Voluntary Report - public distribution

**Date:** 7/16/2004

**GAIN Report Number:** PL4022

PL2004

**Poland**

**Product Brief**

**Dried Fruits and Nuts**

**2004**

**Approved by:**

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**Report Highlights:**

Overall Polish imports of dried fruits and nuts increased 6.5 percent in 2003. US exporters have more opportunities to enter the market due to the May 1, 2004, accession of Poland to the EU. Demand for these products generally increased between January and May, stimulated by the Carnival Season

Includes PSD Changes: No

Includes Trade Matrix: No

Unscheduled Report

Warsaw [PL1]

[PL]

**Section I. Market Overview**

Quick snacks and foods are showing continued expansion in the Polish food industry. Polish consumers perceive dried fruit & nuts as a positive, healthy form of food "on the go." As a result, this sector shows overall growth. Total imports of dried fruit & nuts in 2003 were 77,286 MT, a 6.5 percent increase from 2002. This developing market has brought forth a variety of changes, including bulk packaging. While bulk packaging brings in a higher quantity of product, it has proven to decrease overall quality. The lack of a tariff for raw shelled and unshelled peanuts and newly decreased tariffs for walnuts, pistachios, raisins, dried prunes, and mixed nuts due to the May 1, 2004, EU accession, may offer U.S. dried fruit and nut suppliers the opportunity to capture a larger market share in Poland.

Market research shows that about 32 percent of the Polish population buys a variety of nuts and dried fruits throughout the year. Nearly 65 percent of the Polish population purchases nuts once a month, 25 percent purcha

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| --- | --- |
| **Advantages** | **Challenges** |
| Polish consumption of dried fruit & nuts is on the rise. | Competition with snack food industry. |
| Market is opening to new products such as flavored and roasted peanuts and almonds. Further development of alcoholic beverage advertisement could be utilized to promote this new category. | EU member states are allowed duty free market access. |
| Tariffs on walnuts, pistachios, raisins, prunes, and mixed nuts have been significantly reduced:  in shell walnuts (20%) decreased to 4%, while shelled walnuts (25%) decreased to 5.1%, pistachios (16%) decreased to 1.6%, while raisins (9%) dropped to 2.4%, prunes (25%) fell to 9.6%, and mixed nuts (25%) decreased to 4%. | Spanish producers currently dominate the market for almonds due to much lower product costs. Market promotions of US products are required in order to convince Polish importers to switch to US products. |
| Consumers consider U.S. products to be higher quality. | Getting fresh products to the consumer. |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Almonds, In Shell, Fresh or Dried, 080211 | | | | | | |
|  | 2001 | | 2002 | | 2003 | |
| Country | Quantity in Metric Tons | US$ | Quantity in Metric Tons | US$ | Quantity in Metric Tons | US$ |
|
| United States | 150 | 399297 | 264 | 660175 | 182 | 569355 |
| Spain | 22 | 64374 | 9 | 31678 | 1 | 5539 |
| World Total | 191 | 520968 | 274 | 695051 | 184 | 575355 |
|  | | | | | | |
| Almonds, Fresh or Dried, Shelled, 080212 | | | | | | |
|  | 2001 | | 2002 | | 2003 | |
| Country | Quantity in Metric Tons | US$ | Quantity in Metric Tons | US$ | Quantity in Metric Tons | US$ |
|
| Spain | 609 | 1935108 | 842 | 3132410 | 923 | 3964709 |
| United States | 693 | 1993908 | 837 | 2537318 | 893 | 3666245 |
| Italy | 0.025 | 132 | 0.143 | 813 | 66 | 321546 |
| Greece | 0 | 0 | 0 | 0 | 12 | 57109 |
| World Total | 1365 | 4117979 | 1709 | 5797673 | 1896 | 8016483 |
|  | | | | | | |
| Raisins, 080620 | | | | | | |
|  | 2001 | | 2002 | | 2003 | |
| Country | Quantity in Metric Tons | US$ | Quantity in Metric Tons | US$ | Quantity in Metric Tons | US$ |
|
| Iran | 6578 | 4373601 | 7210 | 4713098 | 8426 | 6953038 |
| Greece | 3931 | 3726799 | 3271 | 3106914 | 1831 | 2352061 |
| Turkey | 2847 | 1896085 | 2310 | 1807547 | 1724 | 1504077 |
| United States | 1180 | 1277239 | 1071 | 1069420 | 777 | 858719 |
| World Total | 14830 | 11583263 | 14466 | 11228618 | 13715 | 12846489 |

