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Report Name: Direct Versus Indirect Trade - Poland's Hidden Market for US Agricultural Exports

Country: Poland

Post: Warsaw

Report Category: Agricultural Situation, Beverages, Fishery Products, Livestock and Products, Oilseeds and Products, Tree Nuts, Wine

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Report Highlights:

The U.S. Census Bureau's (USCB) bulk, intermediate, and consumer-oriented export data tracks U.S. food and agricultural trade shipped directly to Poland. However, it does not measure the substantial levels of the U.S. agricultural trade to Poland routed through Western European ports of entry. According to USCB, U.S. suppliers shipped \$376 million of U.S. food and agriculture to Poland in 2023. However, according to Poland's Central Statistical Office (CSO), which measures trade by country of origin and, therefore, reflects both direct and indirect trade, Poland sourced upwards of \$740 million of U.S. food and agriculture in 2023. FAS/Warsaw encourages USDA cooperators and other U.S. food and agricultural exporters and stakeholders to look beyond USCB data and review different data sources when considering resource allocation and market development strategies for Poland.

General Information

The United States was Poland's 14th largest supplier of food and agricultural products in 2023. U.S. goods flow into Poland either directly from the United States or are transshipped through other European Union (EU) ports of entry, mainly in the Netherlands and Germany. Because the U.S. Census Bureau's (USCB) data recorded in the USDA Global Agricultural Trade System ([GATS](#)) only reflects direct U.S. trade to Poland, it does not reflect significant volumes of U.S. trade routed through distributors in Rotterdam, Bremerhaven, and other large Western European port cities. As a result, FAS/Warsaw views Poland's Central Statistical Office ([CSO](#)) data, which includes both direct and indirect trade, as a more accurate reflection of Polish demand for U.S. food and agricultural products.

According to CSO data, in 2023 Poland imported agricultural and related products valued at \$40.2 billion from all suppliers, two percent over 2022. The main imported commodities were seafood, soybean meal, petfood, food preparations, and pork. In all those product categories the United States was an important supplier. Polish importers sourced a record high \$740 million worth of U.S. food and agricultural products in 2023 (Table 1). In 2023, soybean meal, food preparations, tobacco, whiskies and wines, food additives, nuts and dried fruit, seafood, and animal feed preparations were the largest categories, and these categories accounted for almost 78 percent of total Polish imports of U.S. food and agricultural products.

Table 1. U.S. Food and Agricultural Trade to Poland 2019-2023 (\$ million)

Source of Data	2019	2020	2021	2022	2023
USCB* (Direct U.S. exports to Poland)	225.7	163.7	208.1	266.9	375.6
CSO** (Direct and Indirect imports from the United States)	513.6	506.4	581.5	584.8	739.9
Difference (Indirect exports)	287.9	342.6	373.4	317.9	364.4
<i>Percentage of indirect exports</i>	56%	68%	64%	54%	49%

* Data on USCB trade published by Trade Data Monitor LLC (TDM) and by GATS

** Data on CSO trade published by Trade Data Monitor LLC (TDM)

Source: USCB and CSO

In 2023 both USCB and CSO recorded significant growth of U.S. trade in agricultural and related products to Poland compared to 2022, driven by imports of U.S. soybean meal benefitting from lower supplies from Argentina and better pricing against major competitors. According to USCB data, 2023 U.S. exports of agricultural and related products to Poland increased by 41 percent over 2022, however, CSO reported a 27-percent increase in value of Polish imports from the United States in the same period. This is mainly due to better capture of indirect exports by USCB data.

