



**MARKET ACCESS SECRETARIAT
Global Analysis Report**

Competitive Trade Analysis

Poland

May 2016



REPORT CONTENT SUMMARY

- This report looks to highlight the major sectors in Poland, and attempts to identify the best opportunities for Canadian exports.
- Specifically, the data analysis that follows focuses on the top ten Polish imports by major aggregate sector, of which Canada is a supplier. It identifies the gap between Poland's imports from the world and the proportion provided by Canada, and then outlines top international competitors.
- Unless otherwise specified, all figures in this document are based on import data as reported by Eurostat, and were sourced from Global Trade Atlas (2015).

POLISH MARKET SUMMARY

- In 2014, Poland was the 17th-largest importer of agri-food and seafood products in the world, and the 8th-largest among members of the European Union (EU) with C\$22.2 billion in imports. Poland is also the world's 17th-largest agri-food and seafood exporter (8th-largest in the EU) with C\$31.9 billion in exports. However, the C\$9.7 billion trade surplus in 2014, highlights' the country's dependency for agri-food and seafood imports.
- Poland's top agri-food and seafood trading partners include Germany with 26.1% of total import value, the Netherlands (10.7%), and Belgium (5.3%). Canada was Poland's 41st-largest import provider in 2014, representing C\$40.1 million, or just 0.2% of the market.

Note: Please see the Annex at the end of this document for a list of abbreviations that will be used throughout this report.

CONTENTS

Report Content Summary	1
Polish Market Summary	1
Trade Overview	2
Top Ten Agri-Food and Seafood Commodity Imports	4
1. Food Waste and Animal Feed	4
2. Fish and Crustaceans	6
3. Meat and Edible Offal.....	8
4. Edible Fruit and Nuts.....	10
5. Miscellaneous Edible Preparations.....	12
6. Dairy, Eggs and Honey	14
7. Cocoa and Cocoa Preparations.....	16
8. Live Animals.....	18
9. Beverages	20
10. Edible Vegetables	22
Conclusion.....	24
For More Information.....	24
Resources	24



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TRADE OVERVIEW

Poland sources from a diverse range of agri-food and seafood products from 155 international suppliers. Key import commodities include food waste and animal feed (11.6% of total imports), fish and crustaceans (10.5%) and meat and edible offal (8.3%). The top three supplying countries of overall agri-food and seafood imports are Germany, the Netherlands and Belgium. Canada is ranked 41st among supplying countries to Poland, and registered a compound annual growth rate (CAGR) of 27.6% from 2010-14.

Poland's Top Ten Suppliers of Agri-Food and Seafood Products, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
World	15,359.34	17,715.68	18,009.54	20,043.92	22,227.15	9.68
1 Germany	3,855.26	4,699.88	4,696.42	5,279.45	5,792.65	10.71
2 Netherlands	1,963.70	2,056.42	1,980.09	2,197.61	2,381.72	4.94
3 Belgium	710.14	842.08	901.90	1,011.34	1,168.20	13.25
4 Denmark	747.56	857.84	830.00	967.18	1,060.07	9.12
5 Spain	765.87	838.55	831.16	974.84	1,051.32	8.24
6 Sweden	612.26	539.69	656.42	956.22	1,033.50	13.98
7 France	658.37	771.63	702.39	810.16	904.56	8.27
8 Italy	673.17	718.88	699.65	758.19	795.59	4.27
9 Argentina	396.10	564.39	627.72	518.95	747.14	17.19
10 Czech Republic	557.53	685.29	715.81	707.47	729.53	6.95
41 Canada	16.65	24.98	33.15	25.84	44.10	27.58

Poland's Top Ten Suppliers of Agri-Food and Seafood Products, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
1 Germany	25.10	26.53	26.08	26.34	26.06	0.96
2 Netherlands	12.79	11.61	10.99	10.96	10.72	-2.07
3 Belgium	4.62	4.75	5.01	5.05	5.26	0.63
4 Denmark	4.87	4.84	4.61	4.83	4.77	-0.10
5 Spain	4.99	4.73	4.62	4.86	4.73	-0.26
6 Sweden	3.99	3.05	3.64	4.77	4.65	0.66
7 France	4.29	4.36	3.90	4.04	4.07	-0.22
8 Italy	4.38	4.06	3.88	3.78	3.58	-0.80
9 Argentina	2.58	3.19	3.49	2.59	3.36	0.78
10 Czech Republic	3.63	3.87	3.97	3.53	3.28	-0.35
41 Canada	0.11	0.14	0.18	0.13	0.20	0.09

Agri-Food and Seafood Products Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Poland's imports from the world	15,359.34	17,715.68	18,009.54	20,043.92	22,227.15	9.68
Poland's imports from the Canada	16.65	24.98	33.15	25.84	44.10	27.58
Supply gap	15,342.69	17,690.70	17,976.39	20,018.09	22,183.04	9.66



Food waste and animal feed represented Poland's top-grossing import commodity in 2014, with a value of over C\$2.1 billion, or 9.6% of overall agri-food and seafood imports. Across the 2010 to 2014 period, all of the top 10 categories had a compound annual growth rate (CAGR) over 6.0%. The categories of live animals and dairy, eggs and honey, were the strongest growing commodities over the period, with CAGRs of 31.5% and 18.4%.

