

Food Poland

from

Polish Magazine for Professionals



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PILOT
Unlimited Trading Company



PERŁA - LUBLIN BREWERIES



ABOUT THE COMPANY

Perła – Browary Lubelskie S.A. is one of the largest regional breweries in Poland. The tradition of beer brewing at the brewery dates back to the 19th century, and is connected with the work of Karol Rudolf Vetter, who in 1844 purchased the buildings of the former Reformed Franciscan monastery in Bernardyńska 15 Street and established a brewery there in 1846.

Long experience in brewing, an elaborate recipes, the selection of natural ingredients, and modern technologies guarantee the highest quality of the offered products. The features that distinguish Perła among other beers present on the market are

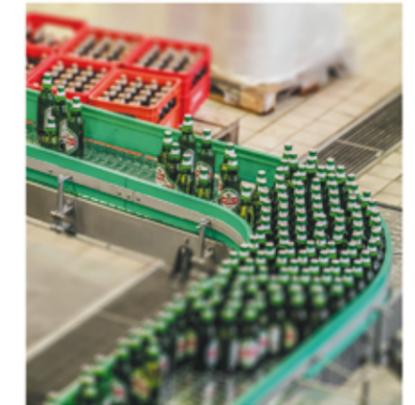
the characteristic bitter taste and the unique aroma, obtained thanks to using only local varieties of hop, which are valued for their quality and aroma all over Europe. The standard product of the enterprise is Perła Chmielowa beer – a brand associated with Browary Lubelskie for a very long time. It is not only appreciated by consumers, but it has also won numerous awards in the region and all over Poland. The product range of Perła – Browary Lubelskie also includes: Perła Export, Perła Mocna, Perła Koźlak, Perła Miodowa, Lubelskie Pils, Lubelskie Mocne, Goolman Premium, Zwierzyniec Pils.



Perła – Browary Lubelskie S.A. also distributes its products abroad. Exports are extensive. At present the products are exported to European markets to countries such as: the United Kingdom, Spain, France, Greece, Italy, Holland, Estonia, Sweden and Russia. Regular beer is shipped overseas, mainly to Australia, Africa and North America, and also to Paraguay, Zambia, Ghana, Cameroon and Benin.

A significant role is played by the distribution of Perła – Browary Lubelskie S.A.'s products in the United States.

The company's activities have become an integral part of the Lublin region, and the Perła brand is inseparably associated with the region, being an ambassador of the values which are characteristic and the most important for Lublin and its surroundings.



Perła - Browary Lubelskie S.A. POLAND, Lublin 20-950, ul. Bernardyńska 15
phone: + 48 81 71 01 221, 241 | export@perla.pl | www.perla.pl

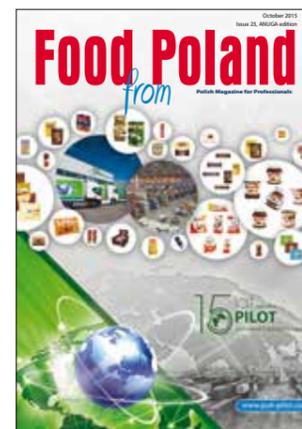
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Editorial Office
Bagno Street 2/218
00-112 Warsaw, Poland

Phone/Fax: +48-22 847 93 67
+48-22 828 93 66
Phone: +48-22 847 93 68
e-mail: redakcja@foodfrompoland.pl
www.foodfrompoland.pl

Editor-In-Chief – Tomasz Pańczyk
e-mail: t.panczyk@foodfrompoland.pl

Deputy Editor-In-Chief – Monika Dawiec
e-mail: m.dawiec@foodfrompoland.pl

Editor – Monika Kociubińska
e-mail: m.kociubinska@foodfrompoland.pl

Advertisement Office
Phone/Fax: +48-22 847 93 67
Phone +48-22 828 93 66

Sales & Marketing Department Director
Beata Kurp
e-mail: b.kurp@foodfrompoland.pl

Senior Account Manager – Katarzyna Paciorek
e-mail: k.paciorek@foodfrompoland.pl

Graphics studio – Paweł Pańczyk
e-mail: p.panczyk@foodfrompoland.pl

Printing house:
Print Studio ArtDruk Kobyłka
www.artdruk.com



Fischer Trading Group Ltd.
Bagno Street 2/218, 00-112 Warsaw
Phone/Fax: +48-22 847 93 67
Phone: +48-22 847 93 68
e-mail: redakcja@ftgroup.pl
www.hurtidet.pl
CEO: Tomasz Pańczyk



TOMASZ PAŃCZYK
Editor In-Chief
t.panczyk@foodfrompoland.pl

Discover great Polish food and cuisine!

Polish products are permanently present in the markets of many countries around the world.

Consumers love the taste and appreciate the quality, which is confirmed by numerous certificates. They are the guarantee that it is worth establishing business cooperation with Polish producers.

Each year, a growing number of new products are conquering international markets. There are more domestic producers who decide – with the success of sales departments – on export.

When we read or listen to the opinions of foreign admirers of Polish food, we can draw a clear thesis, namely: Poland is famous for its excellent products, and hence the tasteful food. Both the quality of Polish products, as well as the taste of our food is the result of a strong connection with tradition.

We can notice constantly increasing popularity of Polish dishes around the world. As we all know, Polish vodka has been valued and praised for years, but recently even such characteristic Polish traditional products such as sausages and cold meats, dairy produce, bread and sweets, are getting more and more popular among native British, Irish, Germans and also Americans. Polish food products are known for their exceptional taste, as well as their traditional and natural way of production and healthiness. Polish cuisine is considered to be delicious and has been gaining recognition from foreigners, who are delighted with the variety of 'exotic' dishes. Polish food products are associated with environmental cleanliness, traditional recipes, natural ingredients, and are free from chemical additives. As well as this, they offer high quality, product safety at every stage of production, international certificates and technological advancement.

Welcome to the new issue of 'Food from Poland' Magazine where you can read about Polish companies and the excellent traditional food products they make.



Give yourself

a moment of intense pleasure...

Export Department:
export@bogutti.com
tel.+48 783 956 466
www.bogutti.com



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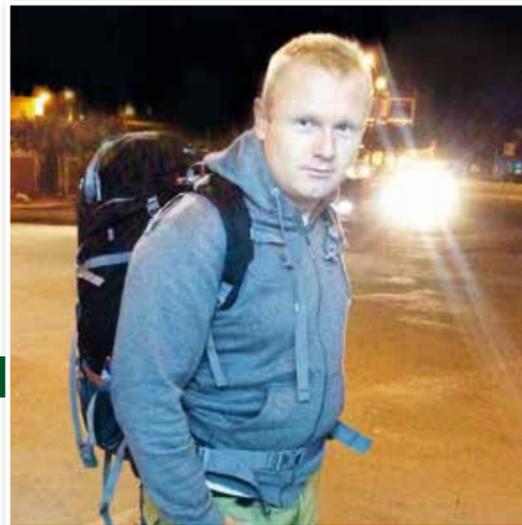
PRESENTATION

The PILOT Company was founded in 2000. Nine years later it took part in the ANUGA fair for the first time. At present, the company holds a strong position in the FMCG market and is constantly developing. More information on our business can be found on our web-site: www.puh-pilot.com. This year once again we are meeting with our customers on a covered market. In order to use this time fully, we would like to introduce our leaders to you. These are the people who constantly develop our team, set high standards in customer relations and make sure that each customer feels our professionalism and commitment.

Paweł Kubiak – The Company's President and founder

A visionary who is not afraid of risks, in particular business risks.

In private, a fan of water sports and fast cars. His passion is backpacking. Apart from Europe he has toured around Eastern Asia, starting from China, Burma, Laos to Malaysia, India, North and South America. At present, his new travel direction is Africa. He loves adrenaline and adventure. At work he is always smiling, he likes to joke. Everybody asks him for advice, both in personal and professional matters, and he gives it with pleasure.



Piotr Kubiak – Food Import & Export Director

At work – demanding, fully professional. His customers are the most serious businessmen from all over the world. His favourite reply to any problems are the words: 'No problem'. Privately, a keen sailor. If there is no contact with him, he surely went sailing on sea. His dream is to sail around the world in his own sailing ship, and on his own, for which he has been preparing for years. He loves peace and calmness which he finds in the Mazury Lake District.



Marta Boguszewska – Import & Export Deputy Director

The first woman among the Company's leaders. She can perfectly use her resourcefulness and creativity in building a strong team and a strong position on the market. Energetic and joyous are the features that best describe Marta. Committed to work, but above all to people, employees and friends all in one. In everyday life – a sports fan, she has been practising kick-boxing for years, she swims on a wake and snowboards perfectly. She loves Norway, she truly rests there, hiking on mountain trails.



Magdalena Malczyk – Piotr Kubiak's Assistant

They form a perfect duo, complementing each other. Professional service, broad knowledge, and a smile on her face, portray her image. Privately, she runs the 'SOS Dalmatians' Foundation. Thanks to her, many dogs have got their second chance for a better life. Totally dedicated to her work in the company and in the foundation.

Marcin Jarzębski – NON FOOD Department Director

Always online, available to his customers and co-workers. He has created and is consistently developing the non food department where women are predominant which is a big challenge. In love with mountains and climbing. A lot of his free time is spent trekking in the Polish Tatry and on climbing.



Marta Truszkowska – Export Manager in the Food Department

Always smiling and committed to her work with passion. Customers like to work with her because apart from being professional, she simply likes them. In private life she is very keen on fitness and healthy food. She motivates others to take sports challenges. Totally dedicated to her friends and family.

She infects everybody with her optimism. It is hard to be serious around Marta. She can get out of any difficult situation using a joke or riposte.

Agnieszka Brzezińska – Logistics Director

Logistics Director. She chooses sub-contractors in respect of road and sea transport. She takes care of the safety and quality of processing orders. She is the person customers contact to get information on a planned date of delivery or loading. Open to customers' needs, professional, consistent in her operation. She spends her private time travelling, usually with the latest edition of an interior design magazine.

She is always willing to help her friends in arranging or rearranging their interiors. She likes good wine, dreams of travelling the European vineyard trail.