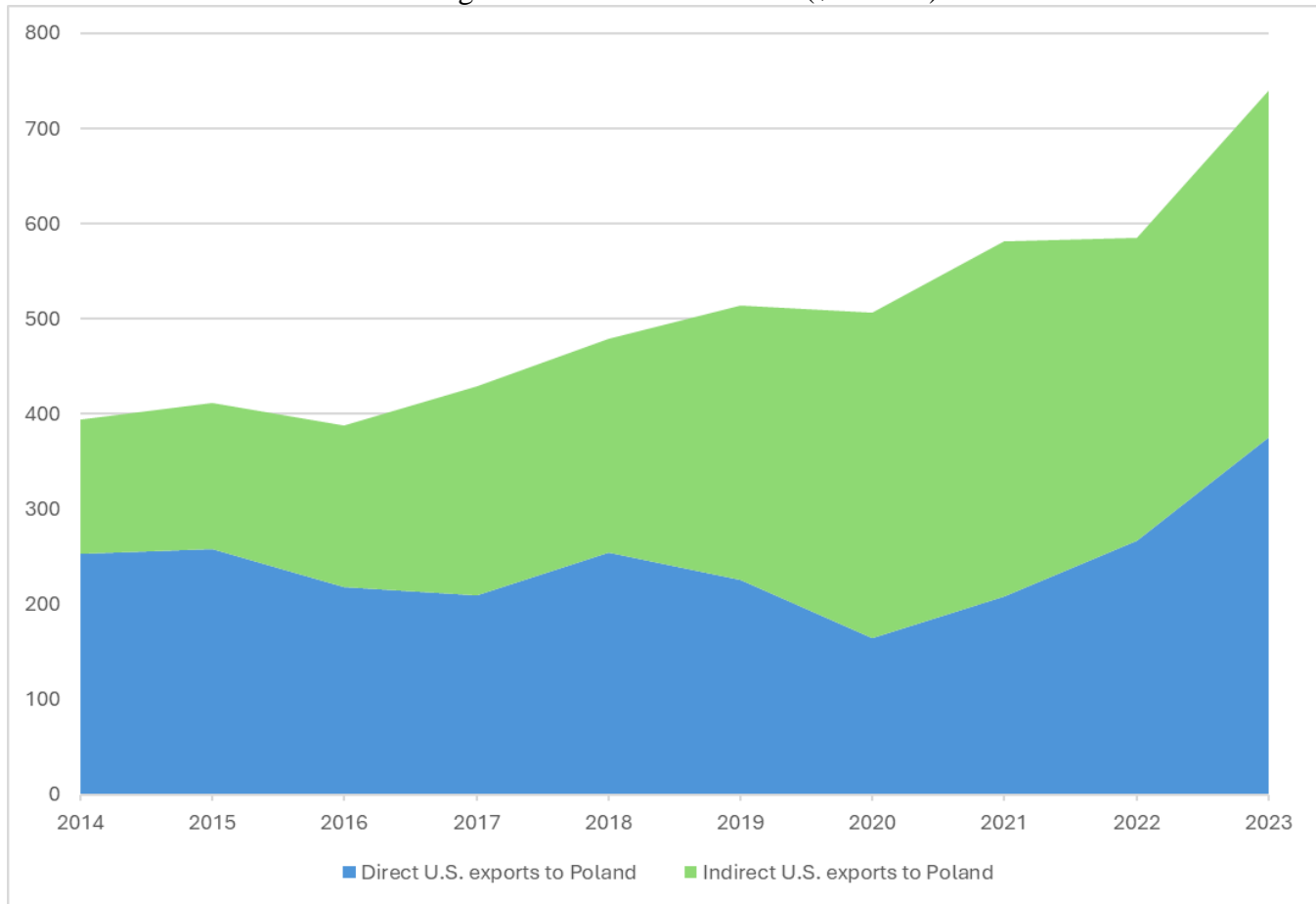
Chart 1: USCB and CSO Data on U.S. Food and Agricultural Trade to Poland (\$ million)



Source: USCB and CSO

USCB data for 2023 indicates that the European Union is the 4th largest market for U.S. agricultural and related products, but Poland is not ranked among the top 35 country markets, while the Netherlands is ranked as the 8th and Germany as the 13th leading market. However, part of the shipments indicated as destined for those countries is further distributed among other EU Member States as indirect trade. The undervaluation of the U.S. indirect exports to Poland has been increasing until 2020. Since then, it was on a decline, reaching 49 percent of reported Polish imports from the United States in 2023. The better capture of indirect U.S. exports to Poland in 2023 is likely due to soybean meal, which is not transshipped in Western European ports. Nevertheless, around half of U.S. trade to Poland is not reported by USCB.