**Poland's Top Ten Agri-Food and Seafood Commodity Imports from the World,
C\$ Millions**

Rank	HS Code	Commodity	2010	2011	2012	2013	2014	CAGR % 2010-14
Total agri-food and seafood imports			15,359.34	17,715.68	18,009.54	20,043.92	22,227.15	9.68
1	23	Food waste and animal feed	1,382.08	1,512.96	1,811.92	1,793.87	2,141.22	11.57
2	03	Fish and crustaceans	1,400.81	1,412.53	1,408.74	1,837.52	2,089.10	10.51
3	02	Meat and edible offal	1,492.30	1,692.20	1,766.03	1,950.75	2,052.92	8.30
4	08	Edible fruit and nuts	1,297.30	1,369.19	1,335.48	1,604.28	1,748.29	7.74
5	21	Miscellaneous edible preparations	886.91	944.73	972.89	1,063.73	1,203.97	7.94
6	04	Dairy, eggs, and honey	598.73	727.65	690.67	996.76	1,176.35	18.39
7	18	Cocoa and cocoa preparations	815.64	884.15	811.90	947.19	1,123.22	8.33
8	01	Live animals	303.98	381.31	570.65	833.50	909.40	31.52
9	22	Beverages	674.85	741.42	732.79	835.71	888.48	7.12
10	07	Edible vegetables	695.47	718.37	609.82	772.22	886.70	6.26



TOP TEN AGRI-FOOD AND SEAFOOD COMMODITY IMPORTS

1. FOOD WASTE AND ANIMAL FEED

Poland's Top Ten Suppliers of Food Waste and Animal Feed, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
World	1,382.08	1,512.96	1,811.92	1,793.87	2,141.22	11.57
Argentina	325.69	489.22	553.33	445.47	685.86	20.46
Germany	235.34	277.48	364.28	330.15	362.32	11.39
Paraguay	45.20	12.81	6.49	20.54	150.17	35.01
Ukraine	76.58	107.14	174.38	107.24	133.79	14.97
Russia	2.33	11.72	16.27	29.79	110.02	162.09
Netherlands	261.68	166.60	190.66	162.13	95.85	-22.20
Belgium	19.62	33.23	70.54	72.29	77.52	40.99
Czech Republic	52.36	59.17	49.15	62.07	65.11	5.60
Hungary	45.41	52.11	52.28	47.64	53.46	4.17
Brazil	0.04	12.68	30.81	29.36	49.87	490.17
(25) Canada	0.25	0.25	11.52	1.39	5.86	120.27

Poland's Top Ten Suppliers of Food Waste and Animal Feed, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Argentina	23.56	35.40	40.04	32.23	49.63	26.07
Germany	17.03	20.08	26.36	23.89	26.22	9.19
Paraguay	3.27	0.93	0.47	1.49	10.87	7.60
Ukraine	5.54	7.75	12.62	7.76	9.68	4.14
Russia	0.17	0.85	1.18	2.16	7.96	7.79
Netherlands	18.93	12.05	13.79	11.73	6.94	-11.99
Belgium	1.42	2.40	5.10	5.23	5.61	4.19
Czech Republic	3.79	4.28	3.56	4.49	4.71	0.92
Hungary	3.29	3.77	3.78	3.45	3.87	0.58
Brazil	0.00	0.92	2.23	2.12	3.61	3.61
(25) Canada	0.02	0.02	0.83	0.10	0.42	0.40



Food Waste and Animal Feed Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Poland's imports from the world	1,382.08	1,512.96	1,811.92	1,793.87	2,141.22	11.57
Poland's imports from the Canada	0.25	0.25	11.52	1.39	5.86	120.27
Supply gap	1,381.83	1,512.71	1,800.40	1,792.48	2,135.36	11.49

Poland's Top Five Food Waste and Animal Feed Product Imports, C\$ Millions

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
230400	Soybean meal	1,010.93	946.31	1,177.35	7.92
230990	Animal feed preparations, other than dog and cat food	275.63	322.89	376.62	16.89
230910	Dog and cat food, retail sale	166.44	201.45	245.10	21.34
230630	Sunflower seed meal	194.74	105.82	122.31	-20.75
230660	Palm nut or kernel oilcake	24.33	73.94	82.77	84.46

**Poland's Top Food Waste and Animal Feed Product Imports
and Top Supplying Countries, 2014**

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
230400	Soybean meal	Argentina 58.18	Paraguay 12.76	Russia 9.18	N/A
230990	Animal feed preparations, other than dog and cat food	Germany 51.18	Netherlands 9.09	France 5.82	N/C
230910	Dog and cat food, retail sale	Germany 26.46	Czech Republic 19.42	Hungary 14.55	2.33
230630	Sunflower seed meal	Ukraine 98.92	Bulgaria 0.74	Hungary 0.19	N/A
230660	Palm nut or kernel oilcake	Belgium 43.20	Indonesia 41.01	Malaysia 8.76	N/A