This year PUH PILOT celebrates its 15th anniversary of operation. The whole team kindly invites your cooperation. On the ANUGA fair we can be found on the stands:

Fine Food Hall 01.1

Stand D069G-D063G

Drinks Hall 08.1

Stand E069



PUH PILOT UNLIMITED
Mokotowska Street 15A lok. 1B
00-640 Warsaw, Poland
phone +48 22 205 25 40
fax +48 22 205 25 41
www.puh-pilot.com

OFFICE / WAREHOUSE
Staniewicka Street 5
03-310 Warsaw, Poland



VISIT OUR STAND
HALL 2.1 D-043

Export Department: export@rolnik.pl
tel. +48 32 326 28 33, +48 32 323 23 49



WWW.ROLNIK.PL

Poland is a nation which, compared with other nations in Europe, strongly sticks to its tradition. This is also visible in the kitchen...

That is correct. Poles prefer a traditional cuisine based on Polish traditional products, including traditional fruit and vegetable preserves which are produced by ROLNIK Company. I have in mind pickled cucumbers, sauerkraut or beetroot and horseradish salad, products for which the Polish vegetable processing industry is famous. We also observe this preference in the export of our products which follow our emigrating fellow countrymen. It is in the countries with the biggest number of Poles, i.e. Great Britain, Ireland, Norway, USA, the Netherlands and Germany that we sell the biggest number of products under the ROLNIK brand. When leaving, Poles do not give up traditional products, they only search for them in local stores or suppliers.

Among the fruit and vegetable processing companies with businesses based on

product pasteurization and preservation, Polish family businesses are predominant. What is the reason for this?

The fragmentation of the fruit and vegetable processing industry is the reason. This trade has a large number of small, family companies, often made up of several people, that have been run for a few generations but have not been expanded. The production process, which is not very complicated, also has an influence on establishing family businesses which – when run on a small scale – do not need any state-of-the-art technology. Development-oriented companies, such as ROLNIK, along with its development, had to start supporting itself with a well-educated and experienced staff. Please remember that ROLNIK has about 600 permanent employees. The size of ROLNIK and the scale of its business require a broader look and new ideas from the outside. We try to cherish family company values and combine them with modern management practices. From our experience we know that such a model works.

The high and consistent quality of products and constantly expanding the assortment – is this the way to success for the ROLNIK Company?

Quality is always on the first place in our production, right from the moment of the cultivation and supply of raw materials. We focus on regular and reliable suppliers. Only vegetables and fruit of the highest quality come to our processing plants. Our products are produced based on the highest possible standards. We hold all certificates required in the EU and worldwide, namely: IFS & BRC. Regarding the assortment, I can say there is no other company trading in vegetable and fruit processing in Poland which has such a wide assortment. We offer more than 250 products. Virtually, there is not a single vegetable which cannot be found in jars with ROLNIK brand products. A wide range of assortments allows us to satisfy even the most demanding customers searching for unique and unusual products. We often try to introduce novelties to our offer, previously not available in Poland, known by customers only from their trips abroad. It allows

us to draw their attention and to promote new culinary habits, as well as to increase our sales.

What does the company's production base look like?

ROLNIK Company owns 4 factories in total. Three are located in southern Poland in Mikołów, Orzesze and Daniec near Opole and we have one factory in Hungary. Each factory has its specialization, however if need be, all the factories complement each other. The factories have modern equipment which allows us to process fruit and vegetables on a large scale, as well as constantly develop our assortment. Our fleet of machines are constantly being modernized and developed. Recently, we bought a state-of-the-art machine to drill fruit, new autoclaves and a new mixing cutter. These machines considerably enhance our production capacity and at present our plants process about 34,000 tonnes of stock per annum which allows us to carry out really big contracts in Poland and abroad. Obviously, we are planning new investments. Keeping track and implementing new techno-

logies and trends in the fruit and vegetable processing industry is extremely important to gain success, because it often allows to reduce costs and increase the company's competitiveness.

ROLNIK has its regular suppliers. Is loyalty the most important thing in this line of cooperation?

As I said before, ROLNIK Company always puts high quality and reliable suppliers on the first place. Obviously, when cooperating with farmers loyalty is the most important thing. In our Polish reality you cannot always count on this loyalty. The price is the most important thing. Moreover, in the extreme conditions which we had this season because of drought, the vegetable crop is often 40-50% smaller than in previous years, even the most loyal suppliers cannot meet our demands regarding the quality and quantity. We often help ourselves by purchasing fruit and vegetables abroad. Being a member of the EU, we have the opportunity to buy raw materials abroad, where the drought did not destroy the crop, without any barriers.

The possibility to acquire high quality raw material is a key factor for further development of the fruit and vegetable processing sector. What is this sector's position in Poland, compared with other European countries?

As it turns out, this year our agriculture's position is not as good as it seems. In particular, I have in mind the system of arable land irrigation which does not exist in Poland at all. In the event of this year's drought the absence of land irrigation – as is in Hungary or Germany – resulted in a considerably lower availability and quality of raw materials compared with our neighbours. In this area we have much to improve. And regarding the fruit and vegetable processing sector itself, we have nothing to be ashamed of. As I mentioned before, the sector is fragmented but big players are constantly developing themselves, factories are being extended and modernized, and ROLNIK Company is an example of this. We are competitive in relation to Western European companies and the perspectives ahead of us are very promising.





Polish foreign trade

2014 showed a high exchange dynamics in the Polish foreign trade. A distinct decrease in the pace of exports, combined with a strong growth of imports, resulted in quite a dynamic increase in the goods trade deficit.

Exports increased by 5.2% to EUR 163.1 billion, and imports by 5.5%, to EUR 165.6 billion. As a result, the total foreign trade deficit increased by as much as 23% on a year-over-year basis, from EUR -1.984 to -2.446 billion. The total share of agricultural products in overall exports exceeded 13%, whereas in the case of imports, it amounted to less than 9%. In both the import and export of food, a drop in their share in overall trade occurred. A positive trade balance was recorded again in the foreign trade of agricultural and food products, contrary to the overall trade.

In 2014, the share of total exports to developed countries increased by 2 pp to 84%, the significance of the EU countries increased by the same value to 77%, the share of developed third countries remained stable (7%). In the case of developed countries, 2014 saw, nearly, an 8% increase in exports, whereas the dynamics in developed countries excluding the EU were significantly lower, approaching 3%. The share of the Eurozone in exports increased by 2 pp to 54%, and the positive dynamics of exports exceeded 9%. A higher growth rate of exports in this direction could be explained by the good economic situation. According to the

International Monetary Fund, GDP increased in 2014 by 3.3% worldwide and by 1.8% in the developing countries. Improvement was also observed in Poland's main trade partners: Germany (+1.4%), France (+0.4%), the United Kingdom (+3.2%), whereas the GDP in the Eurozone increased by 0.8%. The share of exports in third countries (excluding developed ones) decreased by 2 pp to 16% due to an almost 6% drop of exports in this direction. Exports to the CIS dynamically decreased by almost 17%, and the share dropped to 8% (less by 2 pp YOY). The share of developed countries without the EU did not change (7%).

With regard to imports, a minimally higher growth rate was recorded than in exports (5.5 compared to 5.2%), the growth dynamics for the Eurozone were almost twice as high as for other EU countries, while purchases from the CIS and non-EU developed countries dropped (by slightly above 3% each). 65% of imports reached Poland from the developed countries (less by 1 pp), whereas imports from the EU amounted to 59% (+ 1 pp), and from the Eurozone, 46% (unchanged). The share of purchases in the CIS dropped by 1 pp to 13%. Due to a 14% growth in imports, the share of imports

from third countries excluding developed ones and the CIS increased by 2 pp to 22%. Imports from developed countries (including the EU) showed positive dynamics (4.6%), although lower than the total imports (+5.5%), while the imports from third countries excluding developed ones increased at a rate higher than average (+7.2%), which allowed an increase of the shares of this group, in the geographical structure of the imports, by 1 pp to 35%.

Due to slightly higher growth dynamics in imports than in exports in 2014, the deficit in the balance of the foreign trade distinctly increased from EUR -1.984 billion to EUR -2.447 billion (+23%). It is also worth noticing a change in the growth rate of trade on a year-to-year basis: in 2013, exports increased by 8% YOY, and imports by 1.9%. In 2014, on the other hand, the growth rate of imports was 5.5% (strong growth YOY), and of exports, 5.2% (a distinct decrease). Trade with the EU countries showed a positive balance amounting to EUR 28.8 billion (including almost EUR 11.2 billion for the Eurozone), the trade with developed countries excluding the EU ended with a deficit of EUR 362 million, which, nevertheless, dropped by as much as 2/3 YOY. The trade exchange

Product structure of the Polish agri-food trade

Product group	Export (mln EUR)				Import (mln EUR)				Balance (mln EUR)	
	2013	2014	% share in 2014	2014/13 change	2013	2014	% share in 2014	2014/13 change	2013	2014
Live animals	186,9	165,9	1%	-11%	610,1	618,8	4%	1%	-423,2	-452,9
Meat, offal and preserves	6 301,8	6 480,5	30%	3%	2 543,2	2 572,6	17%	1%	3 758,5	3 907,9
Fish and fish products	1 365,9	1 429,0	7%	5%	1 471,5	1 547,4	10%	5%	-105,5	-118,5
Vegetal feedstock	2 647,0	2 638,0	12%	0%	2 391,3	2 423,5	16%	1%	255,7	214,6
Horticulture products	6 522,3	6 522,8	31%	0%	4 864,6	5 035,5	34%	4%	1 657,7	1 517,3
Stimulants, beverages, other	3 403,3	4 081,6	19%	20%	2 431,8	2 594,3	18%	7%	971,5	1 487,3
Total	20 427,2	21 347,9	100%	5%	14 312,6	14 792,2	100%	3%	6 114,6	6 555,7

(FAMMU/FAPA), Foreign Agricultural Markets Monitoring Team – April 2015

with developed countries in total ended with a high positive balance (EUR 28.4 billion). On the other hand, a large deficit had been recorded in the case of third countries excluding the developed ones (EUR -30.9 billion), which increased by 22%. The negative balance of trade with the CIS increased by as much as 29% to EUR -8.4 billion, and with other countries (excluding the developed ones and the CIS) increased by 19% to EUR -22.5 billion.

