

Poland.

Agri-food industry Poland. Japan

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Characteristics of the agri-food industry

The Agri-food industry in Poland

Poland is among the biggest European food producers. Over the past 15 years, the country has considerably improved its effectiveness and added value in the agricultural industry at current prices.

As regards cereals, in 2022 Poland accounted for 12.9% of the EU production, with potatoes at 12.7%, carrots at 14%, cucumbers at 18.8%, apples at 34%, poultry at 21%, and cheese at 9%. Poland also has a considerable share in the EU processing of food and beverage production.

Polish employees account for 9.9% of EU inhabitants employed in that sector, and the share of Poland in the resulting added value is 5.7%.

In terms of net exports of agricultural, food and beverage products, Poland (with €12.5 billion in trade surplus) ranks third in the European Union, as a runner up to the Netherlands (€35.5 billion in surplus) and Spain (€15.1 billion).

Polish agriculture is mainly based on family-owned farms, where human work is a major factor of production. The level of technical equipment of the farms is below the European Union's average.

The share of organic crops in Poland in total crops is just below 4.



Characteristics of the agri-food industry

The agri-food industry in Japan

The progressing drop in the crop area over the past decades combined with the shortage of workforce in agriculture and the dietary changes have contributed to the increased imports of foods to Japan.

In 2022 Japan's self-sufficiency in terms of food stood at a mere 38% in terms of caloric content and 58% in terms of production value.

The import indicators for products such as potatoes, fruit, beef, plant oils, dairy and milk products have been growing since the demand exceeds domestic production capacity.

When it comes to fruit and vegetables, the import indicators increase despite the drop in consumption per inhabitant, since the production falls even faster.

As regards products such as beef or dairy, consumption grows and drives imports.

Development trends of the Japanese agri-food industry

Besides the rapid development of technologies and their impact on the development of agriculture and the food industry, changes in consumer behaviour and purchasing preferences have been noticed in Japan. Greater significance has been attached to sustainable food, in line with global trends, with decreased consumption of plant-based food and fish. Meanwhile, the consumption of bread, dairy products, fats and food of animal origin has been increasing, which points to the westernization of the diet in that country. The popularity of RTD, ready to drink beverages, has been on the rise.

Development trends

Development trends and challenges for the Polish agri-food industry

In Poland, the sustainable agriculture trend has been on the rise, especially in the Dolnośląskie, Kujawsko-Pomorskie, Łódzkie, Mazowieckie, Opolskie, Podlaskie, Warmińsko-Mazurskie, Wielkopolskie, Świętokrzyskie and Zachodniopomorskie voivodeships. The factors determining it include:



Growing demand for food (by 2050, the production of virtually all popular cereals, sugar, soybeans and cassava is expected to increase);



Growing demand for organic products; changes in food preferences and consumers moving away from certain categories, such as meat;



development of modern, environmentally-friendly fertilizers;



growing awareness of environmental protection and the need to rationalize the use of natural resources in crops



legal regulations

Export from Poland

Meat and edible offal accounted for the largest share of global exports of agri-food products from Poland in 2023 (14% in the category of agri-food products); followed by tobacco and manufactured tobacco substitutes (10% in the category of agri-industrial products) and preparations of cereals, pastrycooks products (9% in the category of agri-industrial products).

From 2019 to 2023, the export of agri-food products from Poland grew by 63%. The largest increases in 2023 were recorded for categories such as cereals, products of plant origin, fats and oils, although this could be affected by the import of such products from Ukraine and their subsequent re-export. For categories such as trees, plants, flowers and live animals, a drop in exports was recorded in the researched period from 2019 to 2023.

Export from Japan

Fish and crustaceans accounted for the largest share of global exports of agri-food products from Japan in 2023 (19% in the category of agri-food products); followed by miscellaneous edible preparations (19% in the category of agri-industrial products) and beverages, spirits and vinegar (16% in the category of agri-industrial products).

From 2019 to 2023, the export of agri-food products from Japan grew by 15% on average. In 2023, the highest increases were recorded in categories such as dairy products, eggs, natural honey, fats and oils, and beverages, spirits and vinegar. For categories such as seeds and oil plants, products of plant origin or meat or fish processed products a drop in exports was recorded in the researched period from 2019 to 2023.





The structure of export and import of agri-food products

Import to Poland

Residues and waste from the food industries; prepared animal fodder accounted for the largest share of global imports of agri-food products to Poland in 2023 (11% in the category of agri-food products); followed by fish and crustaceans (9% in the category of agri-industrial products) and fruit and nuts (8% in the category of agri-industrial products). From 2019 to 2023, the import of agri-food products to Poland grew by 57%. The largest increases in 2023 were recorded for categories such as preparations of cereals, pastrycooks' products, fats and oils, and products of the milling industry, although this could be affected by the import of such products from Ukraine.

Import to Japan

Meat and edible offal accounted for the largest share of global imports of agri-food products to Japan in 2023 (13% in the category of agri-food products); followed by fish and crustaceans (13% in the category of agri-industrial products) and cereals (11% in the category of agri-industrial products). From 2019 to 2023, the global import of agri-food products to Japan grew by less than 3%. In 2023, the highest increases were recorded in categories such as products of plant origin, sugars and sugar confectionery, and products of the milling industry. For categories such as tobacco and manufactured tobacco substitutes; products of animal origin and trees, plants, flowers, a drop in exports was recorded in the researched period from 2019 to 2023.

Export of agri-food products from Poland to Japan

From 2019 to 2023, the export of agri-food products from Poland to Japan fell by 6% from \$113,908,000 to \$106,837,000. Meat and edible offal accounted for the largest share of export of agri-food products from Poland to Japan in 2023 (33% in the category of agri-food products); followed by preparations of vegetables and fruit (14% in the category of agri-industrial products) and products of animal origin (11% in the category of agri-industrial products), in USD 000s. In 2023 the highest increases were recorded in categories such as cereals, live animals, and products of the milling industry. For categories such as preparations of meat or of fish; dairy products, eggs, and natural honey, a considerable drop in export was recorded in the researched period from 2019 to 2023.

Import of agri-food products to Poland from Japan

From 2019 to 2023, the import of agri-food products to Poland from Japan fell by 47% from \$8,351,000 in 2019 to \$4,446,000 in 2023. Coffee, tea, and spices accounted for the largest share of global exports of agri-food products from Japan in 2023 (25% in the category of agri-food products); followed by beverages, spirits and vinegar (15.6% in the category of agri-industrial products) and miscellaneous edible preparations (14% in the category of agri-industrial products), in USD 000s. In 2023, the highest increases were recorded in categories such as cereals, meat and edible offal. For categories such as tobacco and manufactured tobacco substitutes; preparations of meat or of fish, dramatic drops were recorded in the researched period from 2019 to 2023 and the import of such categories was virtually non-existent.

The structure of export and import of agri-food products



THE POLISH EXPORT HITS IN 2023

MEAT OF BOVINE ANIMALS, FROZEN

PRODUCTS
CONTAINING TABACCO

FEATHERS USED FOR STUFFING AND DOWN

THE JAPANESE EXPORT HITS IN 2023

TEA

VEGETABLES WAXES, BEESWAXES
AND OTHER INSECT WAXES

FRESH ORCHILLED BONELES BEEF

The foreign trade balance of Poland in the category of agri-food products total is positive.. In 2023, the balance increased by 22% compared to the previous year (but the impact of the trade in grains and related products on statistics should be taken into account).

The foreign trade balance of Japan over the entire researched period demonstrates a very strong deficit, which points to the massive import potential of that country when it comes to agri-food products.

In 2023, the trade balance between Poland and Japan was basically at the same level as in 2019.

The leading category in the export of products from Poland to Japan is meat and edible offal (33% of exports of agri-food products to Japan in 2023), with the meat of bovine animals, frozen accounting for the most.

While watching the structure of global imports of meat and edible offal to Japan we

can see that it is dominated by the import of swine meat (40% in the entire meat category), the meat of bovine animals, fresh or chilled (16%) and the meat of bovine animals, frozen (14%), meat and edible offal of fowls (14%).

The analysis of global exports of meat and edible offal from Poland demonstrates that meat and poultry offal accounted for 55% of Polish export of meat and edible offal in 2023, the export of the meat of bovine animals, fresh or chilled 22% and the meat of swine 11%.

