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Report Highlights:

Poland is Central and Eastern Europe's largest market for food and beverage products. With a population of nearly 38 million people, Poland is a growing market for U.S. food and agricultural products. Poland is considered to be one of the most economically stable and fastest developing countries in the world; and is now among the world's 20 largest economies. 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. products with strong sales potential, apart from soybeans, include distilled spirits, wine, tree nuts, fish and seafood, beef, dried fruit, condiments, and innovative food ingredients.

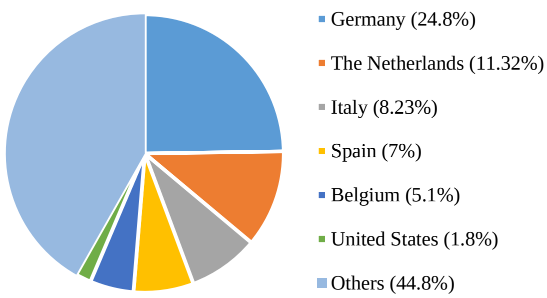
Market Fact Sheet: Poland

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 (i.e. avocado oil and mushroom popcorn).

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. Polish consumers have rising incomes and are sophisticated buyers who 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 2025, 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 global markets.

Food Retail Industry

Poland's food retail sector is diverse. It ranges from small family-operated 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 2025

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) Rossman
5) Auchan	10) Carrefour

GDP/Population

Population (millions): 37.7
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

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Section I: Market Overview

Poland is a modern European country with a population of 38 million. Poland’s 2025 Gross Domestic Product (GDP) growth of 3.2 percent is likely to reach 3.5 percent in 2026, supported by a rebound in consumption and expansion of investment.

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

The Government of Poland's social safety net initiatives, including Family Support Programs, provide additional income to millions of families. The minimum wage in 2026 is PLN 4,806 ($1,340) per month. Polish households spend over 27 percent of disposable household income on food and beverage purchases. There are considerable income disparities between the richest and poorest Poles, with the top 20 percent earning close to five times as much as the lowest 20 percent.

Over 55 percent of Poland’s population live in urban areas and have a median age of 43 years. Family sizes have become smaller, with a current three-person average among Poland’s 15 million households. The typical Polish family eats meals together and generally buys groceries several times a week.

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
Cow’s milk	l	246	251	262	276	282
Sugar	kg	42.9	41.8	42.8	43.2	39.8
Vodka, liqueurs, other spirits 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 generally view the United States positively and consider U.S.-origin products to be of high quality. However, many Polish consumers prefer Polish products over imports, and retail chains commonly advertise they offer Polish products. U.S. products are often shipped initially to third-country EU ports of entry, customs-cleared, and then re-exported to Poland. Except for language labeling, these products are not subject to additional tariffs or regulatory requirements. (An exception to this is some of the alcoholic beverages not customs cleared at the EU point of entry; these products are assessed individual excise tax rates in each EU country).

Impact of Russia-Ukraine War: The ongoing strife in neighboring Ukraine continues to challenge the Polish market. The war has disrupted the transportation of goods into Poland, affecting not only domestic consumption, but also certain processing industries. This has created a potential gap between consumer demand and supply in several sectors, such as processed fruit, pollock, and salmon. One of the most affected industries is Poland's fish processing industry, which is one of the largest in the world. The imposition of sanctions by the EU and Poland on Russia and Belarus and the disruption of trade have contributed to increased inflation, driven by energy/fuel and food prices. More than two million Ukrainian refugees have arrived in Poland since the start of the conflict, increasing demand for goods. An estimated one million of the Ukrainian refugees moved to Western European countries, Canada, and the United States by 2026. Companies based in Poland continue searching for new suppliers and supply chains to mitigate the externalities brought on by the conflict in Ukraine.

Table 3: Polish Market Advantages and Challenges

Advantages	Challenges
Central Europe's most populous country with a domestic consumer market of nearly 38 million people.	U.S. products face higher transportation costs than many European competitors.
A strategic location offering re-export potential.	The EU's complicated system of product registration can delay new-to-market products from entering the Polish market.
Transshipment from other EU countries of import is possible because of Poland's EU membership.	Poland's EU membership puts U.S. products at a competitive disadvantage compared to duty-free access for the other 27 EU Member States.
Market niches exist in food-ingredients categories, particularly dried fruit, nuts, baking mixes, functional foods, and organic components.	Despite rising incomes, Polish consumers are still price-sensitive when purchasing food and beverage products.
Polish consumers associate U.S. products with good quality.	Foreign investment in the Polish food processing industry results in local production of many high-quality products that were previously imported.
Economic growth is rising and the growing Polish middle class is eager to try new products.	While market access for some U.S. products is not affected by EU trade barriers, some goods (e.g., poultry, beef, etc.) are limited due to EU sanitary and phytosanitary standard barriers.