For many years, Germany has been the most important trade partner of Poland, both in exports and imports. In 2014, sales to the German market increased on a year-over-year basis by 10% to EUR 42.6 billion, while the imports increased by 7% to EUR 36.4 billion. In both cases, the growth dynamics were higher than in the total trade. Germany's share in Polish trade, in the case of imports, remained unchanged at a level of 22%, and in exports it increased by 1 pp to 26%. Among the top ten largest outlets in value terms, only Russia (a 4% share) was outside the EU. In the case of imports, the top ten largest suppliers included three third countries: Russia (a 11% share), China (11%) and the USA (2%). Trade with the top ten trade partners constituted 65% of exports and 67% of total imports. It is worth noticing the large decrease in the dynamics of purchases from Russia (-9% YOY) and Ukraine (-27%, which made this country fall out of the top ten recipients).

The year 2014 brought a minimal drop in

the share of agricultural and food products in the total Polish foreign trade, whereas the growth rate of food exports and imports was noticeably lower than the total trade. The share of exports dropped by 0.1 pp to 13.1%, and of imports, by 0.2 pp to 8.9%. Of special interest is the slowdown of the growth rate of the share in exports, which had been growing quite strongly for the last three years. The dynamics of imports had been subject to minimal changes in the recent years. Despite weaker dynamics of trade in agricultural and food products than in total trade in 2014, the food trade balance has been positive for years, it increased by 7% to EUR 6.6 billion in 2014. The results of the Polish foreign trade in food, in 2014, were determined by exports to the CIS (-23% YOY), including, above all, Russia (-30%) and Ukraine (-22%), which is connected with the Russo-Ukrainian conflict, the Russian embargo on EU food (assorted products), and the strong depreciation of the rouble and hryvnia. The share of the CIS countries in the geographical structure of Polish food exports decreased in 2014 by 3 pp, from 11% to 8%.

The Ministry of Economic Affairs expects that in 2015, the total Polish exports will increase by 5.5% to EUR 172.1 billion, and the imports will grow slightly slower, by 5% to EUR 173.9 billion (after a study in March 2015). The deficit will amount to EUR 1.8 billion and will be lower in the year-over-year approach.

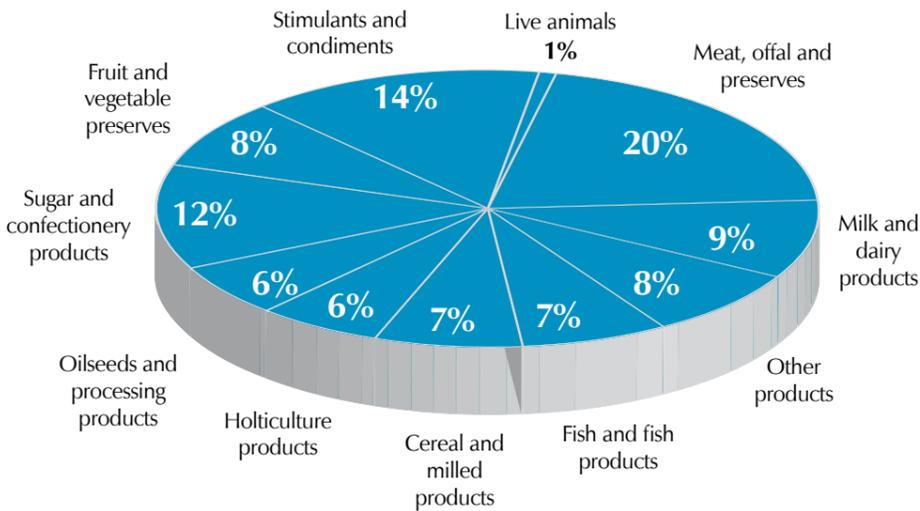
COMMODITY STRUCTURE OF THE AGRICULTURAL AND FOOD TRADE

In 2014, the positive balance in the Polish agricultural and food trade increased per annum by 7% to EUR 6.5 billion. The positive trade balance in the section of processed products of animal origin and stimulants improved. In the animal section, the value of the export of milk and dairy products, meat and poultry offal, as well as processed meats increased. The positive balance in the trade of red meat decreased, mainly due to a significant drop in the export of pork and beef. The negative balance in the trade of live animals deepened again due to the continuing high imports of piglets and an increase in the purchase of poultry and cattle. In the plant section, a positive trade balance was recorded again. This was mainly caused by an increase in the export of wheat, grain mill products, starch, feed components and confectionery. The positive balance in the trade of sugar decreased due to a drop in export.

Polish agricultural and food exports were dominated by low-processed products constituting 58% of their value. Highly-processed products had a share of 24%, and unprocessed products – 19%. In comparison with 2013, the share of highly-processed products increased by 1 pp.

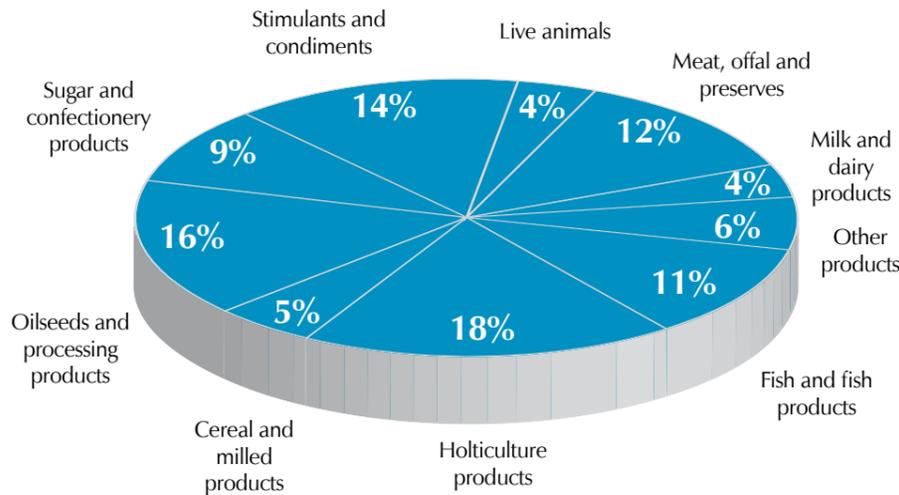
The export value of low-processed products increased by 4%, and that of highly-processed products – by 8%, and of unprocessed products – by 3%. In 2014, the animal section saw a 13%

Product structure of the Polish agri-food export in 2014
(in terms of value)



(FAMMU/FAPA), Foreign Agricultural Markets Monitoring Team – April 2015

Product structure of the Polish agri-food import in 2014
(in terms of value)



(FAMMU/FAPA), Foreign Agricultural Markets Monitoring Team – April 2015

decrease of positive balance in the trade of red meat, mainly due to a significant decrease of proceedings from the export of pork (-24%), beef (-19%), and horse meat (-8%). The export value of poultry meat, on the other hand, increased by 22%, and in the case of sheep and goat meat, by 15%. An increase was also recorded in revenues from the foreign sales of powdered milk (+66%), whey (+10%), processed meats (+8%), honey (+36%), fish and crustaceans (+5%). The value of sales was lower than the

year before in the field of live animals (-11%), mostly cattle and horses, as well as animal fats and meals (-16%), cheese and curd (-5%), eggs and egg products (-2%), butter (-1%). In the vegetable section, as in earlier years, of greatest significance in their export were processed products, the export value of which in 2014, nevertheless, increased only slightly (+0.3%). This group saw an increase in proceeds from the sales of starch, meals and malt (+20%), oil meals, feed ingredients and feed

(+8%), confectionery (+6%) and grain mill products (+2%). On the other hand, the export value of sugar was lower than the year before (-30%), due to a drop in its profitability. There were also reductions in earnings from the export of processed vegetables and fruit (-6%), sauces, soups and thickeners (-6%), as well as vegetable oils and fats (-1%). In the group of vegetable raw materials, a positive balance in foreign trade was recorded once more, however, it was lower by 16% than in 2013. A positive balance in the trade of grains increased per annum by one third due to an increase in exports by 21%, mostly of wheat. This was influenced by an increase in the profitability of exports from Poland and other EU countries, due to the loss of profitability of supplies of American wheat and the limitations of Russian export. On the other hand, 2014 saw a reduction in earnings from the export of Polish fruit (-18%), especially apples, due to the Russian embargo imposed in August of the previous year. There was also a decrease in the export value of oilseed rape (-11%), flowers (-12%), and potatoes (-6%).

The first item in the section of other products, and, at the same time, the product with the highest value in the commodity structure of agricultural and food exports, were cigarettes; their export value increased by 8% per year, and the value of total tobacco and tobacco products increased by 27%. There was also an increase in the re-exportation of cocoa, coffee, tea and spices (+15%), the export of waters and soft drinks, (+24%) as well as alcohol and alcoholic drinks (+5%).

The imports of agricultural and food products to Poland in 2014 were dominated, traditionally, by low-processed products (48% of the value of supplies). Unprocessed products had a 33% share in the value of purchases, and highly-processed products – a 19% share. Within a year, the value of supplies of low-processed products increased by 5%, of highly-processed products – by 3%, and of unprocessed products – by 2%. Vegetable products constituted a half of the value of the overall agricultural and food imports. The cost of the supply of vegetable products increased by 3% in relation to 2013. To a greater extent, the export value increased in the case of processed vegetables (+15%), oil meals

Geographical structure of the Polish agri-food trade

Formation	Export (mln EUR)				Import (mln EUR)			
	2013	2014	% share in 2014	change 2013=100	2013	2014	% share in 2014	change 2013=100
European Union	15 979,2	16 876,7	79%	5,6	9 944,4	12 210,7	69%	2,7
"EU 15"	11 955,2	12 573,5	59%	5,2	8 472,4	8 763,4	59%	3,4
"EU 13"	4 024,0	4 303,3	20%	6,9	1 472,1	1 447,3	10%	-1,7
Eurasian Economic Union	1 629,0	1 237,7	6%	-24,0	129,1	200,0	1%	54,9
Eastern Partnership	503,0	407,8	2%	-18,9	389,1	397,1	3%	2,1
NAFTA	338,4	364,1	2%	7,6	430,7	315,5	2%	-26,8
PIK EU	187,8	170,0	1%	-9,5	241,5	247,2	2%	2,4
EFTA	169,8	176,3	1%	3,8	699,3	743,6	5%	6,3
ASEAN	135,0	166,9	1%	23,6	366,9	323,4	2%	-11,8
Third countries	1 580,4	2 086,9	10%	32,1	2 521,3	2 718,8	18%	7,8
Total	20 427,2	21 347,9	100%	4,5	14 312,6	14 792,2	100%	3,4

(FAMMU/FAPA), Foreign Agricultural Markets Monitoring Team – April 2015

and feeds (+13%), as well as potatoes (+13%). Compared to the year before, more was also spent on the purchase of confectionery (+4%), grains (+4%), flowers (+6%), fresh vegetables (+2%) and fruit (+1%), as well as sauces, soups and thickeners (+3%). On the other hand, there was a decrease in expenditure on the imports of grain mill products (-16%), oilseeds (-8%), sugar and molasses (-13%), as well as vegetable fats and oils (-5%). The section of animal origin products had a share of approx. one-third in the import value of all agricultural and food products. Over the year, the value of imports of animal products increased by 2%.