Chart 2: Historical U.S. Food and Agricultural Trade to Poland (\$ million)



Source: USCB and CSO

U.S. Food and Agricultural Trade to Poland by Category

Direct U.S. agricultural trade to Poland generally consists of products shipped as sea freight, including intermediate products like soybean meal, but also wood products, some spirits, and some bulk commodities like rice and pulses. The trade data for these categories are captured by both USCB and CSO data. Indirect trade tends to be products that are shipped in smaller quantities, or that may require more flexible terms of trade than U.S. suppliers are able to provide. In other cases, Western European distributors can offer U.S. shippers sales volumes and/or payment terms that would be difficult for Polish importers to match. Many U.S. exporters also find it more efficient to simply ship large volumes to well-established distribution hubs in Western Europe and rely on those channels to supply other EU markets. In addition, some Polish importers prefer to work through European distributors and find it convenient for intermediaries to handle EU customs clearance for U.S. products. Also, for new-to-market products, some Polish importers prefer to purchase smaller volumes to test consumer demand and to build distribution channels before committing to longer term agreements and purchases. Finally, European distributors may incentivize Polish importers with favorable terms of payments or advertising, particularly if there are longstanding commercial relationships. Table 2 below shows USCB and CSO data for U.S. agricultural trade to Poland for different products groups.

Table 2. 2023 Direct and Indirect U.S. Agricultural, Food, and Fishery Trade to Poland (\$ 1,000)

Product	CSO (Direct and Indirect U.S. Trade to Poland) in 1,000 USD	USCB (Direct U.S. Exports to Poland) in 1,000 USD	Difference (Indirect) in 1,000 USD	% Share of Indirect Exports
Agricultural & Related Products	739,908	375,552	364,356	49%
Consumer Oriented Total	346,768	162,435	184,333	53%
Tree Nuts	89,187	41,101	48,086	54%
Soups and Other Food Preparations	87,325	47,900	39,425	45%
Distilled Spirits	67,819	47,345	20,474	30%
Wine and Related Products	30,056	1,066	28,990	96%
Processed Fruit	28,596	13,138	15,458	54%
Dog and Cat Food	17,729	2,561	15,168	86%
Meat Products NESOI	5,848	58	5,790	99%
Processed Vegetables	3,016	730	2,286	76%
Dairy Products	2,880	1,715	1,165	40%
Condiments & Sauces	2,740	3,596	-856	
Bakery Goods, Cereals, & Pasta	2,253	599	1,654	73%
Chewing Gum and Candy	1,887	82	1,805	96%
Beef and Beef Products	1,579	202	1,377	87%
Non-Alcoholic Beverages (excluding juice)	1,200	840	360	30%
Chocolate and Cocoa Products	1,185	21	1,164	98%
Manufacturing Tobacco	901	551	350	39%
Fresh Fruit	759	14	745	98%
Tea	647	144	503	78%
Fresh Vegetables	292	0	292	100%
Eggs and Products	286	155	131	46%
Fruit and Vegetable Juices	172	504	-332	
Spices	170	75	95	56%
Nursery Products and Cut Flowers	86	20	66	77%
Beer	70	0	70	100%
Coffee, Roasted and Extracts	56	14	42	75%
Poultry Meat and Products (excluding eggs)	17	0	17	100%
Coffee, Unroasted	7	0	7	100%
Pork and Pork Products	5	4	1	20%
Intermediate Total	207,965	165,610	42,355	20%
Soybean Meal	90,719	101,625	-10,906	
Essential Oils	64,930	41,610	23,320	36%
Other Feeds, Meals and Fodders	24,602	13,143	11,459	47%