2. FISH AND CRUSTACEAN

Poland's Top Ten Suppliers of Fish and Crustacean, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
World	1,400.81	1,412.53	1,408.74	1,837.52	2,089.10	10.51
Sweden	496.01	424.50	528.68	817.32	881.33	15.45
Norway	220.95	197.05	111.16	119.40	205.59	-1.78
Germany	97.53	120.59	136.06	172.22	193.79	18.73
China	123.19	124.76	121.47	130.64	127.82	0.93
Denmark	71.85	79.42	83.76	96.46	110.27	11.30
United Kingdom	39.28	55.01	52.54	70.23	87.78	22.27
Netherlands	37.26	40.92	46.75	67.51	70.96	17.48
Iceland	45.23	57.75	56.19	46.89	45.34	0.06
Russia	34.03	40.70	30.75	35.59	42.85	5.93
Chile	18.62	20.33	21.01	31.03	41.67	22.31
(26) Canada	1.40	1.56	1.10	0.88	3.90	29.12

Poland's Top Ten Suppliers of Fish and Crustacean, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Sweden	35.41	30.30	37.74	58.35	62.92	27.51
Norway	15.77	14.07	7.94	8.52	14.68	-1.09
Germany	6.96	8.61	9.71	12.29	13.83	6.87
China	8.79	8.91	8.67	9.33	9.12	0.33
Denmark	5.13	5.67	5.98	6.89	7.87	2.74
United Kingdom	2.80	3.93	3.75	5.01	6.20	3.40
Netherlands	2.66	2.92	3.34	4.82	5.07	2.41
Iceland	3.23	4.12	4.01	3.35	3.24	0.01
Russia	2.43	2.91	2.20	2.54	3.06	0.63
Chile	1.33	1.45	1.50	2.21	2.97	1.64
(26) Canada	0.10	0.11	0.08	0.06	0.28	0.18

Fish and Crustacean Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Poland's imports from the world	1,400.81	1,412.53	1,408.74	1,837.52	2,089.10	10.51
Poland's imports from the Canada	1.40	1.56	1.10	0.88	3.90	29.12
Supply gap	1,399.40	1,410.97	1,407.64	1,836.64	2,085.19	10.48



Poland's Top Five Fish and Crustacean Product Imports, C\$ Millions

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
030214	Fresh salmon roe and liver of the Atlantic and Danube	522.04	772.24	791.45	23.13
030213	Fresh salmon roe and liver of the Pacific	30.65	68.26	119.56	97.51
030441	Fresh salmon fillets of the Pacific	42.03	46.29	105.90	58.73
030475	Frozen pollock fillets of Alaska	75.90	90.00	99.83	14.68
030481	Frozen salmon fillets of the Pacific	36.22	78.75	88.93	56.70

Poland's Top Five Fish and Crustacean Product Imports and Top Supplying Countries, 2014

HS Code	Product Description	Market Share %			Canada's Share
		1	2	3	
030214	Fresh salmon roe and liver of the Atlantic and Danube	Sweden 79.86	Norway 10.23	United Kingdom 7.00	N/A
030213	Fresh salmon roe and liver of the Pacific	Sweden 82.94	France 14.69	Denmark 1.08	N/A
030441	Fresh salmon fillets of the Pacific	Sweden 73.76	Norway 11.31	Germany 10.46	N/A
030475	Frozen pollock fillets of Alaska	China 51.82	United States 19.69	Germany 19.27	N/A
030481	Frozen salmon fillets of the Pacific	Germany 43.42	China 27.02	Chile 10.08	N/A



3. MEAT AND EDIBLE OFFAL

Poland's Top Ten Suppliers of Meat and Edible Offal, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
World	1,492.30	1,692.20	1,766.03	1,950.75	2,052.92	8.30
Germany	536.12	594.79	557.91	627.68	610.41	3.30
Belgium	139.71	203.85	295.18	349.53	416.08	31.37
Denmark	365.58	377.78	340.15	342.49	334.34	-2.21
Netherlands	100.63	158.62	172.90	180.28	205.15	19.49
United Kingdom	137.36	129.19	125.72	135.56	155.96	3.23
Spain	61.25	72.89	80.09	127.79	122.09	18.82
Italy	21.06	25.59	30.03	29.11	36.01	14.34
France	28.13	43.09	49.09	40.32	35.80	6.22
Sweden	1.83	1.65	29.08	26.52	29.39	100.13
Hungary	14.16	18.47	19.60	24.92	28.30	18.91

Poland's Top Ten Suppliers of Meat and Edible Offal, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Germany	35.93	39.86	37.39	42.06	40.90	4.97
Belgium	9.36	13.66	19.78	23.42	27.88	18.52
Denmark	24.50	25.32	22.79	22.95	22.40	-2.10
Netherlands	6.74	10.63	11.59	12.08	13.75	7.01
United Kingdom	9.20	8.66	8.42	9.08	10.45	1.25
Spain	4.10	4.88	5.37	8.56	8.18	4.08
Italy	1.41	1.71	2.01	1.95	2.41	1.00
France	1.88	2.89	3.29	2.70	2.40	0.51
Sweden	0.12	0.11	1.95	1.78	1.97	1.85
Hungary	0.95	1.24	1.31	1.67	1.90	0.95

Meat and Edible Offal Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Poland's imports from the world	1,492.30	1,692.20	1,766.03	1,950.75	2,052.92	8.30
Poland's imports from the Canada	-	-	-	-	-	-
Supply gap	1,492.30	1,692.20	1,766.03	1,950.75	2,052.92	8.30