The structure of the Japanese imports and the Polish exports in the category of meat and edible offal demonstrates that categories without a major share in the Japanese import which have a potential and should be promoted as Polish export products include the meat of swine, the meat of bovine animals, fresh or chilled, and meat and edible offal of fowls.



The directory of Polish agri-food companies, which have been present in the Japanese market or have the potential to enter the Japanese market

Table below includes a directory of Polish agri-food companies, which have been present in the Japanese market or have the potential to enter the Japanese market. The following criteria were applied in the selection of enterprises:

- majority of the Polish capital, modern company (organisation, technology), medium-sized, business experience, exporter / potential exporter (company selection: if it meets at least two of the above criteria);
- the company is listed as one of 1,700 largest food companies in Poland (portalspozywczy.pl);
- selection of a company from the first several hundred companies, out of the groups of Polish Classification of Activities, Section PKD 10 Manufacture of food products when there is an online mention that the company exports its products or

when the description of the company suggests that the company may expand into international markets;

- members of the National Food Industry Group: the selection included companies which are members of the National Food Industry Group, which are manufacturers and which export their goods. Rynkometr.pl was used to identify companies (Rynkometr is a knowledge base about the Polish economy and the businesses, as well as the largest publicly available financial ranking of Polish companies. The website presents enterprises by the PKD, or the Polish Classification of Activities);
- public listed companies from the agri-food industry – the list includes companies with recent high share quotations.



Catalogue of the Companies in the agri-food industry which are the leaders in the processing of meat, grain, fruit and vegetables and fish

| No. | Company | Production structure | Export – geographical destinations | Representative offices abroad/ Other forms of presence in the foreign market | Company details included in generally available lists that present companies operating in Poland - |
|-----|---|--|--|---|--|
| 1 | <p>Zakład Przemysłu Mięsnego BIERNACKI Sp. z o. o.</p> <p>Poland, Jarocin, Wielkopolskie Voivodeship</p> <p>Processing and preserving of meat, excluding poultry meat (PKD 10.11.Z) (ZPMB 9)</p> <p>100% Polish capital (ZPMB 7)</p> | <p>The company offers:</p> <ul style="list-style-type: none"> - bovine half-carasses and quarters - beef meat, - beef offal, - beef fat, - beef elements. (ZPMB 1) <p>CERTIFICATES</p> <p>The implementation of the HACCP standards that attest to high quality of production, health safety, the IFS, BRC, Halal, and Kosher standards and the award of the HALAL certificates</p> <p>The HALAL certificate (which attests that the product complies with the requirements of Islamic law on the production, packaging and storage of products, IFS (International Food Standard) and BRC (confirms compliance with the requirements and standards of food safety). (ZPMB 3,4,5,6,8)</p> | <p>In May 2003, the Company received a positive opinion from the National Veterinarian and was listed as a company authorised to export its products to EU Member States. (ZPMB 2)</p> <p>2015 - first shipment of products to Japan and Hong Kong. (ZPMB 3)</p> | <p>Expansion of international channels of distribution – Asian market. (ZPMB 3)</p> | <p>List of 1,700 largest food companies in Poland, rank 50, (A)</p> |

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| 2 | <p>Zakłady Drobiarskie Koziegłowy Sp. z o.o. Poland, Koziegłowy, Wielkopolskie Voivodeship</p> <p>Processing and preserving of poultry meat,</p> <p>PKD 10.12.Z</p> <p>100% Polish capital (ZDK 1)</p> | <p>Company's production profile: - Purchase and slaughter of chickens and turkeys; - Production of chilled and frozen chicken and turkey carcasses - Production of chilled and frozen chicken and turkey elements; - Production of mechanically deboned poultry meat; - Production of poultry cold cuts based solely on own raw materials. (ZDK 5). The company offers chilled and frozen raw chicken meat. The company sells its products under its own brand as well as under the retail chain private labels. All products are HALAL certified. (ZDK 1,2)</p> <p>The company also offers prepared chilled foods under its own brand, Selected for you. (ZDK 3) Frozen ready-made meals include battered, roasted, moulded and whole-muscle products. The meals are HALAL certified (ZDK 4) Besides the HALAL certificate, the company holds certificates that attest to the highest quality of products, such as the IFS certificate. (ZDK 5)</p> | <p>In order to keep such high positioning among the top European poultry companies, we constantly develop and improve our standards at each of our activity levels. (ZDK 1)</p> | <p>List of 1,700 largest food companies in Poland, rank 128 (A)</p> |
| 3 | <p>LST Polska Sp. z o. o. Poland, Nałęczów, Lubelskie Voivodeship</p> <p>Other processing and preservation of fruit and vegetables (PKD 10.39.Z) (LST 1)</p> | <p>The company produces frozen fruit. It also produces freeze-dried products (freeze-dried, water-free). Freeze-dried products retain their nutritional value and vitamins (LST 2). The range of products includes frozen strawberries, raspberries, black and red currants, rhubarb, elderberries, chokeberries, wild strawberries, forest berries, blackberries, cherries, blueberries, and gooseberries. Freeze-dried products include mainly strawberries, raspberries and currants (LST 3.4). The company holds certificates which confirm the highest quality of the product at all stages of production. (LST 5)</p> | <p>The company exports its products mainly to the European countries. The company has been also expanding its exports to the United States, Canada, Japan, New Zealand, Israel, and Thailand (LST 2).</p> | <p>List of 1,700 largest food companies in Poland, rank 441 (A)</p> |

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| 4 | <p>Okręgowa Spółdzielnia Mleczarska Poland, Włoszczowa, Świętokrzyskie Voivodeship</p> <p>Dairy processing and cheese making (PKD 10.51.Z) (WŁ 6)</p> <p>Only citizens of the Republic of Poland are the shareholders of the cooperative. (WŁ 5)</p> | <p>The Włoszczowa Cooperative manufactures Swiss and cottage cheeses, bread cheeses, sour cream and curd. (WŁ 1)</p> <p>The company produces butter, yogurts, creams, milk drinks. (WŁ 2)</p> <p>The company holds an ISO certificate confirming the high quality of products (WŁ 4), and also holds HACCP and BRC certificates. (WŁ 3)</p> | <p>OSM Włoszczowa is licensed to export to the EU and third countries. (WŁ 3) The company exports its products to EU Member States, Russia, Ukraine and the Balkan countries. It also exports its products to Israel, and follows strict kosher rules in the manufacturing process of such products. (WŁ 1)</p> | <p>List of 1,700 largest food companies in Poland, rank 124 (A)</p> |
| 5 | <p>Przedsiębiorstwo Produkcji Lodów Koral Spółka Jawna Poland, Limanowa, Małopolskie Voivodeship</p> <p>Manufacture of ice cream</p> <p>PKD 10.52.Z (KO 4)</p> <p>Shareholders of the company are Polish citizens. (KO 3)</p> | <p>PPL Koral is the largest ice cream manufacturer in Poland and one of the largest in Europe. Koral manufactures more than 400 kinds of ice cream. It owns the Koral and Bracia Koral – Lody Jak Dawniej brands. In cooperation with other companies, Koral manufactures ice cream under popular brands, such as Łaciate, Wypasione and Oshee. The range of products includes impulse ice cream on a stick, ice cream in a cone, ice cream in cups, squeeze-ups, ice cream sandwiches and a wide range of family-sized frozen desserts. The company has won multiple awards, distinctions and medals. (KO 1)</p> | <p>EU Member States (KO 1)</p> <p>The company sells ice cream through its own and third party network of distributors and wholesalers throughout Poland and EU Member States. (KO 1)</p> <p>The company has its representative offices run by domestic companies in Hungary, Great Britain, Ireland, Slovakia, the Czech Republic and Lithuania. (KO 2)</p> | <p>List of 1,700 largest food companies in Poland, rank 125. (A)</p> |

