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Poland

EXPORTER GUIDE ANNUAL

Report on situation in Poland and Baltic States

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Report Highlights:

Exporters should explore opportunities in Poland, Lithuania, Estonia, and Latvia. There are challenges facing the U.S. exporter in light of Poland's EU membership. Exporters should first determine if their commodity has market access to the EU. If you sell to one of its 27 member states your business should be promoting its products in Poland. Poland is the only EU Member State with positive GDP growth in 2009; while the economies of the Baltic States face some economic challenges. This region highly regards America and products displaying their American heritage with a flag or geographic emphasis are popular. To formerly Communist dominated Central Europe America remains the Land of the Free and Home of the Brave – let it always be so. Poland and the Baltic States' retail and HRI sectors are growing. The region's expanding food processing sector also provides opportunities for U.S. suppliers of a wide variety of inputs. Many

consumer ready and high value food products, especially baking ingredients, seafood, wine and spirits, pet food, almonds, pistachios, sunflowerseeds, protein isolates, grapefruit and cranberries are popular. Poland is Europe's top market for U.S. soybean meal and dairy genetics. The American exporter should be concerned about market access barriers in Europe. Since Poland joined the EU five years ago, with its high tariffs, subsidies, and difficult approach to food safety, Poland no longer imports U.S. beef, poultry or corn. Exporters are advised to carefully ascertain the market access to the EU for their product before making a sale to Europe.

Post:
Warsaw

Executive Summary:

SECTION I: MARKET OVERVIEW

POLAND

During the last quarter of 2009 Poland's economy stands out in the region and is weathering the financial crises better than its neighbors, including most old member states; reaching an estimated 1 percent GDP growth in 2009. Financial experts predict an increase of 3 percent GDP growth for 2010. Poland's economy grew about 4 percent in 2008 with inflation about 3.2 percent, and it felt the effects of the financial crises in terms of a devaluation of the zloty of 20 percent in early 2009. The devaluation was helpful in helping keep Poland afloat as the crisis gripped Europe.

Poland's population of 38.5 million is increasingly concentrated in cities with 61 percent living in urban centers. The median age is 37 years of age and increasing. The age ranges 30 to 44 and 45 to 64 are the largest with 20 percent and 25.4 percent of the population respectively. A trend toward smaller families is becoming more apparent in Poland's 13.3 million households, with an average household size of 3.07. Polish families eat together and households buy for only a few days to stock the house. Convenience foods are growing more popular, but traditional womens' roles to shop and cook remain in place.

Basic economic indicators for Poland are as follows:

	POLAND			
	2007	2008	2009	2010f
Population, mln	38.00	38.00	38.00	38.00
Nominal GDP, PLNbn	421.70	481.80	430.20	434.70
GDP per capita, US \$	11.082	12.662	11.322	11.439
Real GDP growth, % change y-o-y	6.6	4.9	1.0	3.4

Industrial production index, % y-o-y, ave	9.6	8.5	-6.5	2.1
Budget balance % of GDP	-1.5	-1.9	-2.9	-2.6
Consumer prices % y-oy, eop	4.0	3.2	2.8	2.7
Exchange rate PLN/US\$, eop (November 2009)	5.00	5.00	2.80	3.75
Exchange rate PLN/EUR, eop (November 2009)	2.47	2.96	4.20	3.24
Import, EURbn	118.48	138.81	97.17	102.02
Export EURbn	106.03	121.08	93.23	96.03
Trade balance, EURbn	-12.44	-17.73	-3.93	-5.99
Current account, % of GDP	-4.77	-5.58	-0.76	-1.50
Foreign reserves ex gold, US\$bn	62.97	59.30	65.00	68.00
Total external debt stock, % of GDP	55.27	60.80	65.40	61.80

Source: Emerging Europe Monitor: Central Europe and Baltics, December 2009

Advantages and Challenges of the Polish Market for U.S. Exporters

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-27 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 consumer ready food products - i.e. dried fruits, nuts, wine and distilled spirits, and microwavable products.	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 the U.S. dollar's depreciation makes U.S. imports more affordable.	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.