Poland's Top Five Meat and Edible Offal Product Imports, C\$ Millions

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
020319	Fresh boneless pork	633.34	717.08	737.03	7.88
020311	Fresh pork carcasses and half-carcasses	383.11	449.01	478.26	11.73
020312	Fresh bone-in pork (hams and shoulders)	405.67	455.70	453.84	5.77
020329	Frozen pork	110.98	118.31	129.41	7.98
020130	Fresh boneless beef	19.77	20.99	29.34	21.85

Poland's Top Five Meat and Edible Offal Product Imports and Top Supplying Countries, 2014

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
020319	Fresh boneless pork	Germany 44.31	United Kingdom 15.64	Denmark 11.12	N/A
020311	Fresh pork carcasses and half-carcasses	Belgium 74.07	Germany 14.12	Denmark 5.16	N/A
020312	Fresh bone-in pork (hams and shoulders)	Denmark 44.93	Netherlands 24.01	Germany 19.12	N/A
020329	Frozen pork	Germany 39.38	Spain 12.71	Italy 12.70	N/A
020130	Fresh boneless beef	Ireland 34.51	Germany 19.90	Czech Republic 16.13	N/A



4. EDIBLE FRUIT AND NUTS

Poland's Top Ten Suppliers of Edible Fruit and Nuts, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
World	1,297.30	1,369.19	1,335.48	1,604.28	1,748.29	7.74
Spain	343.27	353.30	338.38	383.66	385.83	2.96
Germany	194.27	201.34	197.04	313.08	369.34	17.42
Netherlands	210.53	210.55	214.46	272.06	298.29	9.10
Italy	161.32	159.22	158.34	146.99	141.22	-3.27
Belgium	93.54	102.00	92.87	78.78	95.25	0.45
Turkey	47.54	36.95	35.71	41.03	55.67	4.03
Greece	35.62	35.24	37.78	49.68	43.08	4.87
Czech Republic	11.36	10.85	26.61	37.67	37.82	35.09
Portugal	5.56	14.28	15.88	26.03	37.73	61.42
France	19.16	24.91	21.97	22.96	30.13	11.99
(40) Canada	0.39	1.84	0.37	1.09	1.60	42.39

Poland's Top Ten Suppliers of Edible Fruit and Nuts, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Spain	26.46	27.23	26.08	29.57	29.74	3.28
Germany	14.98	15.52	15.19	24.13	28.47	13.49
Netherlands	16.23	16.23	16.53	20.97	22.99	6.76
Italy	12.44	12.27	12.20	11.33	10.89	-1.55
Belgium	7.21	7.86	7.16	6.07	7.34	0.13
Turkey	3.66	2.85	2.75	3.16	4.29	0.63
Greece	2.75	2.72	2.91	3.83	3.32	0.57
Czech Republic	0.88	0.84	2.05	2.90	2.92	2.04
Portugal	0.43	1.10	1.22	2.01	2.91	2.48
France	1.48	1.92	1.69	1.77	2.32	0.84
(40) Canada	0.03	0.14	0.03	0.08	0.12	0.09

Edible Fruit and Nuts Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Poland's imports from the world	1,297.30	1,369.19	1,335.48	1,604.28	1,748.29	7.74
Poland's imports from the Canada	0.39	1.84	0.37	1.09	1.60	42.39
Supply gap	1,296.91	1,367.35	1,335.11	1,603.19	1,746.69	7.73



Poland's Top Five Edible Fruit and Nuts Product Imports, C\$ Millions

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
080390	Fresh bananas	153.52	252.10	299.53	39.68
080610	Fresh grapes	166.69	194.99	185.68	5.54
080520	Fresh or dried mandarins	142.23	151.00	143.03	0.28
080550	Fresh or dried lemons and limes	91.76	115.43	133.91	20.80
080510	Fresh oranges	93.54	131.57	121.16	13.81

Poland's Top Five Edible Fruit and Nuts Product Imports and Top Supplying Countries, 2014

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
080390	Fresh bananas	Germany 43.63	Belgium 23.17	Netherlands 12.58	N/A
080610	Fresh grapes	Italy 36.62	Netherlands 28.35	Germany 17.22	N/A
080520	Fresh or dried mandarins	Spain 71.10	Germany 11.59	Italy 6.62	N/A
080550	Fresh or dried lemons and limes	Spain 48.16	Netherlands 21.84	Germany 17.34	N/A
080510	Fresh oranges	Spain 50.87	Germany 17.45	Netherlands 12.36	N/A



5. MISCELLANEOUS EDIBLE PREPARATIONS

Poland's Top Ten Suppliers of Miscellaneous Edible Preparations, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
World	886.91	944.73	972.89	1,063.73	1,203.97	7.94
Germany	265.03	289.49	301.47	350.69	378.13	9.29
France	79.38	81.70	68.97	79.95	105.61	7.40
Netherlands	99.74	70.53	65.02	77.65	77.50	-6.11
United Kingdom	49.18	59.65	61.88	58.59	64.15	6.87
Italy	39.70	43.12	49.90	47.95	62.48	12.00
Austria	43.97	45.67	43.25	50.82	62.19	9.05
Spain	18.89	18.50	24.19	29.92	59.82	33.40
Ecuador	28.82	39.92	59.84	66.69	53.95	16.97
Hungary	30.97	42.20	48.65	40.21	48.01	11.58
Czech Republic	38.08	44.46	40.39	43.09	46.11	4.90
(44) Canada	1.28	1.28	0.79	0.31	0.57	-18.24

