

FACTSHEET – CONSUMER GOODS INDUSTRY POLAND



The consumer goods industry represented 36.5% of Poland GDP¹ in 2023 (1):

- Consumer Goods Contribution to GDP in Poland: €273.9 billion

Consumption is a key contributor to the economy. The consumer goods industry is an essential motor of the Polish economy, driven by FMCG² Brands.

Household consumption³ in Poland (2022):

- Represented 57.1% of Poland GDP (2)
- Households spent €39.9 billion on FMCG brands consumed at home (3)
- Fast-Moving-Consumer-Goods (FMCG) brands represented 10.7% of household consumption at home (4)

The Polish branded FMCG industry provides choice to consumers across the EU. By exporting their production, Polish FMCG brands respond to European consumer choices, contribute to Poland's reputation around the world, and bring revenues to the Polish government.

Supporting the EU Single Market (2022 data) (5):

- Polish FMCG companies exported to other EU countries products valued at €22.1 billion
- Polish FMCG companies imported from other EU countries products valued at €14.7 billion

Promoting Poland and EU excellence outside the EU (2022):

- Polish FMCG companies exported €9.9 billion of FMCG products to countries outside of the EU

Bringing a positive international trade balance to Poland (+€ 6.8 billion):

- Polish FMCG companies imported €3.1 billion of FMCG products produced in countries outside the EU

The Polish branded FMCG industry is a major contributor to government resources, supporting communities through the payment of numerous taxes.

Poland tax revenues in 2022:

- Accounted for 35.1% of Poland GDP (6)
- Taxes on production and import represented 14 % of Poland GDP (39.6% of total tax revenues) (7),
- an amount of € 91.5 billion (8)

The Polish FMCG industry supports household purchasing power with higher wages and salaries than average, providing high-quality jobs.

In Poland, 38.5% of social protection is funded by employers' contribution (9).

¹ $GDP = C + I + G + (X - M)$, nominal expenditures approach (Consumption of Household & Government + Investments (gross capital formation) + trade surplus (export – import))

² Fast-moving-consumer-goods (FMCG) = Health&Beauty, Packaged Food, Pet Care, Beverages (alcohol & non-alcohol), Homecare, Paper tissue & hygiene. Products purchased at least once a year vs durable consumer goods

³ Household consumption in addition to FMCG = clothing and footwear; housing, water, electricity, gas and other fuels; furnishings, household equipment and routine household maintenance; health; transport, communication, recreation & entertainment including culture; restaurants and hotels; miscellaneous goods and services

The Polish FMCG industry in 2021:

- Employed 333.422 people (10)
- Paid € 5.8 billion in salaries and social contributions (11)

In Poland in 2021:

- The average annual labour costs⁴ per employee for FMCG Companies was €18.188 (12)
- The average full time annual adjusted salary per employee at national level was €14.574 (13)

The Polish branded consumer goods industry innovates and invests, supporting EU industrial sovereignty and the EU transition to a more sustainable production and environment.

FMCG companies invested €3.1 billion in Poland (2021):

- €2.6 billion in assets⁵, representing 13.9% of the investments made in Polish manufacturing (14)
- €494.1 million in R&D (15)

Total R&D expenditure carried out in Poland amounted to €9.5 billion (2022) (16):

- 65.9% (€6.3 billion) of total R&D expenditure came from the private sector
- 34.1% (€3.2 billion) of total R&D expenditure came from the public sector

Source References:

(1)	Eurostat, National accounts indicator (ESA 2010)
(2)	Eurostat _ Household consumption by purpose _November 2023
(3)	Euromonitor Euromonitor: Global Market Research & Industry Analysis - Euromonitor.com
(4)	Eurostat _ Household consumption by purpose _November 2023
(5)	Euromonitor based on Eurostat, Trade by commodity and NACE Rev. 2 activity
(6)	Eurostat, Tax revenues statistics, 26 October 2023
(7)	Eurostat, Tax revenues statistics, 26 October 2023
(8)	Eurostat, Tax revenues statistics, 26 October 2023
(9)	Eurostat May 2023, Social protection benefits, ESSPROS , 2020 data
(10)	Eurostat, Main national accounts aggregates by NACE Rev.2 activity (level 4)
(11)	Eurostat, SBS , Employee benefits expenses incl.social contribution Enterprises by detailed NACE Rev.2 activity (level 4)
(12)	Eurostat, Labour cost per employee FTE
(13)	Eurostat, Average full time adjusted salary per employee
(14)	Eurostat : SBS by detailed NACE Rev.2 activity Gross investment in tangible non-current assets
(15)	Euromonitor based on Eurostat BERD (Business Enterprise R&D), by NACE 4 digit codes for FMCG data
(16)	Eurostat GERD by sector of performance (Gross domestic expenditure on R&D (GERD))

⁴ Wages, salaries, training, taxes etc

⁵ Gross investment in tangible non-current assets