

Voluntary Report – Voluntary - Public Distribution

Date: September 03, 2026

Report Number: PL2026-0009

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

Country: Poland

Post: Warsaw

Report Category: Agriculture in the Economy, Beverages, Agricultural Situation, Fishery Products, Livestock and Products, Oilseeds and Products, Tree Nuts, Wine

Prepared By: Anna Galica, Jolanta Figurska

Approved By: Benjamin Petlock

Report Highlights:

U.S. Census Bureau (USCB) bulk, intermediate, and consumer-oriented export data tracks U.S. agricultural and related products shipped directly to Poland. However, USCB data does not reflect the substantial levels of U.S. agricultural trade that arrives in Poland through Western European ports of entry. USCB reported U.S. suppliers shipped \$386 million of U.S. agricultural and related products to Poland in 2025. However, as Poland's Central Statistical Office (CSO) measures trade by country of origin, it reflects both direct and indirect trade and is therefore more extensive. CSO reported Poland sourcing \$888 million of U.S. agricultural and related products in 2025. Nuts and dried fruit, seafood, food preparations, whiskies and wines, tobacco, animal feed, and food additives were the top U.S. imported products. FAS/Warsaw encourages USDA cooperators, stakeholders, and other U.S. exporters of agricultural and related products to look beyond USCB data when considering market development strategies for Poland.

General Information

The United States was Poland's 14th largest supplier of food and agricultural products in 2025. U.S. goods flow into Poland either directly from the United States or 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 account for significant volumes of U.S. trade transshipped and 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, Poland imported agricultural and related products valued at \$48 billion from all suppliers in 2025, up 12 percent over 2024. The top five exporters to the Polish market were Germany, the Netherlands, Italy, Spain, and Ukraine. The main imported commodities were seafood, chocolate and cocoa products, dairy products, fresh fruit, and forest products. The United States was an important supplier in some of those product categories.

According to CSO, Polish importers sourced \$888 million worth of U.S. food and agricultural products in 2025 (Table 1). In 2025, nuts and dried fruit, seafood, food preparations, whiskies and wines, tobacco, animal feed (including pet food), and food additives were the largest categories, accounting for nearly 89 percent of total Polish imports of U.S. food and agricultural products. According to USCB, U.S. direct exports to Poland of agricultural and related products in 2025 were valued at \$386 million, with nuts and dried fruit, food preparations, seafood, whiskies, and animal feed preparations at the top of the list of exported products.

Table 1. U.S. Food and Agricultural Trade to Poland 2021-2025 (\$ million)

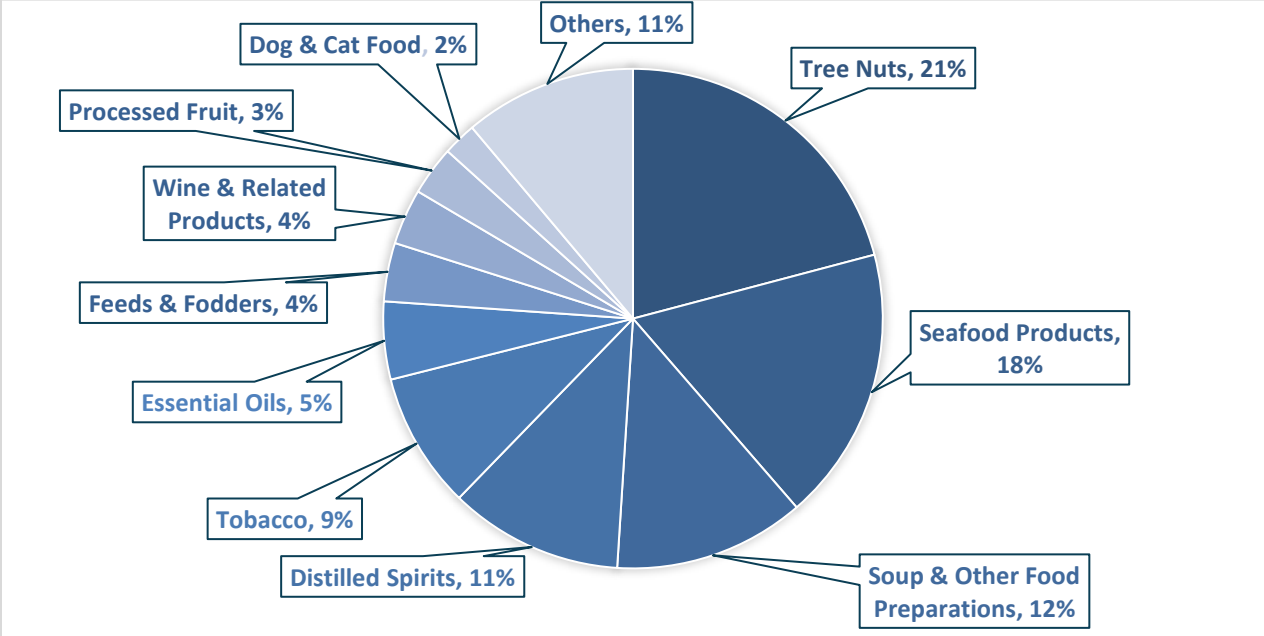
Source of Data	2021	2022	2023	2024	2025
USCB* (Direct U.S. exports to Poland)	208.1	266.9	375.5	354.6	387.0
CSO** (Direct and Indirect imports from the United States)	581.5	584.8	739.9	729.0	887.9
Difference (Indirect exports)	373.4	318.0	364.4	374.4	500.9
<i>Percentage of indirect exports in total trade volume</i>	64%	54%	49%	51%	56%