Poland's Top Ten Suppliers of Miscellaneous Edible Preparations, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Germany	29.88	32.64	33.99	39.54	42.63	12.75
France	8.95	9.21	7.78	9.01	11.91	2.96
Netherlands	11.25	7.95	7.33	8.76	8.74	-2.51
United Kingdom	5.54	6.73	6.98	6.61	7.23	1.69
Italy	4.48	4.86	5.63	5.41	7.05	2.57
Austria	4.96	5.15	4.88	5.73	7.01	2.05
Spain	2.13	2.09	2.73	3.37	6.75	4.62
Ecuador	3.25	4.50	6.75	7.52	6.08	2.83
Hungary	3.49	4.76	5.49	4.53	5.41	1.92
Czech Republic	4.29	5.01	4.55	4.86	5.20	0.91
(44) Canada	0.14	0.14	0.09	0.04	0.06	-0.08

Miscellaneous Edible Preparations Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR 2010-14
Poland's imports from the world	886.91	944.73	972.89	1,063.73	1,203.97	7.94
Poland's imports from the Canada	1.28	1.28	0.79	0.31	0.57	-18.24
Supply gap	885.63	943.45	972.10	1,063.42	1,203.39	7.97



Poland's Top Five Miscellaneous Edible Preparation Product Imports, C\$ Millions

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
210690	Food preparations	432.50	488.36	577.20	15.52
210111	Coffee extracts and essences	237.30	255.79	272.48	7.16
210390	Sauces, mixed condiments and seasonings	113.54	116.74	135.28	9.16
210500	Ice cream and other edible ice	34.34	38.23	46.06	15.82
210410	Soups and broths	39.19	40.67	40.17	1.24

Poland's Top Five Miscellaneous Edible Preparation Product Imports and Top Supplying Countries, 2014

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
210690	Food preparations	Germany 27.31	France 14.14	Netherlands 10.26	0.04
210111	Coffee extracts and essences	Germany 39.31	Ecuador 19.80	Spain 13.37	N/C
210390	Sauces, mixed condiments and seasonings	Germany 35.63	Austria 18.23	United Kingdom 8.71	N/A
210500	Ice cream and other edible ice	Germany 48.50	Hungary 26.81	Lithuania 4.61	N/A
210410	Soups and broths	Germany 44.66	Italy 30.54	Czech Republic 5.62	N/A



6. DAIRY, EGGS, AND HONEY

Poland's Top Ten Suppliers of Dairy, Eggs and Honey, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
World	598.73	727.65	690.67	996.76	1,176.35	18.39
Germany	254.41	324.81	283.31	403.19	462.20	16.10
Netherlands	81.77	82.88	73.42	105.82	132.19	12.76
Ireland	16.71	14.54	34.23	59.10	100.69	56.68
Lithuania	40.69	45.67	55.82	110.94	90.24	22.03
France	41.84	59.51	55.27	68.24	74.23	15.41
Czech Republic	36.81	42.93	39.33	53.80	65.07	15.31
Italy	20.25	30.51	24.27	32.69	49.43	24.99
Denmark	32.08	37.82	37.38	37.01	40.80	6.19
Ukraine	3.87	7.33	9.52	18.71	25.42	60.12
Belgium	11.98	10.01	12.14	19.70	21.25	15.41
(21) Canada	3.48	3.54	3.64	4.04	4.15	4.51

Poland's Top Ten Suppliers of Dairy, Eggs and Honey, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Germany	42.49	54.25	47.32	67.34	77.20	34.71
Netherlands	13.66	13.84	12.26	17.67	22.08	8.42
Ireland	2.79	2.43	5.72	9.87	16.82	14.03
Lithuania	6.80	7.63	9.32	18.53	15.07	8.27
France	6.99	9.94	9.23	11.40	12.40	5.41
Czech Republic	6.15	7.17	6.57	8.99	10.87	4.72
Italy	3.38	5.10	4.05	5.46	8.26	4.88
Denmark	5.36	6.32	6.24	6.18	6.81	1.46
Ukraine	0.65	1.22	1.59	3.13	4.25	3.60
Belgium	2.00	1.67	2.03	3.29	3.55	1.55
(21) Canada	0.58	0.59	0.61	0.67	0.69	0.11

Dairy, Eggs and Honey Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Poland's imports from the world	598.73	727.65	690.67	996.76	1,176.35	18.39
Poland's imports from the Canada	3.48	3.54	3.64	4.04	4.15	4.51
Supply gap	595.25	724.11	687.02	992.72	1,172.20	18.46



Poland's Top Five Dairy, Eggs and Honey Product Imports, C\$ Millions

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
040690	Specialty cheese	128.45	190.92	230.09	33.84
040299	Sweetened milk and cream	35.14	62.18	124.87	88.52
040610	Fresh cheese, including curds	66.96	81.98	102.84	23.93
040120	Milk and cream, fat content >1%, <6%	53.80	72.99	83.95	24.91
040210	Concentrated powdered milk and cream, not sweetened and fat content <1.5%	60.74	85.17	75.36	11.38

Poland's Top Five Dairy, Eggs and Honey Product Imports and Top Supplying Countries, 2014