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| 6. | <p>Podlaskie Zakłady Zbożowe S.A. Poland, Białystok</p> <p>Production of cereal milling products</p> <p>PKD 10.61.Z (PZZ 6)</p> <p>100% share of Polish capital (PZZ 2)</p> | <p>The company is one of the largest grain milling enterprises in Poland (PZZ 2). PZZ manufactures groats, flours, bread mixes and flakes. (PZZ 3) The company is also a pea manufacturer. The new Podlaskie Młyny brand offers flour from organic crops (PZZ 4). The company mills are equipped with entoleters to control all forms of pests. (PZZ 1) The company holds a BRC 8 international food safety and quality certificate (PZZ 2) and other necessary certificates, including HALAL and kosher certificates. (PZZ 5)</p> | 1,500 Worldwide customers (PZZ 1) | List of 1,700 largest food companies in Poland, rank 538 (A) |
| 7 | <p>ZPC Flis Spółka Jawna Poland, Kuranów, Mazowieckie Voivodeship</p> <p>Manufacture of rusks and biscuits; manufacture of preserved pastry goods and cakes (PKD 10.72. Z) (FLIS 1)</p> | <p>ZPC Flis is a waffle and roll manufacturer.</p> <p>The company offers flat wafers, filled wafers, sugar wafer rolls and filled wafer rolls. (FLIS 3, 4)</p> <p>Since 2005 the Company has used non-trans fats in its products.</p> <p>The company has implemented and maintained the IFS (International Food Standard) system. (FLIS2)</p> | Its products are available in countries such as: Russia, Azerbaijan, Germany, France, Italy and Slovakia. (FLIS 2) | List of 1,700 largest food companies in Poland, ranked 410 |
| 8 | <p>Przedsiębiorstwo Zbożowo-Młynarskie "PZZ" w Stośławiu S.A. Poland, Mścice, Zachodniopomorskie Voivodeship</p> <p>Production of cereal milling products</p> <p>PKD 10.61.Z (PZMS 3)</p> | <p>The company deals in contracting, the purchase of cereals, storage, preservation and trade in cereals, as well as the processing and sale of products under the Młyny Stośław brand and by-products of grain milling. (PZMS 2) Processing operations are carried out on site in Stośław, where a modern mill and silo facility is located. (PZMS 5) The company holds certificates which confirm that the production process runs in accordance with quality and health safety requirements. (PZMS 4)</p> | The company sells domestically and abroad, and exports its products, among others, to the United Kingdom, the Netherlands, Germany and Greece. (PZMS 2) | National Food Industry Group https://www.kgssa.pl/113,spolki |

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| 9 | <p>Przedsiębiorstwo Przemysłu Ziemniaczanego - PPZ Trzemeszno Sp. z o.o.</p> <p>Poland, Trzemeszno, Wielkopolskie Voivodeship</p> <p>Manufacture of starches and starch products (PKD 10.62.Z) (PPZT 1)</p> | <p>PPZ TRZEMESZNO Sp. z o. o. is the largest manufacturer of potato starch and feed potato protein in Poland. Potatoes for processing are purchased based on contracts signed with the planters. (PPZT 3)</p> | <p>Our customers are the largest production and trading companies in Poland and numerous international companies from Europe and all around the world. (PPZT 2,3)</p> | <p>Production of potato starch under distributor's private labels (PPZT 4)</p> <p>National Food Industry Group https://www.kgssa.pl/113.spolki</p> <p><u>Does it also include private labels of international distributors?</u></p> |
| 10 | <p>Fabryka Cukierków "Pszczółka" Sp. z o. o.</p> <p>Poland, Lublin, Lubelskie Voivodeship</p> <p>Manufacture of cocoa, chocolate and sugar confectionery,</p> <p>PKD 10.82.Z (FCP 1)</p> <p>100% Polish company (FCP 3).</p> | <p>FC "Pszczółka" manufactures chocolate candies, pralines, jellies, hard and filled caramel candy. "Pszczółka" uses natural juices, natural flavours, nuts and dried fruit, fine chocolate and Polish sugar to manufacture its candy. The company is entirely gluten-free and holds the Crossed-Out Ear certificate (FCP 2). The company holds ISO 22000, BRC and ISF certificates. (FCP 3)</p> | <p>Exports to EU Member States are being developed and acquisition activities are being carried out in Middle Eastern countries. "Pszczółka" Sp. z o.o. sells its products to more than 20 countries worldwide. The main buyers are Slovakia, Azerbaijan, Lithuania, Hungary and Germany. "Pszczółka" sends its products to the US, Sweden, Dubai, Romania, Mongolia, Cyprus, Czech Republic, Jordan and Russia. (FCP3)</p> | <p>"P s z c ó ł k a " Candy Factor of Lublin has reached an agreement with Lulu International Group of the United Arab Emirates to ship test containers of sweets. (FCP 4)</p> <p>National Food Industry Group https://www.kgssa.pl/113.spolki</p> |
| 11 | <p>Kapitan Navi Elżbieta Stramek i Waldemar Karpiński Spółka Jawna</p> <p>Poland, Trzebiatów, Zachodniopomorskie Voivodeship</p> <p>Processing and preserving of fish, crustaceans and molluscs (PKD 10.20.Z) (KNES 1)</p> | <p>The company specialises in the production of pickled and fried herrings in vinegar, oil and cream brines as well as salted herrings in oil and salt brine. (KNES 2)</p> <p>The company holds the following certificates: IFS and MSC (Marine Stewardship Council) (KNES 2, 3).</p> | <p>Herring is delivered to the EU Member States markets. (KNES 2)</p> | <p>List of 1,700 largest food companies in Poland, rank 536 (A)</p> |

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| 12 | <p>Zakłady Mięsne Łuków S.A. Poland, Łuków, Lubelskie Voivodeship</p> <p>Processing and preserving of meat, excluding poultry meat (PKD 10.11.Z) (ZMŁ 1)</p> | <p>The company operates in the field of purchase and slaughter of live cattle and pigs; cutting, distribution of beef and pork; production of cold cuts, canned beef and pork. (ZMŁ 3) C brands:</p> <p>Łuków z Natury od Serca, Śmiłowo (ZMŁ 5,6)</p> <p>The company's products have won awards and prizes at trade fairs and competitions. (ZMŁ 4)</p> <p>The company holds quality and health safety certificates. (ZMŁ 2)</p> | <p>EU Member States.</p> <p>The company holds rights to export its products 37 non-EU countries (including the United States, Canada, and Japan). (ZMŁ 7)</p> | <p>The company participates in all the most important international trade fairs for the meat and food sectors. (ZMŁ 7)</p> <p>List of 1,700 largest food companies in Poland, rank 84 (A)</p> |
| 13 | <p>Zakłady Tłuszczowe "Bielmar" Sp. z o.o. Poland, Bielsko Biała, Śląskie Voivodeship</p> <p>Manufacture of margarine and similar edible fats (PKD 10.42.Z) (ZTB 1)</p> <p>Polish company, employee-owned company (ZTB 7)</p> | <p>The company produces rapeseed margarine with various fat content and for various purposes, rapeseed oil, and feed as a by-product of oil production. (ZTB)</p> <p>The registered office of the Company is located in Bielsko-Biała, where rapeseed storage facilities, a modern oil crushing plant, a refinery, margarine plant and a logistics base are located. (ZTB 3)</p> <p>The Company's brands and logos vary depending on the shape of the product packaging. (ZTB 2) The certificates held by the company confirm that the company manufactures its products in line with the principles of food safety and compliance with hygiene regimes. (ZTB 4,5)</p> | <p>A small share of export revenues in total revenues. (ZTB 7)</p> | <p>List of 1,700 largest food companies in Poland, rank 173 (A)</p> |
| 14 | <p>Unifet Sp. z o.o. Poland, Gliwice, Śląskie Voivodeship</p> <p>Manufacture of margarine and similar edible fats (PKD 10.42.Z) UNIFET 3)</p> | <p>Unifet is a renowned producer of fats for confectionery and baking. (UNIFET 1) The company manufactures confectionery margarine, cream margarine, liquid margarine, butter-added margarine and other types of margarine. (UNIFET 2, 4) The company offers standard and non-standard fats tailored to individual customer requirements. Production is carried out in accordance with international standards. (UNIFET 1) All Unifet® products meet the highest standards developed for food producers. (UNIFET 5) The company received the Business Gazelle award three times, each time ranking high. UNIFET 4)</p> | <p>The company has introduced numerous new products to the Polish and European markets.</p> <p>It exports its products to 17 European countries. (UNIFET 1)</p> | <p>List of 1,700 largest food companies in Poland, rank 432 (A)</p> |