Once again, the commodity with the highest value in purchases on foreign markets was pork, with a 4% decrease in expenses in comparison with 2013. There was a significant increase per annum in the value of imports of poultry meat (+21%), milk, cream and ice cream (+14%), cheese and curd (+12%), beef (+9%), sheep meat (+40%), horse meat (+36%), and also, to a lesser extent, fish and crustaceans (+6%) as well as processed meat (+1%). Moreover, less was spent than in the year before on the purchase of animal fats and meal (-11%), butter (-4%) and processed fish (-7%). In the group of live animals, pigs remained the most important item in imports. However, the import value of these animals (mainly piglets) to Poland decreased by 6% in 2014. On the other hand, expenses on the purchase

of live poultry (+27%) and cattle (+15%) were higher than the year before. In the section of other products, the greatest share in the value of imports (38%) comprised, traditionally, coffee, tea, cocoa and spices. In comparison with 2013, expenses on these goods increased by 3%. There was again an increase in value of the purchase of unmanufactured tobacco for the production of cigarettes (+20%), as well as, slightly, of alcohol and alcoholic drinks (+0.1%). On the other hand, the expenses on the import of waters and soft drinks dropped (-2%).

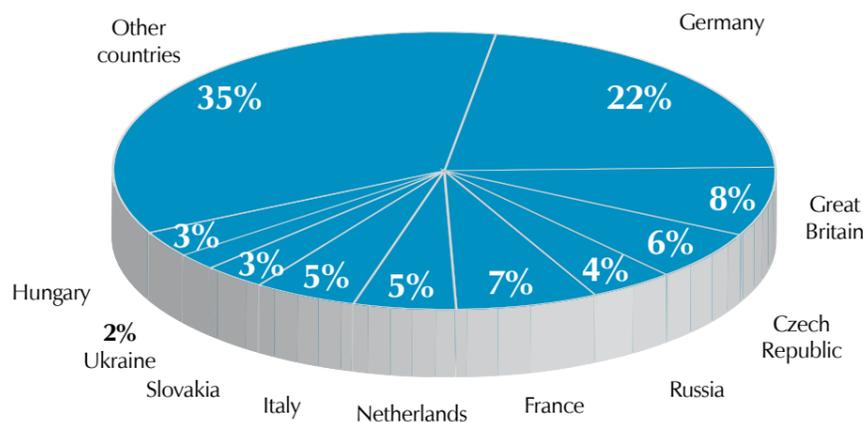
GEOGRAPHICAL STRUCTURE OF THE AGRICULTURAL AND FOOD TRADE

For many years, Poland's most important partner in the agricultural and food trade has been the European Union, and this was the case in 2014 as well. The balance of trade exchange with member states improved by almost 3% due to the growth dynamics of exports being slightly higher than that of imports. In 2014, the balance of trade exchange of agricultural and food products was positive, similarly as in several recent years, and totalled, in value terms, EUR 6.55 billion in comparison with EUR 6.11 billion in 2013, which relates to a 7% growth. In the previous year, the exported agricultural products reached a value higher by 5% – EUR 21.35 billion in comparison with EUR 20.43 billion the year before. Similarly,

the value of imports showed an increase as well – a total amount of EUR 14.79 billion in comparison with EUR 14.31 billion the year before – a growth of nearly 4%. We sent considerably more of all agricultural products in terms of quantity – in total, we exported 20.44 million tons abroad in comparison with 18.64 million tons the year before; in terms of quantity, the exports increased by nearly 10%. We also imported more goods to Poland, by 7% - in total, 20.85 million tons in comparison with 19.46 million tons the year before.

In 2014, agricultural and food products worth EUR 16.87 billion were sold to the European Union, in comparison with EUR 15.98 billion the year before, which comprised as much as a 79% share in the total Polish agricultural and food exports. The value of the agricultural and food products exported from Poland to the countries of the EU-15 grouping reached a 59% share in total exports – EUR 12.57 billion, and to the remaining new member states, 20% – EUR 4.3 billion. In the previous year, as previously mentioned, a positive trade balance of agricultural and food trade with the EU was experienced again – it amounted to EUR 6.66 billion and was higher by 10% than in 2013. The improvement in the balance results was from better exports in this direction – an increase by 6% in comparison with 2013. In the period under consideration, goods worth approx. EUR 10.21 billion were brought to Poland from all countries of

Major recipients of Polish agri-food products in 2014 (in terms of value)



(FAMMU/FAPA), Foreign Agricultural Markets Monitoring Team – April 2015

the Community, in comparison with EUR 9.94 billion (+3%), constituting a 69% share of total Polish agricultural and food imports. The value of agricultural and food products imported from the “EU-15” constituted 59% of the total value of the previous year’s imports of these products – EUR 8.76 billion, and from the “EU-13”, nearly 10% - EUR 1.44 billion.

In the previous year, we exported goods worth EUR 12.57 billion to the countries of “EU-15” in comparison with EUR 11.95 billion the year before, and EUR 4.30 billion to the “EU-13”, in comparison with more than EUR 4.02 billion in 2013 – in both cases, an increase in the value of Polish exports was recorded – by 5% in the former case and by 7% in the latter. Last year, imports from the Union “15” ended with a value of EUR 8.76 billion in comparison with EUR 8.47 billion the year before, and from the Union “13” – with an amount of 1.44 billion in comparison with EUR 1.47 billion, respectively. Thus, a 4% increase in the former and a 2% drop in the latter was recorded. In 2014, the trade balance for the countries of the EU-15 was positive, amounting to EUR 3.81 billion in comparison with EUR 3.48 billion the year before, and for the countries of the Union “13”, EUR 2.85 billion in comparison with EUR 2.55 billion the year before.

In general, in the previous year, we sent more in overall agricultural and food products to all countries of the Community in terms of quantity – 14.78 million tons; we also imported

more agricultural and food products from this direction – 14.2 million tons. For comparison, the year before, these amounts totalled 13.99 million tons and 13.58 million tons, respectively.

In value terms, all EU markets were reached, above all, by traditionally processed Polish vegetable products – value: EUR 6.76 billion, with an approx. 32% share in the value of the total agricultural and food exports, as well as processed animal products – EUR 6.66 billion (a 31% share). In total, our exports of live animals, processed meat products, as well as vegetable raw materials and their preserves to the EU market had the value of EUR 13.42 billion – i.e., in total, 79% of the total exports of Polish agricultural products to the EU and 63% of overall exports. The most important items from the vegetable section in exports to the EU were confectionery – EUR 1.77 billion, processed fruit – EUR 933 million, grain – EUR 607 million, oil cake and feed components as well as feed – nearly EUR 524 million, processed vegetable – above EUR 492 million, and fresh vegetables – EUR 438 million. The section of animal products was dominated by red meats and offal – EUR 1.55 billion, poultry meats and offal – EUR 1.22 billion, fish and crustaceans – above EUR 960 million, processed meat – EUR 781 million, as well as milk, cream and ice cream – EUR 686 million. Another important item in exports to the EU countries were tobacco products – EUR 1.77 billion.

The imports of EU agricultural and food products was dominated, in value terms, by vegetables and processed vegetable products – EUR 5.02 billion, with a 49% share of the EU imports and a 34% share of total imports. Here, of greatest significance were confectionery – EUR 972 million, vegetable fats and oils – above EUR 623 million, and fresh fruit with EUR 603 million. In the imports of EU processed and unprocessed animal products (value: EUR 3.56 billion), the greatest quantities in the previous year were red meat and offal – EUR 1.4 billion. Moreover, of considerable significance in imports were coffee, cocoa, tea and spices – above EUR 504 million EUR, oil cake and feed ingredients, fish, as well as alcohol and alcoholic drinks.

The most important recipient of Polish agricultural and food products the year before, both in the EU market and outside it, was traditionally Germany. In 2014, it purchased products worth approx. EUR 4.81 billion (+2% increase in comparison with 2013) in Poland, constituting 22% of the total Polish agricultural and food exports and 28% of exports to all EU countries. As in every year, the goods sent in this direction included, above all, Polish vegetable products, both fresh and processed – EUR 2.34 billion, and processed animal products – EUR 1.02 billion. The highest receipts were gained from the export of fish and crustaceans – EUR 598 million, including, mainly, smoked fish, grain – EUR 455 million, confectionery – nearly EUR 438 million, and processed fruit – EUR 364 million. Another significant position comprised all sorts of meat and offal as well as dairy products.

The second most valuable outlet was again the United Kingdom with an amount of EUR 1.63 billion and a share of nearly 8% in the total Polish agricultural and food exports and 9% in exports to the EU countries. In the previous year, the value of agricultural and food products exported in this direction showed a 6% increase in value from EUR 1.54 billion the year before. The main products imported by the British from Poland were confectionery – EUR 347.0 million, processed meat – above EUR 278.0 million, poultry meat – nearly EUR 182.0 million, and processed fruit.

The top five recipients of Polish agricultural and food products among the European Union countries also included France (EUR 1.46 billion, a 23% increase in exports per annum), the Czech Republic (EUR 1.3 billion, a 5% increase) and Italy (EUR 1.15 billion, an 8% increase).