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
040690	Specialty cheese	Germany 49.28	Netherlands 13.54	Denmark 10.28	N/A
040299	Sweetened milk and cream	Ireland 73.52	Netherlands 18.60	Germany 6.96	N/A
040610	Fresh cheese, including curds	Germany 46.03	Italy 14.14	France 13.39	N/A
040120	Milk and cream, fat content >1%, <6%	Lithuania 58.60	Czech Republic 17.22	Germany 17.21	N/A
040210	Concentrated powdered milk and cream, not sweetened and fat content <1.5%	Germany 55.92	Italy 11.49	France 6.13	N/A



7. COCOA AND COCOA PREPARATIONS

Poland's Top Ten Suppliers of Cocoa and Cocoa Preparations, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR 2010-14
World	815.64	884.15	811.90	947.19	1,123.22	8.33
Germany	276.11	329.08	305.64	385.85	444.40	12.64
Netherlands	158.04	156.93	119.87	107.68	172.45	2.20
Cote d Ivoire	106.86	87.76	86.27	88.16	135.08	6.03
Italy	67.21	75.18	71.57	77.85	56.72	-4.15
Belgium	30.14	40.45	31.49	46.53	52.52	14.89
France	28.12	25.26	36.08	46.83	49.92	15.43
Austria	13.97	14.54	18.91	30.12	33.26	24.22
United Kingdom	10.88	22.83	19.85	24.66	28.01	26.68
Czech Republic	20.11	20.77	14.93	16.54	27.47	8.11
Ghana	24.43	29.60	46.12	50.63	26.33	1.89
(43) Canada	0.13	0.24	0.14	0.02	0.02	-39.05

Poland's Top Ten Suppliers of Cocoa and Cocoa Preparations, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Germany	33.85	40.35	37.47	47.31	54.48	20.63
Netherlands	19.38	19.24	14.70	13.20	21.14	1.76
Cote d Ivoire	13.10	10.76	10.58	10.81	16.56	3.46
Italy	8.24	9.22	8.77	9.54	6.95	-1.29
Belgium	3.69	4.96	3.86	5.70	6.44	2.75
France	3.45	3.10	4.42	5.74	6.12	2.67
Austria	1.71	1.78	2.32	3.69	4.08	2.37
United Kingdom	1.33	2.80	2.43	3.02	3.43	2.10
Czech Republic	2.47	2.55	1.83	2.03	3.37	0.90
Ghana	3.00	3.63	5.65	6.21	3.23	0.23
(43) Canada	0.02	0.03	0.02	0.00	0.00	-0.02

Cocoa and Cocoa Preparations Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Poland's imports from the world	815.64	884.15	811.90	947.19	1123.22	8.33
Poland's imports from the Canada	0.13	0.24	0.14	0.02	0.02	-39.05
Supply gap	815.52	883.91	811.76	947.17	1,123.20	8.33



Poland's Top Five Dairy, Cocoa and Cocoa Preparation Imports, C\$ Millions

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
180690	Cocoa preparations, not in bulk form	168.75	233.11	220.81	14.39
180310	Cocoa paste, not defatted	135.46	142.39	179.43	15.09
180400	Cocoa butter, fat and oil	91.39	111.52	177.19	39.24
180620	Prepared chocolate, in blocks, > 2 kg	143.11	165.77	168.82	8.61
180631	Chocolate and other cocoa preparations, not in bulk	91.42	120.69	157.84	31.40

Poland's Top Five Dairy, Cocoa and Cocoa Preparation Imports and Top Supplying Countries, 2014

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
180690	Cocoa preparations, not in bulk form	Germany 61.33	Italy 10.00	Lithuania 7.43	N/A
180310	Cocoa paste, not defatted	Cote D'ivoire 26.46	Germany 25.21	Netherlands 20.73	N/A
180400	Cocoa butter, fat and oil	Netherlands 37.20	Germany 28.72	Cote D'ivoire 25.68	N/A
180620	Prepared chocolate, in blocks, > 2 kg	Germany 25.99	Belgium 21.63	Italy 15.47	N/A
180631	Chocolate and other cocoa preparations, not in bulk	Germany 59.64	Netherlands 15.15	Austria 11.39	0.01



8. LIVE ANIMALS

Poland's Top Ten Suppliers of Live Animals, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
World	303.98	381.31	570.65	833.50	909.40	31.52
Denmark	50.68	90.78	166.19	250.74	333.00	60.10
Germany	79.46	104.06	197.38	273.18	267.10	35.40
Netherlands	96.65	80.16	79.91	97.65	80.98	-4.32
Lithuania	10.51	17.81	35.33	65.07	57.18	52.72
Slovakia	15.86	25.88	24.01	48.16	51.52	34.25
Czech Republic	26.39	29.74	25.35	33.92	42.87	12.90
Latvia	4.23	2.55	4.76	13.80	16.24	39.99
Hungary	1.77	3.80	3.62	7.88	13.23	65.34
Austria	2.85	3.93	3.50	5.52	12.65	45.21
France	8.84	8.55	10.60	10.58	9.97	3.06
(23) Canada	0.02	0.05	0.03	0.06	0.03	10.06

