|  |  |
| --- | --- |
| **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. |

h wholesalers.

However, more dried fruit & nut importers are tending toward direct distribution to the retail market. Direct distribution reduces overall cost and avoids the loss of product freshness that results in declining sales. Larger firms have also introduced sales representatives in the field to process orders and to disseminate market information back to the firm. The smaller, less capital accessible firms still rely on the wholesaler link to the market. These firms do not have the capital necessary to distribute their product internally.

Exporters of U.S. dried fruit and nuts may obtain a list of current Polish importers by contacting the Office of Agricultural Affairs at the U.S. Embassy in Warsaw (see Section V).

2) Market Size, Structure, Trends

The retail centers for dried fruit & nut sales are broken into several segments. They include hypermarkets, supermarkets and discount stores, convenience stores, traditional stores, and kiosks. Hypermarkets have been growing in number throughout Poland and offer the largest variety and shelf space of any segment. Supermarkets and discount stores also offer a large variety of dried fruit & nuts and shelf space. Convenience stores are a new and growing distribution channel located at railway, bus, and gas stations throughout Poland. The number of these stores is expected to double over next few years and will likely offer the greatest potential for market growth in snack products such as dried fruit & nuts. In addition, Poland’s vehicle sales increased sharply in the 1990's. Although this trend does not continue, sales continue to increase slightly, which makes the gas stations with food stores an increasingly attractive retail outlet. Traditional stores and kiosks offer the least amount of variety and shelf space for dried fruit & nuts but make up the largest percentage of stores.

In terms of substitutes, the potato chip/snack food industry competes heavily with the dried fruit and nuts sector. Firms involved in this industry advertise heavily through TV and billboards to increase their sales of these products. Fresh fruit and vegetables compete with dried fruit and nuts during the months of June through August. Consumption of dried fruit and nuts is the strongest during the months of September through May.

While overall imports of dried fruits and nuts have grown 6.5 percent, new trends in market development have promoted an increase in bulk packaging from grams to kilograms, which has dampened quality. In addition, foreign retail outlets in Poland often demand the same product terms and prices as occur among their Western European outlets. The following tables show a break down of the dried fruit and nuts imported to Poland.

**Table I. Dried Fruit & Nuts Import Tables**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| 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 |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| 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 |

\* Denotes information that is unavailable.

Source: World Trade Atlas

3.) Market Preferences

Flavored peanuts, almonds, and hazelnuts have recently become popular among Polish consumers. Spicy flavors tend to be most appealing. Coated peanuts, referred to as double crunch peanuts, are also rather popular among Poles, and are available salted or flavored. Energy bars produced from grains, nuts, and dried fruits are becoming more visible on the market as the society moves towards becoming more health conscious. Products from companies outside of Poland primarily dominate the energy bar market, however; Polish companies are starting to produce these bars under their own brands. Chocolate manufacturers are also starting to look for high quality ingredients to ensure longer shelf life of their products. This has led to an increased demand for high quality nuts as raw materials. Due to increased local demand, Polish importers have become more interested in larger orders increasing the demand for direct shipments from the US.

**Section III. Costs & Prices**

Costs of dried fruits and nuts vary by the market in which they are sold (upper, middle, lower income), in addition to the brand they carry. However, overall price fluctuation is moderat

|  |  |  |  |
| --- | --- | --- | --- |
| **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 |

|  |  |  |  |
| --- | --- | --- | --- |
| 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% |