* 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

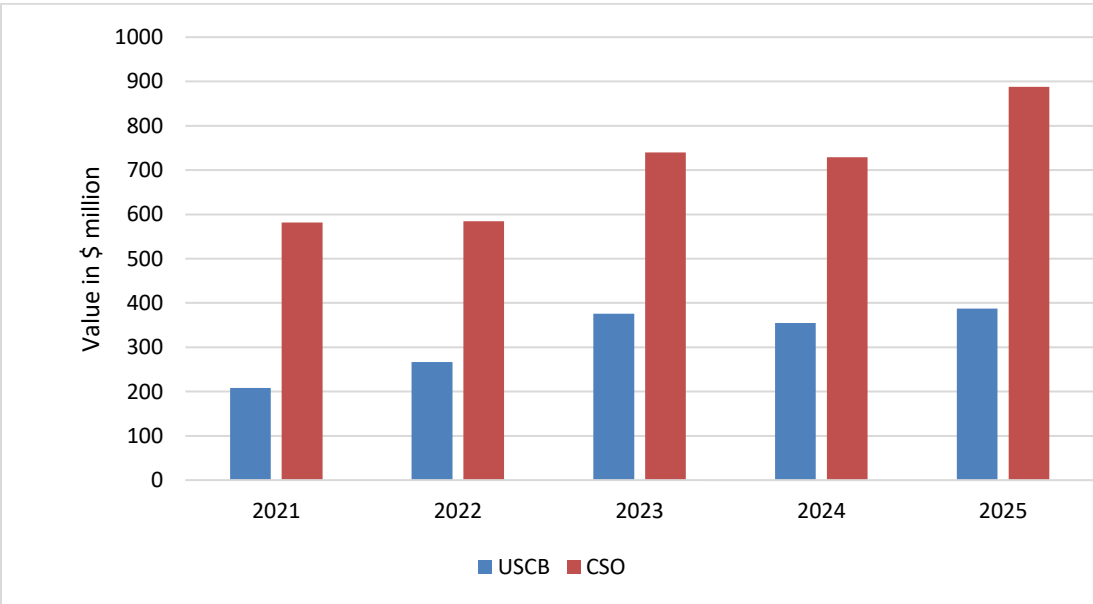
Graph 1. Top 10 U.S. Products Imported in 2025



Source: CSO

In 2025, both USCB and CSO indicated U.S. agricultural and related product sales to Poland reaching a record high. This growth was driven by higher imports of U.S. tree nuts and seafood. According to USCB, 2025 U.S. exports of agricultural and related products to Poland increased by 9 percent over 2024, while CSO reported 22 percent growth in value of Polish imports from the United States in this period (See Chart 1). The U.S. trade’s record-high levels prove that Polish consumers increasingly value agricultural and related products of U.S. origin.