Dextrins, Peptones, and Proteins	9,038	3,787	5,251	58%
Other Intermediate Products	6,038	3,607	2,431	40%
Industrial Alcohols & Fatty Acids	4,782	11	4,771	100%
Planting Seeds	2,946	329	2,617	89%
Milled Grains and Products	2,019	69	1,950	97%
Vegetable Oils (excluding soybean)	1,338	678	660	49%
Oilseed Meal/Cake (excluding soybean)	898	4	894	100%
Sugar, Sweeteners, Beverage Bases	439	135	304	69%
Live Animals	175	18	157	90%
Hides and Skins	32	594	-562	
Ethanol (non-beverage)	8	0	8	100%
Animal Fats	1	0	1	100%
Bulk Total	93,273	24,230	69,043	74%
Tobacco	78,409	13,894	64,515	82%
Peanuts	6,544	4,372	2,172	33%
Rice	2,146	1,932	214	10%
Corn	2,089	2,084	5	0%
Pulses	1,914	1,280	634	33%
Other Bulk Commodities	1,402	255	1,147	82%
Coarse Grains (excluding corn)	531	384	147	28%
Oilseeds (excluding soybean)	172	0	172	100%
Rapeseed	40	0	40	100%
Cotton	26	29	-3	
Agricultural Related Products	91,901	23,278	68,623	75%
Seafood Products	71,799	9,123	62,676	87%
Forest Products	20,090	14,155	5,935	30%
Biodiesel and Blends higher than B30	12	0	12	100%

Source: USCB and CSO

For certain commodities indirect trade is significant. This concerns mainly tree nuts, wine, petfood, beef, sweet potatoes, and seafood. Please consult the Appendix for top 50 U.S. imported food and agricultural products most valued in 2023, by the World Customs Organization's Harmonized System (HS) code.

For shelled almonds (fresh or dried), USCB data captured \$13.4 million of 2023 trade, while CSO data showed \$35.1 million of U.S. almonds. U.S. almonds were distributed to Poland through Spanish, German, and Dutch intermediaries.

USCB reflected \$18.5 million of U.S. pistachio in shell trade to Poland in 2023, while CSO valued U.S. pistachio trade to Poland at \$36.9 million in 2023. U.S. pistachios arrive in Poland mostly through German intermediaries, especially through German retail supply chains. Several large German retail chains are present throughout Poland.

USCB data indicated that 2023 U.S. wine and related products exports to Poland were valued at \$1.1 million. 2023 CSO data cited \$30.1 million of U.S. wine. In 2023, most U.S. wine traded to Poland arrived through Germany, France, and the Netherlands, explaining the significant difference between USCB and CSO data.

In the case of whiskies, the gap between USCB and CSO data is smaller, given that whiskies are often shipped via ocean freight directly to Poland.

In the case of U.S. dog and cat food, USCB indicated almost \$3 million, while CSO data showed \$17.7 million. A large proportion of U.S. petfood is distributed in Poland through German intermediaries, especially through German retail supply chains.

