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## **Report Name:** Food Processing Ingredients Annual

**Country:** Poland

**Post:** Warsaw

**Report Category:** Food Processing Ingredients

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### **Report Highlights:**

Poland is one of the largest agri-food industry producers in Central and Eastern Europe. In 2024, companies operating within this sector exported goods valued at over \$61 billion, an increase of over 2.7 percent compared to 2023. The food processing industry accounted for 6 percent of Poland's total \$917 billion gross domestic product. Strong growth in the Polish food processing sector in 2024 was stimulated by internal demand and exports. The most important segments in terms of value were meat, dairy, beverage, confectionary, bakery, and horticultural processing. Poland's total 2025 imports of food and agricultural products were valued at over \$48 billion, with U.S. imports accounting for \$888 million. U.S. ingredients with strong sales potential include tree nuts, dried fruit, fish (salmon and pollock) and seafood, highly processed, and functional ingredients.

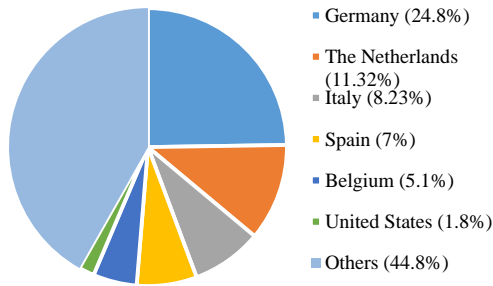
# Market Fact Sheet: Poland

## Executive Summary

Poland is the largest market for food and beverages in Central and Eastern Europe. With a population of nearly 38 million people, it is an attractive and growing market for U.S. agricultural products. Poland’s 2025 Gross Domestic Product (GDP) increased by 3.2 percent. In 2025, Poland imported nearly \$48 billion in food, agricultural, and fish and seafood products. U.S. agricultural and related products were valued at \$888 million. U.S. products with strong sales potential in Poland include tree nuts, fish and seafood, distilled spirits, wine, dried fruit, and innovative food ingredient products.

## Imports of Consumer-Oriented Products

Total 2025 Polish imports of consumer-oriented food products were nearly \$28 billion, with U.S. imports accounting for \$515 million. Rising incomes and increasingly sophisticated Polish consumers value more diverse food products, with imports steadily catering to such demands.



## Food Processing Industry

Poland’s food processing industry is one of the largest in the European Union (EU). In 2024, the food processing industry accounted for over 6 percent of Poland’s \$917 billion GDP. The most important sectors are meat, dairy, beverage, confectionary baking, and processed fruit and vegetables. Since the early 1990s, many multinational food processors, such as Danone, Heinz, Unilever, Mondelez, and Nestle, have expanded their operations into Poland. Companies producing in Poland serve not just the Polish customers, but often also export to key markets globally.

## Food Retail Industry

Poland’s food retail sector is diverse. It ranges from small family-operated stores to medium-sized stores, as well as large distribution centers comparable with those in the United States. Most hypermarkets and large discount stores are foreign-owned, while small-scale stores are predominantly Polish-owned.

### Quick Facts CY 2024

Imports of Consumer-Oriented Products  
\$28 billion (U.S. imports \$515 million)

### List of Top 10 Growth Products in Poland

- |                      |                      |
|----------------------|----------------------|
| 1) Tree Nuts         | 6) Pet food          |
| 2) Distilled Spirits | 7) Condiments/Sauces |
| 3) Wine              | 8) Sweets            |
| 4) Fish and Seafood  | 9) Snacks            |
| 5) Processed Fruit   | 10) Beef             |

### Top 10 Polish Retailers

- |                     |               |
|---------------------|---------------|
| 1) Jeronimo Martins | 6) Kaufland   |
| 2) Eurocash         | 7) Zabka      |
| 3) Lidl             | 8) Dino       |
| 4) Lewiatan         | 9) Rossmann   |
| 5) Auchan           | 10) Carrefour |

### GDP/Population

Population (millions): 37.8  
GDP (billions USD): 917  
GDP per capita: \$24,970

Strengths	Weaknesses
Central Europe’s most populous country with a domestic consumer market of nearly 38 million people.	U.S. products incur an overall higher cost for transportation than closer European competitors.
Opportunities	Threats
Market niches exist for food ingredients, notably dried fruit, tree nuts, and functional ingredient products.	Foreign investments in food processing result in diverse and high-quality local products, which compete with U.S. imports.