BALTIC STATES:

Baltic States economy slowed markedly this year and Estonia and Latvia fell into recession in mid-2008, as an investment and consumption slump occurred following a real estate market bubble burst.

Analysts spend time comparing which country is worse off. The winner seems to be Latvia, for which the high growth rates of recent years were the result of a bubble. Economists estimate a double digit contraction in 2009 for Estonia and Lithuania.

2010 should bring marginal improvement in the region, as the Governments work to improve political stability and public confidence. Baltic nations will need substantial funds for bailouts from international and EU stabilization funds in the near future.

Basic economic indicators for the region are as follows:

	LITHUANIA			
	2007	2008e	2009	2010f
Population, mn	3.4	3.4	3.4	3.3
Nominal GDP,	98.1	110.4	99.5	101.7
GDP per capita,				
US \$	11.487	13.462	11.435	9.415
Real GDP growth,				
% change y-o-y	8.9	3.2	-15.9	0
Industrial production				
index, % y-o-y, ave	4.1	2.9	-7.2	-7.5
Budget balance				
% of GDP	-1.2	-3.3	-10.9	-9.9
Consumer prices				
% y-o-y, eop	8.1	8.5	2	3.5
Exchange rate				
X/US\$, eop				
(November 2009)	2.36	2.45	2.3	3.21
Exchange rate				
X/EUR, eop (November 2009)	3.45	3.45	3.45	4.14
Import, EURbn	16.81	19.94	14.23	14.84
Export EURbn	12.52	16.15	14.07	14.96
Trade balance,				
EURbn	-4.29	-3.79	-0.16	0.12
Current account,				
% of GDP	-14.62	-12.4	0.29	2.02
Foreign reserves				
ex gold, US\$bn	7.57	6.28	4.2	4.3
Total external	77.29	76.6	85.47	93.9

Source: Emerging Europe Monitor: Central Europe and Baltics, December 2009

	ESTONIA			
	2007	2008e	2009	2010f
Population, mn	1.3	1.3	1.3	1.3
Nominal GDP,	238.9	248.2	214.9	213.3

GDP per capita,				
US \$	15.572	17.335	14.389	12.461
Real GDP growth,				
% change y-o-y	6.4	-3.6	-14	-1.2
Industrial production				
index, % y-o-y, ave	6.8	-5.7	-26	2
Budget balance				
% of GDP	2.7	-2.8	-5.5	-3.9
Consumer prices				
% y-o-y, eop	9.6	7	-1	2
Exchange rate				
X/US\$, eop				
(November 2009)	10.64	11.18	10.43	15.41
Exchange rate				
X/EUR, eop (November 2009)	15.52	15.66	15.64	21.88
Import, EURbn	10.76	10.41	6.97	7.25
Export EURbn	8.08	8.54	6.4	6.59
Trade balance,				
EURbn	-2.69	-1.87	-0.57	-0.66
Current account,				
% of GDP	-18.04	-9.29	3.17	2.74
Foreign reserves				
ex gold, US\$bn	3.26	3.93	2.67	2.7
Total external				
debt stock, % of GDP	120.77	115.63	111.74	112.89

Source: Emerging Europe Monitor: Central Europe and Baltic's, December 2009

	LATVIA			
	2007	2008e	2009	2010f
	Population, mn	2.3	2.3	2.3
Nominal GDP,	14	15.4	13.3	13
GDP per capita,				
US \$	12.708	13.478	9.216	8.458
Real GDP growth,				
% change y-o-y	10.2	-2	-18.4	-2.3
Industrial production				
index, % y-o-y, ave	3	-3.4	-7.8	-4.5
Budget balance				
% of GDP	0	-2.3	-8.2	-5.5
Consumer prices				
% y-o-y, eop	14.1	11.2	-2	2
Exchange rate				
X/US\$, eop				
(November 2009)	0.48	0.51	0.47	0.71
Exchange rate				
X/EUR, eop (November 2009)	0.7	0.71	0.7	0.96
Import, EURbn	11.03	10.15	6.9	7.11
Export EURbn	6	6.78	5.56	5.83
Trade balance,				
EURbn	-5.03	-3.37	-1.34	-1.27
Current account,				
% of GDP	-22.38	-11.4	1.58	2.97
Foreign reserves				
ex gold, US\$bn	5.76	4.9	3	3.15

