rts 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.

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

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

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