.73 |
| 5 | Alma Delikatesy | Alma Market | 69.81 | 70.92 |
| 6 | Dino | Dino Polska | 68.48 | 68.90 |
| 7 | E. Leclerc | Grupa E. Leclerc | 68.34 | 67.40 |
| 8 | Stokrotka | Grupa Emperia | 61.71 | 67.29 |
| 9 | Carrefour Market | Carrefour Polska | 66.29 | 65.65 |
| 10 | Eko | Eko Holding | 67.45 | 65.63 |

Source: *Kondej Marketing*

In 2013 retail networks have done exceptionally well, despite the near stagnant Polish economy.

Leading the retail networks are the discount operations which will be difficult to dethrone while the economy remains soft.

Retail Sales

In 2012, retail sales in current terms achieved by trade and non-trade enterprises totaled **676.0 billion** PLN, reflecting a market that grew 4.6 percent compared to the previous year.

The value of goods sold in retail sales outlets amounted to 651.7 billion PLN (a 4.4 percent increase), including the value of food and non-alcoholic beverages –166.2 billion PLN, alcoholic beverages and tobacco – 56.2 billion PLN and non-foodstuff goods with 429.4 billion PLN and a significant growth of 5.2 percent.

Table 5. Retail Sales by Groups of Goods (at current prices)

| SPECIFICATION | 2010 | 2011 | 2012 | |
|---|------------------|------------------|------------------|------------|
| | PLN mln | | | 2011 = 100 |
| Total | 592,958.4 | 646,127.1 | 675,992.6 | 104.6 |
| food and non-alcoholic beverages | 172,684.4 | 178,593.7 | 185,631.5 | 103.9 |
| alcoholic beverages and tobacco | 57,962.8 | 59,040.0 | 60,755.1 | 102.9 |
| non-foodstuffs (excluding tobacco) | 362,311.2 | 408,493.4 | 429,606.0 | 105.2 |

Data source: Internal Market Report 2013

Over the past eight years the market structure has barely changed. Behind non-foodstuffs (45 percent market share), food and non-alcoholic beverages account for over a quarter of retail sales. However, for the average Pole, this category is a shrinking expense category.

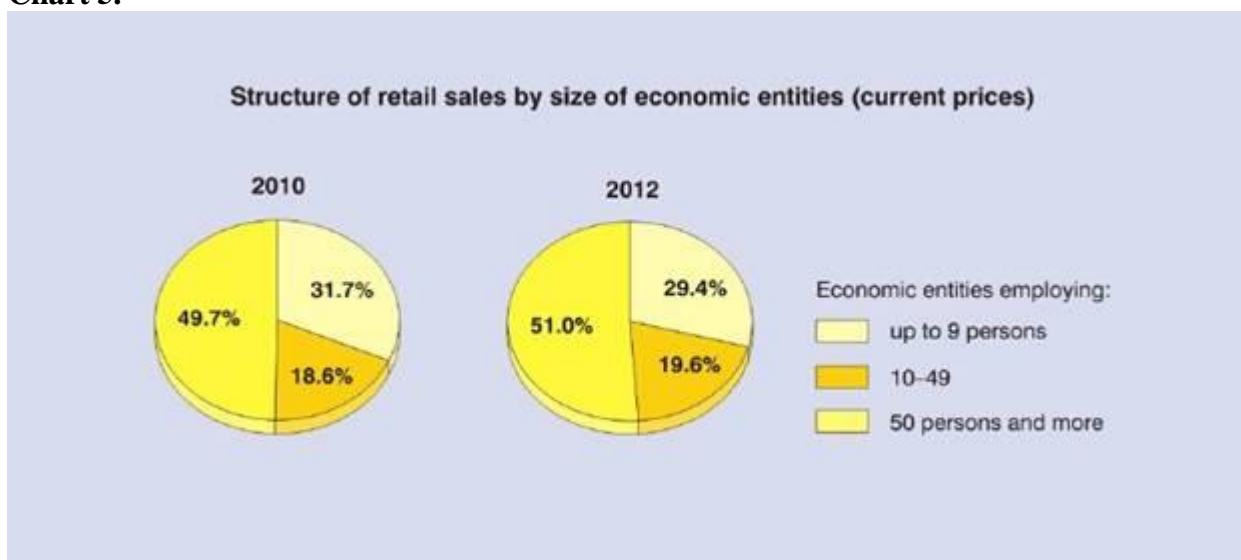
Chart 4.