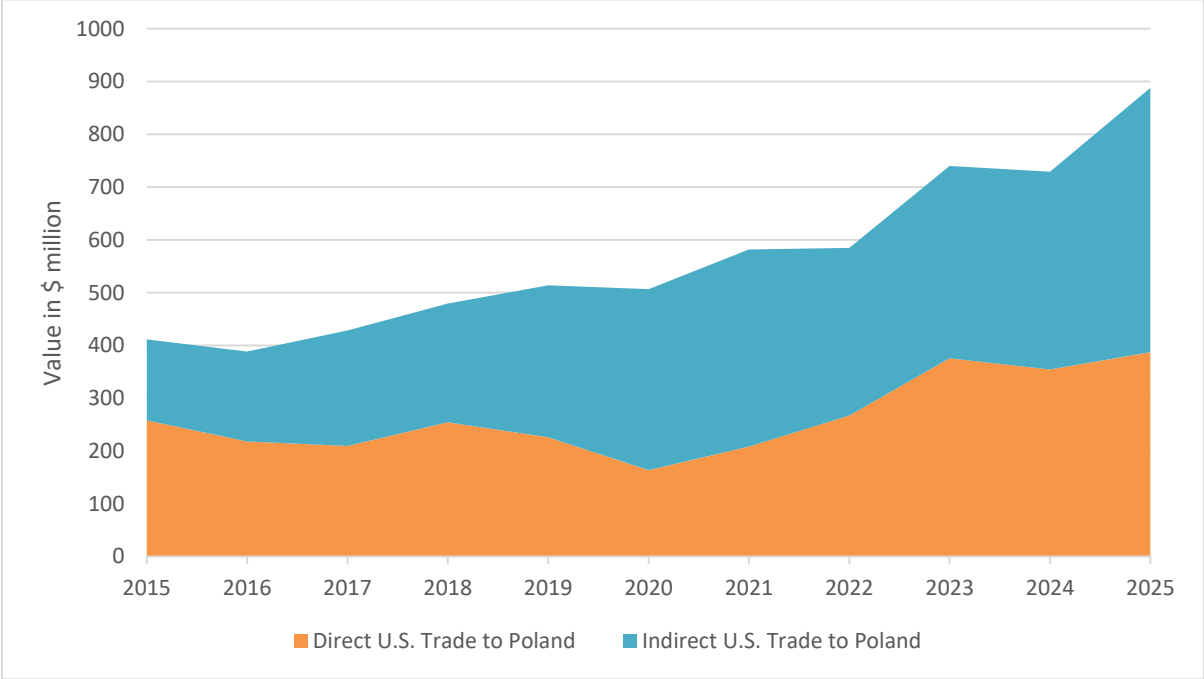
Chart 1: USCB and CSO Data on U.S. Food and Agricultural Trade to Poland (\$ million)



Source: USCB and CSO

Until 2021, values of indirect U.S. exports to Poland were constantly increasing, even with the fluctuation in direct trade values. After a drop in 2022, indirect U.S. exports to Poland started to grow again starting in 2023, reaching a record value of \$501 million by 2025. However, the share of indirect trade narrowed from 64 percent in 2020 to 56 percent in 2025 due to the increase in the total trade value and with Polish consumers seeking more American products on the domestic market (See Chart 2).

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 such as essential oils, feeds, certain bulk commodities like rice and pulses, and some non-alcoholic beverages. Both USCB and CSO record the trade data for these categories. However, indirect trade tends to be products shipped in smaller quantities, or those which 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 are more difficult for Polish importers (who may be smaller or new to the U.S. market) 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 more 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 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 product groups.