Total external debt stock, % of GDP	134.45	131.27	146.81	123.22
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Source: Emerging Europe Monitor: Central Europe and Baltic's, December 2009

Advantages and Challenges of the Baltic States Market for U.S. Exporters

Advantages	Challenges
Consumer market of 7 million people.	U.S. products face high transportation costs as compared to many European competitors.
A strategic location offering re-export potential to The Russian Federation, Ukraine and the Balkans.	Complicated system of product registration in some cases delaying or even preventing the product from entering the Baltic States' market.
Transshipment from other EU countries of import now possible with Baltic's EU integration.	Baltic States' EU Accession puts United States products at a competitive disadvantage versus EU-27 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.	Given the current economic conditions the Baltic States 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.
Local consumers associate United States products with good quality.	Food recalls in the EU have had a negative impact on Baltic States consumers views of imported products, and GMO issues hamper imports of United States products.
Market niches exist in consumer ready food products - i.e. dried fruits, nuts, wines, and microwavable products.	Foreign investment in the Baltic States food processing industry results in local production of many high quality products that were previously imported.
Despite economic slow down sales of high end goods continue.	European exporters tend to offer credit term (30-90 days) payments; while many of the U.S. exporters require pre- payment.

SECTION 2: EXPORTER BUSINESS TIPS

POLAND

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 product. Personal contact is considered very important when conducting business in Poland. Most purchases are made after meeting an exporter or their representative in person. English is more and more common as the language of commerce, but it is

important to check in advance to see if translation services are necessary. It is customary for business people to shake hands upon meeting. An American businesswoman should not be surprised if a Polish businessman kisses her hand upon greeting or saying goodbye. Business cards are the norm in Poland 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-27 accession. Most of the requirements were amended in order to reflect EU regulations. For detailed information on product import certificates please refer to the EU 27 FAIRS Report, GAIN E48078. Available at:

<http://gain.fas.usda.gov/Recent%20GAIN%20Publications/Food%20and%20Agricultural%20Import%20Regulations%20and%20Standards%20-%20Narrative%20Brussels%20USEU%20EU-27%207-2009.pdf>

For details on other Poland specific regulations such as labeling, refer to Poland's Food and Agricultural Regulations and Standards Report available at:

<http://www.fas.usda.gov/scripts/AttacheRep/default.asp>

Imports have risen as quickly as exports as Poland's growing middle class consumers begin to demand more variety and year round availability of their food choices. Poland imports significant quantities of pork from other EU member states and in 2008 became a net importer of this products and sugar. Poland imports agricultural products mainly from Germany, the Netherlands, Spain, Argentina and China. Major imports to Poland consisted of: pork, soybean meal, grains, citrus fruits, fish, pet food, sausage casings and dried fruits and nuts.

BALTIC STATES

Personal contact is considered very important when conducting business in the Baltic States. English is more and more common as the language of commerce, but it is important to check in advance to see if translation services are necessary. It is customary for business people in the Baltic States to shake hands upon meeting. An American businesswoman should not be surprised if the Baltic States businessman kisses her hand upon greeting or saying goodbye. Business cards are the norm in the Baltic States 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 local languages of the Baltic States are not necessary. Business attire is formal, including a suit and tie for men and a suit or dress for women.

Television, though the most expensive venue, is the best of these mediums in the Baltic States with products advertised through television promotions showing the greatest sales growth of all advertised products. Billboards and in-store promotions are also proving very effective.

Technical regulations including documentation, sanitary and phytosanitary requirements and labeling have changed since Baltic States' EU-27 accession. Most of the requirements were amended in order to reflect EU regulations. For detailed information on product import requirements please refer to USDA/FAS/Brussels Office's web site at:
<http://useu.usmission.gov/agri>