The second grouping after the European Union, to which we provide most agricultural and food products, is the organization known as the Eurasian Economic Union, comprising the CIS countries connected with a customs union – including Belarus, Kazakhstan, Kyrgyzstan, Russia, Armenia and Tajikistan. In 2014, sales to the EEU decreased in value terms by 24% per annum to EUR 1.23 billion, in comparison with EUR 1.63 billion the year before, and the share in the total Polish agricultural and food exports constituted less than 6%. Such a significant decline in the value of exports was caused by a significant reduction of exports to the Russian market, caused by the embargo. The structure of exports was dominated by fresh fruit – EUR 302 million, confectionery – EUR 136 million, and processed vegetables – EUR 123 million, as well as cheese and curd – above EUR 76 million. The biggest recipients from this grouping included Russia and Belarus. However, in 2014, Russia had reduced the value of agricultural and food imports from Poland by 30% to EUR 881.7 million, thus becoming, in value terms, the seventh largest recipient of agricultural and food products from Poland. The most important items in supplies to the Russian market in the previous year included fresh fruit – above EUR 318 million, red meat (pork) – EUR 137 million, fresh vegetables and their preserves, as well as cheese and curd. Russia’s share in exports to the grouping of the EEU countries constituted 71% in value terms and 4% of the total Polish exports of agricultural and food products. In the previous year, the value of exports to Belarus decreased by 7% to EUR 273 million, and the exports were dominated by fresh fruit and vegetables – in total, less than EUR 160 million, as well as dairy products and processed vegetables.

Other importers of agricultural and food products from Poland are the countries of the Eastern Partnership, comprising, among

Geographical analysis of Polish agri-food trade in Europe

Partner	Export (mln EUR)			Import (mln EUR)		
	2013	2014	r/r	2013	2014	r/r
Germany	4 711,6	4 812,5	2%	3 227,8	3 279,3	2%
Great Britain	1 545,0	1 635,3	6%	404,1	424,8	5%
Czech Republic	1 240,2	1 302,2	5%	453,3	432,3	-5%
France	1 193,7	1 463,2	23%	524,0	544,9	4%
Netherlands	1 059,7	1 053,8	-1%	1 171,0	1 231,9	5%
Italy	1 065,5	1 152,7	8%	571,5	579,2	1%
Slovakia	716,1	691,1	-3%	281,1	266,4	-5%
Hungary	540,3	565,5	5%	293,8	282,0	-4%
Lithuania	418,5	451,0	8%	253,3	211,6	-16%
Denmark	416,8	408,9	-2%	671,3	684,9	2%
Austria	340,6	330,6	-3%	182,3	189,0	4%
Romania	373,0	414,2	11%	40,7	58,0	42%
Spain	388,5	420,8	8%	769,8	760,5	-1%
Sweden	367,4	352,3	-4%	168,9	206,8	22%
Belgium	363,9	432,6	19%	469,9	500,1	6%
Croatia	92,4	128,8	39%	13,5	16,6	23%
Cyprus	25,3	42,0	66%	10,0	33,0	230%
Ireland	174,5	158,2	-9%	109,7	142,3	30%
Bulgaria	235,5	225,9	-4%	64,2	74,1	15%
Latvia	221,3	276,5	25%	39,7	46,2	16%
Finland	127,8	129,0	1%	42,2	39,1	-7%
Estonia	121,2	118,9	-2%	19,6	18,1	-8%
Greece	130,7	136,7	5%	103,4	116,0	12%
Slovenia	74,7	78,5	5%	8,3	8,3	0%
Portugal	63,9	80,0	25%	48,6	59,9	23%
Total	16 008,1	16 861,2	9%	9 942,0	10 205,3	16%

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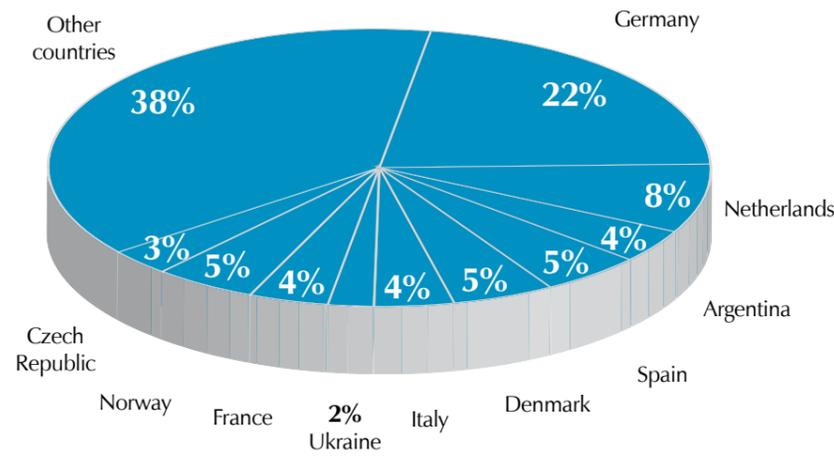
others, Azerbaijan, Georgia, Moldova and Ukraine which is the largest recipient of Polish agricultural and food products in this group. In 2014, the total exports to this group of countries ended with a value exceeding EUR 407 million, i.e. lower by 19% in comparison with the data for 2013 – EUR 503 million. The products we exported to Ukraine were worth above EUR 357 million, of which the largest group was fresh fruit – worth above EUR 71 million, confectionery, as well as coffee, cocoa and tea.

A considerable recipient is the NAFTA, i.e. the United States of America, Canada and

Mexico, the previous year’s value of exports was EUR 364 million, i.e. 8% more than the year before. Exports in this direction constituted approx. 1.5% of the Polish agricultural and food exports in value terms. The greatest share (78%) in this grouping was to the United States; in 2014, the USA imported Polish agricultural and food products worth EUR 285 million, 14% more than in 2013, comprising mainly red meat and offal, confectionery, processed meat, and alcoholic drinks.

For many years, the most important supplier of agricultural and food products to Poland has been the European Union, with the value of

Major delimiters of Polish agri-food products in 2014 (in terms of value)



(FAMMU/FAPA), Foreign Agricultural Markets Monitoring Team – April 2015

imports in 2014 reaching EUR 10.21 billion, constituting a 70% share of the total imports.

In comparison with 2013, the value of these supplies increased by 3%. The greatest amounts were imported from the countries of EU-15 – EUR 8.76 billion (an increase by 3% per annum), comprising a 61% share in the total imports to Poland in value terms and 86% in supplies from the EU alone. The remaining amounts of agricultural and food products are imports from new EU member states – in 2014, the value of purchases reached EUR 1.44 billion and was lower by 2% than the year before. From the EU countries, in total we imported a greater volume of agricultural and food products than in 2013 (an increase by 5%) – 14.2 million tons. The 2013 imports from the countries of EU-15 to Poland were dominated in value terms by pork – EUR 1.36 billion, and the consequent places were held by confectionery – EUR 809 million, fresh fruit – EUR 582 million, vegetable oils and fats, coffee, cocoa, tea and spices, as well as fresh vegetables and alcohol. The new member states' exports to the Polish market included mainly red meat – EUR 192 million, confectionery – less than EUR 163 million, grain, vegetable oils and feed ingredients.

Outside the European Union, agricultural and food products of significant value are imported from the countries of the EFTA (including, above all, Norway, as mentioned below) – in the pre-

vious year, it was an amount above EUR 743 million, and the supplies were obviously dominated by fish and crustaceans with a total value of EUR 703 million. Other major suppliers to the Polish market are countries of the Mercosur group, including, above all, Argentina, Brazil and Paraguay – the total amount of supplies from this direction in the previous year exceeded EUR 984 million. Definitely, the most imported goods from these countries are oil cake, feed and feed ingredients – in total, above EUR 651 million, as well as tobacco and tobacco products. Moreover, nearly EUR 400 million is the value of Polish imports from the grouping of countries of the Eastern Partnership, including nearly EUR 360 million from Ukraine alone.

For years, Germany has been not only the greatest importer of Polish products, but also a country supplying agricultural and food products to Poland, with a 23% share in the total Polish agricultural and food imports and a 32% share in the 2014 imports from the EU countries. In the previous year, the value of products imported from Germany increased by 2% to EUR 3.28 billion, in comparison with EUR 3.22 billion the year before. The supplies were dominated by confectionery – less than EUR 461 million, red meat, including pork – EUR 445 million, coffee, cocoa, tea and vegetable oils – EUR 246 million, as well as vegetable fats and oils and feed.

Similarly as in the previous years, Poland's second largest market for provision of agricultural and food products in 2014 were the Netherlands, where goods worth EUR 1.23 billion were purchased – a value higher by 5% than the year before – EUR 1.17 billion. In terms of goods, the greatest share of supplies traditionally comprised flowers – EUR 195 million, vegetable fats and oils – EUR 156 million, red meat – pork, as well as cocoa and coffee.

The third largest supplier of agricultural and food products to the Polish market was another member state - Spain, which reduced the value of products sent to our market by just 1%, to EUR 760.5 million. Spain has traditionally provided the Polish market with horticultural products – fresh fruit, above all, citrus fruit with a value of less than EUR 289.0 million, fresh vegetables – EUR 180 million, red meat, as well as processed fruit and vegetables.

The fourth position, once again, was occupied by Norway; in the previous year, it increased the value of products exported to Poland by 7%, to above EUR 688 million, in comparison with EUR 642 million the year before. From this country, we purchased, above all, fresh fish (salmon with a value above EUR 461 million) and processed fish with a total amount of EUR 666 million – a 97% share in supplies to the Polish market.

Lastly, the fifth position in the previous year was held by Denmark, providing us with goods worth 2% more than the year before – just under EUR 685 million. The supplies from Denmark were dominated by pork and pigs – in total, above EUR 435 million.

The next position among the leaders of exports to the Polish market was held by Argentina, which increased the value of products sent to Poland by 17% in comparison with the year before, to just under EUR 594 million. Approx. 85% of the value of imports from this country was soybean meal – EUR 506 million, an essential component for the production of industrial feed, as well as oilseeds and tobacco. Moreover, goods worth nearly EUR 580 million were provided by Italy – mainly fruit, confectionery and wines, France – EUR 545 million, and Belgium – EUR 500 million.



What things determine the popularity of Polish beer abroad?

The times, when the demand for Polish beer was almost only created by interest of our fellow countrymen staying abroad, are over. Obviously, Poles are still faithful to their favourite Polish brands but more and more often Polish beer is consumed by foreigners. Polish beer is becoming increasingly recognizable and highly valued by consumers worldwide. This is caused, above all, by its perfect taste and high quality achieved thanks to natural ingredients and unique recipes. I am glad that among the brands of beer from Poland with regularly increasing export, include PERŁA - a flag brand of the Lublin Brewery.

The range of export is wide. Apart from European markets, Perła is also available among others in Australia or Zambia. How important is export for the company?