Table 2. 2025 Direct and Indirect U.S. Agricultural and Related Products 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		887,879	386,977	500,902	56%
Consumer Oriented Total		515,217	232,489	282,728	55%
	Tree Nuts	185,388	99,712	85,676	46%
	Food Preparations	109,923	58,048	51,876	47%
	Distilled Spirits	99,881	43,859	56,022	56%
	Wine & Related Products	32,008	1,413	30,595	96%
	Processed Fruit	28,329	13,408	14,921	53%
	Dog & Cat Food	19,223	2,773	16,450	86%
	Processed Vegetables	13,629	4,624	9,006	66%
	Dairy Products	4,751	2,779	1,972	42%
	Condiments & Sauces	4,063	3,192	871	21%
	Chewing Gum & Candy	3,592	543	3,049	85%
	Bakery Goods, Cereals, & Pasta	2,785	358	2,427	87%
	Chocolate & Cocoa Products	2,571	84	2,487	97%
	Other Consumer Oriented	2,536	535	2,000	79%
	Meat Products NESOI	1,914	0	1,914	100%
	Fresh Vegetables	1,022	0	1,022	100%
	Beef & Beef Products	978	193	785	80%
	Non-Alcoholic Bev. (excl. juice)	931	635	295	32%
	Fruit & Vegetable Juices	704	84	620	88%
	Fresh Fruit	333	0	333	100%
	Eggs & Products	303	108	195	64%
	Poultry Meat & Prods. (excl. eggs)	201	0	201	100%
	Nursery Products & Cut Flowers	76	123	-47	
	Beer	63	17	45	72%
	Pork & Pork Products	12	0	12	100%
Intermediate Total		116,541	71,852	44,689	38%
	Essential Oils	44,691	27,732	16,959	38%
	Other Feeds, Meals & Fodders	33,640	27,381	6,259	19%
	Industrial alcohols & fatty acids	10,258	3	10,254	100%
	Dextrins, Peptones, & Proteins	9,728	2,518	7,210	74%
	Other Intermediate Products	8,914	3,839	5,075	57%
	Planting Seeds	5,416	2,812	2,604	48%
	Milled Grains & Products	1,094	533	561	51%

Soybean Oil	995	0	995	100%
Vegetable Oils (excl. soybean)	766	372	393	51%
Sugar, Sweeteners, Bev. Bases	739	418	321	43%
Soybean Meal	134	0	134	100%
Live Animals	115	192	-77	
Hides & Skins	49	5,953	-5,904	
Oilseed meal/cake (ex. soybean)	1	0	1	100%
Distillers Grains	0	98	-98	
Agricultural Related Products	164,652	54,014	110,639	67%
Seafood Products	157,607	50,230	107,377	68%
Forest Products	7,020	3,783	3,237	46%
Biodiesel & Blends > B30	25	0	25	100%
Bulk Total	91,469	28,622	62,847	69%
Tobacco	78,248	21,752	56,496	72%
Other Bulk Commodities	5,906	2,952	2,954	50%
Pulses	3,913	2,315	1,599	41%
Rice	2,905	1,430	1,475	51%
Oilseeds (excl. soybean)	497	153	343	69%
Cotton	0	20	-20	

Other Consumer Oriented Products include tea, manufacturing tobacco, spices, and coffee.

Other Intermediate Products include animal fats, hay, ethanol (including for beverage), and other intermediate products.

Other Bulk Commodities include peanuts, corn, coarse grains, and other bulk commodities.

Source: TDM (BICO-HS6)

Indirect trade can be significant for certain commodities. This is especially true for key products, such as tree nuts, wine, pet food, beef, and seafood. (See the Appendix for top 50 U.S. imported food and agricultural products most valued in 2025 by the World Customs Organization's Harmonized System [HS] code).

For example, USCB showed \$48.1 million of U.S. pistachio in shell trade to Poland in 2025, whereas CSO valued U.S. pistachio trade to Poland at \$87.2 million. U.S. pistachios arrive in Poland mostly through German intermediaries, especially retail supply chains, as several large German retail chains are present throughout Poland.

For shelled almonds (fresh or dried), USCB data captured \$29.4 million of 2025 trade, while CSO data showed \$59.5 million of U.S. almonds. U.S. almonds were distributed to Poland through Spanish, German, and Dutch intermediaries.