Lithuania is a net exporter of food products. Lithuania's major agricultural exports include prepared foodstuffs and products of animal origin (milk, dairy products incl. cheese), and fish and fish products. Major imports include fresh fruits (citrus fruits, bananas, grapes) and nuts (incl. almonds), non-alcoholic beverages and drinks, oil, meat, sugar and confectionary, coffee, tea and spices. **Estonia** is a net importer of food products. Wood and wood product exports dominate Estonia's agricultural exports. The most significant agricultural imports included beverages, meat products, fresh and preserved fruits and vegetables, coffee, tea, cotton and animal feed. **Latvia** is a net agricultural products exporter. Key Latvian exports include sawn timber and wood products, textiles, seafood and dairy products. Latvia agricultural imports include fresh fruits (citrus fruits, bananas, grapes) and nuts (incl. almonds), non-alcoholic beverages and drinks, oil, meat, sugar and confectionary, coffee, tea and spices

Section III. MARKET SECTOR STRUCTURE AND TRENDS

POLAND

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, the least numerous of them, operate several branches throughout Poland with central management. The regional chains have recently grown through consolidation and purchase of bankrupt firms; they are territorial, usually cover several provinces, and supply mainly retailers. Regional wholesalers have a strong presence in local markets and offer a wide range of products and greater service. Local wholesalers are feeling the pressure of the larger firms in the industry who now primarily deal in cash and carry. Buyer groups operate in several market segments and are increasing their integration with specific retailers.

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. It should be noted that despite many obstacles including the high cost of credit, high store rents, and complaints of late payments by retailers, it remains one of the most dynamic and fastest growing areas of the Polish economy. The retail sector in Poland is very 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 countries in the western EU and the United States.

In 2007 regulations were passed by the Polish legislature forcing hypermarkets, supermarkets, and medium stores to close during certain religious and national holidays. This has led to reduced sales as consumers tended to plan large shopping trips on these days.

Foreign investors are very active in retailing. There are now over 293 hypermarkets nationwide along with many super-stores. The vast majority of the hypermarkets are foreign, with traditional small-scale and predominantly Polish-owned shops facing steadily decreasing sales. There are approximately 30.9 shops per 10,000 inhabitants. According to Polish analysts big retailing chains will gain control of as much as 80 percent of the Polish market within the next five years with only 8 major players remaining.

For more information on the Polish retail sector please refer to GAIN report PL8007.

GAIN PL8007 - <http://www.fas.usda.gov/gainfiles/200802/146293810.pdf>

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 is constantly increasing.

For more detailed information on Poland's processing sector please refer to GAIN report PL6026 - <http://www.fas.usda.gov/gainfiles/200604/146187598.pdf>

Hotel, Restaurant & Institutional Sector

With more Poles working longer hours, Polish eating habits have also been altered and eating out is common. Polish, Italian, Chinese, Mexican and Indian restaurants can be found in almost every Polish city. American chains have also started to appear in larger cities like Warsaw. These chains include T.G.I. Friday's, Champions, Mc Donald's, Pizza Hut, and KFC. In addition, many of the international hotel chains such as the Marriott Hotel, Radisson, Sheraton, Hyatt, Hilton, and Holiday Inn are present in Polish cities. Many local entrepreneurs are investing heavily in this sector as well.

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

For more detailed information on Poland's HRI sector please refer to GAINS PL6013 - <http://www.fas.usda.gov/gainfiles/200603/146187212.pdf>

BALTIC STATES

Wholesale Sector

Baltic States' wholesale market has the following categories: international chains, national chains, regional chains, regional wholesalers, local wholesalers, and buying groups. The International chains, mostly Scandinavian, are likely to dominate the markets in the future. The national chains operate branches in individual countries (Lithuania, Estonia, Latvia). The regional chains located in individual countries are territorial usually cover several provinces. Regional wholesalers have a strong presence in local markets and offer a wide range of products and greater service, and supply mainly smaller retailers. Local wholesalers are feeling the pressure of the larger firms in the industry so now primarily deal in cash and carry. Buying groups operate in several market segments and are increasing their integration with specific retailers.

Retail Sector

The distribution system for consumer ready food products, as with all other branches of the Baltic States economy, is still undergoing a rapid transformation. It should be noted that despite many obstacles including the high cost of credit, high store rents, and complaints of late payments by retailers, it remains one of the most dynamic and fastest growing areas of the Baltic economy. The retail sector in the Baltic States is very 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 the Scandinavian countries (RIMI chain operating in all three Baltic States).