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| 15 | Victoria Cymes Sp. z o.o. Poland, Wałcz, Zachodniopomorskie Voivodeship | The company manufactures fruit and vegetable juices, smoothies (mixed fruit drinks, lemonades, syrups, water, fresh juices, syrups with food supplements, mustards. | VICTORIA CYMES products are sold in Germany, the Netherlands, the Czech Republic, Ireland, Latvia, Lithuania, Estonia, Croatia, Russia, the United States, Fiji, Ukraine and the United Kingdom. (VC 3) | Victoria Cymes cooperates with international corporations and local companies. (VC 4) | List of 1,700 largest food companies in Poland, rank 370 (A) |
| | 100% Polish capital (VC 4) | The company offers approximately 160 products. (VC 2). | | | |
| | Production of fruit and vegetable juices (PKD 10.32. Z) (VC 1) | The company also manufactures juices and other products under Private Labels and offers its products with the logos of Cymes trading partners. The company operates equipment to ensure that the production process is carried out in accordance with the HPP technology (High Pressure Processing). (VC 5) | | | |
| | | The stages of production processes are organised and are run in accordance with the EU requirements. The company holds the IFS FOODS certificate. (VC 5) | | | |
| 16 | Czarnieckie Makarony Sp. z o.o. Poland, Czarniec, Śląskie Voivodeship | The company offers 38 types of pasta: 5 egg pasta, pressed pasta, rolled pasta, eggless pasta made from 100% semolina and pasta with added fibre. (CM 3) | Our pasta is available almost everywhere in Poland and abroad, in countries such as Great Britain, or the United States. (CM 2) | | List of 1,700 largest food companies in Poland, ranked 481(A) |
| | Manufacture of macaroni, noodles, couscous and similar farinaceous products (PKD 10.73.Z) (CM 1) | The company runs a modern laboratory where the quality of produced pasta is regularly tested. The company also holds a BRC certificate. The company meets both IFS Food requirements at the higher level and the Global Standard for Food Safety. (CM 4) | | | |

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|----|--|---|---|---|--|
| 17 | <p>P.P.U.H. Woseba Sp. z o.o. Poland, Odolany, Wielkopolskie Voivodeship</p> <p>Processing of tea and coffee (PKD 10.83.Z) (WOS 2)</p> <p>Polish company (WOS 5)</p> | <p>WOSEBA is a coffee roasting plant which offers a wide range of high quality whole bean, ground and instant coffees. (WOS 5).</p> <p>The company holds certificates which confirm that the production process runs in accordance with quality and health safety requirements. (WOS 6)</p> | <p>Woseba stops sales of coffee to Russia (1922) (WOS 3)</p> | <p>The potential of export development: high quality of products, modern process, high quality of raw materials, and the traditional way of roasting coffee in drum roasters. (WOS 4)</p> | <p>Rynkometr.pl https://www.rynkometr.pl/inne/o-serwisie (WOS 1)</p> |
| 18 | <p>Helio SA Poland, Wyględy, Mazowieckie Voivodeship</p> <p>Other processing and preservation of fruit and vegetables (PKD 10.39.Z) (H 2)</p> <p>The company shares have been listed on the Warsaw Stock Exchange since 2007. (H 7)</p> | <p>The company specialises in the production and sales of dried nuts and fruit. The HELIO manufacturing facility is one of the most modern and largest in the dried fruit and nut industry in Europe. (H 4) The company manufactures microwave popcorn and cake mixes. In 2021, the HELIO brand was recognized as the most valuable Polish brand of dried fruit and nut. The company manufactures products that are sold under multiple private labels, also by the largest retail chains in Poland and Europe. (H 5)</p> <p>Helio SA holds a BRC certificate, Global Standard for Food Safety. (H 6)</p> | <p>"Although the vast majority of our sales are targeted at the domestic market, we will continue to try to increase the use of our sales potential abroad. Export seems to be a natural step for our further development." (H 3)</p> | <p>Production under private labels (H 5)</p> | <p>https://www.stock-watch.pl/wiadomosci/4-cichych-bogate-row-hossy-w-branzyspozywczej,akcje,317708 (H 1)</p> |

| | | | | |
|----|---|--|--|--|
| 19 | <p>Seko SA Poland, Chojnice, Pomorskie Voivodeship</p> <p>Processing and preserving of fish, crustaceans and molluscs (PKD 10.20.Z) (S 2) The company shares have been listed on the Warsaw Stock Exchange since 2007. (S 3)</p> | <p>Seko SA is one of the leading fish processing companies in Poland. The company mainly offers fish pickles, fish products based on salted herring, salads and fish spreads, fish fried in vinegar and tomato, and other ready-made fish products. (S 5) The company offers, among others, ready-made meals with groats, jellies, spreads, vegetable and herring salads. (S 6) The plant meets all EU requirements and standards for fish processing. Health Quality Assurance System (HACCP) has been introduced. The company has implemented certified quality standards: International Food Standard (IFS) and Global Standard Food (BRC). (S 6)</p> | <p>The development strategy of the Company provides for a continuous increase in sales revenues in the domestic and international markets. (S 4) SEKO products are available in Germany, Czech Republic, Slovakia, Ireland, England, Romania, Italy, France and Lithuania. (S 6)</p> | <p>https://www.stockwatch.pl/wiadomosci/4-cichych-bohaterow-hossy-w-branzys-spozywczej,akcje,317708 (S 1)</p> |
| 20 | <p>Fabryka Cukiernicza Kopernik SA Poland, Toruń, Kujawsko-Pomorskie Voivodeship Manufacture of bakery and farinaceous products (PKD 10.7) (KOP 1)</p> <p>Retail sale of bread, cakes, flour confectionery and sugar confectionery in specialised stores (PKD 47.24.Z) (KOP 2)</p> | <p>The Kopernik Confectionery Factory is the oldest producer of gingerbread and wafers in Poland. (KOP 6)</p> <p>Kopernik offers gingerbread in a variety of flavours and shapes, including unglazed gingerbread, glazed gingerbread (covered with sugar glaze), chocolate-covered gingerbread, uncoated and coated wafers (KOP 3).</p> <p>In 2018, 17 Kopernik products from Toruń received the V-Label VEGAN certificate. (KOP 5)</p> | <p>Kopernik products are sold in a number of European export markets, as well as in the United States, Canada, Israel, Australia and Morocco. KOP 4)</p> | <p>List of 1,700 largest food companies in Poland, rank 556 (A)</p> |

Statistics tabels

Global export of agri-food products from Poland (section 01-24) from 2019 to 2023, in USD 000s

| Code | Products | Global export of agri-food products from Poland (section 01-24) from 2019 to 2023, in USD 000s | | | | | | |
|------|--|---|------------|------------|------------|------------|------------------------------|---------------------|
| | | 2019 | 2020 | 2021 | 2022 | 2023 | Category share in 2023 | 2019/2019 change |
| | Worldwide exports from Poland, categories 01-24 | 34,522,858 | 37,672,877 | 43,346,128 | 49,819,059 | 56,268,083 | 100.00% | 63% |
| '01 | Live animals | 166,493 | 161,498 | 161,714 | 164,408 | 159,503 | 0% | -4% |
| '02 | Meat and edible offal | 5,828,408 | 5,512,985 | 6,351,024 | 7,933,206 | 8,132,048 | 14% | 40% |
| '03 | Fish and crustaceans | 1,835,228 | 1,914,675 | 2,093,188 | 2,279,389 | 2,523,635 | 4% | 38% |
| '04 | Dairy products, eggs, natural honey | 2,769,627 | 2,751,637 | 3,184,477 | 4,068,051 | 3,917,079 | 7% | 41% |
| '05 | Products of animal origin | 393,832 | 382,143 | 441,257 | 459,131 | 468,133 | 1% | 19% |
| '06 | Trees, plants, flowers | 254,954 | 259,520 | 281,531 | 212,468 | 238,148 | 0% | -7% |
| '07 | Vegetables, roots, tubers | 1,365,842 | 1,312,786 | 1,483,026 | 1,563,257 | 1,851,524 | 3% | 36% |
| '08 | Fruit, nuts | 1,255,211 | 1,323,394 | 1,642,448 | 1,543,412 | 1,610,597 | 3% | 28% |
| '09 | Coffee, tea, spices | 642,664 | 700,576 | 743,484 | 836,570 | 856,474 | 2% | 33% |