USCB data indicated that 2025 U.S. grape wine (other than sparkling wine) exports to Poland were valued at almost \$1.2 million. The 2025 CSO data cited \$25.5 million of U.S. wine. In 2025, most U.S. wine traded to Poland arrived through Germany, France, and the Netherlands, explaining the significant difference between USCB and CSO data.

Simultaneously, USCB data for whiskeys showed exports valued at \$42.8 million, while CSO recorded \$81.9 million imports of U.S. whiskeys into Poland. U.S. distilled spirits arrive in Poland mostly through the Netherlands (a major hub), Germany, France, Spain, and Lithuania (with one of the leading craft products importers based in Kaunas). Polish importers are increasingly aiming to switch to direct imports from the United States, as demand in Poland increases significantly each year.

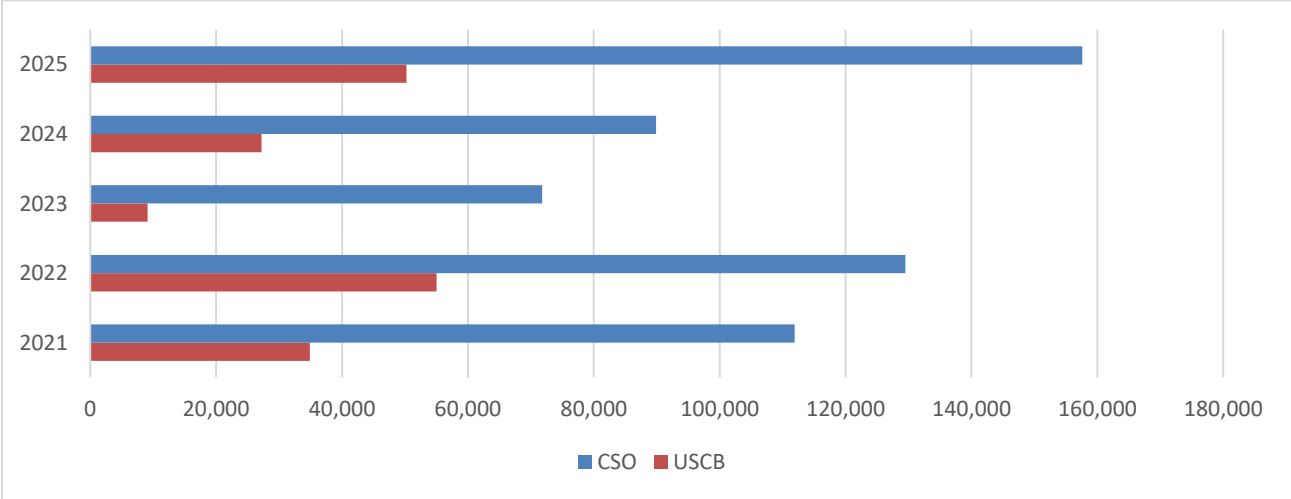
In the case of U.S. dog and cat food put up for retail sale, USCB data indicated \$2.8 million, while CSO data showed \$19.2 million. A large proportion of U.S. petfood is distributed in Poland through German intermediaries, especially through German retail supply chains.

USCB data shows 2025 U.S. beef and beef product trade to Poland at only \$0.2 million, while CSO data shows U.S. trade in 2025 valued at \$0.9 million. With the Polish market opening to high-end and alternative cuts of quality beef, U.S. products are generally purchased in smaller volumes through European intermediaries.

According to CSO, fish and seafood were among the major products traded to Poland in 2025. USCB recorded the total value of U.S. exports of fishery and seafood products at \$50.2 million, while CSO data reported \$157.6 million in 2025. While some U.S. seafood – particularly frozen sockeye salmon or flat fish – 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 data in 2025 showed \$4.7 million worth of trade of U.S. Alaska pollock (HS code 030475) to Poland, while CSO reported Alaskan pollock trade at \$49.2 million. Alaska pollock fillets arrive in Poland mainly through the Netherlands and Germany.