Food Processing Sector

The food processing sector in many ways reflects the development of the Baltic States economy since the fall of communism. 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 Baltic States. The most important sectors of the food processing industry are dairy, confectionery, bakery, cereal, alcohol, sugar, fruits and vegetables, juices and non-alcoholic beverages production. The proportion of food industry products considered to be value-added is constantly increasing.

Hotel, Restaurant & Institutional Sector

Today the variety and sheer number of restaurants reflects the changing demographics in the Baltic States. In the past, primarily foreigners or government officials frequented restaurants and the majority of these restaurants were found in hotels.

With longer working hours, eating habits have also been altered and eating out is common. Italian, Chinese, Mexican, Indian and local restaurants can be found in almost every larger city. In addition, many of the international hotel chains such as the Radisson are present in the region. Sheraton is planning to open its first Latvian Hotel in Riga in 2010. Many local entrepreneurs are investing heavily in this sector as well.

Section IV. Best Sales Prospects

POLAND - Best Sales imports include:

- Almonds
- Salmon
- Wine
- Whiskey (incl. Bourbon)
- Protein isolates
- Pistachios
- Sunflower seed
- Raisins
- Ground nuts
- Grapefruit

Please refer to trade statistics in Author Defined Section of this report.

Section V. KEY CONTACTS AND FURTHER INFORMATION

POLAND

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 the Polish market and many key contacts such as importers, distributors, and retailers. Please contact FAS Warsaw if you would like additional information on the Polish market if your company is interested in selling U.S. food and beverage products to Poland.

Several commodity groups who are partners with FAS in promotion, called cooperators, are active in the Polish market. Those cooperators particularly active in Poland include: Pear Bureau Northwest, California Pistachio Commission, Raisin Administrative Committee, Northwest Wine Coalition, American Hardwood Export Council, U.S. Wheat Associates, Cranberry Marketing Committee, and Food Export USA Northeast. The California Wine Institute, Cranberry Marketing Committee, Almond Board of California, and the U.S. Soybean Board-American Soybean Association have local representatives in Warsaw. These contacts can be provided to any business exporting U.S. food products.

BALTIC STATES

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 the Baltic States. There are a wide variety of ways in which to approach the Baltic States market and many key contacts such as importers, distributors, and retailers. Please contact FAS Warsaw if you would like additional information on the Baltic State's market if your company is interested in selling U.S. food and beverage products to Lithuania, Estonia and Latvia.

Staff contacts for marketing:

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APPENDIX- STATISTICS

A. KEY TRADE & DEMOGRAPHIC INFORMATION

POLAND

Agricultural Imports From All Countries (\$Mil)/U.S. Market Share (%) ^[1] - 2008	17,498/1.07%
Consumer Food Imports From All Countries (\$Mil)/U.S. Market Share (%) - 2008	8,217/0.5%
Edible Fishery Imports From All Countries (\$Mil)/U.S. Market Share (%) - 2008	1,246/3.0%
Total Population (Millions)/Annual Growth Rate (%)	38.5/0.05%
Urban Population (Millions)/Annual Growth Rate (%)	23.9/1-2%
Number of Major Metropolitan Areas ^[2]	1
Size of the Middle Class (Millions)/Growth Rate (%) ^[3]	3.9/1%
Gross Domestic Product (As of 2008)	4.9%
Unemployment Rate (% , 2008)	6.5%
Average Monthly Food Expenditures, USD	\$70
% of Females Economically Active ^[4]	51.9% ⁴
Exchange Rate (U.S. \$1, November 2009)	2.75

BALTIC STATES

Agricultural Imports From All Countries (\$Mil)/U.S. Market Share (%) – 2008 1	\$2.330 mln/2%
Consumer Food Imports From All Countries (\$Mil)/U.S. Market Share (%) - 2008	\$1.055 mln/1%
Edible Fishery Imports From All Countries (\$Mil)/U.S. Market Share (%) - 2008	\$160 mln/6%
Total Population (Millions)/Annual Growth Rate (%)	7 mln/-0.51%
Urban Population (Millions)/Annual Growth Rate (%)	4.1 mln/0.2%
Number of Major Metropolitan Areas ²	2
Size of the Middle Class (Millions)/Growth Rate (%) ³	0.7 mln/0.1%
Gross Domestic Product (average expected growth in the region, 2009)	-12.7 %
Unemployment Rate (2008, expected 2009 figure)	8-18%
Average Monthly Food Expenditures, USD	\$250
% of Employed Females ⁴	47
Exchange Rate (US\$1, August 2009)	Lithuania – Litai 2.48 Estonia – Krooni 15.64 Latvia – Lati 0.50

[1] Global Trade Atlas, data from 2008.