Source: Internal Market Report 2013

In 2012 the largest economic entities, employing 50 persons or more, accounted for 51 percent of all market sales. Meanwhile, the share of retail sales registered by entities employing up to nine persons amounted 29.4 percent, and by enterprises employing from 10 to 49 persons, amounted to 19.6 percent.

Chart 5.



Source: Internal Market Report 2013

As seen below, most groups of goods maintain a similar share of the market over time, fluctuating only 0.2-0.4 percent. However, a notable change in the shares for the bread and cereal products group increased 0.8 percent from 2010 to 2011 while that for alcoholic beverages rose 0.6 percent. The rise in alcoholic beverages runs counter to the theory that an increasing excise duty would cut down on demand for the alcohol.

Table 6. Retail Sales Structure by Groupings from Stores and Petrol Stations, 2000 – 2011

| Product\ Year | 2000 (%) | 2005 (%) | 2010 (%) | 2011 (%) |
|--|------------|------------|------------|------------|
| Fruit and Vegetables | 2.1 | 2.4 | 2.5 | 2.4 |
| Meat and meat products | 5.9 | 6.0 | 5.4 | 5.6 |
| Fish and fish products | 1.1 | 1.0 | 1.1 | 1.0 |
| Bread and cereal products | 3.3 | 3.4 | 2.9 | 3.7 |
| Milk, eggs and cheese | 2.9 | 3.5 | 3.6 | 3.4 |
| Sugar and confectionery | 5.0 | 3.8 | 2.1 | 1.9 |
| Coffee, tea and cocoa | 1.4 | 1.6 | 1.3 | 1.4 |
| Other foodstuff articles and non-alcoholic beverages | 10.6 | 8.1 | 8.0 | 8.4 |
| Alcoholic beverages | 6.5 | 6.5 | 4.8 | 5.4 |
| Tobacco | 2.3 | 2.4 | 2.9 | 3.0 |
| Other non-food articles | 58.9 | 61.3 | 65.4 | 63.8 |
| TOTAL | 100 | 100 | 100 | 100 |

Source: Polish Statistical Yearbook 2012 (page 541, Table 3[466])

In years 2005-2011, total retail sales exceeded the previous year consistently with the lone except being in 2010. In 2011 total sales returned positive again. For the last three years total sales of food and non-alcoholic beverages, however, have slightly decreased year by year. The Polish economy is dynamic. Except for 2010 Poles have spent more on non-consumer goods, e.g. in 2011 investing in all sorts of equipment, machinery etc. Generally, expenses per capita in retail market grew in 2011 by 3.2 percent.