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| --- | --- | --- | --- | --- | --- | --- |
| Peanuts, In Shell, Not Roasted or Cooked, 120210 | | | | | | |
|  | 2001 | | 2002 | | 2003 | |
| Country | Quantity in Metric Tons | US$ | Quantity in Metric Tons | US$ | Quantity in Metric Tons | US$ |
|
| China | 4408 | 2773741 | 8412 | 3932126 | 6189 | 3932126 |
| Switzerland | 9 | 4784 | 113 | 54284 | 103 | 54013 |
| Vietnam | 5 | 3855 | 4 | 1771 | 2 | 1576 |
| Uzbekistan | 0 | 0 | 0 | 0 | 1 | 239 |
| World Total | 4466 | 2831260 | 8816 | 4777897 | 6294 | 3987996 |
|  | | | | | | |
| Peanuts, Shelled, Not Roasted, or Cooked, 120220 | | | | | | |
|  | 2001 | | 2002 | | 2003 | |
| Country | Quantity in Metric Tons | US$ | Quantity in Metric Tons | US$ | Quantity in Metric Tons | US$ |
|
| China | 10756 | 7607755 | 11499 | 7517295 | 15025 | 11366787 |
| Argentina | 4794 | 3907682 | 4554 | 3330696 | 7351 | 5816550 |
| Brazil | 104 | 61907 | 255 | 155776 | 817465 | 1180 |
| United States | 897 | 763653 | 3499 | 2983975 | 692 | 681727 |
| World Total | 19797 | 14528486 | 22203 | 15445040 | 25251 | 19422010 |
|  | | | | | | |
| Mixture of Nuts or Dried Fruits, 081350 | | | | | | |
|  | 2001 | | 2002 | | 2003 | |
| Country | Quantity in Metric Tons | US$ | Quantity in Metric Tons | US$ | Quantity in Metric Tons | US$ |
|
| Germany | 17 | 66666 | 20 | 104105 | 35 | 154160 |
| Hungary | 0 | 0 | 0 | 0 | 42 | 16989 |
| Austria | 1 | 10217 | 2 | 12135 | 1 | 16580 |
| Ukraine | 2 | 8174 | 0 | 0 | 9 | 6580 |
| World Total | 29 | 107860 | 30 | 129258 | 93 | 225479 |
|  | | | | | | |
| Pistachios, Fresh or Dried, 080250 | | | | | | |
|  | 2001 | | 2002 | | 2003 | |
| Country | Quantity in Metric Tons | US$ | Quantity in Metric Tons | US$ | Quantity in Metric Tons | US$ |
|
| Iran | 867 | 2687093 | 951 | 3023327 | 1147 | 3465081 |
| Turkey | 183 | 507372 | 31 | 99032 | 41 | 122391 |
| United States | 1 | 2179 | 0 | 0 | 31 | 73566 |
| Italy | 13 | 32191 | 30 | 84639 | 21 | 62139 |
| World Total | 1066 | 3238827 | 1025 | 3248252 | 1241 | 3733519 |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Prunes, Dried, 081320 | | | | | | |
|  | 2001 | | 2002 | | 2003 | |
| Country | Quantity in Metric Tons | US$ | Quantity in Metric Tons | US$ | Quantity in Metric Tons | US$ |
|
| Argentina | 70 | 10168 | 621 | 855355 | 1759 | 2453891 |
| United States | 2499 | 3620118 | 1011 | 1734554 | 971 | 1526560 |
| Chile | 423 | 563147 | 1085 | 1454830 | 934 | 1330000 |
| France | 26 | 44603 | 1 | 5281 | 72 | 112626 |
| Slovakia | 0 | 0 | 24 | 42270 | 24 | 39679 |
| World Total | 3044 | 4342616 | 2881 | 4278769 | 3849 | 5547830 |
|  | | | | | | |
| Walnuts in Shell, Fresh or Dried, 080231 | | | | | | |
|  | 2001 | | 2002 | | 2003 | |
| Country | Quantity in Metric Tons | US$ | Quantity in Metric Tons | US$ | Quantity in Metric Tons | US$ |
|
| France | 274 | 197578 | 230 | 210129 | 250 | 224895 |
| United States | 103 | 62441 | 95 | 57718 | 90 | 79394 |
| Spain | 0 | 0 | 0 | 0 | 2 | 4367 |
| World Total | 377 | 260803 | 327 | 270446 | 342 | 309243 |
|  | | | | | | |
| Walnuts, Fresh or Dried, Shelled, 080232 | | | | | | |
|  | 2001 | | 2002 | | 2003 | |
| Country | Quantity in Metric Tons | US$ | Quantity in Metric Tons | US$ | Quantity in Metric Tons | US$ |
|
| Moldova | 2 | 9428 | 0.336 | 502 | 6 | 51834 |
| Germany | 2 | 11916 | 1 | 6054 | 3 | 42918 |
| India | 4 | 31659 | 2 | 19014 | 2 | 24030 |
| France | 9 | 43141 | 32 | 91290 | 2 | 14829 |
| World Total | 46 | 165180 | 45 | 139730 | 21 | 155401 |
|  | | | | | | |
| Sunflower Seeds, Whether or Not Shelled and in a Grey and White Striped Shell (Excl. for Sowing), 12060091 | | | | | | |
|
|  | 2001 | | 2002 | | 2003 | |
| Country | Quantity in Metric Tons | US$ | Quantity in Metric Tons | US$ | Quantity in Metric Tons | US$ |
|
| Hungary | \* | \* | 8989 | 3942452 | 7180 | 3734635 |
| China | \* | \* | 907 | 782405 | 2782 | 2224313 |
| United States | \* | \* | 1487 | 1195407 | 664 | 453091 |
| Czech Republic | \* | \* | 175 | 63114 | 373 | 152213 |
| World Total | \* | \* | 11932 | 6173517 | 11318 | 6704127 |