**Data and Information Sources:** Polish Central Statistical Office, data published by Trade Data Monitor

**Contact:** FAS Warsaw, Poland  
AgWarsaw@usda.gov

## General Information:

### SECTION I. MARKET SUMMARY

Poland and its nearly 38 million consumers constitute a large and growing market for U.S. food and agricultural products. In 2025, total food and agricultural imports were valued at \$48 billion, with U.S. imports accounting for \$888 million.<sup>1</sup> Poland's 2025 real GDP growth reached 3.2 percent, driven largely by increasing domestic demand and exports.

*Table 1. Basic Economic Indicators*

Poland	2025	2026*
GDP Growth	3.2	3.5
Unemployment Rate	3.1	3.1
Consumer Price Inflation	3.4	2.9

*Source: Eurostat \*forecasted values*

Polish households spend over 26 percent of disposable household income on food and beverage purchases. The minimum wage in 2025 was 4,666 PLN (\$1,266) and increased to 4,806 PLN (\$1,305) on January 1, 2026. In addition to economic growth and higher monthly wages, government social-safety net initiatives (such as the Family 800+ Program) also supplemented the incomes of millions of families. However, considerable income disparity between socioeconomic classes in Poland does exist.

Poland's food processing industry is one of the largest in Central and Eastern Europe and the fifth largest in the EU. In 2025, the combined food processing industries accounted for 6 percent of Poland's \$917 billion GDP. The most important enterprises in value terms were meat, dairy, beverage, confectionary, bakery products, and processed horticultural products. Consumer demand for products perceived as healthy, international trends, and increased incomes are significant drivers of Poland's food processing industry.

*Table 2: Polish Per Capita Market Basket Consumption*

Consumer Goods	Unit of Measure	2020	2021	2022	2023	2024
Cereal grains (as processed Products)	kg	102	101	103	106	108
Potatoes	kg	94.3	94.8	94.2	94.7	94.7
Vegetables	kg	103	104	104	106	107
Fruit	kg	58	59	59	61	63
Meat and edible offal	kg	78.1	75.1	79.2	77.8	81.1
Animal edible fats	kg	6.0	6.3	6.7	5.2	6.3

<sup>1</sup> Import data includes 2025 direct (BICO) + indirect (Polish Customs data).

Butter	kg	5.9	6.1	5.6	5.9	6.0
Cow's milk	l	246	251	262	276	282
Sugar	kg	42.9	41.8	42.8	43.2	39.8
Vodka, liqueurs, other spirit beverages in terms of 100% alcohol	l	3.7	3.8	3.5	3.4	3.4
Wine and honey wine	l	6.5	6.7	6.3	6.0	5.4
Beer from malt	l	94	93.2	93	87.4	85.9

*Source: Poland's Central Statistical Office (CSO)*

Polish consumers tend to view the United States positively and U.S.-origin products are considered high quality. U.S. products are often shipped to third-country EU ports of entry where they are re-exported to Poland without additional tariffs or regulatory requirements, aside from language labeling. (The \$888 million worth of U.S. imports of agricultural and related products to Poland in 2025 includes both those which arrived directly and indirectly. Of the \$888 million, only \$386 million came directly to Poland).

Since the early 1990s, multinational companies like Coca-Cola, PepsiCo, Mars, Heinz, Danone, Unilever, Mondelez, and Nestle have invested in Poland. These companies now account for over 70 percent of confectionery production and own the largest breweries, meat processing plants, bottling plants, and horticultural processing plants. These stakeholders produce a broad range of high-quality products and compete directly with locally available U.S. exports. For additional country profile information please see FAS Warsaw's [Exporter Guide](#).

**Sector Trends:** Development of the food processing industry over the next 5-10 years will be driven by:

- Increased demands of domestic as well as foreign food markets;
- Increased demand for processed fruit, vegetables, milk, fish, and meat;
- Increased demand for convenience products (highly processed, ready-to-eat);
- Increased demand for semi-processed food products for home meal preparation;
- Increased demand for processed organic foods and beverages; and
- Fewer small and local food processors, giving way to large plants.