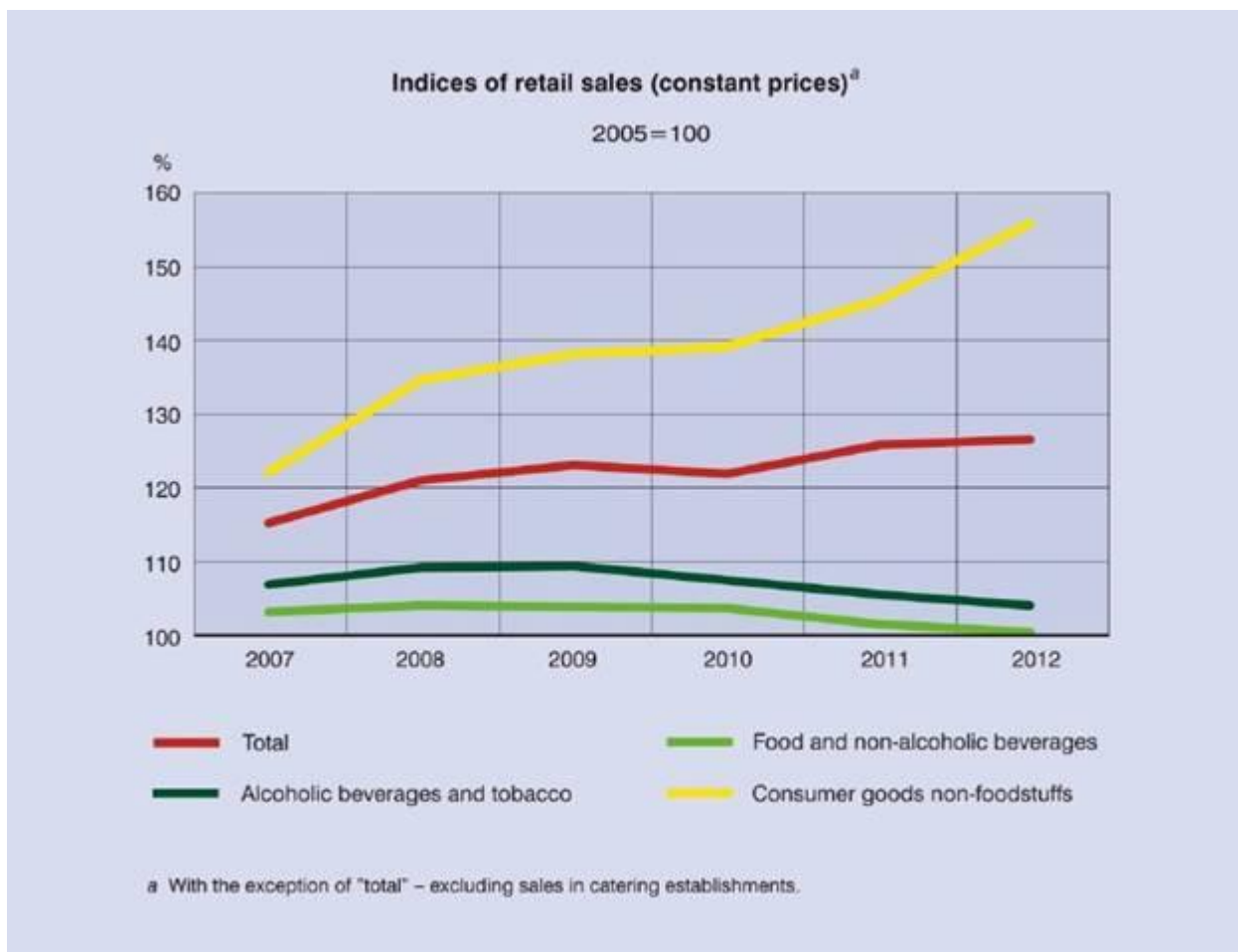
Table 7. Indices of Retail Sales (constant prices)

| SPECIFICATION | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 |
|---|---------------------|-------|-------|-------|-------|-------|-------|
| | previous year = 100 | | | | | | |
| TOTAL | 97.6 | 107.2 | 107.6 | 105.0 | 101.7 | 99.0 | 103.2 |
| consumer goods | 96.0 | 106.3 | 106.8 | 106.2 | 101.4 | 100.1 | 101.6 |
| food and non-alcoholic beverages | 98.5 | 101.4 | 101.8 | 100.9 | 99.8 | 97.9 | 97.9 |
| alcoholic beverages, tobacco | 102.0 | 101.1 | 105.7 | 102.4 | 100.1 | 98.1 | 96.1 |
| non-foodstuffs | 93.2 | 110.8 | 110.3 | 110.3 | 102.6 | 100.7 | 104.6 |
| non-consumer goods | 105.1 | 112.1 | 112.3 | 101.4 | 103.3 | 94.9 | 110.5 |
| per capita | 97.6 | 107.3 | 107.7 | 105.0 | 101.6 | 98.9 | 103.2 |

Source: Polish Statistical Yearbook 2012, table 2 (465), page 540

Retail sales, at constant prices in 2012, were 0.5 percent higher than in the year before. The increase in consumer goods non-foodstuffs was above average (of 7.0 percent). Food and non-alcoholic beverages sales dropped by 1.1 percent when compared to the previous year. Alcoholic beverages and tobacco sales also decreased (of 1.3 percent).

