



# Poland *tastes good*

  
**KOWR**  
National Support  
Centre for Agriculture

*A brief guide  
to Polish agri-food offer*



A still life composition of various Polish food products. In the foreground, several long, thin, reddish-brown sausages are laid out on a piece of burlap. Behind them are several glass jars: one with a cloth cover containing pickled vegetables, another with small green pickles, and a larger one with a white substance. To the left is a ceramic pitcher and a bowl of white beans. In the background, there are more jars, including one with red berries, and a bunch of onions. A red circular logo with the text "Poland tastes good" is in the upper right corner.

*Poland  
tastes good*

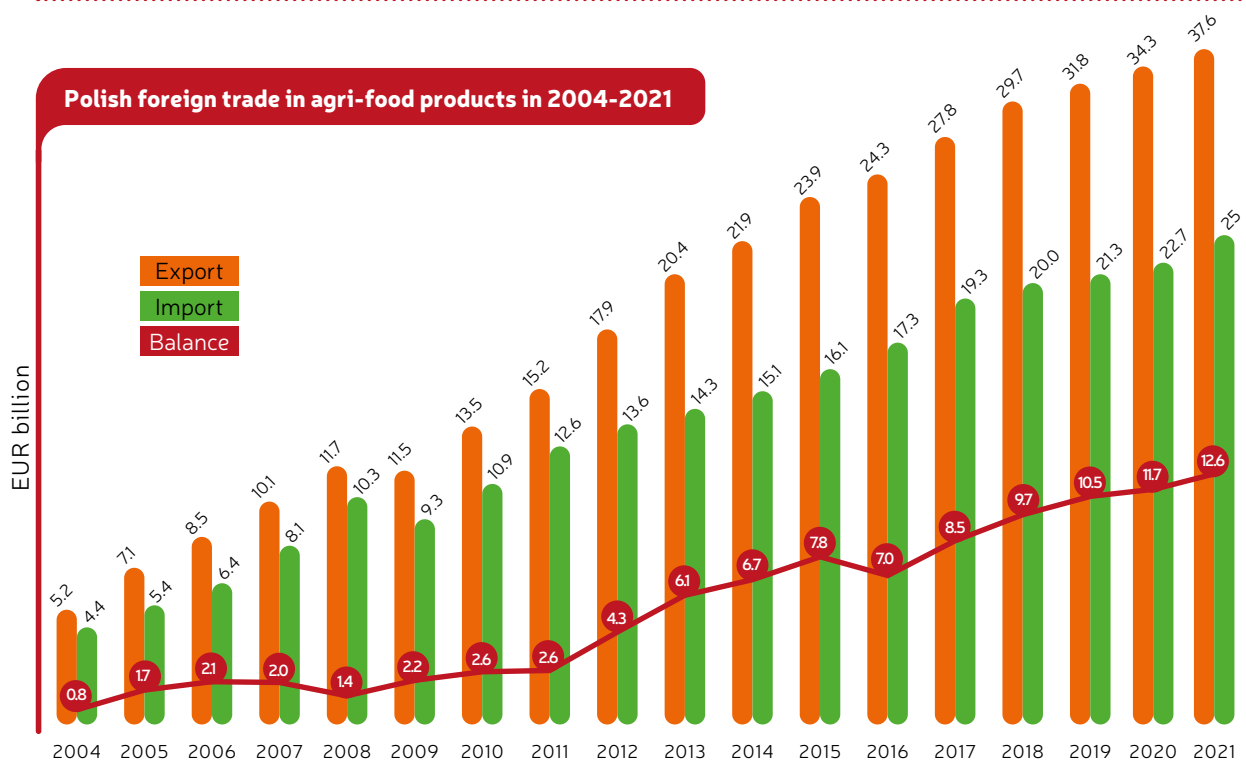
In 2021, Polish agri-food exporters made history again, breaking the record for the highest revenue ever generated by Polish agri-food exports. At EUR 37.6 billion, this revenue reached a level almost 9% higher than in 2020 and over 7 times higher than in the year that Poland acceded to the EU (2004). Poland is ranked third in the EU in terms of trade balance. The results generated by Polish agri-food exporters in 2021 show that Poland is one of the most dynamically developing agri-food markets in the world.

The road to success has been paved with the determination and entrepreneurial spirit of Polish companies who, in 2004, were faced with a great challenge when the country joined the European common market. The progress that the Polish agriculture and agri-food sector has achieved in the last two decades is unprecedented. Today, Poland boasts one of the most high-tech technological parks in the EU, delivering a high production capacity, innovative technology and supreme quality.

While Poland is one of the most important European food producers and exporters, it has developed a market which accommodates players of all sizes: big companies, small, medium-sized and family enterprises and start-ups with inventive ideas about how to use Polish agri-food produce. The Polish food product offer is broad and rich, and responds to a variety of tastes and needs. It combines both the heritage of centuries-old traditions, as well as the excitement of modern trends and the spirit of innovation. But, most of all, it reflects the Polish passion for good food.

We invite you to give our wonderful Polish food products a try. Enjoy, and let the message that Poland Tastes Good reach every table in the world!

The United Kingdom left the European Union on 31 January 2020. As the UK remained in the customs union with the EU and participated in the EU Common Market from 1 February to 31 December 2020, it is included in the EU trade statistics in this brochure for that period.



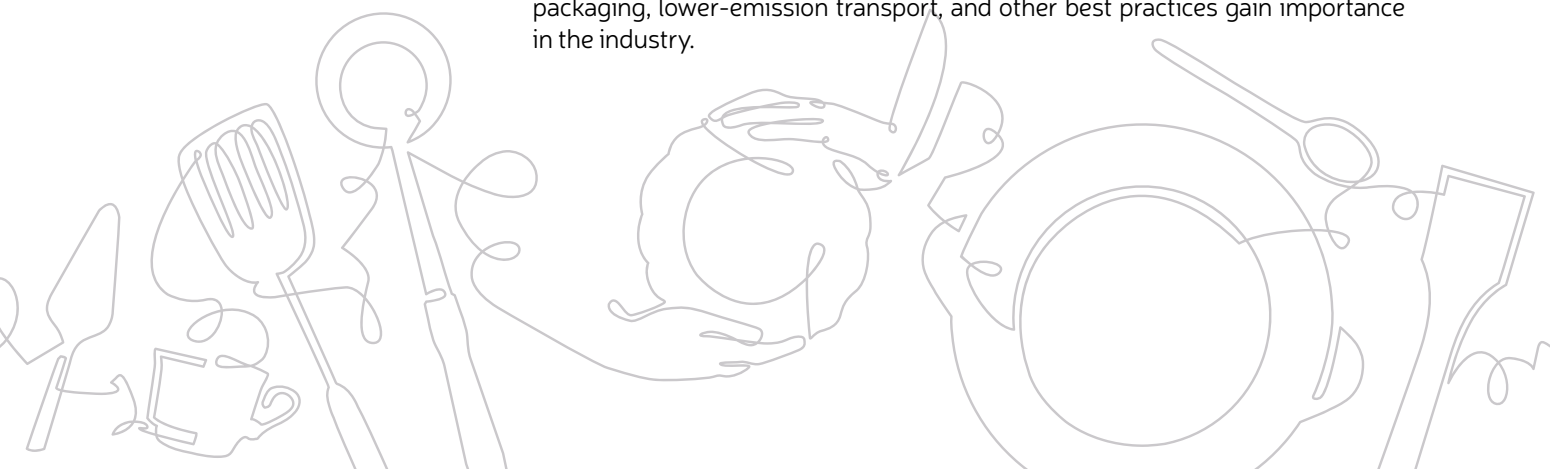
Source: compiled by the KOWR based on data of the Polish Ministry of Finance.





## MEAT AND PRODUCTS

**The** meat sector is a very important branch of Polish agri-food production and plays a crucial role in the development of the national food industry. Poland is among chief European producers of meat and meat products and a large exporter of these goods. Meat in Poland is produced with meticulous attention to quality at every stage of production, from breeding to the final product. Such factors as care for animal welfare, modern technologies and the development of vertical integration of production, help to obtain products of high quality and excellent taste. Poland's meat industry focuses also on sustainability through the whole production chain. Renewable energy sources, biodegradable packaging, lower-emission transport, and other best practices gain importance in the industry.





Position (2021)	EU		Poultry	Pork	Beef
		Producer	1 <sup>st</sup>	4 <sup>th</sup>	6 <sup>th</sup>
		Exporter	1 <sup>st</sup>	6 <sup>th</sup>	2 <sup>nd</sup>
Annual production volume <sup>1</sup> (2021)			2 609 thousand tonnes	1 868 thousand tonnes	555 thousand tonnes
Annual export volume <sup>2</sup> / value (2021)			1 860 thousand tonnes/EUR 3.3 billion	701 thousand tonnes/EUR 1.5 billion	483 thousand tonnes/EUR 1.8 billion
Share of export in production (2021)			71%	38%	87%
Average buying-in price of livestock in Poland <sup>3</sup> (2021)			PLN 4.18/kg	PLN 4.79/kg	PLN 7.63/kg

<sup>1</sup> Livestock production volume expressed in hot carcass weight.

<sup>2</sup> Livestock, meat and products - export volume expressed in meat equivalent.

<sup>3</sup> Average exchange rate for 2021: 1 EUR = 4,5670 PLN.

## WHAT WE OFFER

### Excellent taste

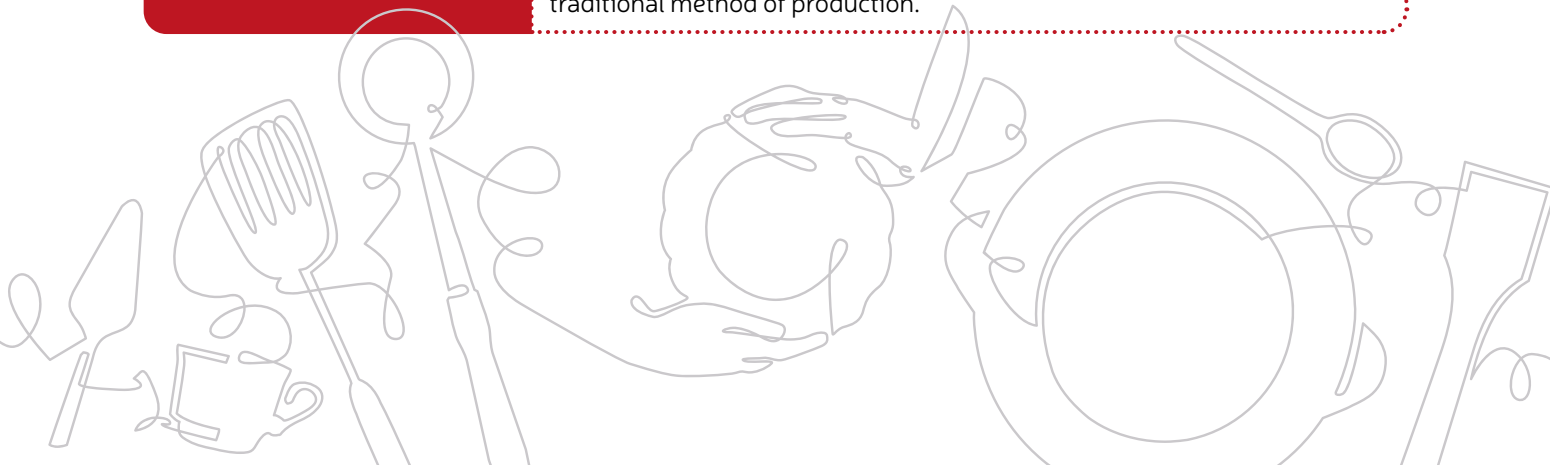
Poland has favourable natural conditions for pig breeding as well as potential for beef production. Polish producers source raw material from individual farmers who raise herds using traditional breeding methods. This means high quality raw materials, which is reflected in the taste of the finished products. What distinguishes Polish meat products and makes them popular is the richness of flavours and aromas.