**Table 3. Advantages and Challenges for American Products in the Polish Market**

<b>Advantages</b>	<b>Challenges</b>
Central Europe's most populous country with a consumer market of 38 million people.	U.S. products incur an overall higher cost for transportation than closer European competitors.
A strategic location within a dense, major international market offering re-export potential.	The EU's complicated system of product registration can delay or even prevent products from entering the Polish market.
Transshipment from other EU countries occurs commonly due to Poland's EU membership.	Many U.S. products face a competitive disadvantage versus duty-free EU-27 products.
Market niches exist for U.S.-origin fish and seafood, tree nuts, dried fruit, highly processed, and functional ingredients.	Significant foreign investment results in high-quality, locally produced, value-added products competing with imported ones.

Russia's war in neighboring Ukraine has challenged the Polish market. The war caused some disruption in the transportation of goods into Poland, forcing some transportation and supply chain routes to reroute. This disruption has affected not only domestic consumption but also certain processing industries, creating a potential gap between consumer demand and supply in several sectors.

## SECTION II. ROAD MAP FOR MARKET ENTRY

### Entry Strategy

The Polish market can be price-sensitive and therefore pose challenges to some U.S. ingredient exporters. Imported products are typically used when low-cost domestic or regional products are unavailable.

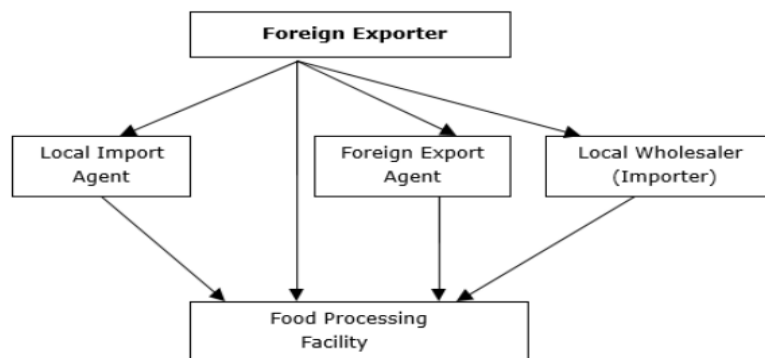
- I. Some food processors purchase imported products directly from Polish importers, but most buy from local wholesalers or suppliers.
- II. The largest food processors have internal procurement operations and can directly import.
- III. Local agents or representatives should develop personal relationships with clients. Exporters must understand current laws, cultural norms, and tax/customs regulations.

U.S. companies seeking to export goods to Poland are advised to conduct research to gain an understanding of the market. [USDA Gain reports](#) are a good source for country specific information.

Attending one of Europe's [USDA endorsed trade shows](#) and/or other trade shows in Europe, such as the [Food Ingredients show](#), is a good way of entering the market. Most leading Polish importers visit these shows.

### Market Structure:

**Chart 1: Product Entry**



## Company Profiles

The Polish food industry consists of thousands of enterprises, although most are small firms that employ fewer than nine workers. Leading food processing companies operating in Poland include:

[ARYZTA POLSKA Sp. z o.o.](#)  
[COCA COLA HBC Sp. z o.o.](#)  
[COCA COLA POLAND SERVICES Sp. z o.o.](#)  
[CARGILL POLAND Sp. z o.o.](#)  
[DANONE POLSKA Sp. z o.o.](#)  
[DEVELEY FARM FRITES POLAND S.A.](#)  
[FERRERO POLSKA Sp. z o.o.](#)  
[PEPSICO Polska](#)  
[GRUPA MASPEX Sp. z o.o.. S.K.A.](#)  
[JACOBS DOUWE EGBERTS PL Sp. z o.o.](#)  
[MONDELEZ POLSKA S.A.](#)  
[NESTLE POLSKA S. A.](#)  
[NUTRICIA POLSKA Sp. z o.o.](#)  
[ORANGINA SCHWEPPE POLSKA](#)  
[SM GOSTYŃ](#)  
[UNILEVER POLSKA S.A.](#)  
[MARS](#)  
[ŻYWIEC ZDRÓJ S.A.](#)

Key Polish Food Processing Associations:

[Polish Federation of Food Producers](#)  
[Association of Milk Processors](#)  
[Union of Producers of Meat Industry](#)  
[Association Polish Meat "POLSKIE MIESO"](#)  
[The Polish Association of Fish Processors](#)

## SECTION III. COMPETITION

The Polish food processing industry is increasingly interested in sourcing tree nuts, fish and seafood, dried fruit, flavors and aromas, sweeteners, food additives, colors, and enzymes. In 2025, Polish consumer-oriented imports totaled \$28 billion, with \$515 million from the United States. The increasing U.S. market share are largely a result of higher disposable incomes. Domestic products and products from other EU members are the main U.S. competitors. Domestic food producers are consistently evolving, innovating, and producing high-quality products. Also, many Poles often prefer Polish products over imports.