Chart 6.



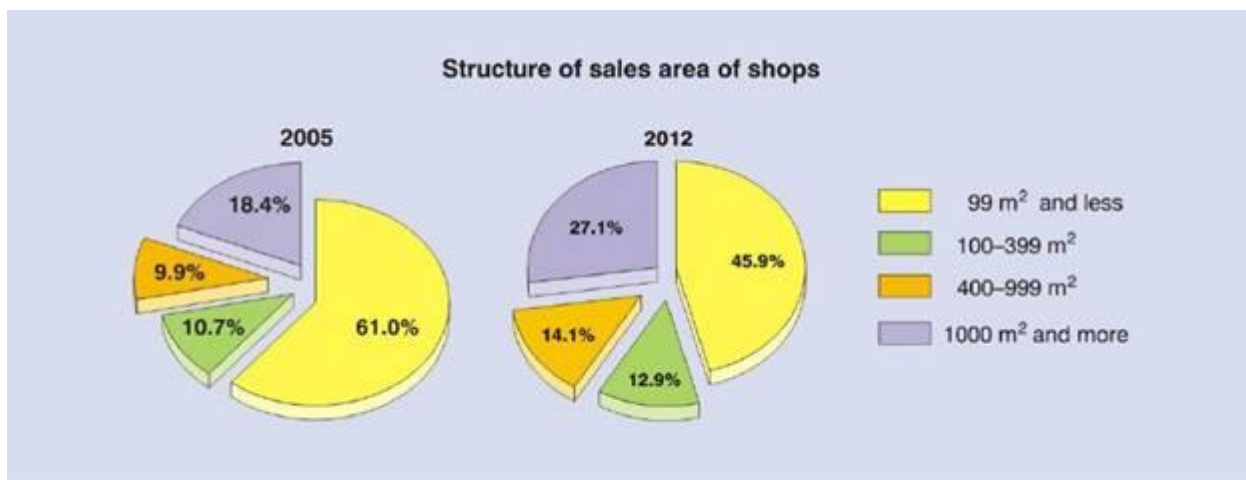
Source: Internal Market Report 2013

Trade infrastructure

At the end of 2012, the total number of stores in Poland was 357 thousand, and was 3.6 percent more than in 2011. The sales area of shops equaled approximately 33,695 thousand square meters (m²), and was 2.2 percent larger than in the previous year. The most significant increase in area was recorded in stores in the 400-999 m² size range (of 6.0 percent), 1000 m² and larger (3.5 percent), and 99 m² and smaller (of 0.9 percent). On the other hand, a slight decrease in sales area (of 0.1 percent) was recorded in small stores with an area of 100-399 m².

Following chart shows changes on the market by a comparison between the year 2005 and 2012.

Chart 7.



Source: *Internal Market Report 2013*

The market also witnessed the increasing importance of retail chains or entities that operate more than single store. At the same time the number of smaller stores (e.g. family stores, called “mom and pop” stores) is constantly decreasing.