### Certified quality

Polish producers care about having the highest quality and treat it as a priority, which is ensured by well-developed quality control methods and the implementation of new quality systems. Several Polish quality certificates are especially dedicated to meat products: PQS – Pork Quality System, QAFP – Quality Assurance for Food Products and QMP – Quality Meat Program (for beef). Many types of Polish sausages are recognised as EU 'Protected Geographical Indication' or 'Traditional Speciality Guaranteed'.

### EU GEOGRAPHICAL INDICATIONS

Since Poland's accession to the European Union, Polish producers have been able to protect and promote the uniqueness of their products by making use of the designations established by the European Union. Awarded by the European Commission, the Protected Designation of Origin (PDO) and the Protected Geographical Indication (PGI) certificates emphasize the relationship between the quality and the place of origin of the products, while the Traditional Speciality Guaranteed (TSG) is awarded for their traditional method of production.



### Flagship meat products

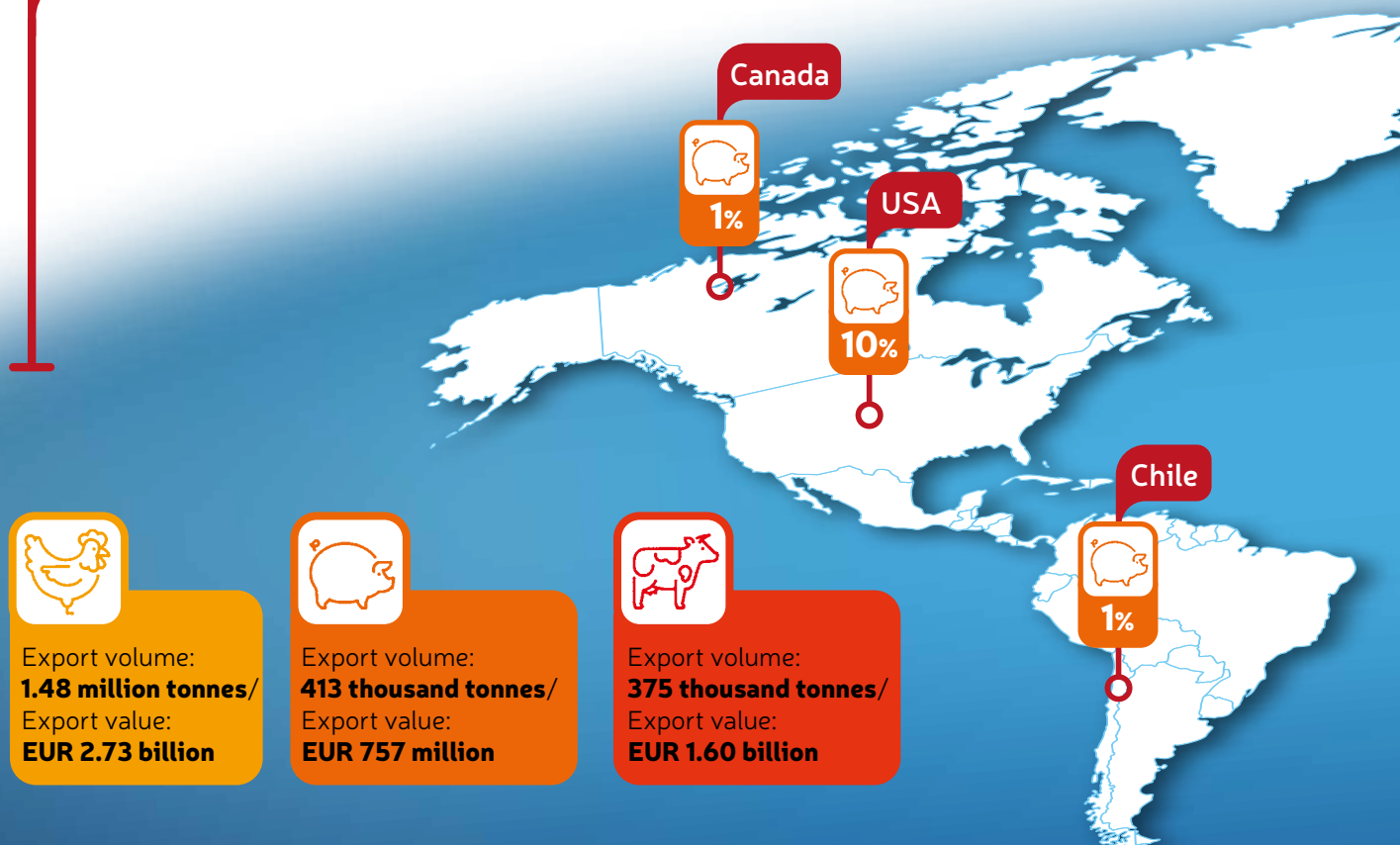
Poland has a long tradition in the production of cold cuts and other cured meat products. The most popular among them is "Kiełbasa" (the Polish word for sausage), usually made from red meat (mostly pork). Other types of meat are also used: poultry, beef and even game. The different tastes and types of Kiełbasa vary a lot depending on the region they come from – and they are all worth trying. The production processes involve curing, smoking, drying, steaming, frying and ripening. Other delicious cold meats produced in Poland include: hams, sirloins, bacon, pâtés, "Kabanosy" – very dry thin sausages, popular as an all-occasion snack, and many others.

### Did you know that?



- Poland's poultry production is not restricted to chickens. Poland is also a producer of geese, ducks and turkeys. The tradition of goose breeding in Poland started over three hundred years ago. Very popular right now are the Polish white goose "Gęś Biała Kotłudzka" and the young Polish oat goose "Młoda Polska Gęś Owsiana". The latter is particularly appreciated for the high quality of its meat and of its fat. Polish geese are mainly exported to Germany. Polish turkeys are also popular – especially in Germany, Spain and the United Kingdom.
- Poland is the sixth biggest producer of eggs in the EU.
- Poland is the world's fourth biggest exporter of feathers and down; 6% of world exports of feathers and down come from Poland.

### Geographical structure of meat exports from Poland in 2021





## WHO TRUSTS US:



The Polish meat sector has been thriving in recent years. The volume of meat exports has grown 7 times since Poland acceded to the European Union.

Polish producers have managed to gain the trust of the most demanding markets in the world. A major portion of meat produced in Poland is exported to the EU and the United Kingdom, as well as North America, Asia and Africa. A notable portion of products is certified Halal and Kosher. Polish meat exports have reached approximately 130 destinations worldwide in recent years.



CN Codes: 0201, 0202, 0203, 0207

Compiled by the KOWR, based on data of the Polish Ministry of Finance



## DAIRY PRODUCTS

**P**olish dairy production has been on the rise since the 1990s and has skyrocketed since Poland's accession to the EU as a result of farms being modernised and dairy processing being upgraded with the use of the EU funds. Currently, Poland has one of the most modern dairy industries and one of the most competitive milk purchase prices in Europe. It is a top EU producer of skimmed milk powder, butter, cheeses and curds, as well as drinking milk, buttermilk, cream for direct consumption, acidified milk and other fresh dairy products. The majority of milk processors in Poland are dairy cooperatives, mostly with Polish capital, who acquire their raw material straight from Polish farmers.





	Milk and products
Position - milk (2021)	EU: 3 <sup>rd</sup> largest producer, 4 <sup>th</sup> largest exporter
Annual production volume (2021)	14.9 million tonnes
Average buying-in price of milk in Poland <sup>1</sup> (2021)	PLN 156.93/hl
Milk products annual export volume <sup>2</sup> / value (2021)	4.8 million tonnes/EUR 2.6 billion
Share of export in production of milk products (2021)	32%

<sup>1</sup> Average exchange rate for 2021: 1EUR = 4,5670 PLN.

<sup>2</sup> Export volume expressed in milk equivalent.

## WHAT WE OFFER

### Respect for nature

Due to its natural conditions and a long-lasting tradition of cattle breeding, Poland is particularly suited to the development of milk production. In Poland, dairy cows are bred mainly by individual farmers (approximately 96% of the national cow herd). In 2021, agricultural holdings with up to 20 cows accounted for approx. 78% of the total number of milk producers. The small concentration of herds makes it possible to use pastures which, apart from natural fodder, provide for animal welfare and protection of the environment.

### European quality

Polish milk is mainly acquired from the most natural and pristine regions located in Poland's north and east. The strict observance of EU hygiene and veterinary standards throughout the process of milk acquisition, storage and transportation results in supreme milk quality.

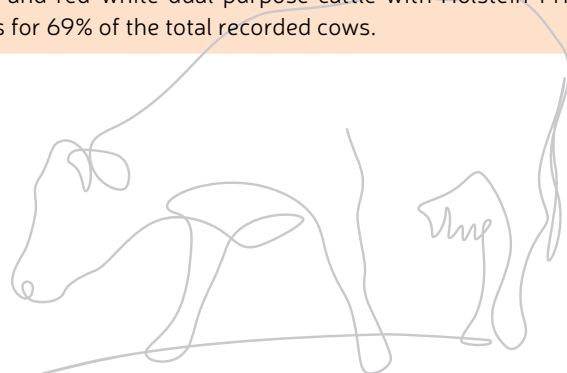
### Customised and competitive products

Increasing domestic and export demand has resulted in the dynamic increase of cheese and curd production (especially curds, ripening cheeses and cheese spreads), milk-based drinks, ice-cream and many other products. The Polish export offer is carefully adjusted to meet the expectations of particular markets. Polish dairy products are competitive in terms of their nutritional values as well as product diversity, functionality, flavour and price.

### Did you know that?



One in every ten cows in the EU is Polish. Poland ranks third, after Germany and France, in the EU in terms of the number of milk cows. The most popular breed is Polish Holstein-Friesian (PHF), created by the crossbreeding of traditional Polish black-white and red-white dual purpose cattle with Holstein-Friesian. The breed accounts for 69% of the total recorded cows.