[2] Population in excess of 1,000,000.

[3] These are unofficial estimates due to the lack of reliable statistics.

[4] Percent of total number of women 18-59 years old.

Author Defined:

Poland Best Sales Prospects:

Product Category	2008* Market Size mln \$	2008 Polish imports mln \$	5 Yr Average imp growth %	Import tariff Rate	Key constraints	Market attractiveness for USA
Salmon	\$283.0	\$283.0	29.0%	2% & 8%	U.S. product is considered to be expensive. Polish importers are mostly interested in cheaper varieties. Large competition exists from EU suppliers.	Polish market is interested in the following varieties (H& G): salmon (beta, gorbusha).
Wine	\$191.0	\$191.0	6.3%	9.9-32\$/hl depending on alcohol content	U.S. product is considered to be expensive.	US wines are considered to be of high quality.
Almonds	\$12.0	\$12.0	13.0%	3.50% 0% for bitter almonds	U.S. product is considered to be expensive. Active competition from Spain.	Polish importers consider U.S. product to be of high quality and import it for usage in high end food products.
Pistachios	\$13.0	\$13.0	19.9%	1.60%	U.S. product is considered to be expensive. Active competition from Iran.	Polish importers consider U.S. product to be of high quality and import it in order to supply delicatessen customers.
Sunflower Seeds	\$30.0	\$30.0	4.5%	0%	U.S. product is considered to be expensive. Active competition exists from Hungary and China.	Polish bakery industry is becoming increasingly interested in using this product.
Raisins	\$23.0	\$23.0	1.7%	2.40%	U.S. product is considered to be expensive. Active competition exists from Iran.	Polish bakery industry is becoming increasingly interested in using high quality product from the U.S.
Groundnuts	\$15.0	\$15.0	14.9%	19.42%	U.S. product is considered to be expensive. Active competition exists from Argentina.	Polish food processing is interesting in using U.S. product in high end products.
Protein isolates	\$36.0	\$36.0	3.4%		Belgian and Chinese producers are actively promoting their product on the Polish market.	Polish food processing industry as well as producers of supplies for body building are increasingly interested in the U.S. products.

Poland - Imports from the United States:

U.S. Exports of Agriculture, Fish & Forestry Products To *Poland*
CY 2002 - 2008
(In Thousands Of Dollars)