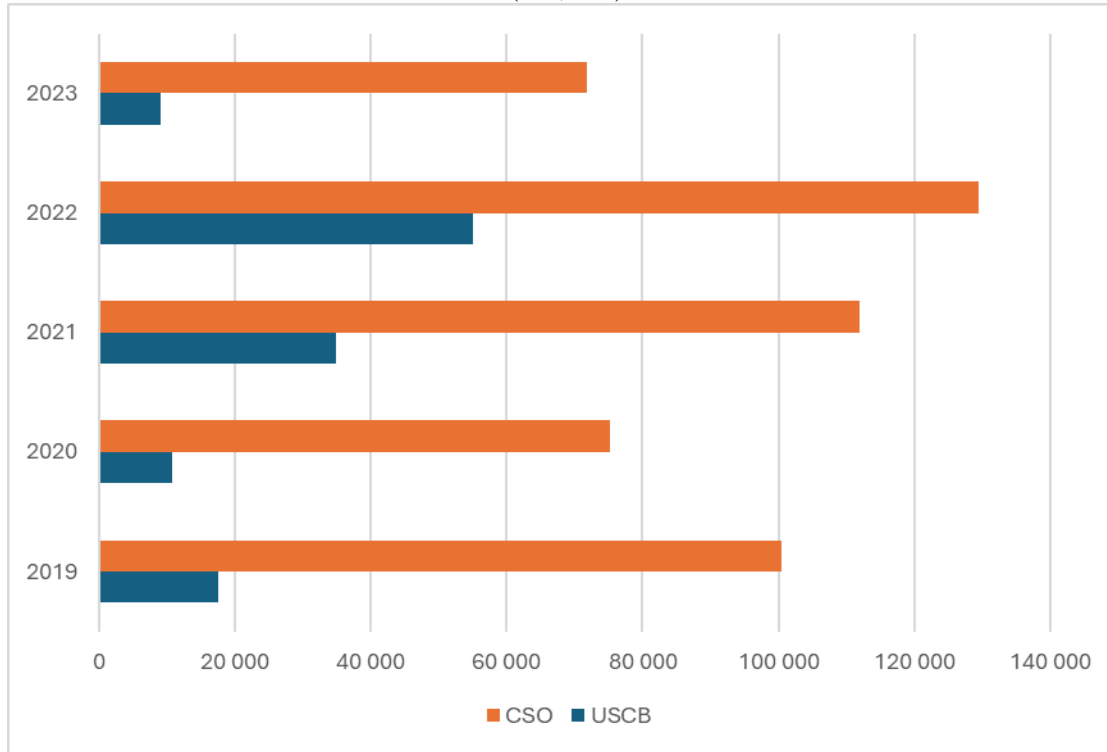
USCB accounts for 2023 U.S. beef and beef product trade to Poland valued only at \$0.2 million. CSO data shows U.S. beef trade valued at \$1.5 million and additional beef products trade valued at almost \$101,700. With the Polish market opening to high-end as well as alternative cuts from quality beef, U.S. products are generally purchased in smaller volumes, through the European intermediaries.

For U.S. sweet potatoes, USCB indicated no U.S. trade with Poland, while CSO data reflected that U.S. sweet potato trade was valued at \$1.7 million. U.S. sweet potatoes were shipped to Poland through Germany, Italy, and the Netherlands.

According to CSO data, fish and seafood were among the major products traded to Poland in 2023. USCB data showed the total value of U.S. exports of fishery and seafood products at \$9.1 million, while CSO data reported \$71.8 million in 2023. While some U.S. seafood, particularly frozen Alaska pollock and sockeye salmon, is shipped directly to Poland through the Port of Gdynia, most local seafood importers/processors prefer European distributors in the Netherlands and Germany. For example, USCB showed no data for U.S. Alaska pollock (HS code 030475) trade to Poland, while CSO data showed that U.S. Alaska pollock trade reached \$25.7 million in 2023. Alaska pollock fillets arrive in Poland mainly through the Netherlands and Germany.

Poland is a number one salmon processor in the world and imports almost 95 percent of the seafood it processes. U.S. seafood imports to Poland were at record high levels in 2022. However, in 2023 lower priced products from other competitors negatively affected imports from the United States. Regardless of trade fluctuations, the value of U.S. exports of seafood to Poland has regularly been underestimated.

Chart 3. U.S. Seafood Trade to Poland (\$ 1,000)



Source: USCB and CSO

The differences in specific products can be traced by HS codes. Due to the fact that majority of the direct and indirect U.S. trade is covered by HS code 03 (fish and crustaceans, molluscs and other aquatic invertebrates), it can be used to illustrate how CSO and USCB capture U.S. exports of fish and fishery products to Poland. The comparison indicates that almost 90 percent of U.S. exports were underestimated by USCB data in 2023.

Table 3. U.S. Fish and Seafood Traded to Poland 2019-2023 (\$ 1,000)

HS Code	Description	Data Source	2019	2020	2021	2022	2023
03	fish and crustaceans, molluscs and other aquatic invertebrates	CSO	99,984	74,950	111,693	129,426	71,728
		USCB	17,125	10,449	34,568	53,081	7,135
0301	fish, live	CSO	79	22	12	26	49
		USCB	39	15	22	29	31
0302	fish, fresh or chilled, excluding fish fillets and other fish meat without bones; fish livers and roes, fresh or chilled	CSO	3	1	96	0	235
		USCB	4	0	0	0	0
0303	fish, frozen, excluding fish fillets and other fish meat without bones; fish livers and roes, frozen	CSO	56,033	30,374	62,582	69,291	33,112
		USCB	15,311	6,865	32,486	48,750	4,156
0304	fish fillets and other fish meat	CSO	43,698	44,402	48,771	59,379	37,717