Poland's Top Ten Suppliers of Live Animals, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Denmark	16.67	29.86	54.67	82.49	109.55	92.88
Germany	26.14	34.23	64.93	89.87	87.87	61.73
Netherlands	31.79	26.37	26.29	32.12	26.64	-5.15
Lithuania	3.46	5.86	11.62	21.41	18.81	15.35
Slovakia	5.22	8.51	7.90	15.84	16.95	11.73
Czech Republic	8.68	9.78	8.34	11.16	14.10	5.42
Latvia	1.39	0.84	1.57	4.54	5.34	3.95
Hungary	0.58	1.25	1.19	2.59	4.35	3.77
Austria	0.94	1.29	1.15	1.82	4.16	3.22
France	2.91	2.81	3.49	3.48	3.28	0.37
(23) Canada	0.01	0.02	0.01	0.02	0.01	0.00

Live Animals Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Poland's imports from the world	303.98	381.31	570.65	833.50	909.40	31.52
Poland's imports from the Canada	0.02	0.05	0.03	0.06	0.03	10.06
Supply gap	303.96	381.26	570.62	833.44	909.37	31.52



Poland's Top Five Live Animal Imports, C\$ Millions

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
010391	Live pork <50 kg	244.73	321.66	369.97	22.95
010392	Live pork >50 kg	160.04	266.23	223.35	18.14
010594	Live chicken >185 g	39.84	57.55	63.00	25.75
010599	Live turkeys, ducks, geese and guinea fowls, >185 g	12.56	24.82	51.43	102.34
010229	Live cattle, other than purebred breeding	15.36	32.96	45.68	72.46

Poland's Top Five Live Animal Imports and Top Supplying Countries, 2014

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
010391	Live pork <50 kg	Denmark 78.76	Netherlands 9.13	Germany 7.89	N/A
010392	Live pork >50 kg	Germany 73.39	Lithuania 15.43	Denmark 5.23	0.01
010594	Live chicken >185 g	Slovakia 38.04	Netherlands 24.73	Czech Republic 12.22	N/A
010599	Live turkeys, ducks, geese and guinea fowls, >185 g	Germany 32.63	Czech Republic 31.72	Hungary 16.44	N/A
010229	Live cattle, other than purebred breeding	Slovakia 36.98	Lithuania 19.49	Romania 9.17	N/A



9. BEVERAGES

(Excl. Juices)

Poland's Top Ten Suppliers of Beverages, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
World	674.85	741.42	732.79	835.71	888.48	7.12
Germany	166.22	194.46	178.17	193.18	242.71	9.93
United Kingdom	63.47	82.66	85.48	116.11	94.82	10.56
Italy	66.25	67.74	63.51	73.33	87.27	7.13
France	47.70	45.21	48.69	55.59	59.60	5.73
Czech Republic	44.25	46.63	48.37	46.91	48.65	2.40
Spain	19.82	27.12	27.70	34.70	37.71	17.45
United States	10.34	12.68	17.26	24.05	31.69	32.30
Austria	32.53	20.04	20.12	24.66	31.07	-1.14
Hungary	11.29	17.69	30.65	28.92	31.05	28.77
Netherlands	20.49	45.23	29.37	27.53	24.76	4.85
(52) Canada	0.25	0.12	0.08	0.11	0.09	-21.67

Poland's Top Ten Suppliers of Beverages, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Germany	24.63	26.23	24.31	23.12	27.32	2.69
United Kingdom	9.41	11.15	11.67	13.89	10.67	1.26
Italy	9.82	9.14	8.67	8.77	9.82	0.00
France	7.07	6.10	6.64	6.65	6.71	-0.36
Czech Republic	6.56	6.29	6.60	5.61	5.48	-1.08
Spain	2.94	3.66	3.78	4.15	4.24	1.30
United States	1.53	1.71	2.36	2.88	3.57	2.04
Austria	4.82	2.70	2.75	2.95	3.50	-1.32
Hungary	1.67	2.39	4.18	3.46	3.49	1.82
Netherlands	3.04	6.10	4.01	3.29	2.79	-0.25
(52) Canada	0.04	0.02	0.01	0.01	0.01	-0.03

Beverages Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Poland's imports from the world	674.85	741.42	732.79	835.71	888.48	7.12
Poland's imports from the Canada	0.25	0.12	0.08	0.11	0.09	-21.67
Supply gap	674.60	741.30	732.71	835.60	888.38	7.12



Poland's Top Five Beverage Product Imports, C\$ Millions

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
220421	Grape wines, >2L	199.16	239.87	259.42	14.13
220830	Whiskies	92.16	129.85	121.91	15.02
220710	Undenatured ethyl alcohol, <80%	96.19	102.98	110.14	7.00
220290	Non-alcoholic beverages	53.51	67.41	67.45	12.27
220300	Beer made from malt	52.19	47.10	66.25	12.67

**Poland's Top Five Beverage Product Imports
and Top Supplying Countries, 2014**

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
220421	Grape wines, >2L	Germany 26.49	Italy 13.91	France 11.46	0.01
220830	Whiskies	United Kingdom 64.30	United States 19.01	France 3.75	0.06
220710	Undenatured ethyl alcohol, <80%	Germany 84.25	Hungary 4.67	Belgium 3.30	N/C
220290	Non-alcoholic beverages	Germany 35.34	Hungary 15.01	Netherlands 12.58	N/A
220300	Beer made from malt	Germany 26.46	Czech Republic 25.75	Estonia 21.44	N/A