Table 8. Economic Entities by Number of Shops, as of 31 XII 2011

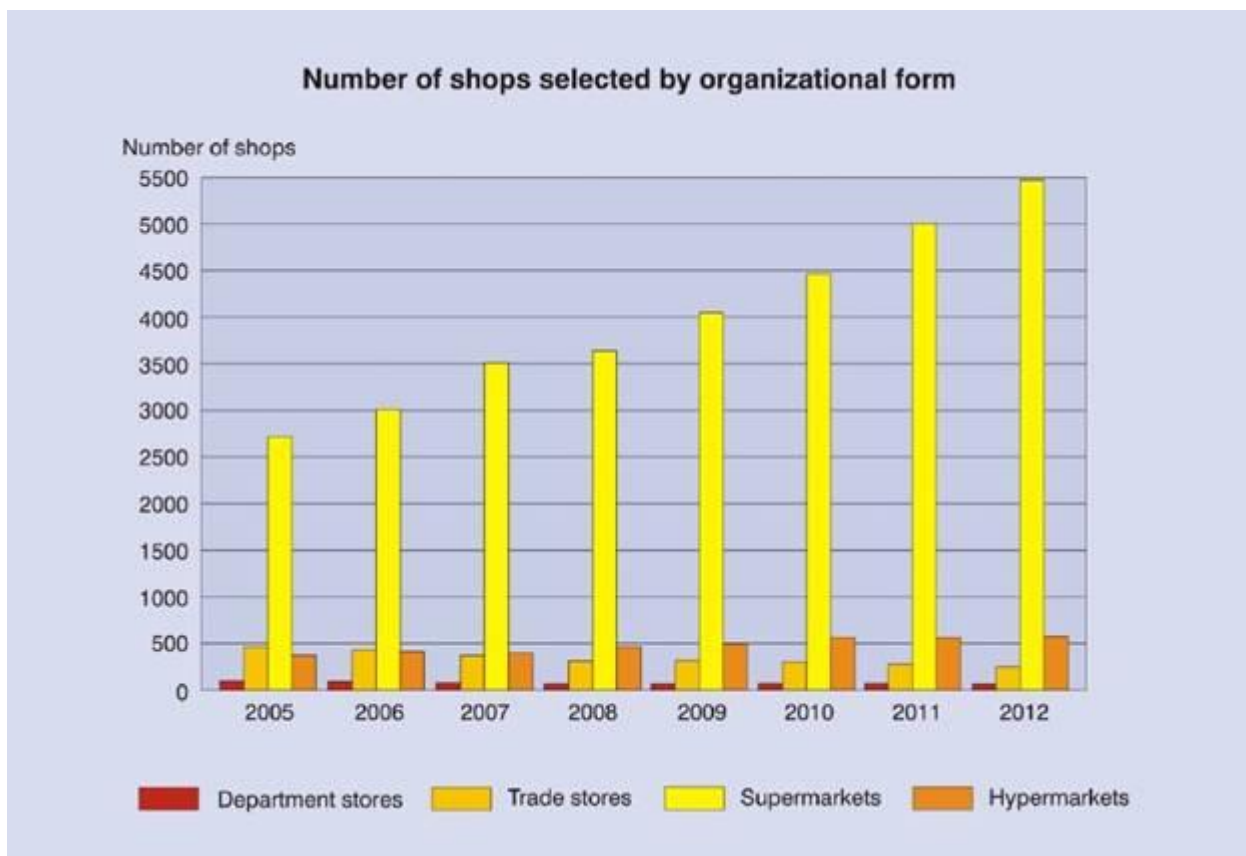
| | 2005 | 2010 | 2011 |
|---------------------|---------|---------|---------|
| 1—2 stores | 330,758 | 277,112 | 274,743 |
| 3—10 stores | 4,792 | 5,278 | 5,166 |
| 11—20 stores | 716 | 758 | 729 |
| 21—50 stores | 270 | 320 | 322 |
| 51—100 stores | 66 | 81 | 92 |
| 101—200 stores | 20 | 38 | 41 |
| 201 and more stores | 6 | 20 | 20 |

Source: *Polish Statistical Yearbook 2012*(page 542, Table 5[468])

Throughout the previous eight years, the highest percentage increase in the number of shops took place in the supermarket category. In 2012 their numbers grew by 9.2 percent year over year. Hypermarkets numbers increased marginally, by 1.2 percent, when compared to the year 2011.

In 2012 the share of retail sales generated jointly by supermarkets and hypermarkets amounted to 22.4 percent, or 0.6 percent higher than the year before.