	(whether or not minced), fresh, chilled or frozen	USCB	1,766	3,567	2,059	4,303	2,930
0305	fish, dried, salted or in brine; smoked fish; fish meal fit for human consumption	CSO	59	44	88	645	523
		USCB	0	0	0	0	0
0306	crustaceans, live fresh chilled frozen dried etc.; smoked; in shell, cooked by steam or boiling water; flours, meals & pellets for human consumption	CSO	28	21	17	50	45
		USCB	0	0	0	0	10
0307	molluscs, live, fresh, chilled, frozen, dried, salted or in brine; smoked; flours, meals and pellets, fit for human consumption	CSO	78	80	122	30	40
		USCB	0	0	0	0	8
0308	aquatic invertebrates other than crustaceans & molluscs, live, fresh, chilled, frozen, dried, salted/ in brine; smoked; edible flours, meals & pellets	CSO	6	6	6	5	8
		USCB	5	3	0	0	0

Source: USCB and CSO

As with many other products, seafood deliveries get custom cleared in West Europe and Poland is not recorded as their final destination. Hence, when analyzing the importance of the Polish market, Polish import data should be used to fully reflect the current market situation.

Appendix

Top 50 U.S. Food and Agricultural Products Imported in 2023, by HS Code (\$ 1,000)

No.	HS Code	Code Description	Direct and Indirect U.S. Trade to Poland (CSO)	Direct U.S. Exports to Poland (USCB)	Indirect U.S. Trade to Poland (Difference)	% Share of Indirect Exports
	TOTAL	agricultural and related products	739,908	375,552	364,356	49.24%
1	230400	soybean oilcake and other solid residues resulting from the extraction of soy bean oil, whether or not ground or in the form of pellets	90,719	101,625	-10,905	
2	210690	food preparations nesoi	87,317	47,134	40,183	46.02%
3	240120	tobacco, partly or wholly stemmed/stripped	76,757	13,894	62,863	81.90%
4	220830	whiskies	56,686	45,635	11,051	19.50%
5	330210	mixtures of odoriferous substances and mixtures (including alcoholic solutions) with a basis of these substances used in the food or drink industries	42,335	41,448	887	2.10%
6	080251	pistachios, in shell, fresh or dried	36,934	18,513	18,421	49.88%
7	080212	almonds, fresh or dried, shelled	35,083	13,352	21,731	61.94%
8	220421	wine of fresh grapes (other than sparkling wine) and grape must with fermentation prevented, etc. by adding alcohol, containers of not over 2 liters	26,976	836	26,140	96.90%
9	030475	alaska pollock (theragra chalcogramma)	25,725	0	25,725	100.00%
10	230990	animal feed preparations (mixed feeds, etc.), other than dog or cat food put up for retail sale	23,017	13,143	9,874	42.90%
11	200893	cranberries (vaccinium macrocarpon, vaccinium oxycoccus); lingonberries (vaccinium vitisidaea)	21,381	7,084	14,297	66.87%
12	30311	sockeye salmon (red salmon) (oncorhynchus nerka), frozen	20,344	1,260	19,084	93.81%
13	330129	essential oils, nesoi	17,884	96	17,788	99.47%
14	230910	dog and cat food, put up for retail	17,729	2,561	15,168	85.55%