Export Market: *Poland*

Product	Calendar Years (Jan-Dec)							% Change
	2002	2003	2004	2005	2006	2007	2008	
Bulk Total	1,793	974	4,627	14,463	20,071	30,082	36,983	22.94
Coarse Grains.....	0	0	0	19	0	4,109	0	-100.0
Rice.....	221	460	385	35	15	34	59	74.47
Soybeans.....	135	29	0	0	44	0	21	-
Cotton.....	0	0	0	0	0	42	111	160.49
Tobacco.....	33	5	3,232	12,390	18,398	23,526	33,844*	43.86
Pulses.....	34	0	0	0	0	0	0	-
Peanuts.....	305	0	0	0	0	134	714	432.69
Other Bulk Commodities.....	1,065	491	1,010	2,020	1,614	2,237	2,236	-0.03
Intermediate Total	11,117	13,280	13,252	16,635	21,133	29,131	40,236	38.12
Soybean Meal.....	40	22	0	87	36	134	11,467	8465.8
Soybean Oil.....	0	0	0	0	0	0	0	-
Vegetable Oils (Ex Soybean)....	93	77	113	463	650	94	149	58.09
Feeds & Fodders.....	49	58	0	20	140	252	652	158.50
Live Animals.....	31	0	43	316	247	285	25	-91.23
Hides & Skins.....	2,031	2,571	2,179	3,229	3,649	3,800	2,408	-36.62
Animal Fats.....	349	10	15	253	3	0	0	-
Planting Seeds.....	317	289	593	746	436	832	2,708	225.36
Sugar, Sweeteners, Bev Bases	301	363	410	362	441	374	536	43.38
Other Intermediate Products.....	7,906	9,889	9,899	11,170	15,531	23,359	22,300	-4.53
Consumer Oriented Total	54,735	51,953	66,702	52,819	55,809	47,922	68,877	43.73
Snack Foods.....	625	4,127	1,006	731	332	548	1,599	191.87
Breakfast Cereals.....	0	42	119	53	78	110	142*	29.09
Red Meats, FR/CHFR.....	5,086	4,385	19,231*	12,394	8,264	7,594	1,328	-82.51
Red Meats, Prep/Pres.....	53	64	148	0	96	0	0	-
Poultry Meat.....	32,657	27,468	24,975	21,079	20,527	2,021	2,831	40.04
Dairy Products.....	6,328	6,811	7,872	6,244	8,921	11,536	17,404	50.86
Eggs & Products.....	38	12	155	0	0	66	0	-100.0
Fresh Fruit.....	647	897	588	304	404	514	1,133	120.32
Fresh Vegetables.....	24	5	3	0	0	7	0	-100.0
Processed Fruit & Vegetables..	2,262	2,304	3,010	2,879	4,220	4,395	7,810*	77.70
Fruit & Vegetable Juices.....	0	78	81	28	78	280	304	8.76
Tree Nuts.....	1,673	2,469	4,971*	4,624	2,540	4,392	3,132	-28.70
Wine and Beer.....	293	267	333	522	467	1,018	1,063	4.42
Nursery Products.....	80	15	59	32	87	91	47	-48.40
Pet Foods.....	526	320	718	1,041	1,065	1,745	1,395	-20.08
Other Consumer Oriented.....	4,442	2,700	3,435	2,887	8,741	13,604	30,689*	125.59
Forest Products	3,544	2,968	4,858	7,389	6,086	9,130	8,768	-3.96
Logs and Chips.....	0	47	1,004	2,718	3,091	5,582*	3,952	-29.20
Hardwood Lumber.....	212	131	696	2,599	1,004	661	1,479	123.78
Softwood and Treated Lumber..	0	19	8	78	0	0	65	-
Panel Products (Incl Plywood)..	3,173	2,054	2,279	1,571	1,663	2,406	2,508	4.24
Other Value-Added Wood Prod	159	717	871	423	327	481	765	58.84
Fish Products	669	850	4,870	6,751	13,866	11,932	16,641*	39.47
Salmon Whole or Eviscerated...	466	500	2,836	1,039	4,485	5,689	6,636	18.64
Salmon Canned.....	0	0	145	35	335	135	277	105.64
Surimi (Fish Paste).....	0	0	69	0	3	124	394*	216.89
Roe & Urchin (Fish Eggs).....	0	55	0	51	0	200*	0	-100.0
Other Edible Fish & Seafood....	202	295	1,820	5,627	9,043	5,783	9,333*	61.40
Agricultural Products	67,644	66,207	84,581	83,917	97,013	107,135	146,096	36.37
Aq, Fish & Forest Prods	71,857	70,025	94,309	98,057	116,965	128,196	171,505	33.78

Analysis By: Commodity and Marketing Programs/FAS/USDA
Source: U.S. Bureau of the Census Trade Data
Note: * Denote Highest Export Levels Since at Least CY 1970

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Baltic Countries - Imports from the United States:

U.S. Exports of Agriculture, Fish & Forestry Products To *Baltic States*
 CY 2002 - 2008
 (In Thousands Of Dollars)