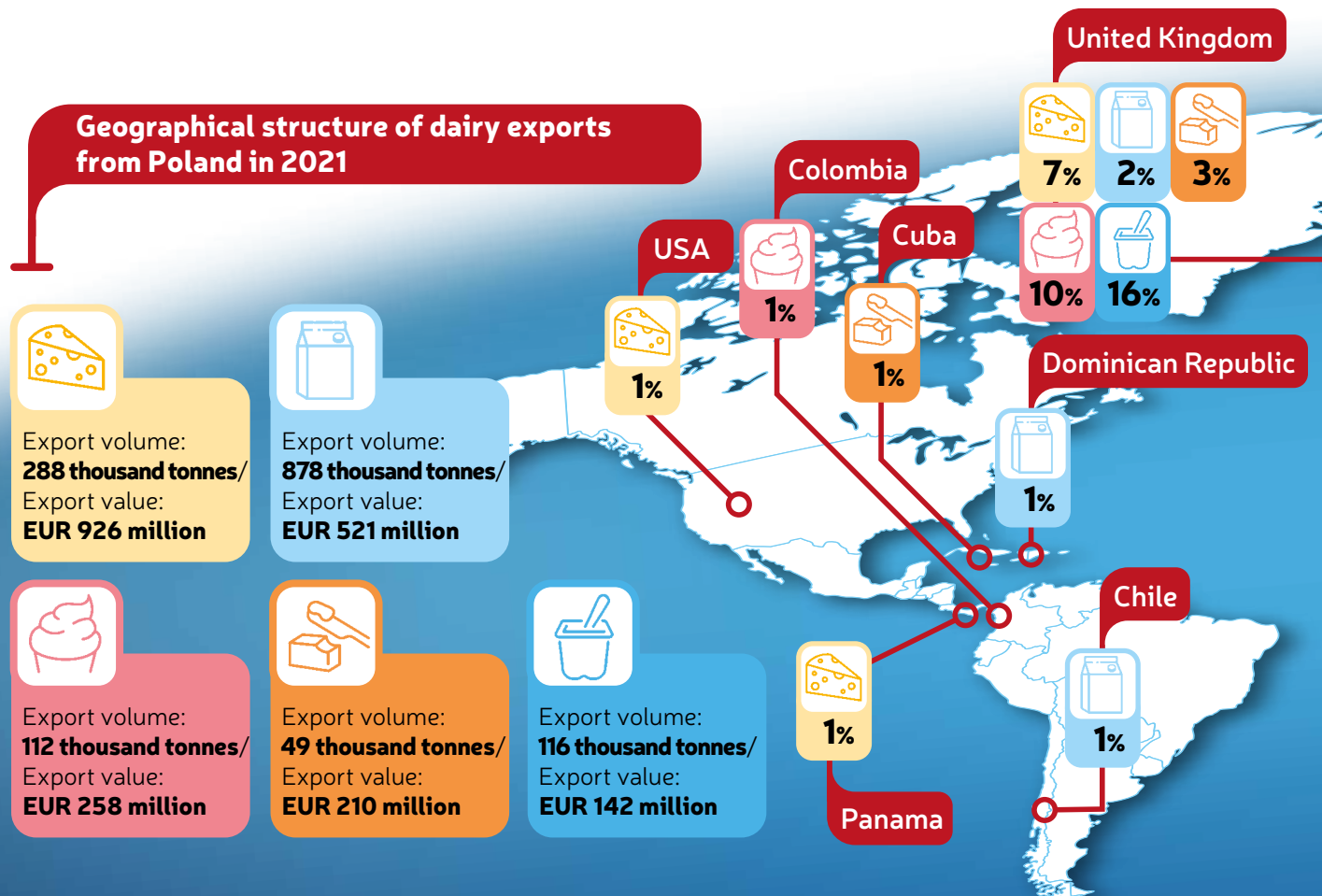


### Did you know that?



"Oscypek" is a hard, smoked cheese made from sheep's milk. Well-known and popular in Poland and Europe, the product is characteristic of the Polish mountains, in particular the Region of Podhale. It is traditionally manufactured in shepherd's huts, in the form of small, spindle-shaped blocks with typical edge decorations. "Oscypek", which was registered as a protected designation of origin (PDO), was the second Polish product to be covered by such EU protection after "Bryndza podhalańska" (PDO). The list of such products also includes other types of Polish cheeses: "Redykotka" (PDO), "Wielkopolski ser smażony" (PGI) and "Ser koryciński" (PGI).

### Geographical structure of dairy exports from Poland in 2021

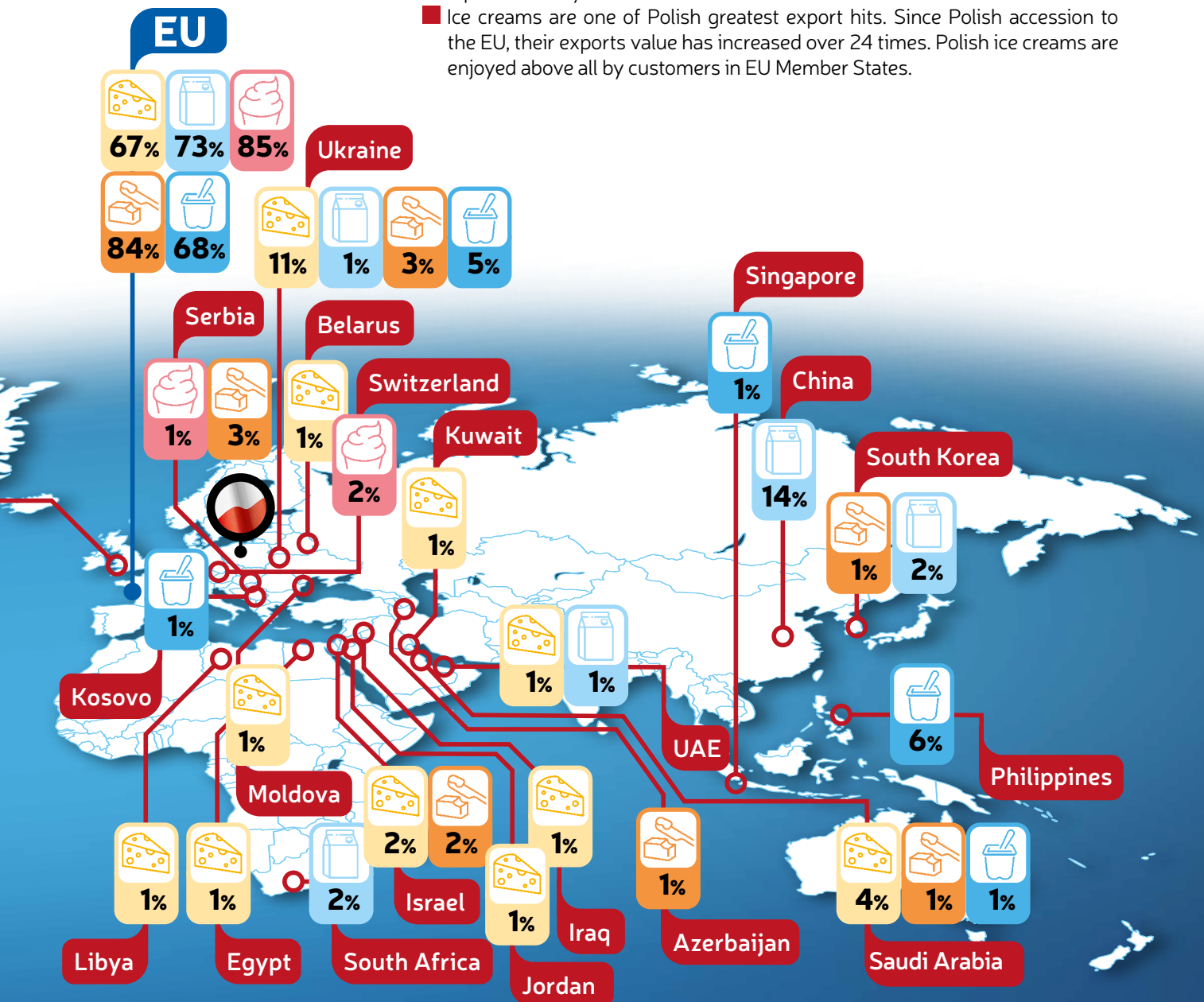




## WHO TRUSTS US:



- Polish dairy products can be found all over the world. They are largely directed to the most demanding markets of the EU, but are also gaining in popularity in third country markets.
- 67% of Polish skimmed milk powder is exported to third countries such as Algeria, the Philippines, Saudi Arabia, China, Nigeria, Vietnam, Ghana, Jordan and Indonesia, whereas whole milk powder is mainly directed to Cuba, Algeria, Lebanon, Serbia, Nigeria, Ukraine, Saudi Arabia and Israel. Polish liquid milk is appreciated in the EU as well as in China.
- 57% of whey and 54% of Polish casein exports find their destinations in third countries. Apart from the EU, whey is sent to Asian countries such as China, Indonesia, Malaysia and Thailand, and the casein – to Indonesia, Switzerland, Japan and Kenya.
- Ice creams are one of Polish greatest export hits. Since Polish accession to the EU, their exports value has increased over 24 times. Polish ice creams are enjoyed above all by customers in EU Member States.



CN Codes: 0401, 0403, 0405, 0406, 2105

Compiled by the KOWR, based on data of the Polish Ministry of Finance



## FISH AND PRODUCTS

**F**ish processing is one of the swiftest developing branches of the Polish food sector. Well-established traditions and high-tech manufacturing and processing technologies as well as modern, environmentally friendly breeding methods enable the Polish fishing sector to offer high-quality products that possess unique tastes and nutritional value.







	Fish and products
Position (2021)	EU: 5th largest exporter
Annual production volume (2021)	Sea fishing in the waters of the Baltic Sea – 123 thousand tonnes (mainly sprat, herring, flounder and codfish) Fish cultivation (2020) – 59 thousand tonnes (mainly carp, trout)
Annual export volume / value (2021)	387 thousand tonnes / EUR 2.4 billion

## WHAT WE OFFER

### High-quality fish products

Polish processing plants manufacture fish products from the raw materials they procure from sea and inland fishing as well as from fish farms.

The assortment of fish products includes: fresh and frozen fish (sea and freshwater), fish fillets, smoked fish, canned and pickled fish, as well as convenience meals, e.g. salads, spreads, pâtés, fish fingers, fish cutlets and burgers.

Production processes satisfy the highest quality standards and include innovative systems for production monitoring, storage and transportation. Numerous Polish processing plants also offer „tailor-made products” to meet the demand for product size, packaging and required certificates.

Furthermore, Polish producers offer such exquisite products as sturgeon, trout or pike caviar, which are sourced using traditional methods, with meticulous attention placed on quality and taste. Owing to all this effort, Polish caviar is appreciated by even the most demanding consumers.

### Did you know that?



The history of the Polish fish processing sector goes back to the end of the 19th century, when the first fish smoking chamber was officially registered in Pomerania in 1898, however, the first references to processing fish with salt and smoking go as far back as the Middle Ages.

A popular Polish type of canned fish is “Paprykarz szczeciński” – a fish spread with rice, tomato and spices, developed in the 1960s. Its name, which brings about the memories of the communist rule in Poland, was used in the title of a record with jazz arrangements from the 1960s and 70s, released by the Mieczysław Karłowicz Philharmonic in Szczecin. As an original product with distinctive taste, Paprykarz szczeciński was added to the List of Traditional Products of the West Pomerania Province.



### Freshwater fish from Poland

The tradition of breeding freshwater fish in Poland goes back to early medieval times. The first large water basins, embedded in the natural environment, were built at that time to be stocked with the fry of different species. Large pond holdings existed in the Valley of Barycz, in the Region of Milicz and Przygodzice as well as in the Region of Oświęcim and Zator as early as the 13th century. Carp ranked first among the fish reared and it has held the crown until today.

Polish fish farms specialize in breeding carp, trout and sturgeon. However, they also breed other species, such as pike, catfish, salmon, sea trout, Baltic whitefish and eel. Farming crayfish is also starting again.

The majority of Polish fish farms use traditional methods and create conditions – in ponds or rivers – that are as similar to the natural ones as possible. Natural food that is available in our waters, appropriate foodstuffs and the right conditions for their development make Polish fish and fish products popular around the world.



### Geographical structure of fish exports from Poland in 2021



Export volume:  
**387 thousand tonnes/**  
Export value:  
**EUR 2.42 billion**



**Did you know that?**

One of the Polish food products registered as EU Protected Designation of Origin (PDO) is "Karp zatorski", which is farmed in three municipalities of the Małopolskie Voivodeship. The unique quality and flavor of "Karp zatorski" are created thanks to its over 700-year-old special local method of farming, which shortens the production time of the carp to two years, as well as the unique geographical and natural conditions of the region.