At present, our beer is exported to European countries such as: Great Britain, the Netherlands, Spain, Greece and Ireland. An important role is played by the distribution of the products of Perła - Browary Lubelskie S.A. in the United States. We regularly send our beer also to other continents - to Australia, Asia and South America. Despite the fact that export is not fundamental to our business, it is an important tool for the expansion of our customer base and it is conducive to a more complete usage of our production capacity. Moreover, in the case of sales to countries which are a popular direction of economic emigration, it allows to maintain contact with the brand and keep up the loyalty of our consumers who decided to leave Poland.

Are you planning to discover new export markets in the near future?

Perła - Browary Lubelskie S.A. promotes the Perła brand by taking part in more fairs, economic missions and trade exhibitions worldwide. The presence of our company in such events gives notable benefits – consumers have a chance to get to know the taste of our beer and compare it with products offered by our competition, and for us it is a perfect opportunity to establish cooperation with new distributors - a cooperation which may result in the availability of Lublin beer in countries where it was not available earlier.



ANDRZEJ RUTKOWSKI

Managing Director of Perła – Browary Lubelskie S.A.

Last year we probably set a record in the export of Polish beer. Until November Polish breweries sent abroad 2.7 million hl, while in the entire 2013 it was 2.6 million hl. The beer market is still very competitive which results in many innovations. What is new in the portfolio of Perła - Browary Lubelskie?

In our company's portfolio you can find representatives of many beer sorts and styles. We have honey beers, unpasteurized beers, unfiltered beers, bock beers, Baltic Porter, Witbier, Rauchbier or Whisky Stout. Not all are available in a wide distribution – for example, some are brewed only for our company's Beer Pubs. Despite changes, new trends, the Polish beer market is still dominated by the traditional lagers. And this is the sort of beer which is in the lead in the portfolio of Perła - Browary Lubelskie S.A. Traditional lagers are both Perła Chmielowa – lager brewed from excellent Lublin hop with a characteristic bitter taste and light hops aroma, and Perła Export - more delicate, refreshing, particularly valued by young consumers. Both these flag products of the Lublin Brewery are also available abroad.

Thank you. Tomasz Panczyk, Editor-In-Chief

MADE IN POLAND – a reason to be proud?



Dorota Kalowska
Expert at the Polish Chamber of Commerce Partner & Strategy Consultant Cobalt Spark

For 16 years, she has advised brand owners in the Polish market with regard to building of brand value and efficient communication thereof. She cooperates with Polish brand owners, foreign producers and trade chains, and conducts training in brand management. An active trainer and coach, an author of many publications in specialist press.

Poland, being the 22nd-23rd economy in the world, occupies a distant 45th position in the country brand ranking (Future Brands 2014), behind Fiji, Malta or Costa Rica. Yet we are a sizeable country with an excellent geographic location, a member of the European Union, a proud, entrepreneurial and increasingly better educated nation. We cultivate our traditions, we have excellent cuisines, superb crafts, a beautiful, diverse landscape, as well as sincerity and openness in our hearts. And yet...

For 25 years, we have not managed to develop a coherent image of Poland, recognizable worldwide. The undertaken initiatives (although essentially right) either did not see a sufficiently successful execution or faced a shortage of efforts and outlays in the promotion of the developed messages. Today, Poland's problem is not a bad image but lack of an image whatsoever. Poland, as considered globally, does not conjure any specific associations which would translate into exports of Polish goods. A lack of a national brand means lower margins for producers, lack of added value resulting from the Polish origin of the products, and hindered communication in the identity of our national

brands. These are facts, supported by numerous surveys of Poland's image in the international arena. However, does it mean that we should give up all efforts intended to promote Polish goods, surrendering to the idea of brand homogenization? This is a question all producers who consider exporting Polish products should answer themselves. Let me share my subjective assessment of the situation with you.

I am saddened by the fact that the Poles themselves see few reasons to be proud. In a survey conducted in 2013 by the Laboratory of Social Research, contracted by the Ministry of Foreign Affairs, every fifth surveyed Pole was unable to indicate anything Poles can be proud of. Somewhat reassuring may be the fact that this group comprised mainly of poorly-educated men living in villages and small towns. Fortunately, they are not persons responsible for the export of Polish products and the promotion of Polish brands worldwide. Sadly, when the European Union was preparing a directive obliging all countries to sign their products (which, in practice, means placing the information 'Made in Poland' on Polish goods), objections arose from Polish producers and industry organizations who strongly opposed the obligation to identify their goods with the brand of Poland. Why this opposition?

Poland does have illustrious traditions, a rich culture, and cuisines appreciated in the world. If we, the Poles, do not believe in the strength of our brand, it will be extremely difficult to promote its coherent image in the international arena. Currently, the situation is that every producer who decides to export Polish goods abroad is obliged to promote 'Polishness' on his own. Deciding to conceal

the place of origin, offering 'unified' products which are hard to identify, we consciously decide to enter into a price war with competition which is hard even to define. Yet we have many reasons to be proud and reliable data confirms (confirmed by research) that Polish goods, especially food, have the potential to be noticed and appreciated on foreign markets. The universal 'tastiness' of the Polish cuisine is recognized by people visiting our country. We have many meals which can easily win a significant and identifiable place in the foreign market. Here, it is worth mentioning Polish semi-prepared foods, alcoholic drinks, confectionery, pickles or regional cheeses, all having the potential to be a showcase of Polishness in the best meaning of the word.

However, it should be stressed that 'made in Poland' alone will not work. Poland has no strong, clearly identifiable brand which could guarantee the identity of our goods, and the 'Polishness' alone will not sell the products. Therefore, every producer is obliged to create Polishness on his own, offering top-quality, modern (on a 21st-century level) products. Therefore, we should not hide behind the curtain of bland 'Union' brands but undertake (unfortunately, everyone on their own) the effort of promoting the value of Polish products in export markets. I am convinced that if Polish producers sincerely, professionally and proudly promote Polish products, we will together succeed over time in elaborating a clear and identifiable image of Poland in international markets, as a place of origin of products which are tasty, in good quality, and simultaneously unique on an international scale.

MOKATE *The world of coffee and tea*

MOKATE is one of the leading manufacturers in the Polish and European food industry and a recognised exporter of branded and high quality food products (coffee mixes, cappuccino, latte, instant coffee, roast and ground coffee, coffee beans, chocolate drinks, creamers and all types of tea). In the rapidly developing sector of food ingredients the company also plays strong role and is perceived as a proven supplier on B2B market. Mokate holds the majority of the quality certificates available: IFS, BRC, IQNet, HACCP, ISO 9001, HALAL, KOSHER included and its products have been awarded with numerous medals and prizes in Poland and abroad.

coffee



tea



cookies



Mokate Sp. z o.o.
44-240 Żory
Strażacka 48

Mokate S.A.
43-450 Ustroń
Katowicka 265a

export@mokate.com.pl
tel.# +48 32 43 49 700
fax # +48 32 43 49 722

www.mokate.com.pl



ALICJA ADAMIEC-ŚLIPY

Commercial Director,
Octim Company

The Octim Company was founded in 1994. It was founded by employees of a state owned company Vinegar & Mustard Factory in Olsztynek. How has the company developed throughout the years?

In the 1960s the Vinegar and Mustard Factory of Olsztyn Food Company in the Field Industry (Olsztyńskie Zakłady Spożywcze Przemysłu Terenowego) was located in Olsztyn. Because of necessary modernization and extensions, it was decided to build a new headquarters in Olsztynek.

In 1965 the new production facility started to operate in Olsztynek. The project was financed from our own capital and funds from the Field Industry Companies' Association (Zjednoczenie Przedsiębiorstw Przemysłu Terenowego). At that time the company had been awarded many times in national competitions, and in 1972 it was awarded during a national exhibition of food production in Poznań.

Recipes were centrally worked out and according to Polish standards, only slightly modified by individual factories. The original taste distinguished itself among other national products.

Privatisation of companies in Poland, connected with the political changes after 1989, allowed the company to transform. The staff agreed on the company's privatisation. The founders were employees of the company including the present President Mr. Robert Adamiec.

On 3 August 1993 the employees' company was founded under the business name Wytwór-

nia Octu i Musztardy OCTIM Sp. z o.o. w Olsztyнку (Vinegar and Mustard Factory OCTIM Ltd. in Olsztynek), which under regulations in force, as of 1 April 1994, leased from the State Treasury the company's property and it operates to this day.

Octim is above all vinegar. Please tell us how it is produced?

Indeed, the product we specialize in is spirit vinegar manufactured traditionally by way of biological vinegar fermentation, stored in traditional larch vats. Throughout the years we worked out new technologies and at present we obtain vinegar with a very high acidity. The second in line is cider vinegar also manufactured by fermentation but of apple wine from Polish apples! We are pioneers in this area. Obviously, in our offer we have other tastes of vinegar, e.g. balsamic vinegar.

The second flag product is mustard...

As we mentioned, our recipes are 50 years old but that does not mean that we do not develop our mustard category. We combine the future with tradition. We are a major national producer and our mustards are valued both by consumers and connoisseurs, which is confirmed by the "Superior Taste Award 2015 ***" won for our Sarepska Mustard. The mustard is manufactured according to a traditional home recipe. I would like to highlight the fact, that Octim is not only vinegar and mustard, we also produce ketchup.

Natural raw materials and a traditional recipe are the production's priority. Is this the case also with other Octim products?

Obviously these are the grounds of our company's operation. In production we use only proven raw materials from reliable suppliers. I know that it sounds like a slogan, but it is the truth. Regarding the recipes, we use our 'old, tried and tested' recipes but we do not limit ourselves only to them. We constantly search for and create new recipes and new tastes.

The high quality of your products is confirmed by certificates. What certificates?

As I said, we use only proven and carefully selected raw materials. Because of that our pro-

ducts enjoy the recognition of both consumers and experts who grant certificates. As a company, Octim Vinegar and Mustard Factory Ltd., holds BRC and IFS Food certificates. Apart from the certificates that I have just mentioned, we have been awarded many times in various contests which also confirms the high quality of our products.

On which foreign markets are the Octim products available? Are you planning to conquer other parts of the world? Will your export outside the European markets increase?

I can say that our products have already toured around the world. Ranging from the United States to Japan. We are looking for new sales markets all the time, we are aware of the fact that as a company we cannot sell only 'in our backyard' but we have to search for a place for our products outside Poland and Europe.