		sale				
15	440131	wood pellets	15,857	10,182	5,676	35.79%
16	030312	pacific salmon (<i>oncorhynchus gorboscha</i> , keta, tschawytscha, kisutch, masou and rhodurus), frozen, nesoi	7,912	1,686	6,226	78.69%
17	220840	rum and tafia	7,267	0	7,267	100.00%
18	080252	pistachios, shelled, fresh or dried	7,016	165	6,851	97.65%
19	030495	fish of the families bregmacerotidae, eulichthyidae, gadidae, macrouridae, melanonidae, merlucciidae, moridae and muraenolepididae, other than alaska pollock (<i>theragra chalcogramma</i>)	5,651	193	5,458	96.58%
20	050400	animal guts, bladders and stomachs (other than fish), whole and pieces thereof, fresh, chilled, frozen, salted, in brine, dried or smoked	5,347	0	5,347	100.00%
21	210610	protein concentrates and textured protein substances	5,155	3,510	1,645	31.91%
22	120242	peanuts, shelled, whether or not broken other than seed	4,732	2,047	2,685	56.75%
23	080299	nuts, fresh or dried, whether or not shelled or peeled (excl. coconuts, brazil nuts, cashew nuts, almonds, hazelnuts, filberts, walnuts, chestnuts, pistachios, macadamia nuts, kola nuts, areca nuts and pine nuts)	4,429	809	3,621	81.75%
24	382370	industrial fatty alcohols	4,205	0	4,205	100.00%
25	081320	prunes, dried	4,194	3,935	259	6.17%
26	051110	bovine semen	3,597	2,571	1,026	28.52%
27	030494	alaska pollock (<i>theragra chalcogramma</i>)	3,428	91	3,337	97.35%
28	350400	peptones and derivatives; other proteins and derivatives, nesoi; hide powder, chromed or not	3,071	110	2,960	96.40%
29	080232	walnuts, fresh or dried, shelled	3,051	1,952	1,098	36.01%
30	030339	flat fish, nesoi, excluding fillets, livers and roes, frozen	2,993	354	2,639	88.17%
31	210390	sauces and preparations therefor, nesoi; mixed condiments and mixed seasonings	2,577	3,521	-944	
32	030474	hake (<i>merluccius</i> spp., <i>urophycis</i>)	2,527	295	2,232	88.34%

		spp.) fillets, frozen				
33	200819	nuts (other than peanuts (ground-nuts)), and other seeds, including mixtures, prepared or preserved, nesoi	2,462	141	2,322	94.29%
34	190190	malt extract; food products of flour, meal, etc. with cocoa (if any) under 40% and milk or cream products with cocoa (if any) under 50%, nesoi	2,242	1,526	716	31.95%
35	220870	liqueurs and cordials	2,239	205	2,034	90.84%
36	120991	vegetable seeds for sowing	2,199	164	2,034	92.53%
37	100630	rice, semi-milled or wholly milled, whether or not polished or glazed	2,136	1,932	204	9.54%
38	100590	corn (maize), other than seed corn	2,089	2,084	5	0.23%
39	170490	sugar confectionary (including white chocolate), not containing cocoa, nesoi	1,840	68	1,772	96.31%
40	120241	peanuts, in shell, other than seed	1,812	2,325	-513	
41	030367	alaska pollock (theragra chalcogramma)	1,768	817	950	53.77%
42	121020	hop cones, ground, powdered or in the form of pellets; lupulin	1,744	52	1,692	97.04%
43	071420	sweet potatoes, fresh or dried, whether or not sliced or in the form of pellets	1,687	0	1,687	100.00%
44	240130	tobacco refuse (waste)	1,652	0	1,652	100.00%
45	020130	meat of bovine animals, boneless, fresh or chilled	1,477	202	1,275	86.30%
46	071333	kidney beans, including white pea beans (phaseolus vulgaris), dried shelled, including seed	1,403	1,280	123	8.76%
47	230310	residues of starch manufacture and similar residues, whether or not in the form of pellets	1,368	0	1,368	100.00%
48	220590	vermouth and other wine of fresh grapes flavored with plants or aromatic substances, in containers holding over 2 liters	1,269	0	1,269	100.00%
49	330113	essential citrus fruit oils of lemon	1,244	0	1,244	100.00%
50	081190	fruit, nesoi, and nuts, uncooked or cooked by steaming or boiling in water, whether or not containing added sweetening, frozen	1,118	1,162	-45	

Source: USCB and CSO

Attachments:

No Attachments.