| | | | | | | | | |
|-----|---|-----------|-----------|-----------|-----------|-----------|------------|-------------|
| '10 | Cereals | 920,588 | 1,951,342 | 2,293,169 | 3,280,204 | 3,868,079 | 7% | 320% |
| '11 | Products of the milling industry | 336,525 | 350,054 | 426,033 | 524,451 | 531,995 | 1% | 58% |
| '12 | Seeds and oil plants | 486,242 | 574,055 | 652,327 | 827,989 | 979,125 | 2% | 101% |
| '13 | Lac, gums, resins | 27,270 | 27,531 | 35,874 | 34,524 | 38,057 | 0% | 40% |
| '14 | Vegetable products | 3,717 | 5,286 | 6,094 | 6,971 | 9,771 | 0% | 163% |
| '15 | Fats and oils | 519,236 | 641,500 | 951,391 | 1,617,421 | 1,553,090 | 3% | 199% |
| '16 | Preparations of meat or of fish | 2,001,059 | 2,229,253 | 2,559,426 | 2,803,793 | 3,356,935 | 6% | 68% |
| '17 | Sugars and sugar confectionery | 783,927 | 834,729 | 969,083 | 1,019,548 | 1,518,075 | 3% | 94% |
| '18 | Cocoa and cocoa preparations | 1,890,244 | 2,144,892 | 2,420,028 | 2,426,822 | 2,769,843 | 5% | 47% |
| '19 | Preparations of cereals, pastrycooks' products | 2,563,898 | 2,733,132 | 3,030,290 | 4,029,281 | 5,034,639 | 9% | 96% |
| '20 | Preparations of vegetables and fruit | 1,545,182 | 1,552,467 | 1,895,307 | 2,056,332 | 2,285,341 | 4% | 48% |
| '21 | Miscellaneous edible preparations | 2,276,503 | 2,415,218 | 2,987,665 | 3,193,450 | 3,661,137 | 7% | 61% |
| '22 | Beverages, spirits and vinegar | 913,433 | 1,108,847 | 1,366,311 | 1,726,912 | 1,768,859 | 3% | 94% |
| '23 | Residues and waste from the food industries; prepared animal fodder | 1,616,479 | 1,976,152 | 2,459,584 | 2,770,858 | 3,241,760 | 6% | 101% |
| '24 | Tobacco and manufactured tobacco substitutes | 4,126,296 | 4,809,205 | 4,911,397 | 4,440,611 | 5,894,236 | 10% | 43% |

Global export of agri-food products from Japan (section 01-24) from 2019 to 2023, in USD 000s

| Code | Products | Global export of agri-food products from Japan (section 01- 24) from 2019 to 2023, in USD 000s | | | | | | |
|------|--|---|-----------|-----------|-----------|-----------|------------------------------|---------------------|
| | | 2019 | 2020 | 2021 | 2022 | 2023 | Category share in 2023 | 2019/2023 change |
| | Worldwide exports from Poland, categories 01-24 | 7,488,765 | 7,986,494 | 9,639,949 | 26,772 | 35,793 | | 15% |
| '01 | Live animals | 36,730 | 13,400 | 23,977 | 415,918 | 429,556 | | -3% |
| '02 | Meat and edible offal | 300,590 | 306,483 | 519,815 | 1,966,019 | 1,658,768 | 0% | 43% |
| '03 | Fish and crustaceans | 1,536,614 | 1,363,855 | 1,848,271 | 149,902 | 110,787 | 55% | 8% |
| '04 | Dairy products, eggs, natural honey | 51,304 | 81,849 | 105,512 | 42,465 | 57,589 | 19% | 116% |
| '05 | Products of animal origin | 61,684 | 51,600 | 50,570 | 72,240 | 60,784 | 1% | -7% |
| '06 | Trees, plants, flowers | 97,401 | 110,939 | 80,506 | 81,387 | 67,747 | 1% | -38% |
| '07 | Vegetables, roots, tubers | 56,049 | 76,106 | 68,782 | 294,085 | 258,400 | 1% | 21% |
| '08 | Fruit, nuts | 228,461 | 212,045 | 290,783 | 214,408 | 243,512 | 1% | 13% |
| '09 | Coffee, tea, spices | 174,004 | 199,206 | 244,976 | 57,482 | 69,419 | 3% | 40% |
| '10 | Cereals | 55,836 | 59,317 | 63,666 | 107,431 | 107,566 | 3% | 24% |
| '11 | Products of the milling industry | 84,162 | 87,825 | 99,424 | 108,299 | 102,508 | 1% | 28% |

| | | | | | | | | |
|-----|---|-----------|-----------|-----------|-----------|-----------|-----|------|
| '12 | Seeds and oil plants | 177,697 | 162,585 | 165,865 | 35,829 | 31,118 | 1% | -42% |
| '13 | Lac, gums, resins | 33,295 | 38,340 | 42,662 | 1,226 | 1,172 | 1% | -7% |
| '14 | Vegetable products | 1,918 | 1,865 | 2,001 | 356,855 | 357,573 | 0% | -39% |
| '15 | Fats and oils | 231,428 | 245,016 | 293,054 | 627,640 | 563,036 | 0% | 55% |
| '16 | Preparations of meat or of fish | 640,117 | 570,743 | 612,826 | 156,364 | 158,998 | 4% | -12% |
| '17 | Sugars and sugar confectionery | 154,974 | 137,804 | 165,398 | 105,631 | 107,074 | 7% | 3% |
| '18 | Cocoa and cocoa preparations | 84,192 | 83,920 | 107,282 | 836,669 | 765,979 | 2% | 27% |
| '19 | Preparations of cereals, pastrycooks' products | 718,410 | 803,553 | 896,851 | 175,243 | 173,784 | 1% | 7% |
| '20 | Preparations of vegetables and fruit | 130,615 | 152,646 | 186,706 | 1,753,415 | 1,602,080 | 9% | 33% |
| '21 | Miscellaneous edible preparations | 1,455,967 | 1,944,854 | 2,035,625 | 1,468,142 | 1,378,229 | 2% | 10% |
| '22 | Beverages, spirits and vinegar | 919,568 | 1,015,876 | 1,453,575 | 142,862 | 142,858 | 19% | 50% |
| '23 | Residues and waste from the food industries; prepared animal fodder | 107,506 | 133,592 | 149,160 | 97,352 | 129,165 | 16% | 33% |
| '24 | Tobacco and manufactured tobacco substitutes | 150,243 | 133,075 | 132,662 | 4,440,611 | 5,894,236 | 2% | -14% |

Source: own study based on Trade Map 2024 data.

Global import of agri-food products to Poland (section 01-24) from 2019 to 2023, in USD 000s

| Code | Products | Global export of agri-food products from Poland | | | | | | |
|------|---|---|------------|------------|------------|------------|------------------------|------------------|
| | | 2019 | 2020 | 2021 | 2022 | 2023 | Category share in 2023 | 2019/2023 change |
| | Worldwide exports from Poland, categories 01-24 | 23,025,342 | 25,267,633 | 29,249,543 | 33,182,035 | 36,052,183 | | 57% |
| '01 | Live animals | 821,084 | 781,356 | 732,173 | 940,578 | 1,336,366 | 4% | 63% |
| '02 | Meat and edible offal | 1,957,144 | 1,784,555 | 1,813,627 | 2,055,970 | 2,412,184 | 7% | 23% |
| '03 | Fish and crustaceans | 2,387,433 | 2,379,861 | 2,720,576 | 3,018,734 | 3,272,853 | 9% | 37% |
| '04 | Dairy products, eggs, natural honey | 1,182,832 | 1,193,119 | 1,515,806 | 1,741,666 | 1,793,916 | 5% | 52% |
| '05 | Products of animal origin | 302,434 | 273,207 | 340,246 | 367,121 | 362,588 | 1% | 20% |
| '06 | Trees, plants, flowers | 427,146 | 429,400 | 558,749 | 584,294 | 588,218 | 2% | 38% |
| '07 | Vegetables, roots, tubers | 1,134,802 | 1,134,438 | 1,278,642 | 1,282,699 | 1,676,655 | 5% | 48% |
| '08 | Fruit, nuts | 1,802,894 | 2,302,574 | 2,594,285 | 2,499,664 | 2,755,342 | 8% | 53% |
| '09 | Coffee, tea, spices | 814,628 | 914,172 | 1,012,715 | 1,257,272 | 1,278,353 | 4% | 57% |