Export Market: *Baltic States*

Product	Calendar Years (Jan-Dec)							% Change
	2002	2003	2004	2005	2006	2007	2008	
Bulk Total	1,969	4,608	13,236	31,807	46,828	16,480	15,427	-6.40
Coarse Grains.....	0	0	4	9	0	0	0	-
Rice.....	0	64	7	17	36	111	183	63.98
Cotton.....	989	4,308	4,854	4,211	4,824	4,661	503	-89.21
Tobacco.....	421	54	8,072	27,118	41,319*	10,367	12,979	25.20
Pulses.....	0	0	0	0	19	0	608*	-
Other Bulk Commodities.....	559	182	300	461	629	1,347*	1,154	-13.96
Intermediate Total	14,191	9,112	8,121	6,607	8,133	17,068	30,309*	77.68
Wheat Flour.....	6,130*	0	0	0	0	0	4	-
Soybean Meal.....	45	0	0	0	0	18	5,065	28781
Soybean Oil.....	0	0	220	0	0	0	0	-
Vegetable Oils (Ex Soybean)...	25	180	200	371	528*	184	135	-26.54
Feeds & Fodders.....	2,198*	195	105	222	28	6	19	243.25
Hides & Skins.....	73	34	101	0	139	58	150	158.36
Animal Fats.....	441	0	0	0	0	0	60	-
Planting Seeds.....	228	139	232	269	211	1,238	1,016	-17.99
Sugar, Sweeteners, Bev Bases	194	152	386	290	402	982*	437	-55.47
Other Intermediate Products.....	4,857	8,413	6,876	5,456	6,826	14,582	23,422*	60.62
Consumer Oriented Total	27,626	47,052	69,612	78,043	78,000	153,379	189,666	23.66
Snack Foods.....	45	175	519	246	541	715	1,247	74.45
Breakfast Cereals.....	0	0	0	0	14	67	0	-100.0
Red Meats, FR/CH/FR.....	95	668	1,537	2,353	1,325	814	17,053*	1995.7
Red Meats, Prep/Pres.....	0	0	48	0	129	7	357	5019.9
Poultry Meat.....	20,021	32,898	48,828	48,639	57,414	110,388	102,104	-7.50
Dairy Products.....	17	267	51	21	132	7,545*	7,539	-0.08
Eggs & Products.....	0	0	87	160	63	0	0	-
Fresh Fruit.....	0	27	40	79	0	59	433*	640.22
Fresh Vegetables.....	12	20	16	12	50	0	99	-
Processed Fruit & Vegetables..	262	1,843	3,139	1,634	1,643	5,418	5,721*	5.68
Fruit & Vegetable Juices.....	0	0	0	61	0	19	15	-22.51
Tree Nuts.....	3,896	8,163	12,479	21,286	13,013	23,804	47,595*	99.94
Wine and Beer.....	439	579	627	761	904	166	260	56.67
Nursery Products.....	10	28	85*	22	37	59	21	-64.99
Pet Foods.....	495	945	604	1,032	1,239	1,703	1,655	-2.82
Other Consumer Oriented.....	2,333	1,641	1,551	1,738	1,497	2,614	5,566*	112.94
Forest Products	2,014	2,845	3,123	4,092	6,071	10,267*	10,129	-1.34
Logs and Chips.....	36	122	194	121	268	3,068*	3,039	-0.94
Hardwood Lumber.....	1,007	1,537	1,712	2,032	3,940	3,518	4,189*	19.06
Softwood and Treated Lumber..	73	0	0	128	184	418*	112	-73.22
Panel Products (Incl Plywood)..	653	651	813	742	959	2,355*	2,088	-11.32
Other Value-Added Wood Prod	245	535	404	1,069	721	907	701	-22.76
Fish Products	13,626	19,422	26,303	33,554*	20,705	21,336	30,946	45.04
Salmon Whole or Eviscerated...	580	1,291	1,197	2,802*	2,561	1,458	1,586	8.75
Salmon Canned.....	43	0	62	0	92	0	0	-
Surimi (Fish Paste).....	9,899	9,387	13,639	15,725*	5,899	9,991	12,687	26.99
Roe & Urchin (Fish Eggs).....	649	434	1,157	3,400	3,950	6,350	7,477*	17.75
Other Edible Fish & Seafood....	2,454	8,310	10,248	11,627*	8,203	3,537	9,197	159.99
Agricultural Products	43,786	60,772	90,970	116,466	132,961	186,927	235,402	25.93
Ag, Fish & Forest Prods	59,426	83,039	120,396	154,102	159,736	218,530	276,477	26.52

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