Poland is the largest salmon processor in the world, importing almost 95 percent of the seafood it processes. Norway, Germany, Russia, Denmark, Iceland, and the United States were Poland’s main suppliers of seafood and products in 2025. U.S. seafood imports to Poland reached record levels in 2025, increasing by 75 percent over 2024, as Polish processors increased orders from high-quality U.S. suppliers. Regardless of trade fluctuations, the value of U.S. exports of seafood to Poland has regularly been undercounted. (See Chart 3).

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. As a majority of the direct and indirect U.S. trade is covered by HS code 03 (fish and crustaceans, mollusks, and other aquatic invertebrates), the code can illustrate how CSO and USCB capture U.S. exports of fish and fishery products to Poland. The comparison indicates that nearly 70 percent of U.S. exports were underestimated by USCB data in 2025 (See Table 3).

Table 3. U.S. Fish and Seafood Traded to Poland 2021-2025 (\$ 1,000)

HS Code	Description	Data Source	2021	2022	2023	2024	2025
03	fish and crustaceans, molluscs, and other aquatic invertebrates	CSO	111,693	129,426	71,728	89,736	156,630
		USCB	34,568	53,081	7,135	25,397	46,558
0301	fish, live	CSO	12	26	49	51	51
		USCB	22	29	31	51	39
0302	fish, fresh or chilled, excluding fish fillets and other fish meat without bones; fish livers and roes, fresh or chilled	CSO	96	0	235	0	0
		USCB	0	0	0	85	3
0303	fish, frozen, excluding fish fillets and other fish meat without bones; fish livers and roes, frozen	CSO	62,582	69,291	33,112	40,089	84,994
		USCB	32,486	48,750	4,156	24,173	39,884
0304	fish fillets and other fish meat (whether or not minced), fresh, chilled or frozen	CSO	48,771	59,379	37,717	49,272	71,319
		USCB	2,059	4,303	2,930	1,089	6,574
0305	fish, dried, salted or in brine; smoked fish; fish meal fit for human consumption	CSO	88	645	523	244	2
		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 and pellets for human consumption	CSO	17	50	45	48	69
		USCB	0	0	10	0	37
0307	molluscs, live, fresh, chilled, frozen, dried, salted or in brine; smoked; flours, meals and pellets, fit for human consumption	CSO	122	30	40	24	194
		USCB	0	0	8	0	21
0308	aquatic invertebrates other than crustaceans and molluscs, live, fresh, chilled, frozen, dried, salted/ in brine; smoked; edible flours, meals and pellets	CSO	6	5	8	7	1
		USCB	0	0	0	0	0

Source: USCB and CSO

As with many other products, seafood deliveries clear customs in Western Europe. As a result, Poland is not recorded as their final destination. Therefore, 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 2025, 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	887,879	386,977	500,902	56%
1	210690	Food preparations nesoi	109,888	58,048	51,840	47%
2	080251	Pistachios, in shell, fresh or dried	87,241	48,125	39,116	45%
3	220830	Whiskies	81,933	42,828	39,105	48%
4	240120	Tobacco, partly or wholly stemmed/stripped	76,911	20,811	56,100	73%
5	080212	Almonds, fresh or dried, shelled	59,496	29,373	30,123	51%
6	030311	Sockeye salmon (red salmon) (oncorhynchus nerka), frozen	56,848	33,252	23,596	42%
7	030475	Alaska pollock (theragra chalcogramma)	49,201	4,709	44,493	90%
8	230990	Animal feed preparations (mixed feeds, etc.), other than dog or cat food put up for retail sale	31,566	27,381	4,185	13%
9	330210	Mixtures of odoriferous substances and mixtures (including alcoholic solutions) with a basis of these substances used in	27,294	27,556	-262	

		the food or drink industries				
10	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	25,476	1,185	24,291	95%
11	030312	Pacific salmon (oncorhynchus gorbuscha, keta, tschawytscha, kisutch, masou and rhodurus), frozen, nesoi	21,921	2,940	18,981	87%
12	080252	Pistachios, shelled, fresh or dried	21,400	2,459	18,941	89%
13	200893	Cranberries (vaccinium macrocarpon, vaccinium oxycoccos); lingonberries (vaccinium vitisidaea)	19,611	6,628	12,983	66%
14	230910	Dog and cat food, put up for retail sale	19,223	2,773	16,450	86%
15	330129	Essential oils, nesoi	13,475	78	13,397	99%
16	200290	Tomatoes, other than whole or in pieces (including paste and puree), prepared or preserved otherwise than by vinegar or acetic acid	10,092	3,970	6,122	61%
17	030481	Pacific salmon (oncorhynchus nerka, gorbuscha, keta, etc.), atlantic salmon (salmo salar) and danube salmon (hucho hucho) fillets, frozen	9,643	0	9,643	100%