Polish fish and seafood imports continue to grow and reached over \$3.7 billion in 2025, with \$157 million (4 percent market share) originating from the United States. Poland is one of the largest salmon processors in the world.

**Table 4. Polish 2025 Agri-food Import (\$ million)**

<b>Poland</b>	<b>2025</b>
Total imports	48,000
Imports from the United States	888 (1.85 percent)

Source: Trade Data Monitor

**Table 5. Consumer Food Products Exports to Poland in 2025**

<b>Product Category and Total Poland's Imports</b>	<b>Main suppliers in percentage</b>	<b>Strengths of Key supply countries</b>	<b>Advantages and Disadvantages of Local Suppliers/Market situation</b>
<b>Fish &amp; Seafood</b>  <b>\$ 4 billion</b>	1.Norway – 46 percent 2.Germany – 7 percent 3.Russia – 6 percent <b>6. United States – 5 percent</b>	Norway's proximity and intensive promotional efforts create competition for other suppliers. The United States holds strong position for Alaska pollock, and sockeye salmon.	Poland is one of the world's largest salmon processors.
<b>Tree Nuts</b>  <b>\$ 766 million</b>	1. <b>United States – 60 percent</b> 2.Germany– 15 percent 3. Chile – 10 percent 4. Turkey – 9 percent	Germany is a large re-exporter of nuts. The United States is the leading supplier of almonds and pistachios.	Domestic production is minimal. Poland produces limited quantities of walnuts and hazelnuts.
<b>Dried Prunes</b>  <b>\$ 37 million</b>	1. Chile – 50 percent <b>2. United States – 45 percent</b> 3. Moldova – 4 percent 4. Germany – 3 percent	Chilean products have tariff advantages based on the EU-Chile Free Trade Agreement. U.S. product is gaining popularity among local importers.	Limited local production. Product (mostly smoked) is traditionally used for home cooking as a compote ingredient.
<b>Peanuts</b>  <b>\$ 118 million</b>	1. Argentina – 78 percent 2. Brazil – 10 percent 3. <b>United States – 3 percent</b>	Argentina and Brazil are Poland's traditional suppliers. U.S. products are gaining popularity when price competitive.	No local availability. High demand for this product in Poland's food processing sector.

<b>Peptones &amp; Derivatives</b>  <b>\$ 115 million</b>	1. Germany – 17 percent 2. Spain – 16 percent 3. Belgium – 15 percent <b>10. United States – 2 percent</b>	Top suppliers enjoy availability and price advantages.	Products are mostly imported. High demand by local supplement production sector.
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*Source: Trade Data Monitor*

#### **SECTION IV. Best Product Prospects**

##### **Products present in market which have good sale potential:**

- Nuts: pistachios, almonds, peanuts, pecans, walnuts
- Wine and distilled spirits
- Essential oils
- Organic products
- Dried and processed fruit: cranberries and prunes
- Fish and seafood: salmon, pollock, cod, lobster, and other miscellaneous fish product
- Highly processed ingredients: protein concentrates dextrin, peptones, enzymes, lecithin

##### **Products not present in significant quantities, but which have good sales potential:**

- Vegetable fats
- High quality hormone-free beef
- Ingredients for natural and health foods industry
- Innovative high-quality sauces, spices, condiments, and confectionary product

##### **Products not present because they face significant barriers**

- Poultry (non-tariff barrier)
- Processed food with genetically engineered ingredients (non-tariff barrier)
- Food additives not approved by the European Commission

#### **SECTION V. Key Contacts and Further Information**

For additional information regarding the Polish market please contact:

The Office of Agricultural Affairs

Al. Ujazdowskie 29/31

00-540 Warsaw, Poland

Phone number: +48 22 504 23 36

E-mail: [AgWarsaw@usda.gov](mailto:AgWarsaw@usda.gov)

Website: [Office of Agricultural Affairs Warsaw](#)

#### **Attachments:**

No Attachments