|  |  |  |  |
| --- | --- | --- | --- |
| **Product** | **Price** | **Quantity** | **Brand** |
| Double Crunch Peanuts, Flavors:  Chili, BBQ, and Paprika | 4.89 | 120g | Felix |
| Double Crunch Peanuts, Plain | 4.09 | 125g | Lorenz |
| Double Crunch Peanuts, Plain | 4.19 | 150g | Felix |
|  |  |  |  |
| Honey Roasted Peanuts | 4.29 | 150g | Aromat |
| Honey Roasted Peanuts | 6.79 | 300g | Felix |
|  |  |  |  |
| In-Shell Salted Peanuts | 1.99 | 250g | Euroshopper |
| Lightly Salted Peanuts | 7.99 | 500g | Felix |
| Mexican Peanuts | 3.65 | 120g | Aromat |
| Mexican Peanuts | 3.75 | 150g | Aromat |
| Picante Peanuts | 2.45 | 90g | Konpex |
| Paprika (Picante) Peanuts | 4.19 | 150g | Felix |
| Picante Peanuts | 6.59 | 300g | Felix |
|  |  |  |  |
| Mixed Nuts | 13.99 | 185g | Vivat |
| Mixed Nuts | 11.95 | 250g | Uno Quality |
| Mixed Nuts with Raisins | 5.89 | 200g | Lorenz |
| Mixed Nuts with Raisins | 9.95 | 300g | Uno Quality |
| Mixed Fruits | 5.79 | 200g | Not Available |

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| --- | --- | --- | --- |
| Pistachios | 4.55 | 65g | Konpex |
| Pistachios | 4.99 | 80g | Uno Quality |
| Pistachios | 5.39 | 100g | Felix |
| Pistachios | 7.99 | 100g | Uno Quality |
| Pistachios | 16.95 | 250g | Uno Quality |
| Pistachios | 15.49 | 300g | Felix |
| Pistachios | 17.95 | 400g | Bakalland |
|  |  |  |  |
| Dried Apricots | 6.99 | 200g | Hypernova |
| Dried Apricots | 9.95 | 250g | Uno Quality |
| Dried Apricots | 15.95 | 500g | Bakalland |
|  |  |  |  |
| Prunes | 2.39 | 100g | Bakalland |
| Prunes | 9.95 | 200g | Sunsweet |
| Prunes | 17.89 | 270g | St. DalFour (French) |
| Prunes | 9.95 | 300g | Uno Quality |
| Prunes | 12.95 | 500g | Bakalland |
| Prunes | 22.95 | 500g | Sunsweet |
|  |  |  |  |
| Raisins | 2.49 | 200g | Bakalland |
| Raisins | 3.99 | 500g | Makar |
| Raisins | 5.49 | 500g | Bakalland |
| Greek Raisins | 2.99 | 300g | Hypernova |
| Greek Raisins | 3.49 | 300g | Albert |
|  |  |  |  |
| Almonds | 2.99 | 50g | Cięte |
| Almonds | 6.99 | 200g | Hypernova |
| Almonds | 8.99 | 200g | Albert |
| Almonds | 12.95 | 250g | Uno Quality |
| Almonds | 19.95 | 500g | Bakalland |
| Salted Almonds | 6.99 | 80g | Konpex |
|  |  |  |  |
| Salted Peanuts | 1.49 | 80g | Jutrzenka |
| Salted Peanuts | 2.45 | 90g | Konpex |
| Salted Peanuts | 2.89 | 150g | Hypernova |
| Salted Peanuts | 2.99 | 150g | Albert |
| Salted Peanuts | 3.15 | 100g | Aromat |
| Salted Peanuts | 3.55 | 150g | Aromat |
| Salted Peanuts | 4.19 | 200g | Lorenz |
| Salted Peanuts | 4.29 | 150g | Felix |
| Salted Peanuts | 4.65 | 500g | Pop Top |
| Salted Peanuts | 6.99 | 500g | Gorilla |
| Salted Peanuts | 8.49 | 500g | Felix |
| Salted Peanuts | 13.99 | 1000g | Aromat |
|  |  |  |  |
| Unsalted Peanuts | 4.29 | 150g | Felix |
| Unsalted Peanuts | 8.49 | 500g | Felix |