10. EDIBLE VEGETABLES

Poland's Top Ten Suppliers of Edible Vegetables, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
World	695.47	718.37	609.82	772.22	886.70	6.26
Spain	176.67	199.35	189.40	231.06	249.26	8.99
Germany	101.82	119.82	99.60	140.98	186.74	16.37
Netherlands	176.51	158.72	125.51	155.96	178.64	0.30
Italy	48.80	48.53	47.50	54.87	58.09	4.46
France	47.67	49.91	35.80	44.36	51.20	1.80
Belgium	23.21	20.00	16.71	17.76	23.35	0.15
Turkey	17.53	9.72	9.17	9.02	16.53	-1.46
Hungary	15.07	15.25	11.92	10.92	15.78	1.16
Czech Republic	12.02	12.38	10.54	16.01	15.05	5.77
China	22.85	21.86	10.20	15.10	13.76	-11.92
(25) Canada	0.97	0.42	0.53	0.79	1.55	12.39

Poland's Top Ten Suppliers of Edible Vegetables, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Spain	25.40	27.75	31.06	29.92	28.11	2.71
Germany	14.64	16.68	16.33	18.26	21.06	6.42
Netherlands	25.38	22.09	20.58	20.20	20.15	-5.23
Italy	7.02	6.76	7.79	7.11	6.55	-0.47
France	6.85	6.95	5.87	5.74	5.77	-1.08
Belgium	3.34	2.78	2.74	2.30	2.63	-0.71
Turkey	2.52	1.35	1.50	1.17	1.86	-0.66
Hungary	2.17	2.12	1.96	1.41	1.78	-0.39
Czech Republic	1.73	1.72	1.73	2.07	1.70	-0.03
China	3.29	3.04	1.67	1.96	1.55	-1.74
(25) Canada	0.14	0.06	0.09	0.10	0.17	0.03

Edible Vegetables Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Poland's imports from the world	695.47	718.37	609.82	772.22	886.70	6.26
Poland's imports from the Canada	0.97	0.42	0.53	0.79	1.55	12.39
Supply gap	694.50	717.95	609.29	771.42	885.15	6.25



Poland's Top Five Edible Vegetable Product Imports, C\$ Millions

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
070200	Fresh tomatoes	156.22	194.25	227.13	20.58
070960	Fresh peppers	88.31	104.34	118.46	15.82
070190	Fresh table potatoes	31.91	43.97	55.88	32.33
070700	Fresh cucumbers and gherkins	41.21	55.88	51.22	11.49
070511	Fresh head lettuce	31.23	38.43	39.28	12.14

**Poland's Top Five Edible Vegetable Product Imports
and Top Supplying Countries, 2014**

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
070200	Fresh tomatoes	Spain 37.61	Netherlands 21.68	Germany 16.68	N/A
070960	Fresh peppers	Spain 47.90	Netherlands 32.04	Germany 15.92	N/A
070190	Fresh table potatoes	Germany 20.90	Netherlands 17.20	Spain 12.04	N/A
070700	Fresh cucumbers and gherkins	Spain 57.25	Germany 17.05	Netherlands 10.41	N/A
070511	Fresh head lettuce	Spain 46.88	Germany 18.53	Italy 15.43	N/A



CONCLUSION

Poland is a developing market, and the world's 17th-largest importer of agri-food and seafood products. Canada ranked as Poland's 41st-largest supplier in 2014, having registered a large increase in import value since 2010. While Poland's imports from Canada have been growing, they remain relatively marginal compared to other countries, such as European partners. This has created a significant supply gap between Poland and Canada that has been widening at a similar rate compared to Poland's overall import growth in recent years. Poland has a diversified list agrifood and seafood suppliers, however, nine of their top ten primary trading partners are European Union members.

Although Canada's imports (less than 1.0% market share) to Poland is relatively small compared to other suppliers, Canada did see a slight increase in market share in six out of the top ten commodities over five years. These commodities were food waste and animal feed; fish and crustaceans; meat and edible offal; edible fruit and nuts; dairy, eggs and honey; and edible vegetables. Once the Canada-European Union Comprehensive Economic and Trade Agreement (CETA) enters into force this will provide Canada with preferential market access to 38.5 million (Poland's total population) consumers in the EU. The agreement will also eliminate approximately 95% of all of the EU tariff lines on the first day the agreement comes into force, creating significant opportunities in the agricultural and fish and seafood sector for Canada.

FOR MORE INFORMATION

International Trade Commissioners can provide Canadian industry with on-the-ground expertise regarding market potential, current conditions and local business contacts, and are an excellent point of contact for export advice.

- **Overview of Trade Commissioner Services in Poland**
<http://www.tradecommissioner.gc.ca/eng/office.jsp?oid=30&cid=206>
- **Find a Trade Commissioner**
www.tradecommissioner.gc.ca/eng/find-trade-contacts.jsp

For additional intelligence on this and other markets, the complete library of Global Analysis reports can be found under *Statistics and Market Information* at the following link, arranged by sector and region of interest:

- ats-sea.agr.gc.ca

RESOURCES

Global Trade Atlas (October 2015).

ANNEX: ABBREVIATIONS

CAGR - compound annual growth rate
N/A - not applicable
N/C - not calculable
PP - percentage point (difference between two percentage values)



Competitive Trade Analysis: Poland

Global Analysis Report

Prepared by: Carlos Jaramillo, Student

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