| | | | | | | | | |
|-----|---|-----------|-----------|-----------|-----------|-----------|------------|-------------|
| '10 | Cereals | 457,506 | 553,144 | 572,304 | 1,185,328 | 779,401 | 2% | 70% |
| '11 | Products of the milling industry | 305,634 | 323,612 | 385,250 | 523,660 | 586,786 | 2% | 92% |
| '12 | Seeds and oil plants | 745,802 | 746,060 | 989,394 | 1,462,748 | 959,517 | 3% | 29% |
| '13 | Lac, gums, resins | 130,181 | 133,062 | 153,591 | 168,819 | 165,239 | 0% | 27% |
| '14 | Vegetable products | 61,522 | 60,043 | 38,199 | 71,072 | 75,630 | 0% | 23% |
| '15 | Fats and oils | 1,049,069 | 1,302,260 | 1,889,816 | 2,767,032 | 2,174,461 | 6% | 107% |
| '16 | Preparations of meat or of fish | 316,731 | 360,108 | 429,798 | 506,036 | 576,135 | 2% | 82% |
| '17 | Sugars and sugar confectionery | 451,486 | 470,370 | 542,136 | 728,067 | 812,787 | 2% | 80% |
| '18 | Cocoa and cocoa preparations | 1,330,595 | 1,531,381 | 1,695,192 | 1,623,737 | 1,897,931 | 5% | 43% |
| '19 | Preparations of cereals, pastrycooks' products | 786,951 | 1,070,722 | 1,300,133 | 1,497,719 | 1,782,523 | 5% | 127% |
| '20 | Preparations of vegetables and fruit | 929,329 | 999,538 | 1,158,093 | 1,238,533 | 1,358,008 | 4% | 46% |
| '21 | Miscellaneous edible preparations | 1,319,564 | 1,365,626 | 1,622,610 | 1,722,793 | 1,898,034 | 5% | 44% |
| '22 | Beverages, spirits and vinegar | 1,077,366 | 1,330,593 | 1,485,398 | 1,620,207 | 1,824,757 | 5% | 69% |
| '23 | Residues and waste from the food industries; prepared animal fodder | 2,245,630 | 2,591,602 | 3,171,956 | 3,406,711 | 3,819,367 | 11% | 70% |
| '24 | Tobacco and manufactured tobacco substitutes | 987,579 | 1,236,830 | 1,248,854 | 911,575 | 1,865,132 | 5% | 89% |

Global import of agri-food products to Japan (section 01-24) from 2019 to 2023, in USD 000s

| Code | Products | Global export of agri-food products from Japan | | | | | | 2019/2023 change |
|------|--|--|-------------------|-------------------|-------------------|-------------------|------------------------|------------------|
| | | 2019 | 2020 | 2021 | 9,293,636 | 8,613,495 | Category share in 2023 | |
| | Worldwide exports from Poland, categories 01-24 | 73,396,842 | 69,786,030 | 76,036,621 | 83,132,171 | 75,907,928 | | 3% |
| '01 | Live animals | 261,284 | 248,367 | 306,768 | 291,704 | 332,138 | 0.4% | 27% |
| '02 | Meat and edible offal | 10,843,065 | 10,284,531 | 10,987,740 | 11,322,963 | 9,903,626 | 13% | -9% |
| '03 | Fish and crustaceans | 11,540,850 | 9,940,357 | 10,883,307 | 11,672,998 | 10,049,447 | 13% | -13% |
| '04 | Dairy products, eggs, natural honey | 1,920,424 | 1,859,869 | 1,819,768 | 1,986,174 | 2,030,079 | 3% | 6% |
| '05 | Products of animal origin | 716,494 | 604,644 | 635,660 | 637,134 | 636,524 | 1% | -11% |
| '06 | Trees, plants, flowers | 600,794 | 553,781 | 596,219 | 569,423 | 540,239 | 1% | -10% |
| '07 | Vegetables, roots, tubers | 2,470,309 | 2,311,986 | 2,427,088 | 2,602,014 | 2,436,587 | 3% | -1% |
| '08 | Fruit, nuts | 3,465,396 | 3,522,657 | 3,567,482 | 3,273,814 | 3,121,163 | 4% | -10% |
| '09 | Coffee, tea, spices | 1,754,427 | 1,649,452 | 1,838,586 | 2,332,938 | 2,078,169 | 3% | 18% |
| '10 | Cereals | 5,978,123 | 5,773,348 | 7,532,845 | 9,667,914 | 8,158,030 | 11% | 36% |
| '11 | Products of the milling industry | 520,389 | 491,164 | 499,886 | 616,609 | 729,928 | 1% | 40% |

| | | | | | | | | |
|-----|---|-----------|-----------|-----------|-----------|-----------|------|-------------|
| '12 | Seeds and oil plants | 4,758,576 | 4,599,699 | 5,731,876 | 6,955,631 | 5,790,068 | 8% | 22% |
| '13 | Lac, gums, resins | 357,740 | 356,068 | 325,091 | 382,987 | 335,127 | 0.4% | -6% |
| '14 | Vegetable products | 170,690 | 219,722 | 330,231 | 431,919 | 554,636 | 1% | 225% |
| '15 | Fats and oils | 1,429,120 | 1,400,601 | 1,658,596 | 2,056,440 | 1,751,051 | 2% | 23% |
| '16 | Preparations of meat or of fish | 6,607,176 | 6,102,839 | 6,207,748 | 6,706,598 | 6,218,831 | 8% | -6% |
| '17 | Sugars and sugar confectionery | 709,206 | 699,641 | 869,491 | 1,023,333 | 1,174,529 | 2% | 66% |
| '18 | Cocoa and cocoa preparations | 1,002,280 | 947,584 | 1,036,883 | 1,098,499 | 1,044,981 | 1% | 4% |
| '19 | Preparations of cereals, pastrycooks' products | 1,306,786 | 1,372,893 | 1,423,069 | 1,520,703 | 1,418,344 | 2% | 9% |
| '20 | Preparations of vegetables and fruit | 3,532,825 | 3,553,939 | 3,629,688 | 3,959,442 | 4,040,621 | 5% | 14% |
| '21 | Miscellaneous edible preparations | 1,674,111 | 1,639,964 | 1,731,853 | 1,870,098 | 1,683,855 | 2% | 1% |
| '22 | Beverages, spirits and vinegar | 3,661,705 | 3,346,120 | 3,458,228 | 3,885,360 | 3,798,534 | 5% | 4% |
| '23 | Residues and waste from the food industries; prepared animal fodder | 2,621,786 | 2,863,288 | 3,098,970 | 3,494,927 | 3,465,138 | 5% | 32% |
| '24 | Tobacco and manufactured tobacco substitutes | 5,493,286 | 5,443,516 | 5,439,548 | 4,772,549 | 4,616,283 | 6% | -16% |

Source: own study based on Trade Map 2024 data.

Export of agri-food products from Poland to Japan from 2019 to 2023, in USD 000s

| Code | Products | Export of agri-food products from Poland to Japan from 2019 to 2023 | | | | | | |
|------|--|---|---------|---------|---------|---------|------------------------|------------------|
| | | 2019 | 2020 | 2021 | 2022 | 2023 | Category share in 2023 | 2019/2023 change |
| | Export from Poland to Japan categories 01-24 | 113,908 | 104,334 | 133,246 | 158,631 | 106,837 | 100% | -6% |
| '01 | Live animals | 53 | 147 | 207 | 223 | 264 | 0,25% | 398% |
| '02 | Meat and edible offal | 24,058 | 26,352 | 52,058 | 68,969 | 35,535 | 33.26% | 48% |
| '03 | Fish and crustaceans | 3,906 | 5,689 | 5,953 | 6,019 | 3,606 | 3.38% | -8% |
| '04 | Dairy products, eggs, natural honey | 10,311 | 6,552 | 7,363 | 6,535 | 3,651 | 3.42% | -65% |
| '05 | Products of animal origin | 16,500 | 11,223 | 13,581 | 17,175 | 11,575 | 10.83% | -30% |
| '06 | Trees, plants, flowers | 110 | 61 | 38 | 55 | 73 | 0.07% | -34% |
| '07 | Vegetables, roots, tubers | 499 | 774 | 699 | 768 | 419 | 0.39% | -16% |
| '08 | Fruit, nuts | 3,671 | 3,504 | 2,621 | 2,872 | 2,731 | 2.56% | -26% |
| '09 | Coffee, tea, spices | 1,613 | 2,315 | 3,031 | 2,949 | 1,871 | 1.75% | 16% |
| '10 | Cereals | 12 | 0 | 9 | 21 | 384 | 0.36% | 3100% |
| '11 | Products of the milling industry | 850 | 1,193 | 2,006 | 1,763 | 3,684 | 3.45% | 333% |