**WHO TRUSTS US:**

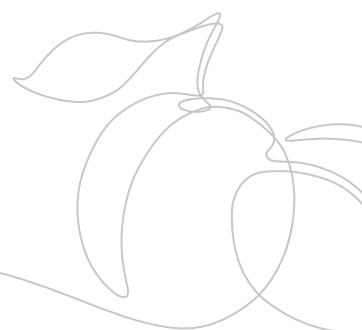
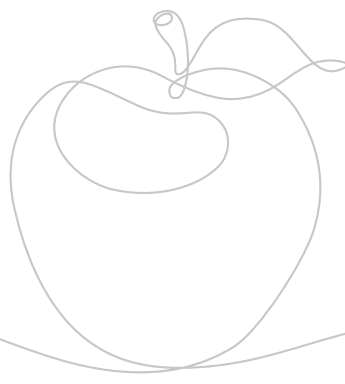
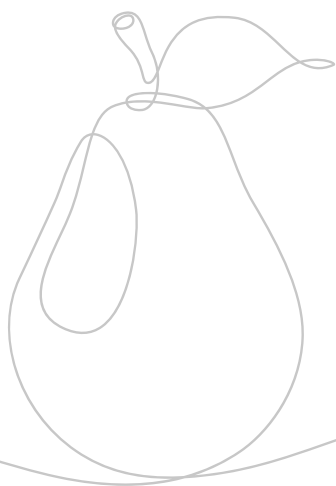
- The main destinations of Polish fish and products are: EU countries (mainly Germany, Italy and France), the United Kingdom, the USA, Vietnam, Australia, and Switzerland.
- The main export products are: dry, salted or smoked fish (mainly salmon), fish fillets and other meat, prepared or preserved fish (mostly herring), and also frozen and fresh fish.





## FRUIT AND VEGETABLES

**P**oland is a significant European producer of temperate climate fruit and vegetables. Polish growers have centuries of expertise at delivering the best products. They benefit from production specialization, the development of new varieties and the use of innovative technologies. Supported by knowledge passed down through generations and grown in pristine environmental conditions, Polish fruit and vegetables are famous for their great taste and high quality.







			Fruit (fresh)	Vegetables (fresh)
Position (2021)	EU	Producer	2 <sup>nd</sup>	4 <sup>th</sup>
		Exporter	9 <sup>th</sup>	6 <sup>th</sup>
Annual production volume (2021)			5.1 million tonnes	5.3 million tonnes
Annual export volume / value (2021)			1.3 million tonnes/ EUR 752 million	0.48 million tonnes/ EUR 320 million
Share of export in production (2021)			25%	9%

## WHAT WE OFFER

### The best selection of fruit and vegetables

Our export hits include, among others:

#### ■ Apples – the jewel in the Polish crown:

- Poland is a European and global leader in the production of apples, which is one of Poland's most popular export commodities. Poland exports a significant proportion of its apple production, mainly in the form of fresh apples and apple juice. It is also a leading global producer and exporter of concentrated apple juice.
- Polish apple orchards offer a wide variety of apples. The most popular varieties are: Idared, Champion, Jonagold, Ligol, Gloster, Golden Delicious, Gala and Cortland.

#### ■ Soft fruit and other Polish 'superfruits':

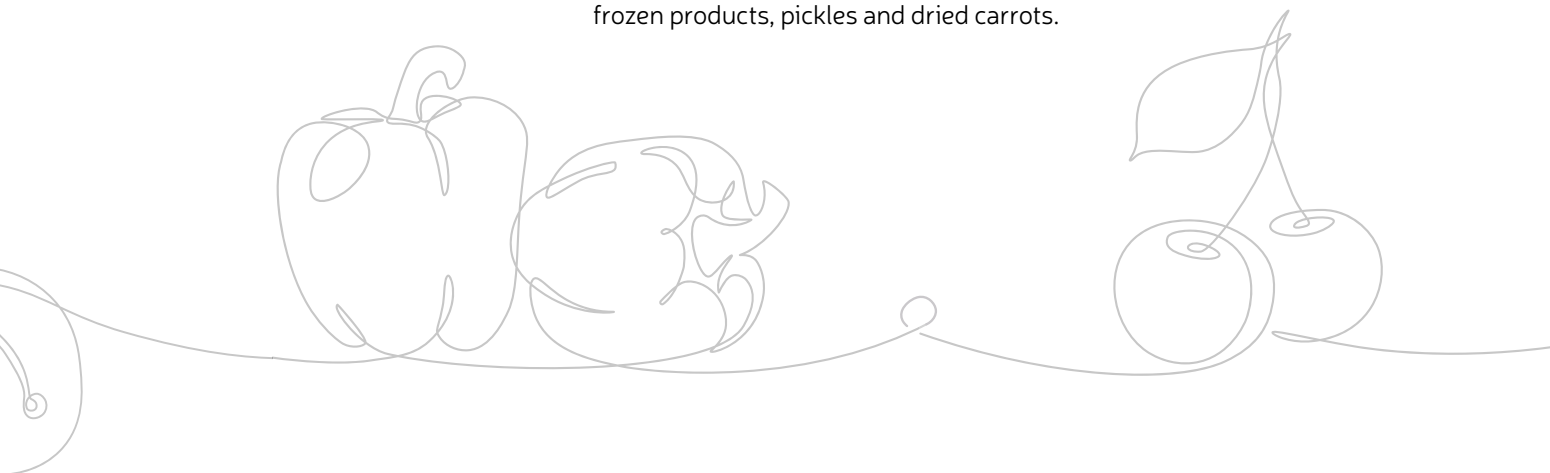
- Poland is the top producer of chokeberries, currants, blueberries, raspberries, and strawberries in the EU. The first three are often called 'superfruits' due to their special health properties and high content of antioxidants, anthocyanins, vitamins, minerals and fibre. Poland is also famous for the production of other 'superfruits' such as cranberries, sea buckthorns, elderberries and blackberries.

#### ■ Champignons – a specialty grown in Poland:

- Champignons produced in Poland are especially appreciated by foreign consumers, owing to their high quality and exceptional flavour. Poland is the first EU producer of this delicacy.

#### ■ Vegetables – delicious in all shapes and sizes:

- Poland is the fourth biggest EU producer of fresh vegetables, specialising in the production of cabbages, potatoes, carrots, onions and cauliflowers, as well as a prominent producer of vegetable preparations, especially frozen products, pickles and dried carrots.



**apples**

**1<sup>st</sup>** producer in the EU  
**4<sup>th</sup>** world producer

**raspberries**

**1<sup>st</sup>** producer in the EU  
**3<sup>rd</sup>** world producer

**currants**

**1<sup>st</sup>** producer in the EU  
**2<sup>nd</sup>** world producer

**strawberries**

**2<sup>nd</sup>** producer in the EU  
**9<sup>th</sup>** world producer

**sour cherries**

**1<sup>st</sup>** producer in the EU  
**12<sup>th</sup>** world producer

**highbush blueberries**

**2<sup>nd</sup>** producer in the EU  
**4<sup>th</sup>** world producer

**champignons**

**1<sup>st</sup>** producer in the EU  
**6<sup>th</sup>** world producer

**cabbages**

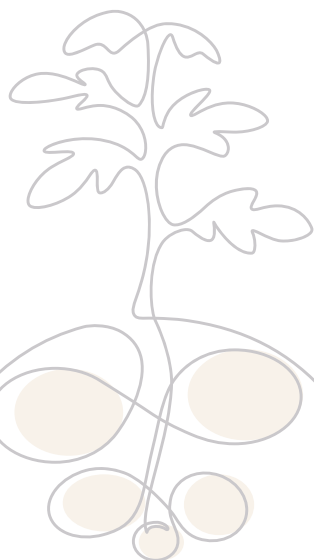
**1<sup>st</sup>** producer in the EU  
**12<sup>th</sup>** world producer

**carrots**

**4<sup>th</sup>** producer in the EU  
**8<sup>th</sup>** world producer

**potatoes**

**4<sup>nd</sup>** producer in the EU  
**9<sup>th</sup>** world producer





### Excellent products

The abundance of fruit and vegetables contributes to the development of the Polish processing industry, which offers a wide array of delicious products. The Polish export offer includes wholesome and tasty fruit and vegetable preparations such as frozen goods, jams, marmalades, pulps, pickles, canned products, ketchups, pastes, sauces, dried and freeze-dried foods, fruit powders and other products, often certified organic.

### Superb juices

Apple juice as well as single and mixed fruit & vegetable juices are Polish export hits. Apart from concentrated fruit juices, Polish production plants produce tasty NFC juices, smoothies, nectars, syrups and soft drinks made of fruit and vegetables from Polish orchards and plantations. The products meet the highest quality and health standards. Polish producers also offer a wide range of juices from attested organic farming.

#### Did you know that?



“Jabłka grójeckie” (the apples from Grójec), the most famous apples from Poland, have been entered in the EU register as a Protected Geographical Indication (PGI). They can be distinguished by their extraordinary acidity and very clear blush, which result from growing in special soil and microclimate. The Grójec region accounts for 40% of Polish apple production.

## WHO TRUSTS US:

- In 2021, Polish fresh fruit managed to reach consumers in ca. 68 countries.
- Apples accounted for over 72% of Polish exports of fresh fruit in 2021. Approximately 23% of the domestic production of apples were intended for export. Polish apples reached markets in ca. 67 countries. They could be found mainly in EU countries, but also in Egypt, Belarus, Kazakhstan, the United Kingdom, Jordan and Ukraine.
- Polish highbush blueberries have been a true export hit. EU Member States are the largest customers for Polish blueberries and other soft fruit.
- Polish juices are extremely popular in Germany, the Netherlands, the United Kingdom and Czechia. Apple juice is the best liked (accounting for 74% of Polish juice exports).
- Polish fruit and vegetable products also enjoy great popularity. In 2021, Poland exported fruit products with a value of EUR 959 million, and vegetable products worth EUR 1.1 billion. These products find customers in EU Member States, the United Kingdom, Russia, the USA, Belarus, Ukraine and other third countries. Frozen food, tinned vegetables and fruit, jams, fruit preserves, plum jams, pastes, dried fruit and vegetables and concentrates are the main export varieties.