Section II – Exporter Business Tips

The Polish market offers good opportunities for U.S. exporters of consumer-oriented products. U.S. suppliers of consumer-ready foods and beverages interested in accessing the Polish market should ensure their products meet all Polish/EU food laws, including packaging and labeling requirements.

The best way to understand the Polish market is to visit and speak to importers and distributors to determine a good entry strategy. Trade shows within Poland and the region offer many unique networking opportunities. See the link for a list of U.S. Department of Agriculture trade shows.

Personal contact is important when conducting business in Poland, as most purchases are made after in-person meetings with an exporter and/or their representative. English is increasingly common as the language of commerce, but translation services may also be necessary.

Polish business culture can be somewhat conservative, and first names are best avoided, at least initially, in a professional context. Address people with Pan (Mr.) and Pani (Ms. or Mrs.) followed by their surname. Relationships often develop to the point when first names can be comfortably used. Business card exchanges are routine and are generally given to each person present at a meeting. Cards printed in Polish are not necessary. Standard business attire is recommended, including jackets and ties for men and suits or dresses for women.

Section III - Import Food Standards and Regulations, Import Procedures

Poland follows EU regulations governing food and agricultural imports specified within General Food Law EC/178/2002. For details on EU regulations, please see the U.S. Mission to the EU's Office of Agricultural Affairs' most recent EU Food and Agricultural Import Regulations and Standards (FAIRS) report. For additional information regarding import food standards and import procedures which are not yet harmonized with the EU legislation, please refer to FAS/Poland's FAIRS report. The EU is a customs union, and all Member States apply the same import duties on goods imported from outside the EU based on tariff classification of goods and the customs value. Inbound products at ports of entry are generally stored in bonded warehouses or at a freight forwarder's facility. Product storage and removal from storage are conducted under the supervision of a customs officer, who also ensures that all documents accompanying the products comply with EU and Polish requirements. Customs officers will also inspect products. They may take samples to check product ingredients (e.g. sugar, alcohol) to assess the correct customs duty and then issue the import duty invoice. Food safety inspectors at the port of entry storage do not routinely inspect packaged foods, but select products are checked. Once imported goods are cleared in one Member State, they are free to move throughout the EU. This means that U.S. products imported into Poland via another EU member state are not subjected to additional import procedures or customs tariffs at the Polish border.

Section IV – Market Sector Structure and Trends

Wholesale Sector

Poland's wholesale market structure has three categories: (1) national chains, (2) regional wholesalers, and (3) buyer groups. National chains are the smallest in number and operate branches throughout Poland with central management. Regional wholesalers have grown, consolidated, and cover specific areas, usually in several provinces. Regional wholesalers have a strong presence in local markets and offer a wide range of products, and at times, a better service than companies operating on a nationwide scale. Buyer groups operate in several market segments and are increasingly integrated with specific retailers.

In Poland, the cash-and-carry format has gained popularity quickly, as small, traditional retailers – of which there are many – rely on them as distributors. Most leading cash-and-carry chains target small, traditional retailers and hotel, restaurant, and institution (HRI) outlets. While market consolidation is likely to increase, new market entrants can also be expected in the long term. The main stakeholders in the cash-and-carry segment are Makro Cash and Carry Polska SA, Selgros Cash & Carry Sp. z o.o., and Eurocash SA.

Retail Sector

Large retail chains control as much as 70 percent of the Polish market. The largest retail chains in Poland include Biedronka, Lidl Polska, Netto Polska, Eurocash (owner of Delikatesy Centrum, Lewiatan, Euro Sklep, ABC, Gama, Groszek), Auchan Polska, Kaufland Polska, and Carrefour Polska. Market analysis shows that almost 30 percent of confectionary retail sales occur through convenience chains such as Zabka and small grocery retailers.

Food Processing Sector

The Polish food processing sector includes both domestic and international companies. Many small companies also operate meat and bakery processing plants throughout Poland. The largest food processing sectors are meat, dairy, and alcoholic beverages, followed by confectionery, food concentrates, sugar, fruits and vegetables, juices, and non-alcoholic beverages. An example of Polish market modernization is the confectionary sector. According to industry reports, about 45 percent of Poles consume at least one chocolate bar per day, and about 35 percent have one or more wafer bars. More Poles, particularly among the expanding middle classes, seek higher-end products. Producers offer advanced high-quality products to cater to the most discerning consumers.