What must be done so that Polish products are well-known worldwide and associated with a good quality?

Supporting Polish brands on foreign markets by, among others, participation in various fairs, promotional events and economic missions. Places where customers have a chance to taste and get to know the offered product. These are the actions that are to identify the Polish economic brand with these products. This is why Poland recalls high quality products available in acceptable price.

But, you can speak of success in brand positioning only when a customer is loyal to the brand, and he/she returns to it every time he/she goes shopping.

Is the participation in international fairs a pass for producers to export success?

Obviously, each national or international fair is a great and – in my opinion – the best way to acquire new customers. Fairs give a chance to present products directly to customers and, more importantly, as a participant of such events we can personally meet people interested in our product and gain their trust. And trust is the most important thing in business.

Thank you. (MD)



OCTIM
OD 1965

OCTIM Wytwórnia Octu i Musztardy Sp. z o.o.
Adress: 11-015 Olsztynek, ul. Zielona 2, Polen

e-mail: octim@octim.com.pl www.octim.com.pl



WOJCIECH RYTEL

Marketing Director at PPH Maxpol Ltd.

The schedule of international fair events in the food sector organized by Maxpol is very impressive. Which of the fair locations were the most popular among Polish exhibitors in the first 6 months this year?

The most popular directions among Polish exhibitors in the first half of this year were: ISM in Cologne – i.e. the biggest confectionery fair in the world, IFE in London – the biggest food and packaging trade fair in Great Britain, SIAL in Shanghai, and increasingly popular among Polish exhibitors the annual fair of PLMA in Amsterdam – this is a private label manufacturer fair.

Other fairs are yet to come in 2015. Which of them would you recommend to potential exhibitors?

Of course the most important event will be the ANUGA fair in Cologne which is so popular that the exhibition space is sold out one year ahead, before its commencement. There is still a vast demand for this fair and the waiting queue is long. Another popular one and enjoying a great deal of interest is the fair in Dubai – Sweet and Snack Middle East, which takes place from

27 until 29 October this year. This fair is expanding every year and the number of exhibitors – companies producing sweets – are constantly growing. This year many Polish exhibitors plan to take part in it. Apart from this – still this year we invite you to: MENOPE Natura and Organic Product Expo in Dubai, World Food in Kazakhstan and PLMA Chicago – in November, and PLMA Shanghai, Sial Middle East in Abu Dhabi and a new fair in our schedule – MAFEX in Casablanca – in December.

What fair events have you prepared for the food industry in 2016? Will there be any new directions?

Apart from well know fairs, such as ISM in Cologne, Prodexpo in Moscow, Biofach in Nuremberg, SIAL in Canada, Food and Drink EXPO in Birmingham, Sial China, Sial Paris - we invite you to many other fairs as per the presented fair schedule, available on our web-site and in the Hurt & Detal monthly magazine. Please visit our web-site – www.maxpol-targi.com.pl – where you can find more information on fairs organised by our company and on details of cooperation.

Specialist fairs (e.g. ISM, PLMA), or general food fairs (ANUGA, SIAL)? Or maybe a combination of these editions? - Which choice will be the most beneficial to Polish exhibitors?

Hard to say. Many of our regular exhibitors search for new sales markets, this is why every year we open new fairs to which it would be worth coming. Definitely, enjoying popularity and interest are the fairs of private-label brands, such as SIALs and ANUGA, and the ones which are organized once every two years - e.g. IFE in London. Business trade events such as sweets, drinks or organic product fairs, will always enjoy a great deal of popularity. These trades are highly specialized. Such fairs are visited only by persons interested in a given trade, not in the general food industry. But it all depends on the company exhibiting on the fair, what are the company's goals, what does it want to achieve and with whom it would like to cooperate.

Recent years show that a very popular direction for Polish exhibitors is the Middle East. Does it mean that this market is so lucrative for Polish exporters? To which fair in the Middle East can one go with Maxpol?

Yes, it is true. In recent years in the Middle East, especially in the UAE, fairs have become very popular. It is a result of the opening to this market, supported by our governmental organizations. In our fair schedule we also have several reputable propositions in this part of world to which we invite all interested.

The fair organization market is not without competition. Why should Polish exhibitors choose Maxpol as the organiser of international fairs?

Indeed, the fair organization market is not without competition. But competition occurs anywhere in the world, not only here. We are not afraid of the competition. Our customers can decide for themselves on the range of cooperation and on services that they want us to render. We do not oblige to buy an entire package of services. What do we offer? From renting a stand surface, accrediting a company,

Trade fairs in 2016

ISM	Germany	Cologne	31 January – 3 February
SIAL Canada	Canada	Montreal	13 – 15 April
Food and Drink Expo	Great Britain	Birmingham	20 – 20 April
Food and Hospitality Africa	Republic of South Africa	Johannesburg	3 – 5 May
SIAL China	China	Shanghai	5 – 7 May
PLMA's World of Private Label	Netherlands	Amsterdam	24 – 25 May
Food, Beverage & Packaging Technology	Iran	Teheran	May
Fine Food Australia	Australia	Sydney	September
Sweets & Snacks Middle East	United Arab Emirates	Dubai	October
SIAL Paris	France	Paris	16 – 20 October
Foodex Saudi	Saudi Arabia	Jeddah	November
SIAL Middle East	United Arab Emirates	Abu Dhabi	December

sending an entry to fair catalogues, designing the stand and ordering utilities such as electricity or water to the stand, entry tickets, parking cards and invitations for customers, to booking of accommodation and plane tickets. We also propose an exhibit transport service to the exhibitor's stand. We also act as agents in hiring interpreters and hostesses and renting conference rooms. You are asking why companies choose us? This is a question to our exhibitors but, immodestly speaking, I think we are good and accurate in our work.

How can one establish cooperation with Maxpol? Is an earlier booking of exhibition space necessary?

Please visit our web-site www.maxpol-targi.com.pl. There you can find full contact details of our company and the schedule of fairs that we organize. We will reply to any query, sending detailed information on chosen fairs with prices.

And in practice - what are the stages - from an exhibitor's decision to be on a fair - to coming to a ready stand prepared by Maxpol?

When an exhibitor sends us an order regarding a fair he has chosen, we start to act, first we order an exhibition space according to the location in the order. Then, having been given the location by the main organizer of the fair, we send the location to the exhibitor for his approval. We ask the exhibitor to send an entry to the catalogue, giving him any necessary guidelines. In the meantime, we accredit the

exhibitor at the organiser's, we order entry tickets. Then we begin to discuss the design of the stand. When completed, the design is sent for the exhibitor's approval allowing him to make any changes. After the approval we begin to build the stand which is later transported to the fair and assembled there. Stands made by our company are always on time. If requested, we can also deliver exhibits directly to the stand.

Can exhibitors - apart from the turnkey preparation of the stand and logistic activities - count on support from Maxpol representatives also during a fair?

Of course. During the fair our employees are at the exhibitors' disposal offering their technical and factual assistance. Our exhibitors appreciate the fact that they can count on us and they are not left alone.

How have the building and equipment standards of stands changed?

Developing our company we focused on solid and modern structures and on a better and more efficient presentation of our exhibitors' products. Apart from stands built in the Octanorm system, we propose to our exhibitors stands built individually. These stands are made of materials such as wooden plates, MDF, glass, Plexiglass, etc. The trend – to make the stands more transparent and available to visitors – has resulted in us designing them as more spatial, so that stands are more inviting to visitors. Our exhibitors choose such solutions more and more often.

Contact us!

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Phone: +48 22 625-14-08
Phone: +48 22 629-96-21

'Customer satisfaction' - this is the motto of the Maxpol Company which has been organising fairs for 25 years. A growing number of regular and loyal customers seems to confirm this thesis...

Since the company's establishment our credo has been customer satisfaction. A systematic increase in the number of exhibitors and the expanding group of regular customers who, every year, take part in many fairs allowed us also to gain the recognition of trade institutions. Our business was positively assessed and awarded with the prestigious title of the Fair Services Leader for the years: 2006, 2007 and 2014. We were also granted Recommendation of the Polish Chamber of Fair Industry in 2009 and 2012.

In closing this interview let me - in the papers of your magazine, on the occasion of the 25th anniversary of our business, that we celebrated this year - one more time thank all our regular exhibitors and wish them and myself much success in the next 25 years of our cooperation. On behalf of the whole staff of MAXPOL I thank you for our long-term cooperation, wishing myself and you further success and more and more readers of this great magazine.

Thank you for a pleasant interview and I wish you only success in the following years of Maxpol company's operation.



That's how it's done

Mrs. Iwona Szklarska, Member of the Management Board of the Chrzanowska Manufaktura Wędlin [Chrzanów Manufactory of Cured Meats], interviewed by Małgorzata Martini.

What was the origin of the brand Chrzanowska Manufaktura Wędlin?

Chrzanowska Manufaktura Wędlin was created as a response to the expectations of our customers. The name and logo of the brand excellently emphasize the traditional character, reference to a good craft practice, proven recipes, top quality and the place of production of our products.

What is the brand idea you pass on to your customers?

Above all, building of brand awareness and competence through a guaranteed top-quality, unique taste and high meat content of the products.

How wide is the assortment Chrzanowska Manufaktura Wędlin can boast of?

The brand portfolio is very broad. It includes smoked meats, thin and thick sausages. Our product leader is the "Krucze z Chrzanowa" (Chrzanów Tender) line, featuring such products as Szynka Krucha z Chrzanowa (tender ham), Kielbasa Krucha z Chrzanowa drobiowa (tender poultry sausage), Kielbasa Krucha z Chrzanowa wieprzowa (tender pork sausage). The offer also includes a long list of products, such as the Kielbaski Degustino homemade preserves pasteurized as in the old days (11 varieties). Recently, we introduced Szynka Bacy [shepherd's ham], Krakowska tender sausage with chicken fillet, as well as a line of roasted products. One of the newest ChMW product lines are wieners, high in meat content, skinless and gluten-free, which have been introduced in eleven varieties. They are packed in small, convenient packages of 100 g and larger ones of 250 g.

What major activities do you undertake to promote the brand successfully?