Chart 8.

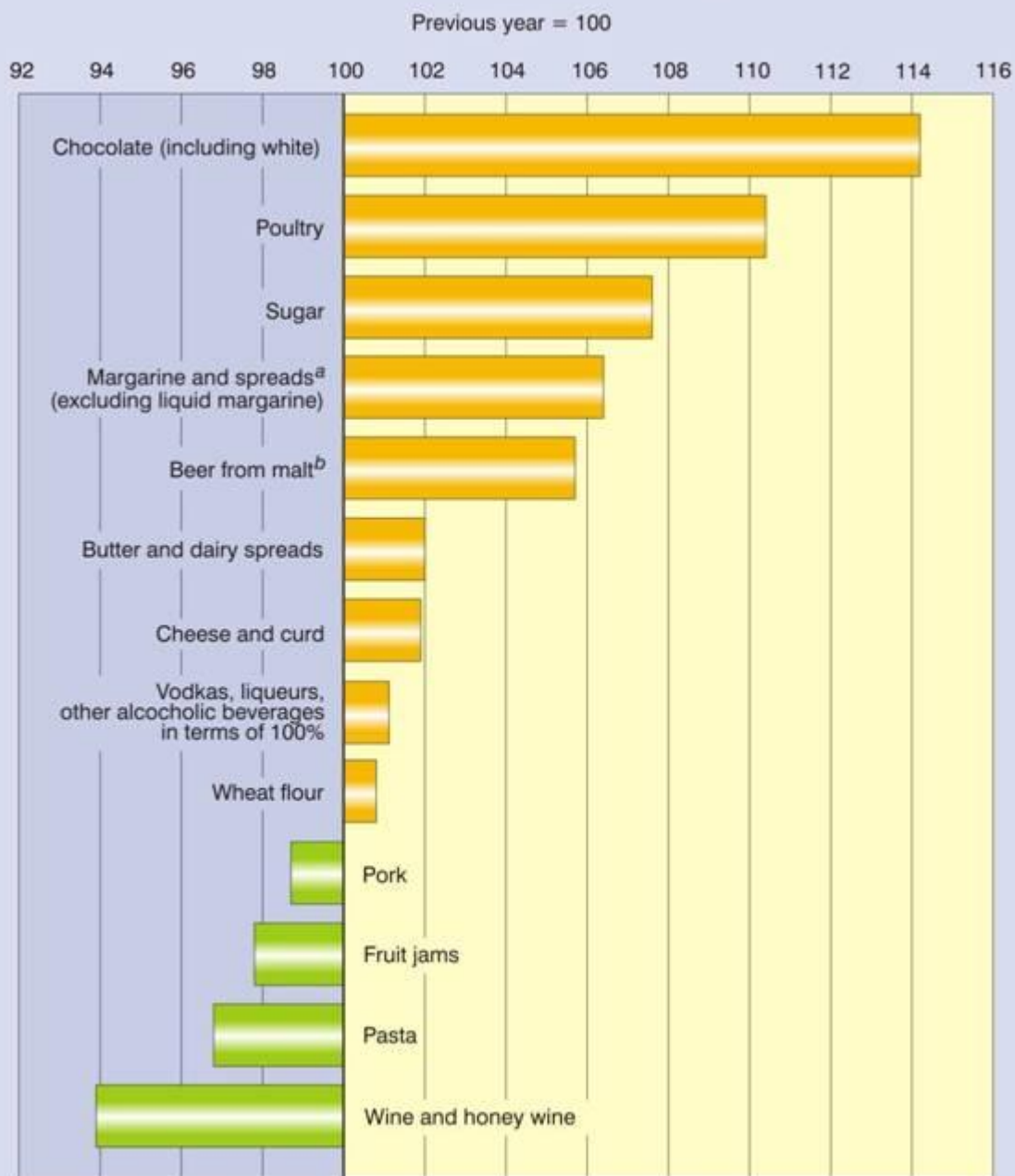


Source: Internal Market Report 2013

In 2012 most consumer goods registered an increase in demand. Products such as chocolate, poultry, sugar, margarine and spreads' suppliers delivered over 105 percent of the previous years' volume. On the other hand, wine distributors recognized sales lower at over 8 percent compared to 2011.