### Geographical structure of the export of selected fresh fruit and vegetables from Poland in 2021



Export volume:  
**939 thousand tonnes/**  
Export value:  
**EUR 359 million**



Export volume:  
**120 thousand tonnes/**  
Export value:  
**EUR 43 million**



Export volume:  
**21 thousand tonnes/**  
Export value:  
**EUR 104 million**



Export volume:  
**9 thousand tonnes/**  
Export value:  
**EUR 41 million**



Export volume:  
**19 thousand tonnes/**  
Export value:  
**EUR 17 million**



Export volume:  
**7 thousand tonnes/**  
Export value:  
**EUR 5 million**



Export volume:  
**145 thousand tonnes/**  
Export value:  
**EUR 70 million**



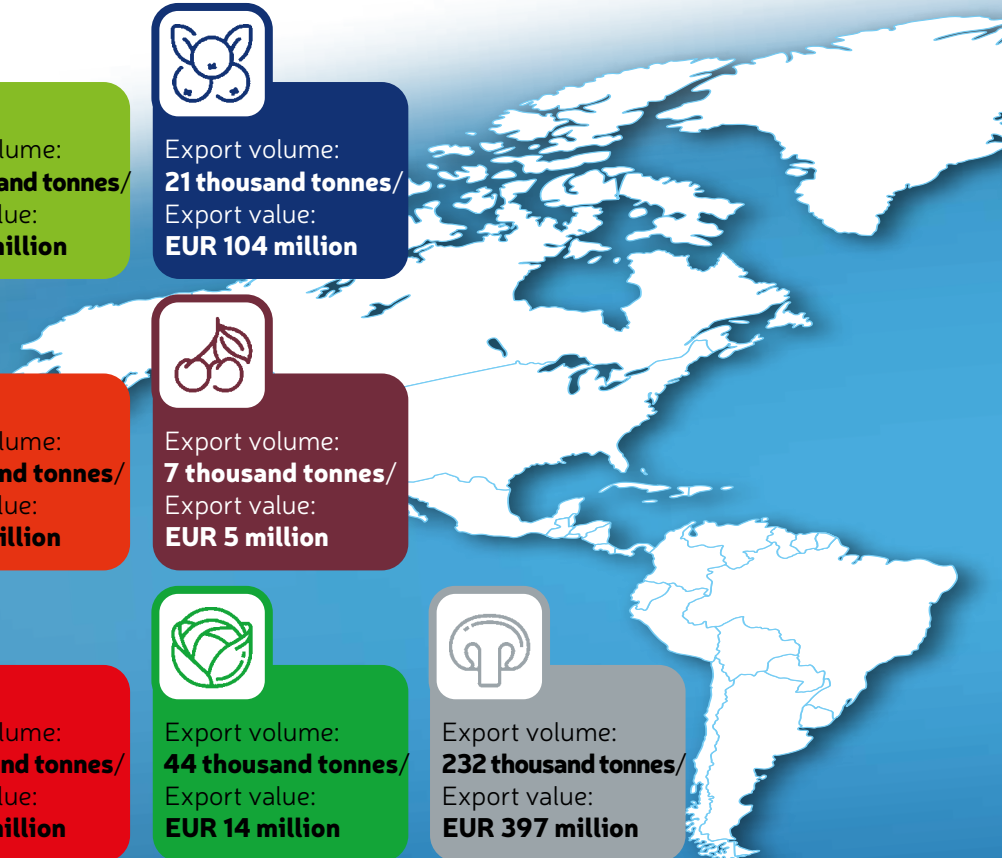
Export volume:  
**67 thousand tonnes/**  
Export value:  
**EUR 75 million**

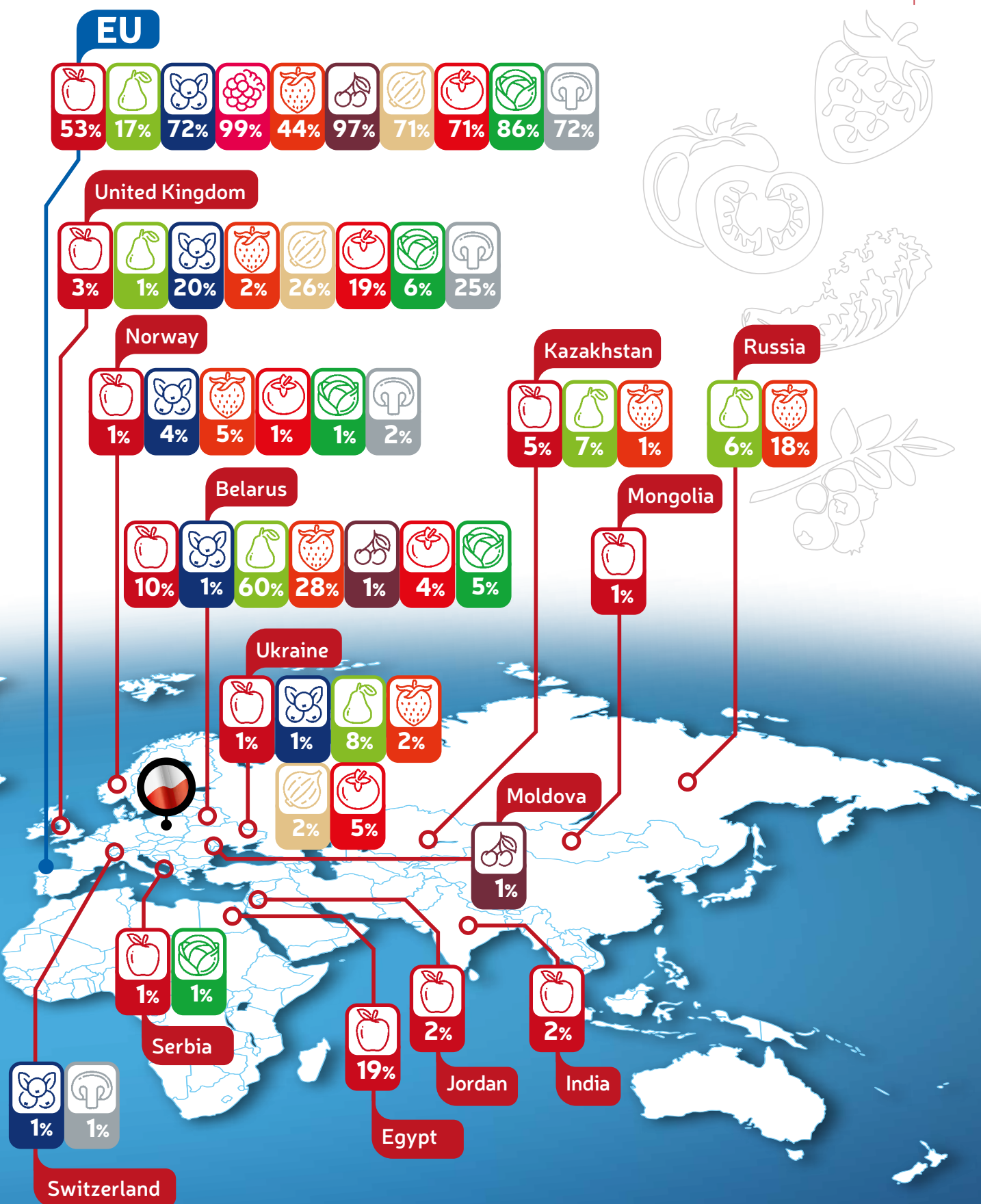


Export volume:  
**44 thousand tonnes/**  
Export value:  
**EUR 14 million**



Export volume:  
**232 thousand tonnes/**  
Export value:  
**EUR 397 million**









## **CEREALS, GRAIN MILL & BAKERY PRODUCTS**

**P**olish agriculture and industry combine tradition with modernity. The production of best-quality grains and grain mill products, especially bakers' wares, is deeply rooted in Polish culture. Bread has been an important part of Polish traditions. For instance, Poles used to welcome their guests with traditional "bread and salt", which was a gesture of the greatest hospitality, and to these days the newlyweds receive such welcome at a traditional wedding. The Polish market offer continues to include newer and newer varieties of grain mill products, which is a consequence of technological progress, as well as contemporary fashion, changing lifestyles and eating habits. Times have changed, yet the unique flavour of Polish bakers' wares remains the same. Poles know how good bread tastes, and won't settle for anything less.





	Cereal grains
Position (2021)	EU: 3 <sup>rd</sup> largest producer, 5 <sup>th</sup> largest exporter
Annual production volume (2021/2022) <sup>1</sup>	34.6 million tonnes
Annual export volume / value (2021/2022) <sup>1</sup>	8 million tonnes/ EUR 2.3 billion
Share of export in production (2021/2022) <sup>1</sup>	23%

<sup>1</sup> Marketing year: from 1st July to 30th June.

### Did you know that?



Flour-based dishes are very popular in Polish cuisine. "Pierogi" (Polish dumplings) are one of the most beloved Polish dishes. They may be prepared in dozens of ways, containing sweet or savoury filling. The most popular recipes include sauerkraut and mushrooms (typically served for Christmas Eve dinner), potato, curd and onion (the so-called "Ruthenian pierogi"), ground meat, fish, lentils, buckwheat as well as fruit.

## WHAT WE OFFER

### Excellent bakery and grain mill products

Polish bakers offer a wide selection of products in numerous forms and flavours – breads, baguettes, crescent rolls, bread rolls and challahs that cannot be resisted. The offer keeps growing, adjusting to the needs of a modern society.

Traditional ingredients and recipes are very popular and highly valued, but the sector is also able to meet the changing tastes and growing demand for products recommended by dietary experts.

Other Polish grain mill products – natural and healthy flours, groats, muesli, and bran – are also greatly appreciated by consumers and highly competitive on international markets.

A large number of Polish pasta plants produce a wide variety of high quality noodles. What appeals to consumers is their shapes and colours as well as the ingredients used, including not only traditional wheat, durum wheat and rye flours, but also buckwheat. Polish plants produce pasta suitable for all types of cuisine.

### Did you know that?



Among the Polish bakery products registered as Protected Geographical Indication (PGI) are:

- "Chleb prądnicki" (a bread from Prądnik district in Kraków)
- "Obwarzanek krakowski" (a bagel from Kraków)
- "Cebularz lubelski" (a bread roll with onion and poppy seed from Lublin)
- „Andrutys kaliskie” (flat wafers from Kalisz)