18	382370	Industrial fatty alcohols	9,548	0	9,548	100%
19	220840	Rum and tafia	9,379	0	9,379	100%
20	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)	8,623	2,611	6,012	70%
21	030495	Fish of the families bregmacerotidae, eulichthyidae, gadidae, macrouridae, melanonidae, merlucciidae, moridae and muraenolepididae, other than alaska pollock (theragra chalcogramma)	5,273	0	5,273	100%
22	030339	Flat fish, nesoi, excluding fillets, livers and roes, frozen	5,270	1,648	3,622	69%
23	220870	Liqueurs and cordials	5,115	39	5,075	99%
24	080232	Walnuts, fresh or dried, shelled	4,766	4,479	287	6%
25	220510	Vermouth and other wine of fresh grapes flavored with plants or aromatic substances, in containers holding 2 liters or less	4,305	0	4,305	100%
26	350400	Peptones and derivatives; other proteins and derivatives, nesoi;	4,115	23	4,092	99%

		hide powder, chromed or not				
27	051110	Bovine semen	4,040	2,968	1,072	27%
28	120991	Vegetable seeds for sowing	4,034	1,078	2,956	73%
29	071333	Kidney beans, including white pea beans (phaseolus vulgaris), dried shelled, including seed	3,825	1,634	2,191	57%
30	440131	Wood pellets	3,766	0	3,766	100%
31	081320	Prunes, dried	3,660	3,865	-206	
32	170490	Sugar confectionary (including white chocolate), not containing cocoa, nesoi	3,566	509	3,057	86%
33	030494	Alaska pollock (theragra chalcogramma)	3,519	369	3,150	90%
34	210390	Sauces and preparations therefor, nesoi; mixed condiments and mixed seasonings	3,407	3,159	248	7%
35	110630	Flour, meal and powder of the products of chapter 8	3,367	0	3,367	100%
36	350220	Milk albumin, including concentrates of two or more whey proteins	3,358	0	3,358	100%
37	200819	Nuts (other than peanuts (ground- nuts)), and other seeds, including mixtures, prepared or preserved, nesoi	3,305	527	2,778	84%
38	210610	Protein concentrates and textured protein substances	3,049	2,241	808	26%
39	100630	Rice, semi-milled or wholly milled,	2,903	1,430	1,473	51%

		whether or not polished or glazed				
40	071420	Sweet potatoes, fresh or dried, whether or not sliced or in the form of pellets	2,728	0	2,728	100%
41	350510	Dextrins and other modified starches	2,564	250	2,314	90%
42	120241	Peanuts, in shell, other than seed	2,424	2,006	418	17%
43	230310	Residues of starch manufacture and similar residues, whether or not in the form of pellets	1,840	0	1,840	100%
44	050400	Animal guts, bladders and stomachs (other than fish), whole and pieces thereof, fresh, chilled, frozen, salted, in brine, dried or smoked	1,730	0	1,730	100%
45	180690	Cocoa preparations, not in bulk form, nesoi	1,653	84	1,569	95%
46	051199	Animal products, nesoi; dead horses and other equine animals, bovine animals, sheep, goats and poultry, unfit for human consumption, nesoi	1,485	0	1,485	100%
47	220860	Vodka	1,420	183	1,237	87%
48	240130	Tobacco refuse (waste)	1,337	941	396	30%
49	350300	Gelatin (including gelatin in rectangular or square sheets) and gelatin derivatives; isinglass; other glue of animal origin (except casein glue) nesoi	1,283	0	1,283	100%
50	220850	Gin and geneva	1,245	808	437	35%

Attachments:

No Attachments.