Chart 9.

Delivery index of selected foodstuffs in 2012



^a Reduced and low fat.

^b Of an alcoholic strength of 0,5% and more.

Delicatessens sell top-quality foodstuffs. In Poland the two leading chains in this branch are Piot & Pawel and Alma. Delicatessen stores offer important opportunities for foreign exporters because they offer a broad variety of foreign food products.

Expected changes

Current market restructuring changes are expected to continue. The number of small stores will continue to decline. Supermarkets will continue to gain customers from hypermarkets, and the operator's of such groups as Carrefour, Tesco, or Auchan will continue to open new operations under various formats in new market areas.

Government data shows the number of stores per 1000 citizens to be steadily declining as average retail area continues increase.

Section Three: Entry Strategy

Majority of the Polish retail chains, with an exception of Alma Delicatessen Chain, do not conduct direct import. Therefore, in order to place new products on shelves, an exporter should use a representative for direct personal contact with the retail shops.

Detail information on exporting food products to Poland is available in FAS/Warsaw annual report – Exporter Guide available for download at www.fas.usda.gov [Attaché Report link](#).

Company Profile – Convenience Stores, Gas Marts, Kiosks

Convenience stores, gas station marts, and kiosks are very fragmented sectors, with each retail outlet often having a different owner even within one chain or a brand due to franchising and licenses.

This sector usually consist of small units employing up to five people, since Polish law do not obligate entities employing fewer than five people to deliver statistical information, no reliable statistics exist for this sector.

According to Nielsen data within two years the number of kiosks in Poland had decreased by 4,002. Ruch, the market leader, is now planning to expand its range of services and try to gain new customers by offering some postal services.

In 2011, there were 9,596 gas stations in Poland. The majority of these stations also offer gas marts. The Polish refinery Orlen is a major player in Poland holding a 70 percent market share of gas marts. The remainder of the gas station market is controlled by the Polish Refinery “Lotos “and foreign companies including BP, Shell, and Statoil.

Convenience stores are gaining in popularity. Zabka, the flagship chain of the sector, has been in the market for 15 years and now has over 2,800 stores operating under a franchise model. In December 2013 ABC, a convenience store network owned by the group Eurocash, held a large event to mark its 6,000th store opening. Even though shopping in convenience stores is associated with

slightly higher expenses, Poles have accepted this form and support this market segment's growth.

Carrefour, a hyper and supermarket chain, also noticed the trend and pays attention to smaller format stores (Carrefour Market and Carrefour Express).

At the end of 2011, this sector registered 344,982 stores. During 2012, 1076 stores closed per the Polish Statistical Office.

Section Four: Competition

On the Polish market the American food exporters compete with domestic producers and exporters from the European Union (mainly Germany, France, Italy, Great Britain, Spain, Finland and the Netherlands which make up 50percent of total Polish food imports).

Nowadays even classic American products, such as chewing gum, Coca-Cola or Pepsi are being produced in Poland. Moreover, polish customers would often choose a slightly more expensive product, if it is labeled as domestic since economic patriotism is supported by a few social campaigns.

On the other hand, Polish customers pay attention to some additional aspects, next to price and quality (e.g. if it is clearly stated on the package that the producer is environmentally friendly or that a part of the revenue will be donated to some foundation, the customers will be more likely to choose the product and pay even more).

Section Five: Best Product Prospects

U.S. PRODUCTS PRESENT ON THE MARKET, WHICH HAVE GOOD SALES POTENTIAL

Sales of the following products imported from the United States continue to grow:

- Wine,
- Dried Fruit (Cranberries, Prunes, Raisins),
- Nuts (Almonds, Peanuts, Pistachios),
- Seafood, fishes (Salmon, Butterfish, Herring, Mackerel, Black cod),
- Distilled spirits (Bourbon, Rum),
- Grapefruit (Red ruby),
- Food consisting of many ingredients highly processed, convenient and ready to cook products (on limited basis).