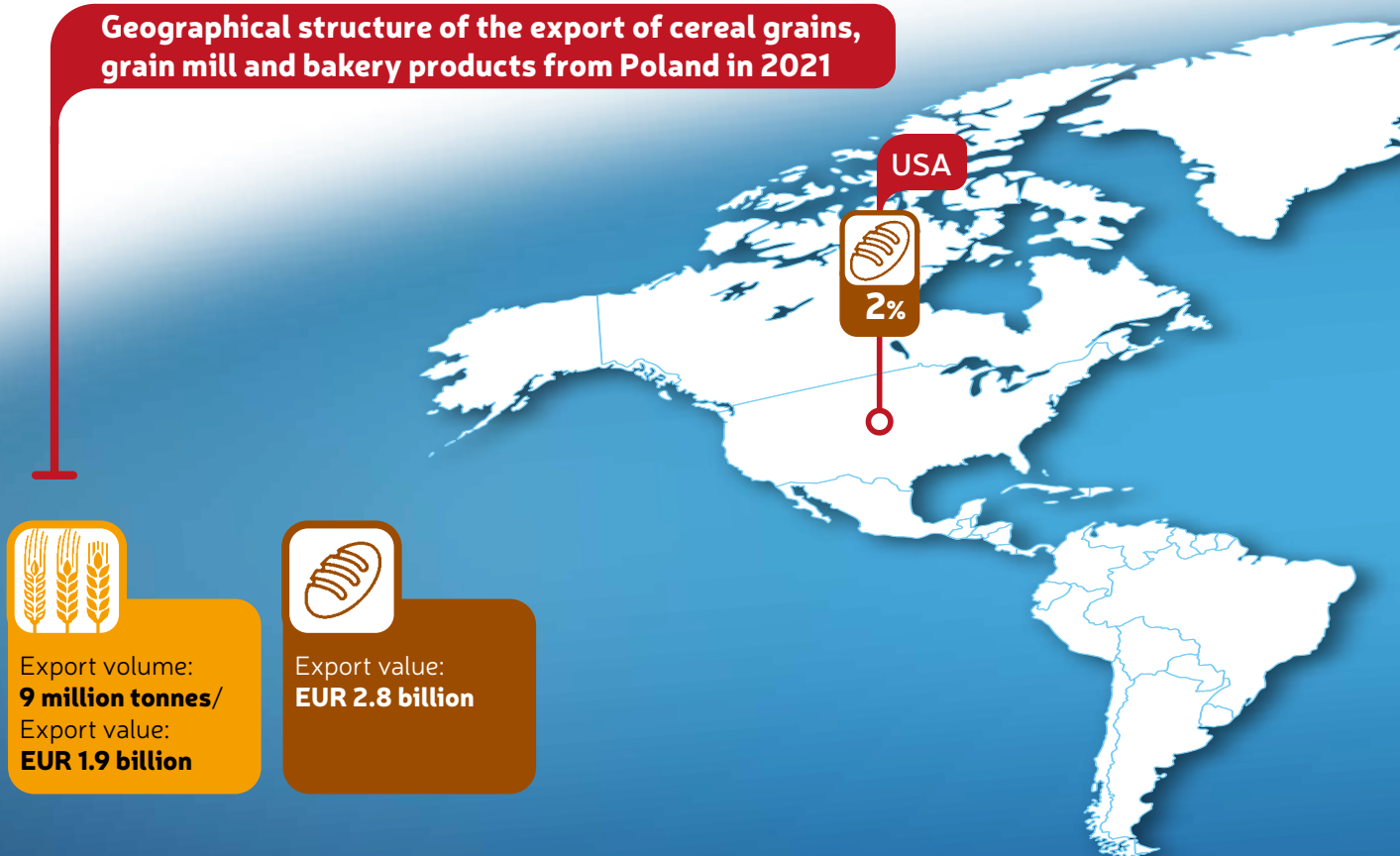


### Wide selection of grains

Wheat is the most popular grain in Poland and wheat flour is one of the dominant Polish export commodities in the grain sector. However, Polish producers offer grains of multiple species and varieties of cereals, both for consumption and foodstuffs, that are high yield and very fertile.



### Geographical structure of the export of cereal grains, grain mill and bakery products from Poland in 2021





## WHO TRUSTS US:

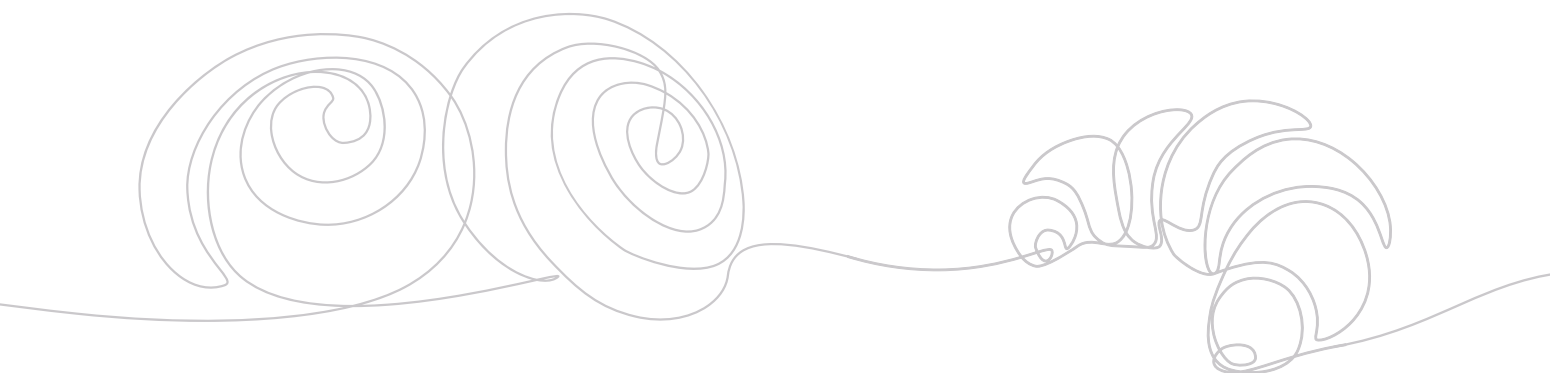
- The main destinations for Polish cereal grains are Germany, Algeria, the Netherlands, Saudi Arabia, Spain, Morocco, the United Kingdom, South Africa.
- Wheat accounted for 42% of grain exports in 2021, while maize represented 27%, and rye 13%.
- Bakers' wares such as bread, rolls, fine bakery wares, cakes and pastries are a major Polish export commodity. Other exported grain mill products include prepared foods obtained by swelling or roasting cereals or cereal product (such as breakfast cereals), pastas and noodles, gluten, wheat flour, malt and groats.
- Poland exported 116 thousand tonnes of malt in 2021, the greatest amounts to Brazil, Germany, Nigeria, Cambodia, Nicaragua, the United Kingdom, Ghana and Israel.
- The top destinations for Polish pastas include France, Germany, the United Kingdom, Spain, Ukraine, the Netherlands, Italy and Czechia.





## CHOCOLATE AND CONFECTIONERY

**P**oland is a paradise for lovers of chocolate and confectionery. The Polish chocolate and confectionery market is one of the most modern in Europe. Thanks to technological progress and continuously implemented state of the art production processes, it has been possible to constantly improve the quality of the products and to broaden their range. The market is developing dynamically and export has become the engine for the bloom of Polish confectionery industry. For several years now, chocolate and confectionery have ranked first among Polish exports of highly processed agri-food products.



	Chocolate and confectionery
Position	EU: 6 <sup>th</sup> largest producer (2020), 3 <sup>rd</sup> largest exporter (2021)
Annual export volume / value (2021)	561 thousand tonnes / EUR 2.4 billion

## WHAT WE OFFER

### Care about quality

Produced from outstanding raw materials, Polish sweets are appreciated by foreign customers for their high quality. Setting high quality standards, Polish producers take great care to use natural ingredients in the production of sweets and make efforts to avoid additives such as artificial flavours or preservatives.

### Diversity of the assortment

The Polish offer of chocolates and confectionery includes both traditional products, manufactured on the basis of traditional recipes, whose timeless taste is appreciated across generations and which have gained adorners on multiple foreign markets over the years, as well as a wide range of products that are a response to the abruptly changing consumer trends and the increasing demand for innovative and functional products. The offer from Polish producers encompasses: chocolates, sweets, marshmallows, bars, meringues, candyfloss, fudges and toffee, chocolate drops, fruit and nuts in chocolate, boxes of chocolates, chocolate candies and many others. Being the biggest chocolate market in Central Europe, Poland offers approximately 250 various types of chocolate bars.

### Competitive prices

Polish producers offer relatively low prices for high quality products. The prices are competitive on foreign markets when compared to offers from other large European chocolate and confectionery exporters.

### Did you know that?



“Rogal świętomarciński” is a traditional pastry from the Wielkopolskie Region, which is prepared for the 11th of November, i.e. Saint Martin’s Day, which is also Independence Day in Poland. The tradition of baking “Rogal świętomarciński” stems from pagan times, yet was taken over by the Church and popularised during the 19th century. The “Rogal” has the traditional form of the horseshoe that was reportedly lost by the saint’s horse. Prepared from a yeast-based croissant dough and stuffed with a filling of white poppy seeds, nuts and dried fruit, the “Rogal” is a sweet mark of Poznań. In 2008, the name “Rogal świętomarciński” was registered in the European Union as a Protected Geographical Indication.

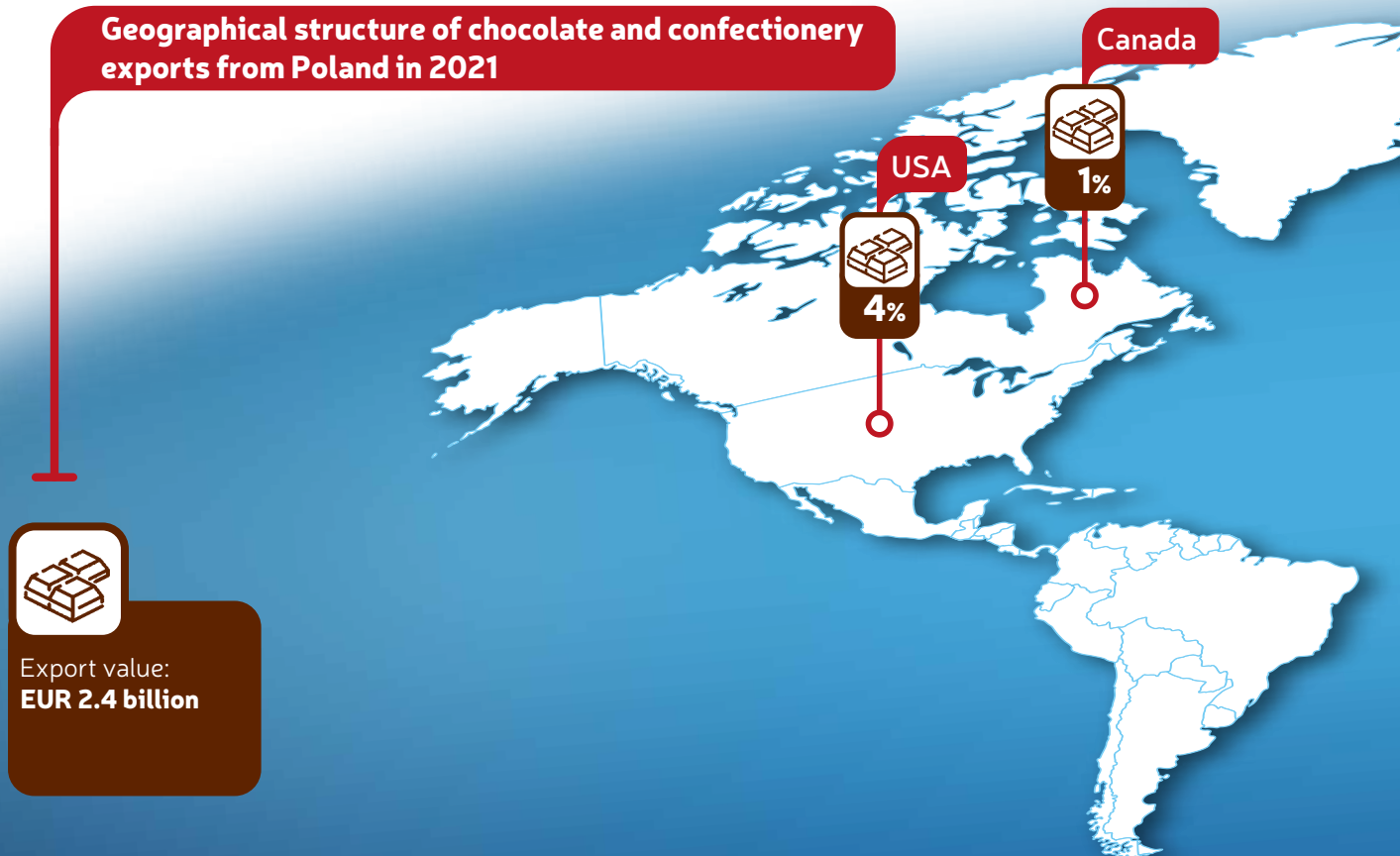




## DO YOU KNOW THE TASTE OF THESE POPULAR POLISH SWEETS?

- **Toruń gingerbread** – rich in aromas, spicy cookies containing honey, flavoured with ginger, cinnamon, cardamon, cloves and pepper. They can be coated with chocolate, glazed or filled with jam. The production of Toruń gingerbread dates back to the Middle Ages.
- **Plums in chocolate** – chocolate candies with an entire dried plum as a filling.
- **Jaffa-style cakes** - the most popular biscuits from Poland produced for several decades, made of sponge cake, a layer of fruit jelly and a coating of chocolate.
- **Krówki** – a kind of fudge candies (crispy or chewy) made of Polish milk, sugar and butter. They are characterized by their delicate caramel and milk flavour.
- **Kukutki** – crispy chocolate caramels with soft cocoa filling and a note of alcohol. The name of the sweets literally means “cuckoos”.
- **Sękacz** – a cake made over an open fire. It is of golden colour and resembles tree knots and branches. Sękacz is a long-life cake – once made it remains fresh for many weeks without any preservatives.
- **Milk mousse chocolates** – a soft, foamy vanilla milk mousse covered with a dark chocolate coating. This Polish sweet delicacy is produced since the 1930s. Today also other milk mousse flavours are available, like lemon, caramel, chocolate.