Poland attracts foreign companies and foreign investors because of its macroeconomic climate, developed financial sector, and its well-educated, productive, and wage-competitive labor force. Foreign investors have played a significant role in developing and modernizing Poland's food processing industry. Multinationals now account for over 70 percent of confectionery production and own the largest breweries, meat processing plants, bottling plants, and horticultural processing plants. Coca-Cola, PepsiCo, Nestle, Mondelez, Danone, and Mars have significant production plants in Poland and U.S. companies are among the largest foreign investors in the food processing sector. These stakeholders produce a broad range of high-quality consumer-ready products, which often compete directly with locally available U.S. consumer-ready exports. Polish processors are increasingly interested in sourcing fish and seafood products, bakery ingredients, tree nuts, dried fruit, flavoring agents, aromas, sweeteners, food additives, food coloring agents, and enzymes.

HRI Sector

According to a survey conducted by leading Polish cash-and-carry operators in 2025, 37 percent of Poles do not regularly dine out. This is changing in urban areas where employees work longer hours and dining out is a more common social activity. Despite Poles' preference for homemade meals, they are gradually moving towards ready-made meals, particularly among young urban professionals. Busy personal lives coupled with professional lives provide less free time. International cuisines are also gaining in popularity due to increased demand by well-traveled Poles. Italian, Chinese, Mexican, and Indian restaurants can be found in almost every city. American casual dining and quick-service chains are common in larger cities. International hotel chains such as Marriott, Sheraton, Radisson, Intercontinental, and Hilton are also present in Polish cities.

Section V. Agricultural and Food Imports

Poland's total 2025 imports of food and agricultural-related products were valued at over $48 billion, with U.S. trade accounting for a new record high $888 million.

Table 4: Polish 2024-2025 Agriculture, Consumer-Oriented ($ million)

Poland	2024	2025
Total imports	$42,535	$48,010
Imports from the United States	$730 (1.8%)	$888* (1.8%)
Consumer-oriented Agricultural Products, total imports	$24,682	$28,511
Consumer-Oriented Agricultural Products, imports from the United States	$427 (1.7%)	$515* (1.8%)

*Source: Trade Data Monitor based on Polish Customs Statistics (****A new record).***

Domestic and EU products, which account for over 50 percent of total food imports to Poland, are the main competitors for U.S. exports. The growth of Poland's food processing industry has led to a wider variety of locally made products, including Polish-produced iconic American products. Polish fish and seafood imports continued to grow in 2025 and reached over $3.7 billion, with a $157 million (4 percent market share) originating from the United States. Poland is now one of the world's largest salmon processors.

Table 5. Examples of Imports of Consumer Food Products to Poland in 2025

Product Category and Total Poland's Imports	Main Suppliers in Percentage	Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers/Market Situation
Fish & Seafood **$ 4 billion**	1.Norway – 46 percent 2.Germany – 7 percent 3.Russia – 6 percent **6. United States – 5 percent**	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.

Tree Nuts **$ 766 million**	1. **United States – 60 percent** 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.
Dried Prunes **$ 37 million**	1. Chile – 50 percent **2. United States – 45 percent** 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.
Peanuts **$ 118 million**	1. Argentina – 78 percent 2. Brazil – 10 percent 3. **United States – 3 percent**	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.
Distilled spirits **$ 719 million**	1. United Kingdom - 43 **2. United States – 20 percent** 2.Ireland– 9 percent 3. Germany – 5 percent 4. Italy – 4 percent	United Kingdom is a traditional supplier present on the Polish market for decades. Products from the United States are quickly gaining popularity among well-travelled Poles.	As the Polish consumers become more affluent U.S. offer is likely to attract further buyers.
Wine **$450 million**	1. Italy – 30 percent 2. France – 25 percent 3. Portugal – 22 percent **6. United States – 6 percent**	Italy and France are traditional suppliers of wine present on the Polish market for decades. Products from the United States, (California and Washington State) are quickly gaining popularity.	As the Polish consumers become more affluent U.S. offer is likely to attract further buyers.

Source: Trade Data Monitor

Best High-Value Product Prospects

Products present in the market with good sale potential:

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

Products not present in significant quantities but with good sales potential:

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

Products not present because they face significant barriers:

- Poultry (non-tariff barrier)
- Processed food with Genetically Engineered "GMO" ingredients (non-tariff barrier)
- Food additives not approved by the European Commission

Section VI. Key Contacts and Further Information

Agricultural Affairs Office Physical Address: Al. Ujazdowskie 29/31, 00-540 Warsaw, Poland http://www.fas.usda.gov	Phone: +48 22 504 23 36 Email: AgWarsaw@usda.gov

Key Polish Food Processing Associations:

- Polish Federation of Food Producers
- Association of Milk Producers
- Union of Producers of Meat Industry
- Association Polish Meat "POLSKIE MIĘSO"
- The Polish Association of Fish Processors

Attachments:

No Attachments