|  |  |  |  |
| --- | --- | --- | --- |
| Walnuts | 6.45 | 250g | Florpak |
| Walnuts | 12.95 | 400g | Uno Quality, Bakalland |
|  |  |  |  |
| Almonds in Shell | 17.99 | 225g | Noci |
| Walnuts in Shell | 16.99 | 350g | Noci |
| Sunflower Seeds in Shell | 1.79 | 200g | Brand Not Available |
| Sunflower Seeds in Shell | 0.99 | 100g | Brand Not Available |
|  |  |  |  |
| **BULK** |  |  |  |
| Peanuts in Shell | 9.95/kg |  |  |
| Shelled Peanuts | 12.95/kg |  |  |
| Raisins | 9.95/kg |  |  |
| Mixed Dried Fruit | 29.95/kg |  |  |
| Sunflower Seeds | 8.99/kg |  |  |
|  |  |  |  |
| **ORGANIC** |  |  |  |
| Walnuts | 16.49 | 100g | Imported, Brand Not Available |
| Raisins | 10.49 | 200g | Imported, Brand Not Available |
| Dried Apricots | 13.99 | 200g | Imported, Brand Not Available |
| Dried Apricots | 4.99 | 150g | Bakal Center |

|  |  |  |
| --- | --- | --- |
| CN Code | Name of Product | EU Tariff |
| 08021110 | Almonds, in shell, bitter | 0% |
| 08021190 | Almonds, in shell, other | 5.6%\* |
| 08021210 | Almonds, shelled, bitter | 0% |
| 08021290 | Almonds, shelled, other | 3.5%\* |
| 080231 | Walnuts, in shell | 4% |
| 080232 | Walnuts, shelled | 5.10% |
| 080250 | Pistachios | 1.60% |
| 080620 | Raisins | 2.40% |
| 081320 | Prunes, dried | 9.60% |
| 08134095 | Cranberries, dried | 2.4%\*\* |
| 08135031 | Mixture of nuts | 4% |
| 120210 | Peanuts, in shell | 0% |
| 120220 | Peanuts, shelled | 0% |
| 12060091 | Sunflower Seeds | 0% |

l of a new additive, (not specified in the approved additives list), the following procedure should be followed:

Appropriate Voivod Sanitary Station should be contacted. In Warsaw - the Wojewodzka Stacja Sanitarna (SANEPID) is the appropriate contact.

An appropriate local sanitary station must be supplied with a product sample for testing. The tests can take between 2 weeks and 2 months. The cost is difficult to estimate but may amount to $250.00 per product. An estimate of the cost can be obtained from the SANEPID station when it is presented with product details. The lab tests for product ingredients determine whether they are permitted on the Polish market.

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

Please note that product testing in SANEPID can only be ordered by a firm **registered in Poland** (eg. potential importer). Each region in Poland has appropriate sanitary stations (a list is available from Warsaw SANEPID)- eg. Only firms registered in Warsaw or neighboring areas can conduct product testing in the Warsaw Sanitary Station).

Effective July 15, 1994 per Journal of Law no. 86 chapter 402, all package/canned food products are required to have Polish language labels. Multi-language labels are acceptable as long as they include Polish. The label must contain: name of the product, name and address of the producer, date - to be consumed before - the Polish phrase “nalezy spozyc do XXX” is commonly used, net content (weight/capacity), and content of the product (ingredients, chemical additives, etc.)

Labeling must be applied in the form of a whole label or a permanent sticker before the product can enter Poland. Products arriving in Poland without appropriate labels will be detained at the border until appropriate labels are applied.

Poland’s Ministry of Health and Social Welfare published a new regulation (Journal of Law no. 87 dtd. May 19, 2003) on food additives on June 3, 2003. Poland uses a positive-additives list, which identifies additives that are permitted for use in foodstuffs. This particular regulation has been one of the most difficult obstacles facing imported products. The new list is in line with the current EU regulations. **Please note:** As each EU member state has a different list of allowable food additives it is vital for all U.S. exporters to check with the potential Polish importers about whether the product intended for the Polish market meets all the ingredient requirements.

If you would like to contact authorities directly involved in preparing regulations on food additives and inspection of additive levels in imported products, please contact the National Food and Nutrition Institute.

Section V. Key Contacts and Further Information

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**For aflatoxin information please contact:**

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