### Geographical structure of chocolate and confectionery exports from Poland in 2021



## WHO TRUSTS US:

- Polish sweets are increasingly popular among consumers and have reached approximately 150 markets around the world.
- They are appreciated both in Europe and non-European countries. Polish sweets can mainly be found in the EU, as well as in the USA, Russia, Ukraine and Saudi Arabia.
- Chocolate products dominate Polish sweets exports (82% of export value).





## ALCOHOLS

**P**oland is the homeland of a variety of unique alcohols and alcoholic beverages. The flagship product here is certainly world-famous Polish vodka, both plain and flavoured. Still there are other national treasures to discover such as Polish beers, wines, ciders, meads, and artisanal alcohols.





	Vodkas	Beers	Wines and vermouths
Annual export volume (2021)	1080 thousand hectolitres	38.8 million hectolitres	849 thousand hectolitres
Annual export value (2021)	EUR 373 million	EUR 226 million	EUR 65 million

### Did you know that?



The history of alcohol production in Poland is very long. Brewing traditions date back to the beginnings of the Polish state. The medieval chroniclers Jan Długosz and Gall Anonim mentioned Polish beer, as well as Thiethmar who, in his chronicles written at the beginning of the 11<sup>th</sup> century, described the Polish king Bolesław the Brave as beer enthusiast. Vodka production is also strongly rooted in the Polish tradition. The word 'wódka' (vodka) was documented in Polish chronicles for the first time in 1405. Primarily vodka denoted various types of infusions for medical purposes. Distilling, on the other hand, started to develop on Polish territory in the 16<sup>th</sup> century.

## WHAT WE OFFER

### Vodka

Poland is one of the biggest producers of vodka in the world. The production of vodka has developed over several centuries and has resulted in the creation of original recipes based on local ingredients as well as inimitable tastes that are valued worldwide. Traditionally, the basic ingredients used for vodka production include cereals and potatoes. Herb additives are also used. In Poland all types of vodka are produced, i.e. plain vodkas as well as a broad range of flavoured vodkas which are becoming more and more popular. There are about 200 varieties of Polish vodka on the Polish market. Two types of Polish vodkas have been registered as EU Geographical Indications (GI): "Herbal vodka from the North Podlasie Lowland aromatised with an extract of bison grass", and "Polska Wódka" / "Polish Vodka".

### Beer

Poland is also famous for its beer. The annual production of beer in Poland amounts to near 39 million hectolitres, which makes Poland an important beer producer – third in the EU and tenth in the world. Polish hops, malt and spring water enable Polish consumers to enjoy quality beer which is one of the oldest beverages drunk in Poland since pre-Slavic times. The Polish beer industry offers several hundred types of beer. In order to address market demand, beer is also flavoured with natural Polish juices. Polish breweries operate on various scales ranging from huge industrial breweries to craft breweries, which sell their produce locally or directly to affiliated restaurants. Craft breweries, some of which were founded in the 19<sup>th</sup> century, use traditional or innovative ingredients to obtain the highest quality and unique properties.

### Wine

Poland boasts a 1000 year-old viniculture traditions. For some time, they were forgotten due to climate changes and historical turmoil. However, in the last two decades winemaking has been re-discovered in Poland and the glory of Polish wine is being restored. Poland focuses on high quality wines, which are gaining the world's recognition. Export volumes have increased almost four-fold in the last five years. What may be interesting is that the Polish market offers a wide range of fruit wines made of apples, pears, blackcurrants, cherries, strawberries, plums, chokeberries as well as dog rose and rowan.

### Cider

Cider is made from the fermented juice of apples. Its low alcohol content and fruity, light taste make it very popular in Western Europe. In Poland, cider has its traditions – it was drunk on the territories of today's Poland as early as the Middle Ages. Since Poland is the largest apple producer in Europe and the fourth-largest in the world, the production of cider is booming. There are many tastes of Polish cider tailored to specific needs: dry, semi-dry and sweet.

### Meads

Poland is an important producer of mead made using traditional methods. Mead is an alcoholic drink, similar to wine, produced by fermenting bee honey diluted with water, i.e. honey wort. The wort may also contain hops, herbs, and roots or fruit juice, which give the mead a different flavour and character. Depending on the proportions of honey and water used for production, mead is divided into classes: "Półtorak" (meaning "one and a half parts", with 1:0.5 honey-to-water ratio), "Dwójniak" ("two parts", 1:1), "Trójniak" ("three parts", 1:2) and "Czwórniak" ("four parts", 1:3). Since their registration in 2008 as EU Traditional Specialties Guaranteed, their consumption has shot up not only in Poland, but also around the world. Meads contain up to 18% alcohol by volume.

### Artisanal alcohols

There are artisanal alcohols which are part of Polish and only Polish heritage. This is the case of "Nalewka", which is made by macerating fruit, roots, flowers, spices, herbs or nuts in strong alcohol, preferably vodka or spirit. Some ingredients may require a long maceration process up to a few months while in other cases Nalewka may be ready in two weeks' time. Traditionally the recipes were kept secret and passed from generation to generation. Nalewka contains usually 40% to 45% alcohol by volume.

## WHO TRUSTS US:

- The most highly appreciated Polish alcohols: spirits, making up 56% of Polish alcohol exports, beers – 34%, as well as wines and vermouths – 9%.
- Alcohols from Poland are exported to dozens of destinations worldwide.
- Polish vodka is most sought after in EU countries (especially in France) as well as in the USA, Ukraine, the United Kingdom, Canada and Turkey.
- Beer from Poland is mostly consumed in EU countries (the Netherlands, Hungary, Germany, Italy, Czechia and France). Outside the EU it is exported mainly to South Korea, the United Kingdom, the USA, Russia and Canada.
- Polish wines are sold primarily to Russia, Ukraine, Belarus and Chile.



## NON-ALCOHOLIC BEVERAGES

Poland is a producer of unique mineral waters as well as isotonic, vitamin and energy drinks. Mineral waters are mainly extracted from Beskid Sądecki, Kotlina Kłodzka and Kuyavia. They are distinctive on a global scale as they are rich in magnesium, calcium, iron and many other minerals. For people who lead an active lifestyle or need to boost their immune system, Poland may offer a wide range of energy, isotonic, and vitamin drinks enriched with caffeine, taurine, ginseng extract, vitamins, electrolytes and minerals, offered in many flavours.

### WHO TRUSTS US:

Non-alcoholic beverages from Poland are sold mostly in Germany, Czechia, the United Kingdom, Slovakia, Lithuania, Hungary, Romania, the USA, Latvia, and Saudi Arabia. The most popular product in this category is mineral water.





## TEA AND COFFEE



**P**oland is one of world's leaders in exports of high quality tea with first position in the EU and fifth in the world after traditional tea producers such as e.g. India. Polish tea producers use imported raw material of tea plants as well as domestic herbs and fruit.

Along with black tea, Poland offers green tea, white and red teas, as well as herbal and fruit teas. Herbal and fruit teas are produced from a single type of herb or fruit (mint, chamomile, raspberry, cranberry, dog rose, chokeberry and forest fruit), or as a medicinal herb mixes as well as herb and fruit blends. Polish producers also manufacture tea in the form of soluble powder or granules of different flavours to be prepared as warm or cold drinks, i.e. ice tea. The growing fashion among consumers for a healthy lifestyle has made Polish producers look for new products adjusted to the market's needs. Polish producers offer blends that strengthen the immune system, help to fight excess weight and boost energy levels.

### Geographical structure of the export of alcohols, non-alcoholic beverages, tea and coffee from Poland in 2021





## WHO TRUSTS US:

The Polish coffee market offers various blends of coffee seeds, carefully selected by top class experts in terms of their rich taste and aroma offered in the form of packages of coffee seeds, ground coffee, instant coffee and cappuccino. Apart from natural coffee, producers also offer flavoured coffees (e.g. chocolate, vanilla or eggnog). The Polish specialty is a roasted grain beverage (so called "grain coffee"), made from grains (rye, wheat, spelt or barley), as well as superfood "coffees" made from dandelion root, Jerusalem artichoke, chicory, acorns or hemp seeds, which are a valuable drink due to their health benefits.

- Polish teas are exported mainly to the European Union: France, the Netherlands, Germany, Sweden and Italy. They are also sought after in the USA, Australia, the United Kingdom, Norway, Saudi Arabia, Canada, Japan and United Arab Emirates.
- Coffees from Poland are exported in the vast majority of cases to the Member States of the EU such as Germany, the Netherlands, Czechia, Hungary, Slovakia, France and Romania. An important destination is also Ukraine and, to a lesser degree, the United Kingdom and Russia.



CN Codes: 2208 60, 2203, 2204, 2205, 0902, 0901, 2201, 2202 10

Compiled by the KOWR, based on data of the Polish Ministry of Finance





## OILS AND OTHER VEGETABLE FATS

**T**ravelling across Poland in spring, you will certainly come across a field of beautiful yellow flowers. Being typical for our country, the landscape is formed of fields of rape – a raw material used for producing oil that may boldly be named the Polish liquid gold thanks to its nutritional values. Rapeseed oil is rich in unsaturated fatty acids, vitamins and other bioactive ingredients that are good for human health. The oil wonder-maker possesses many properties, including: reducing the risk of cardiovascular diseases, contributing to proper blood clotting and keeping bones in good condition. It also lowers the level of LDL cholesterol (the so-called “harmful cholesterol”) by increasing the level of HDL cholesterol (the “good cholesterol”) in our blood. As for saturated fatty acids, their content in people’s diet should be reduced, while rapeseed oil is the healthiest oil in this respect.

Poles may benefit from the medicinal properties of the product almost without any limits. Ranking third in the EU in terms of the cultivation surface and harvest of rape, Poland is also an important producer of rapeseed oil. Poland produced 1.332 thousand tonnes of raw rapeseed oil and 531 thousand tonnes of refined rapeseed oil in 2021, both for consumption and industrial needs, including the production of biofuels and cosmetics. Polish exports of rapeseed oil amounted to 111 thousand tonnes and accounted for 23% of Polish vegetable oil exports.

### Geographical structure of vegetable oils exports from Poland in 2021



Export volume:  
**485 thousand tonnes**  
Export value:  
**EUR 567 million**







The second most popular oil in Poland is sunflower oil that is rich in vitamin E and other vitamins. In 2021, Poland exported 62 thousand tonnes of sunflower oil, which accounted for 13% of Polish exports of vegetable oils.

### Did you know that?



It is worth pointing out that the method of cold pressing is one of the best methods for manufacturing food oil, guaranteeing that the oil will retain the maximum possible amount of fatty acids and other valuable ingredients. The method is used by Polish producers not only to manufacture rapeseed and sunflower oil, but all the lesser known plant oils, e.g. flax, camelina, hemp, black cumin, milk thistle, evening primrose, mustard, walnut and pumpkin seed oils. These oils are not only rich in nutritional properties, but also possess a natural taste and a beautiful smell. Some of them, e.g. hazelnut oil or rosehip oil, are also beauty products.