| | | | | | | | | |
|-----|---|--------|--------|--------|--------|--------|---------------|------|
| '12 | Seeds and oil plants | 955 | 904 | 898 | 1,272 | 1,226 | 1.15% | 28% |
| '13 | Lac, gums, resins | 0 | 3 | 17 | 26 | 20 | 0.02% | 0 |
| '14 | Vegetable products | 0 | 79 | 0 | 0 | 0 | 0.00% | 0 |
| '15 | Fats and oils | 218 | 120 | 177 | 123 | 146 | 0.14% | -33% |
| '16 | Preparations of meat or of fish | 6,731 | 2,825 | 2,552 | 2,435 | 843 | 0.79% | -87% |
| '17 | Sugars and sugar confectionery | 2,038 | 2,623 | 2,834 | 3,695 | 3,229 | 3.02% | 58% |
| '18 | Cocoa and cocoa preparations | 2,875 | 4,654 | 4,793 | 5,054 | 5,058 | 4.73% | 76% |
| '19 | Preparations of cereals, pastrycooks' products | 1,940 | 1,473 | 1,558 | 2,482 | 2,086 | 1.95% | 8% |
| '20 | Preparations of vegetables and fruit | 16,955 | 20,849 | 20,292 | 18,093 | 14,983 | 14.02% | -12% |
| '21 | Miscellaneous edible preparations | 2,849 | 2,415 | 3,398 | 5,065 | 3,169 | 2.97% | 11% |
| '22 | Beverages, spirits and vinegar | 1,539 | 2,051 | 970 | 1,183 | 958 | 0.90% | -38% |
| '23 | Residues and waste from the food industries; prepared animal fodder | 15,096 | 6,594 | 6,935 | 10,850 | 8,697 | 8.14% | -42% |
| '24 | Tobacco and manufactured tobacco substitutes | 1,129 | 1,934 | 1,256 | 1,004 | 2,629 | 2.46% | 133% |

Source: own study based on Trade Map 2024 data.

Import of agri-food products from Japan to Poland from 2019 to 2023, in USD 000s

| Code | Products | Import of agri-food products from Japan to Poland from 2019 to 2023 | | | | | | |
|------|---|---|-------|-------|-----------|-----------|------------------------|------------------|
| | | 2019 | 2020 | 2021 | 9,293,636 | 8,613,495 | Category share in 2023 | 2019/2023 change |
| | Import from Japan to Poland, categories 01-24 | 8,351 | 7,274 | 8,862 | 11,492 | 4,446 | | -47% |
| '01 | Live animals | 2 | 0 | 0 | 0 | 0 | 0 | 0 |
| '02 | Meat and edible offal | 52 | 64 | 248 | 334 | 448 | 10% | 762% |
| '03 | Fish and crustaceans | 313 | 153 | 285 | 235 | 0 | 0 | -100% |
| '04 | Dairy products, eggs, natural honey | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| '05 | Products of animal origin | 82 | 133 | 69 | 1 | 0 | 0 | -100% |
| '06 | Trees, plants, flowers | 37 | 0 | 94 | 31 | 24 | 0.54% | -35% |
| '07 | Vegetables, roots, tubers | 6 | 7 | 7 | 39 | 1 | 0.02% | -83% |
| '08 | Fruit, nuts | 7 | 3 | 0 | 3 | 5 | 0.11% | -29% |
| '09 | Coffee, tea, spices | 430 | 591 | 1,014 | 1,139 | 1,128 | 25% | 162% |
| '10 | Cereals | 4 | 12 | 12 | 9 | 85 | 2% | 2025% |
| '11 | Products of the milling industry | 59 | 52 | 180 | 457 | 233 | 5% | 295% |

| | | | | | | | | |
|-----|---|-------|-------|-------|-------|-----|-------|-------|
| '12 | Seeds and oil plants | 240 | 190 | 70 | 262 | 208 | 5% | -13% |
| '13 | Lac, gums, resins | 469 | 424 | 175 | 369 | 365 | 8% | -22% |
| '14 | Vegetable products | 0 | 0 | 0 | 0 | 2 | 0.04% | 0 |
| '15 | Fats and oils | 174 | 201 | 258 | 285 | 219 | 5% | 26% |
| '16 | Preparations of meat or of fish | 218 | 370 | 237 | 229 | 3 | 0.07% | -99% |
| '17 | Sugars and sugar confectionery | 26 | 25 | 23 | 108 | 50 | 1% | 92% |
| '18 | Cocoa and cocoa preparations | 6 | 3 | 1 | 13 | 3 | 0.07% | -50% |
| '19 | Preparations of cereals, pastrycooks' products | 163 | 105 | 136 | 212 | 17 | 0.38% | -90% |
| '20 | Preparations of vegetables and fruit | 169 | 143 | 181 | 300 | 117 | 3% | -31% |
| '21 | Miscellaneous edible preparations | 1,750 | 1,985 | 2,335 | 3,641 | 613 | 14% | -65% |
| '22 | Beverages, spirits and vinegar | 2,746 | 2,454 | 3,237 | 3,443 | 693 | 16% | -75% |
| '23 | Residues and waste from the food industries; prepared animal fodder | 151 | 267 | 299 | 382 | 230 | 5% | 52% |
| '24 | Tobacco and manufactured tobacco substitutes | 1,247 | 92 | 1 | 0 | 2 | 0.04% | -100% |

Source: own study based on Trade Map 2024 data.

Trade balance of agri-food products in Poland and Japan, total, and trade balance of agri-food products between Poland and Japan, from 2019 to 2023, in USD 000s

| Trade in agri-food products in Poland and Japan | | | | | |
|--|-------------|-------------|-------------|-------------|-------------|
| | 2019 | 2020 | 2021 | 2022 | 2023 |
| Worldwide exports from Poland, categories 01-24 | 34,522,858 | 37,672,877 | 43,346,128 | 49,819,059 | 56,268,083 |
| Worldwide imports to Poland, categories 01-24 | 23,025,342 | 25,267,633 | 29,249,543 | 33,182,035 | 36,052,183 |
| Trade balance of Poland, categories 01-24 | 11,497,516 | 12,405,244 | 14,096,585 | 16,637,024 | 20,215,900 |
| Trade balance of Poland, categories 01-24, year on year change | | 8% | 14% | 18% | 22% |
| Worldwide exports from Japan, categories 01-24 | 7,488,765 | 7,986,494 | 9,639,949 | 9,293,636 | 8,613,495 |
| Worldwide imports to Japan, categories 01-24 | 73,396,842 | 69,786,030 | 76,036,621 | 83,132,171 | 75,907,928 |
| Trade balance of Japan, categories 01-24 | -65,908,077 | -61,799,536 | -66,396,672 | -73,838,535 | -67,294,433 |
| Trade balance of Japan, categories 01-24, year on year change | | -6% | 7% | 11% | -9% |
| Export from Poland to Japan categories 01-24 | 113,908 | 104,334 | 133,246 | 158,631 | 106,837 |
| Export from Poland to Japan categories 01-24, year on year change | | -8% | 28% | 19% | -33% |
| Import from Japan to Poland, categories 01-24 | 8,351 | 7,274 | 8,862 | 11,492 | 4,446 |
| Import from Japan to Poland, categories 01-24, year on year change | | -13% | 22% | 30% | -61% |
| Trade balance of Poland and Japan, categories 01-24 | 105,557 | 97,060 | 124,384 | 147,139 | 102,391 |
| Trade balance of Poland and Japan, categories 01-24, year on year change | | -8% | 28% | 18% | -30% |