All of these products are known to Polish customers. The demand for them varies according to wealth levels. Many similar products are produced in Poland with use of important ingredients.

Table 9. Imports of Some Food Products in Poland in 2012

| Description | HS code | Total imports of agri-food products by | Direct imports from the | Share of US imports | Main Foreign competitors |
|-------------|---------|--|-------------------------|---------------------|--------------------------|
|-------------|---------|--|-------------------------|---------------------|--------------------------|

| | | Poland (\$) | USA* (\$) | in total imports (%) | |
|--|--------|------------------------|----------------------|-------------------------------------|---|
| Frozen Fish | 0303 | 188,016,378 | 17,579,229 | 9.35 | Norway, Denmark, Netherlands, Russia, |
| Fish Fillets | 0304 | 539,083,815 | 20,226,441 | 3.75 | China, Germany, Iceland, Norway, Vietnam, Denmark |
| Almonds | 080212 | 30,632,498 | 13,379,924 | 43.68 | Spain, Germany |
| Pistachios* | 080250 | 13,287,812 | 7,887,544 | 53.36 | Iran, Slovakia |
| Dried Grapes, Raisins | 080620 | 27,593,517 | 1,869,266 | 6.77 | Iran, Germany, China, Chile, Turkey |
| Prunes | 081320 | 19,476,793 | 3,859,280 | 19.81 | Chile, Argentina, Germany |
| Coffee | 0901 | 540,919,785 | 6,681 | 0.00 | Germany, Vietnam, Brazil |
| Peanuts | 1202 | 70,111,055 | 820,612 | 1.17 | Argentina, China, Brazil |
| Vegetable Saps And Extracts Of Licorice | 130212 | 2,908,646 | 2,174,409 | 74.76 | Israel, Germany, UK |
| Mucilage & Thickeners | 130239 | 31,386,538 | 2,498,212 | 7.96 | Germany, China, Denmark, Belgium, Philippines, Spain |
| Cranberries | 200893 | 12,722,395 | 5,457,613 | 42.90 | Canada, Germany |
| Food Preparation Nesoi | 210690 | 419,428,998 | 23,876,458 | 5.69 | Germany, Netherlands, France, Italy, Austria |
| Wine | 2204 | 224,300,877 | 27,711,725 | 12.35 | Germany, Italy, France, Spain |
| Alcohol | 2208 | 183,522,370 | 16,581,280 | 9.04 | Finland, UK, |

| | | | | | |
|--------------------|------|---------------|------------|------|-------------------------------|
| Beverages | | | | | Germany |
| Soybean Oilcake | 2304 | 1,009,798,440 | 65,986,431 | 6.53 | Argentina, Brazil, Germany |
| | | | | | |

Source: Global Trade Atlas Data / *Data for import of pistachios available for 2011.

Section Six: Key Contacts and Further Information

One of the goals of the Foreign Agricultural Service (FAS) office in Warsaw is to assist in the market development and promotion of U.S. food and agricultural products in Poland. There are a wide variety of ways in which to approach these markets and many key contacts such as importers, distributors, and retailers. Please contact FAS Warsaw if you would like additional information on any of these markets if your company is interested in selling U.S. food and beverage products to this region.

There are several U.S. commodity groups, called cooperators, who partner with FAS to promote U.S. agricultural products in the region. Those cooperators who are particularly active in Poland include: The California Wine Institute, Cranberry Marketing Committee, U.S. Soybean Export Council, Food Export USA Northeast, American Peanut Council, Raisin Administrative Committee, American Hardwood Export Council, and U.S. Wheat Associates. The California Wine Institute, Cranberry Marketing Committee, and U.S. Soybean Export Council have representatives based in Warsaw.

Staff contacts for marketing:

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