### WHO TRUSTS US:

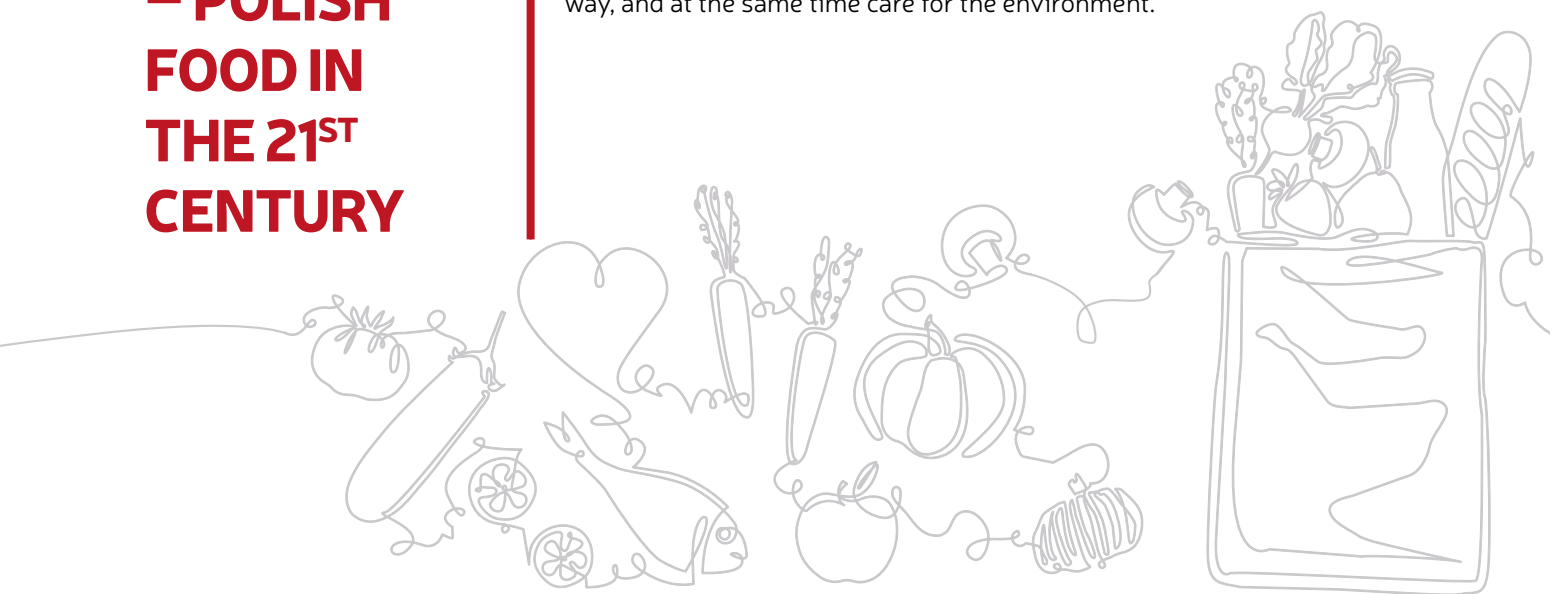
- In 2021, Polish vegetable oils were mainly exported to the EU, the United Kingdom, Russia and Ukraine.
- Apart from rapeseed and sunflower oils, the main vegetable oils that were exported by Poland in 2021 were margarines and soybean oil.





## A RESPONSE TO GLOBAL TRENDS – POLISH FOOD IN THE 21<sup>ST</sup> CENTURY

Consumers are increasingly conscious and demanding, while their lifestyle is getting more and more hectic every year. The modern world promotes multitasking, which is also reflected in nutrition trends. More and more, people are searching for products that are not only tasty, safe and healthy, but also benefit the body and spirit. The offer from Polish producers consists of a number of items that are adjusted to the requirements of modern lifestyles, manufactured in a socially responsible way, and at the same time care for the environment.





### Organic food

For many years, Polish agricultural production has been carried out with respect for the environment. The traditions and knowledge passed on to the new generation of farmers, combined with the new technologies that support organic quality, result in the on-going growth of the Polish organic market. The number of organic producers in Poland amounts to over 21 thousand, of which near 20 thousand are ecological farmers.

The EU organic certification process involves all types and stages of production and processing, as well as packing, labelling and distribution, which are strictly supervised on the national level. The EU organic logo ensures that the product has been produced using the most natural methods, does not contain artificial additives and is GMO-free.

### Functional food and “superfoods”

A well-informed consumer is aware of the fact that prevention is better than cure, which increases the popularity of food that should protect us against civilisation-related diseases and guarantee a long life in good condition.

Cooperating often with research institutes and centres, Polish producers place an increasing number of functional products on the market, which deliver important ingredients in a healthy diet. Their offer includes, among other things, sweets and snacks, dairy products, beverages or cereal products with no harmful or allergenic elements and enriched with additional healthy ingredients. The well-known Polish superfoods, e.g. chokeberry, blackcurrant, mulberry and sea buckthorn are popular additives. The products combining the best-quality chocolate with super-fruit or probiotic bacteria are the biggest hit. Protein products along with healthy sweets and snacks from unprocessed (so-called “raw”) ingredients are increasingly gaining in popularity.

Poland is also one of the largest producers of herbs in Europe. In Poland, 70 species of herbs are cultivated, including such medical varieties as camomile, mint, common valerian, St John's wort and milk thistle. Polish producers of herbs operate on multiple markets, being however particularly successful in the European Union. It should be noted that Polish thyme is often included in the famous French herbs of Provence.

#### Did you know that?



Traditional “super products” have been cultivated and manufactured in Poland for centuries now; they equal the world “superfoods” in their content of nutrients. The greatest national good are pickles which are a natural bomb of vitamins and probiotics, including the famous sour beetroot juice that has an anti-aging effect, damages cancer cells and is... a cure for hangovers.

The most traditional “super products” from Poland also include honeys that possess extraordinary medicinal properties. The most important species are: acacia honey, linden honey, nectar-honeydew and multi-flower honey.







### Plant products

The number of people who reduce their consumption of meat and products of animal origin or decide not to eat such products for health, environmental or ethical reasons is increasing. To address their needs, the largest Polish producers are extending their classical portfolio of products, a gesture that is highly appreciated by consumers, by offering new products of plant origin. On the Polish market, there is also room for start-ups and small manufacturers of plant products, e.g. plant no-meat balls, bacons, hams, sausages, burgers and nuggets, as well as vegan lard, pâtés, cheeses, butter, bread spreads, sauces or mayonnaises. Not only will such products satisfy vegetarians, vegans and allergy sufferers, but all those looking for a varied cuisine while wishing to eat tasty and healthy foods.

#### Did you know that?



Warsaw, the capital city of Poland, has been on the global list of the ten most vegan friendly cities for several years now. Vegan shopping is easy to do there, while local restaurants offer vegetable-based cuisine from any corner of the world.

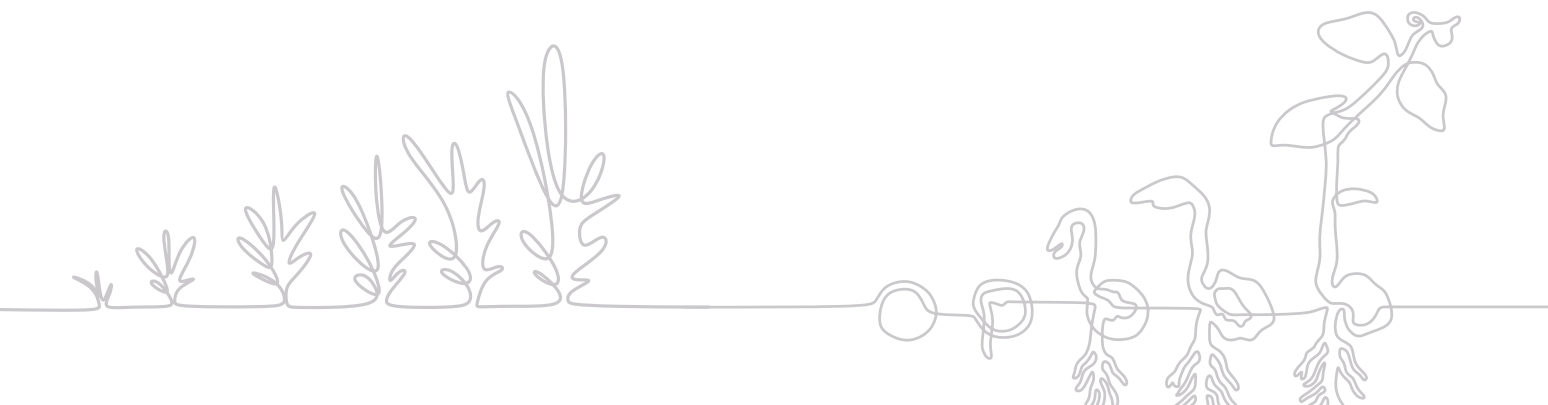




### Healthy convenience food and snacks

Due to the modern lifestyle, customers tend to choose products that are easy and not time-consuming to prepare. Polish producers break the spell cast on convenience meals and instant products that are deemed to be harmful by offering consumers healthy, nutritious and tasty meals that are fast to prepare, including ready-to-use mixtures for preparing plant burgers and stews, risotto and groat-based dishes, soups, drop scones, pancakes, porridges or mixtures for baking home-made bread. The products are targeted at hard-pressed, yet well-informed customers who do not wish to compromise on quality. Many of them are certified as organic products and are labelled as gluten-free or vegan.

How to get rid of a little hunger? Polish producers also offer healthy snacks to eat on the go, including delicious and natural snacks made from fruit, vegetables, cereals, seeds and nuts.







**The National Support Centre for Agriculture (KOWR)** is a Polish governmental agency, supervised by the Minister of Agriculture and Rural Development.

The KOWR's mission is supporting Polish producers and exporters of agri-food products and development of innovative agriculture. Acting for the increase of trade cooperation in agri-food products between Poland and other countries is an important part of the mission.

The KOWR is the main body in Poland responsible for the implementation of the promotion instruments in the agri-food sector.

- Promotional activities are carried out in many countries of the world, with focus on those that offer the best prospects for Polish agri-food exports in Europe, Asia, the Americas, the Middle East and Africa;
- The KOWR operates Polish national stands at major international food fairs and exhibitions. Alongside the presence at fairs, the KOWR organizes outbound trade missions for Polish operators in the agri-food sector as well as specialised business-to-business meetings (B2B);
- The KOWR offers tailor-made solutions for importers, distributors and representatives of retail chains from all over the world. The offer includes support in finding Polish commercial partners, organising B2B meetings and trade missions to Poland;
- The KOWR runs numerous measures and projects aimed to promote Polish food and culinary traditions on foreign markets. They include:
  - dedicated study tours for foreign journalists, food bloggers and other experts involved in food promotion,
  - meetings and seminars on the Polish agri-food sector and the range of Polish foods available for export,
  - a variety of promotional events abroad such as live cooking shows, tastings of Polish food, Polish food festivals, and many others;
- The KOWR also provides the opportunity to participate in information webinars on trade conditions and business culture of other countries, featuring Polish and foreign experts.





**Poland**  
tastes good

*Poland  
tastes good*



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