Source: own study based on Trade Map 2024 data

Export of agri-food products from Poland to Japan from 2019 to 2023, the leading product from each section, in USD 000s

| Export of agri-food products from Poland to Japan from 2019 to 2023, the leading product from each category, in USD 000s | | 2019 | 2020 | 2021 | 2022 | 2023 |
|--|--|--------|--------|--------|--------|--------|
| Products | | | | | | |
| 0106 | Live animals (excl. horses, asses, mules, hinnies, bovine animals, swine, sheep, goats, poultry) | 39 | 81 | 181 | 163 | 225 |
| 0202 | Meat of bovine animals, frozen | 11.228 | 13.603 | 43.151 | 41.578 | 17.447 |
| 0304 | Fish fillets and other fish meat (whether or not minced), fresh, chilled or frozen | 2.242 | 2.758 | 2.595 | 3.862 | 5.569 |
| 0404 | Whey, whether or not concentrated or containing added sugar or other sweetening matter; products | 1.863 | 3.765 | 6.559 | 3.924 | 2.382 |
| 050510 | Feathers of a kind used for stuffing; down | 9.420 | 7.478 | 8.066 | 8.559 | 7.039 |
| 0602 | Other live plants (including their roots), cuttings and slips; mushroom spawn (excluding bulbs, tubers, tuberous plants) | 30 | 17 | 19 | 14 | 7 |
| 071333 | Kidney beans, including white pea beans (<i>Phaseolus vulgaris</i>) | 106 | 361 | 212 | 157 | 230 |
| 081110 | Frozen strawberries, uncooked or cooked, sweetened or unsweetened | 672 | 917 | 655 | 1.368 | 1.206 |
| 0902 | Tea, whether or not flavoured | 3.920 | 4.119 | 5.492 | 4.152 | 3.774 |
| 1008 | Buckwheat, millet and canary seed; other cereals (excluding wheat and mixtures, rye, barley, oats) | 11 | 27 | 42 | 66 | 255 |
| 1105 | Flour, meal, powder, flakes, granules and pellets of potatoes | 149 | 136 | 529 | 2.174 | 1.356 |
| 121299 | Fruit seeds and other plant products, including unroasted chicory roots | 291 | 407 | 541 | 677 | 389 |
| 1302 | Vegetable saps and extracts; pectic substances, pectinates and pectates; agar-agar and other | 71 | 2 | 15 | 346 | 23 |
| '14 | No exports in this category | - | - | - | - | - |

| | | | | | | |
|---------------|---|-------|-------|-------|-------|--------|
| 1506 | Other animal fats and oils and their fractions, whether or not refined, but not chemically modified | 213 | 24 | 0 | 0 | 94 |
| 160431 | Caviar | 21 | 48 | 22 | 96 | 68 |
| 170211 | Lactose and lactose syrup | 683 | 1.150 | 852 | 2.097 | 986 |
| 1806 | Chocolate and other food preparations containing cocoa | 3.020 | 3.963 | 3.926 | 3.176 | 3.305 |
| 1905 | Bread, pastry, cakes, biscuits and other bakers' wares | 698 | 414 | 718 | 868 | 1.032 |
| 2009 | Fruit juices including grape must and vegetable juices, unfermented | 2.967 | 2.959 | 1.367 | 956 | 2.530 |
| 2106 | Food preparations not elsewhere specified or included | 993 | 1.627 | 1.100 | 1.962 | 1.566 |
| 220890 | Undenatured ethyl alcohol of an alcoholic strength by volume of less than 80% vol; spirits, liqueurs and other spirituous beverages | 231 | 583 | 302 | 413 | 232 |
| 230910 | Dog or cat food, put up for retail sale | 3.744 | 3.951 | 8.737 | 8.513 | 8.170 |
| 2404 | Products containing tobacco, reconstituted tobacco, nicotine, or tobacco or nicotine substitutes | 0 | 0 | 0 | 0 | 12.126 |
| 2403 | Other manufactured tobacco and manufactured tobacco substitutes | 548 | 577 | 516 | 791 | 520 |

Import of agri-food products from Japan to Poland from 2019 to 2023, the leading product from each section, in USD 000s

| Import of agri-food products from Japan to Poland from 2019 to 2023, the leading product from each category, in USD 000s | | 2019 | 2020 | 2021 | 2022 | 2023 |
|--|---|------|------|-------|-------|-------|
| 01 | No imports in this category | | | | | |
| 020130 | Boneless meat of bovine animals, fresh or chilled | 52 | 64 | 248 | 333 | 448 |
| 0307 | Molluscs, fit for human consumption, live, fresh, chilled | 185 | 136 | 250 | 150 | 0 |
| '04 | No imports in this category | | | | | |
| '05 | No imports in this category | | | | | |
| 0602 | Other live plants (including their roots), cuttings and slips; mushroom spawn | 37 | 0 | 92 | 27 | 24 |
| 0712 | Dried vegetables, whole, cut, sliced, broken or in powder, but not further prepared | 3 | 6 | 4 | 4 | 1 |
| 0814 | Peel of citrus fruit or melons | 2 | 1 | 0 | 3 | 5 |
| 0902 | Tea, whether or not flavoured | 411 | 569 | 1,000 | 1,124 | 1,125 |
| 1006 | Rice | 4 | 12 | 12 | 9 | 85 |
| 1101 | Wheat or meslin flour | 58 | 45 | 150 | 307 | 220 |
| 121292 | Locust beans (carob) | 199 | 154 | 25 | 153 | 200 |
| 1302 | Vegetable saps and extracts | 469 | 423 | 175 | 369 | 365 |
| '14 | No imports in this category | | | | | |
| 1521 | Vegetable waxes, beeswax, other insect waxes | 28 | 118 | 162 | 688 | 649 |

| | | | | | | |
|---------------|--|-------|-------|-------|-------|-----|
| 160239 | Meat or offal from ducks, geese and guinea fowl | 74 | 99 | 34 | 115 | 255 |
| 1704 | Sugar confectionery (including white chocolate), not containing cocoa | 15 | 21 | 11 | 29 | 49 |
| 1806 | Chocolate and other food preparations containing cocoa | 6 | 3 | 1 | 13 | 3 |
| 1902 | Pasta | 86 | 45 | 28 | 64 | 7 |
| 200899 | Fruit and other edible parts of plants | 26 | 23 | 19 | 23 | 82 |
| 210390 | Preparations for sauces and ready-made sauces; mixed spices and spices | 487 | 424 | 606 | 1.103 | 160 |
| 210310 | Soya sauce | 545 | 707 | 598 | 866 | 238 |
| 2202 | Waters, including mineral waters and aerated waters, containing added sugar or other sweetening matter | 71 | 133 | 444 | 304 | 170 |
| 2208 | Undenatured ethyl alcohol of an alcoholic strength by volume of less than 80% vol; liqueurs | 1.810 | 1.375 | 1.642 | 2.159 | 171 |
| 2206 | Cider, perry, mead and other fermented beverages | 278 | 245 | 266 | 337 | 191 |
| 230990 | Preparations used in animal feeding (excluding dog or cat food) | 147 | 258 | 274 | 333 | 213 |
| 2402 | Cigars, cheroots, cigarillos and cigarettes, of tobacco or of tobacco substitutes | 5 | 2 | 1 | 0 | 1 |

Source: own study based on Trade Map 2024 data

Export of meat and edible offal from Poland to Japan from 2019 to 2023, in USD 000s

| Export of meat and edible offal from Poland to Japan from 2019 to 2023 | | | | | | | | |
|--|--|--------|--------|--------|--------|--------|------------------------|------------------|
| Code | Products | 2019 | 2020 | 2021 | 2022 | 2023 | Category share in 2023 | 2019/2023 change |
| | '02 Meat and edible offal | 20,711 | 21,320 | 57,016 | 57,357 | 31,519 | | 52% |
| '0201 | Meat of bovine animals, fresh or chilled | 0 | 4 | 293 | 62 | 0 | 0 | 0 |
| '0202 | Meat of bovine animals, frozen | 11,228 | 13,603 | 43,151 | 41,578 | 17,447 | 55% | 55% |
| '0203 | Meat of swine, fresh, chilled or frozen | 0 | 0 | 1 | 0 | 0 | 0 | 0 |
| '0204 | Meat of sheep or goats | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| '0205 | Meat of horses, asses, mule | 3,614 | 2,267 | 2,167 | 1,896 | 1,755 | 6% | -51% |
| '0206 | Edible offal | 4,895 | 5,305 | 11,404 | 13,821 | 12,317 | 39% | 152% |
| '0207 | Meat and edible offal of fowls | 974 | 141 | 0 | 0 | 0 | 0 | -100% |
| '0208 | Meat and edible offal of rabbits, hares | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| '0209 | Pig fat | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| '0210 | Meat and edible offal, salted | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

Source: own study based on Trade Map 2024 data

Poland.

The Polish Investment and Trade Agency



The Polish Investment and Trade Agency's mission as a Government Agency is:

- To enable small-and medium-sized companies to reach their full potential in exporting their products and services around the world
- To support potential investors in Poland by providing comprehensive and up-to-date information services regarding legal and tax aspects, location and human capital, as well as on the available financial incentives
- To promote 'Poland as a Brand'



How we can help

The Agency's experienced team of experts with a hands-on approach and excellent understanding of the needs of entrepreneurs will ensure that your projects will move as fast and smooth as possible.

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The Polish Investment and Trade Agency is the institution responsible for preparing Poland's presence at the World Expo 2025 Osaka, Kansai. The Agency carries out this task under the supervision of the Ministry of Economic Development and Technology.

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