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Economic Comment

Automotive – Polish (re)exporting hit

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We decided to estimate what portion of Polish exports is made up of re-exports, i.e. the sale abroad of products purchased in other countries without processing (or with minimal processing) or use as intermediate goods. Based on our analysis, we estimate that re-exports account for approximately 10-20% of total Polish exports. Nearly half of re-exports consist of automotive industry products, clothing and footwear, plastics, and furniture. Around half of the re-exported products originate from Germany, and a significant portion of them (almost half) are sent back to that country. We guess this is a result of integration of Polish industry into German supply chain. Meanwhile, about 1/4 of re-exported products come from China. This suggests that the direct dependence of Polish exports on Germany and China is greater than one could have assumed.

In order to obtain estimates of re-exports, we analysed data on Polish foreign trade according to CN classification at the third (1,270 categories) and fourth level of division (6,550 categories). Our reasoning was that if a given product is imported, not processed, and then sold abroad, it should appear in the same import and export category, provided that the category is sufficiently detailed. Additionally, we assume that in the case of re-exports, the sale abroad occurs relatively quickly after purchase – even within the same month. Based on these assumptions, for each trade category we built an econometric model in which the change in exports was explained by the change in imports in recent months. We interpret the R-squared value obtained in such a model as the ratio of re-exports in total exports of this category.

The highest re-export ratios (above 50%) were found for goods such as: lactose, jackets, tangerines, chocolate, hydrogen chloride, pneumatic tyres, airbags, screws, bolts, nuts.

CN categories (second level) with the highest and lowest re-export shares, estimates based on 2024 data

	PLNbn		
	Re-export	Export	%
Footwear, leggings and similar	10.0	19.8	50.7
Headgear and parts thereof	0.6	1.3	44.2
Knitted clothing and accessories	13.7	31.5	43.5
Non-knitted clothing and acc.	13.5	33.2	40.7
Furniture	7.5	21.7	34.4
Toys, games and sports articles	4.1	12.7	32.6
Rubber and rubber articles	7.1	21.7	32.5
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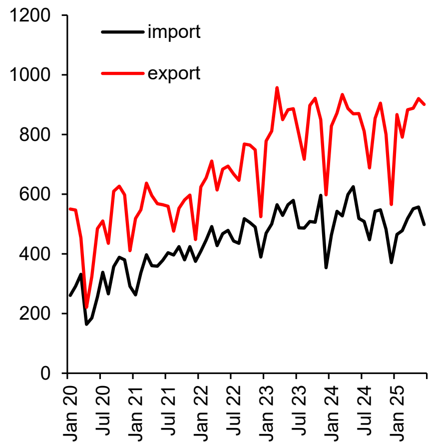
Shellac, gums, resins	0.0	0.6	4.1
Metal ores, slag, ash	0.2	5.8	3.9
Locomotives, rail stock	0.1	3.4	3.1
Plant materials for plaiting	0.0	0.3	3.0
Nickel and nickel articles	0.0	1.1	2.7
Live animals	0.5	37.9	1.2

Source: GUS, Santander

In terms of 21 broad CN classification groups, re-export is negligible (<10%) for products of animal origin, mineral products, precious stones; moderately significant (10–25%) for products of plant origin, fats, prepared foodstuffs, chemical products, hides, wood, paper, stone articles, base metals, machinery and equipment, instruments and apparatus, weapons; and significant (>25%) for plastics, textile products, footwear, non-rail vehicles, and miscellaneous industrial articles.

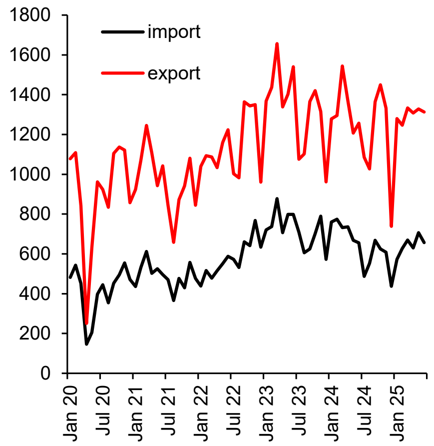
As for product groups where re-export is significant, they account for nearly half of our estimated total re-export value. In miscellaneous industrial articles, furniture leads

Polish import and export of brakes for non-rail vehicles, PLNmn



Source: GUS, Santander

Polish import and export of body parts and accessories for non-rail vehicles, PLNmn



Source: GUS, Santander

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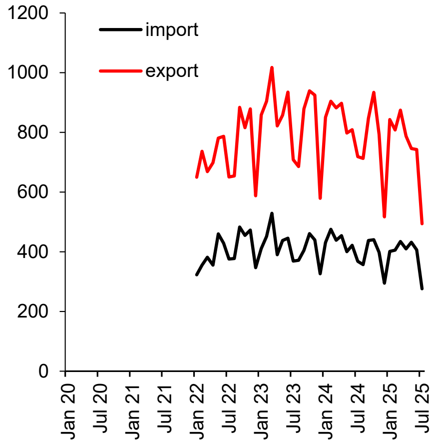
(estimated re-export at cPLN7bn), and these are mainly non-wooden chair parts. For plastics (cPLN25bn) we see significant re-export values for pneumatic tyres, plastic construction articles, transport and packaging items, and other plastic articles. For vehicles (cPLN45bn), these include lorries, body parts and accessories, brakes and their components, shock absorbers, gearboxes. For textiles (cPLN30bn), these include T-shirts, sweatshirts, jackets, trousers; for footwear (cPLN10bn) – shoes with plastic soles and leather uppers. For textiles and footwear, results may be overstated due to strong seasonality in trade – in estimates based on less detailed categories, where these patterns are distorted (e.g. we combine summer and winter clothing), the correlation became weaker, though still significant.

Caveats, robustness

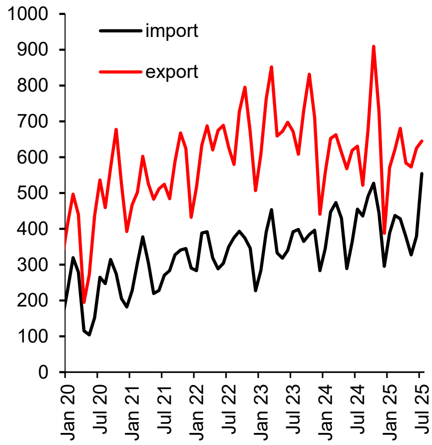
We acknowledge that in many cases the trade statistics may include, in addition to actual re-exports (i.e. the sale of the same goods that were imported), also the sale of goods similar to those imported, but not identical. Based on available data, we are unable to separate them, and this can make us overestimate the reexport. Although we tested the stability of model parameter estimates over time and obtained satisfactory results, it must be noted that this approach is vulnerable to short-term changes in the share of re-exports, so our estimates should be treated as long-term averages. Our models may also be misled by strong seasonal effects, especially in the case of clothing, footwear, and products of plant origin. Our estimates based on seasonally adjusted data suggested a reduction in the re-export estimate by up to half (i.e. it would account for approx. 10% of total exports), but they were sensitive to the chosen seasonal adjustment method.

Polish import and export in the category “other parts of seating furniture, not made of wood”, PLNmn



Source: GUS, Santander

Polish import and export in the category “new pneumatic rubber tyres of the kind used on motor vehicles”, PLNmn



Source: GUS, Santander