We had started building the Chrzanowska Manufaktura brand in late 2014 through an intensive television and radio campaign and we continued from January through to April of this year. TV campaigns were supported by POS materials and many marketing actions supporting our

customers. The main goal of our advertising activities is to build brand awareness and show a wide brand portfolio to our partners. An unquestionable advantage is the high quality of our products, their unique taste and original packaging. We try to ensure that ChMW products distinguish themselves among the competitors, so our packaging is an imitation of paper, referencing naturalness and ecology. For product identification, we use bands and name labels with distinguishing elements.

What is the production capacity of the Chrzanów plant?

The plant has its own modern pork and poultry cutting lines, as well as one of the latest poultry cutting technologies. This allows us to completely secure the raw materials for production, as well as to achieve price flexibility in the market.

Continuous investments in the modernization of the machinery, smoking chambers and other production devices allow us to repeatedly produce high quality products.

Additionally, having one of the most modern fully-automated frankfurters production lines in Poland, we can achieve a very high efficiency of finished products. The products from the frankfurters line are subject to pasteurization, which allows both to preserve the nutritional values of the product and to shelf life up to 6 months. Various forms of packaging, combined with the capability of the production of no casing, allow us to offer a wide range of products, both in variable-weight and fixed-weight, in packages between 100 g and 1000 g.

The plant has one of the most advanced meat freezing lines in the market, shock freezers preserve the properties of the products, and high bay freezers allow to maintain the stock. We are currently planning to purchase a state-of-the-art cured meat slicing line for our production plant, with a performance of more than 20 tons per day.

How do you ensure the quality and safety of your products?

Concerning the safety and high quality of the products offered, the plant successively implements the safe food policy and has ISO-22000, ISO-9001, BRC, and IFS systems in place. We are also one of the few plants in Poland which has a Meat Master machine for the standardization of raw materials with regard to the content of fat, protein, water and salt.

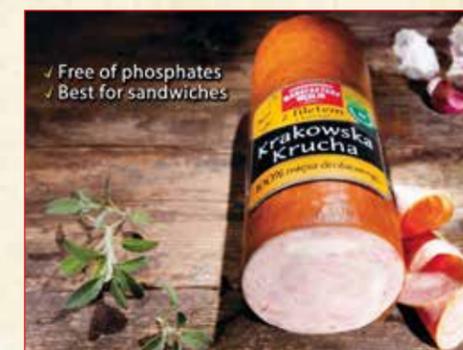
To our customers, we can offer professional service, complete and timely deliveries, and we are also able to create products to match individual requests for proposals.

tel. +48 326 257 410 ext. 283

+48 326 257 410 ext. 668

export@chrzanowskamanufaktura.pl

sieci@chrzanowskamanufaktura.pl





**An interview with Jacek Maciejowski,
Senior Key Account Manager
at Dan Cake Polonia**

In 1931, in a small Danish town, a gifted baker decided to make his dreams come true... That is where the story of your company begins. How has the Dan Cake brand developed over the years?

Today, Dan Cake is a major confectionary manufacturer in Europe. The company has three production facilities: in Give, Denmark; Dhaka, Bangladesh; and Chrzanów, in the Małopolska province of Poland. The latter facility has seven production lines. These are used to manufacture toast, milk rolls, muffins, tartlets, cake bases, sponge cakes, foil cakes and round cakes. A new production line, for yeast cakes, has been completed recently. Dan Cake products are available as private-brand products from most retail chains in Europe and as highly-valued confectionary and bakery products sold under the manufacturer's own brand. Importantly, Dan Cake has been a family-run business since its beginning.

What is it that Dan Cake can be proud of in terms of technology?

The company stands out with its policy of investing in modern production technology and developing innovative products. With modern technology in place and with a knowledgeable, enthusiastic and committed team, we are able to deliver top-quality products that are fully safe to consumers. Every year, the production plant renews its 'high level' certification to the IFS and BRC quality standards.

To stay price-competitive in Poland and intentionally, business operators are optimising their costs by improving their production and logistics processes. What is it like at Dan Cake?

Dan Cake employs modern production methods, follows the lean manufacturing philosophy in terms of costs and manufactures its products in large quantities. This helps the company to offer highly competitive prices, while ensuring its products are excellent in taste and quality.

It is possible to make products that stay fresh for a long time and contain no preservatives?

Dan Cake Polonia follows the rules of the clean label policy and does not use preservatives in its products and eliminates the use of additives, including artificial flavourings and colouring agents. We only use natural ingredients and traditional recipes. For example, we only use natural leaven to make our toast.

What makes Polish bakes and cakes stand out internationally?

It's the taste of our products and, most importantly, their quality. They are appreciated by customers in and outside Poland. We're doing very well in international markets, supplying our products to retail chains and distributors. We have a flexible approach and understand the reality of the retail business as it is today. Our competitive edge is the experience we have gained over the last 80 years, which means we are better prepared to respond to customers' needs.

Thank you for the interview. (MK)

Visit us at the
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- Leader of pre-packaged bakery products in Europe
- More than 60 products in regular offer
- Supplier of private labels to most retail chains in Poland and Europe
- Plant in Chrzanów, Poland offering 7 production lines

FOIL CAKES & ROUND CAKES • TOAST BREADS • MILK ROLLS • YEAST CAKES
MUFFINS & TARTLETS • SPONGE FLAN BASES • SPONGE CAKES

The Fine Art of Baking





CEDROB S.A. and PKM DUDA

are the leaders in meat production and meat processed products.

CEDROB S.A. is one of the largest chicken producer in Poland and Europe. Large part of the stock is exported to several countries around the world.

We are a unique plant in Poland which is entirely integrated and realizes a closed-loop production system. The structure of the company includes the reproduction farms, poultry hatcheries, feed mills, broiler breeding farms, poultry slaughterhouses, poultry processing plant, company retail stores, the fuel trade department, the fertilizer trade department.

Under the brand Krakauerland a high quality geese products are sold, both fresh and frozen, either raw, marinated or ready-made, which serve mostly as the export goods. Krakauerland products are available in Germany, Lithuania and England. We specialize in poultry and pork meat processing. As a big chicken producer, we offer a wide range of poultry processed products, from hams to ready-made meals. Under the brand Gobarto we sell the highest-quality pork hams, loins and sausages.

The production processes in CEDROB are based on the most modern technological solutions. Self-sufficiency and high-quality standards of production are the key elements promoting the diversity of our business.



OUR VALUES

- Honesty towards Customers, Contractors and Employees. We implement our personnel policy, focused on cooperation, and take as much satisfaction from working together as possible.
- Progress, improvement and growth. Constant introduction of positive changes makes us better and more competitive every day.

OUR MISSION

- We introduce innovations. Our priority is a constant improvement and advancement.
- We predict the needs. We are open to the needs of the market to successfully meet its expectations.
- We are a reliable business partner. We maintain a flexible, customer-friendly approach, professional service and stable business relations.

Polski Koncern Mięsny DUDA is the largest company in Poland in the red meat slaughtering and packaging industry (pork, beef, game).

The Company controls and is the most important part of the capital group now made up of about 30 companies operating in the agricultural and food sectors all over Poland. The Capital Group is a major distributor of raw and cured meats in Poland. It controls 1/4 of the game market. In 2007, the group began its expansion on the processing market with the acquisition of Stół Polski, a well-known regional producer of Pre-

mium cured meats. The group has started preparation to expand in the food processing market. The objective is to become a leader in that segment of the meat market in Poland over medium term. Their objective is to attain a leading position in that market segment in the near future. Since 2002, PKM DUDA S.A. has been listed on the Warsaw Stock Exchange.



www.cedrob.com.pl



Krakauerland geese products

Krakauerland products are made of the best quality Polish geese, maintaining the highest European standards. Delicacies prepared from our meat are the greatest choice to serve during the family dinner.

www.krakauerland.com



ŚLAWOMIR OGRYZEK
President of the board
at Ros-Sweet

The products of ROS-SWEET are gaining increasingly more recognition in successive prestigious polls. Please tell us about the most important awards. What is the key to the company's success?

The food market in wholesale trade, in Europe and worldwide, is among the most dynamically developing and changing sectors of the industry. To remain in the lead, it is necessary to update the product offer, to monitor the trends in the industry, and to make use of innovative technological processes. The development policy implemented by ROS-SWEET Sp. z o.o. has resulted in many awards and certificates. Among others, we have received "Forbes Diamonds" in the category of small and medium enterprises. The company ranked first in the Podkarpackie Voivodeship ranking. It has also been honoured by the "Gazelles of Business" certificate, the "Business Credibility Certificate" and the "Fair Play Enterprise" certificate. Apart from distinctions for business actions, we can also boast many awards for the high quality of the products offered. In 2014, we received the "Quality of the Year 2014" emblem for the brands Melbake's Good Seeds and Walnut Kernel with care, optically sorted.

The company constantly invests in its development – expansion of storage areas, state-of-the-art machinery, advanced processes of cleaning, drying or sorting of products...

We invest systematically in new technologies and use innovative solutions – begin-

ning from the optical and laser sorting line for dried fruit and seeds, through a fluid bed dryer, to metal detectors used at every stage of production. The technical infrastructure also enables thermal stabilization of raw materials, while advanced processes of drying and gravity cleaning enable our products to meet the expectations of even the most demanding customers in Europe.

Additionally, to ensure satisfaction of our customers, all raw materials used in production are thoroughly tested by the Department of Quality Control – Laboratory, which guarantees batch-to-batch repeatability.

The brand has been associated with top-quality standards for years...

The quality policy in place at the company is a result of investing in state-of-the-art machinery and the implementation of quality control procedures certified with the ISO 22000 system.

The scope of certification for ROS-SWEET Sp. z o.o. includes the process of production, distribution and sale of walnuts, hazelnuts, peanuts, almonds, as well as poppy seeds, caraway seeds and linseeds, as well as the distribution and sale of dried fruit and seeds: sesame, pumpkin seeds and sunflower kernel.

The ISO 22000 certificate for ROS-SWEET Sp. z o.o. was authorized by the company SGS Polska Sp. z o.o. – System & Services Certification.

Thanks to the continuous development and expansion of the assortment offer, ROS-SWEET has a stable position in the market of nuts, seeds and dry

fruit, herbs, legumes, as well as fresh and frozen vegetables and fruit. Has anything new appeared this year?

It is only the top-quality of products offered, professional service, as well as transparent conditions of cooperation, intended to establish durable business relationships, which distinguishes us among other companies.

We are aware that systematic updates of the product offer are necessary to maintain the established market position. Therefore, we systematically supplement our product range with new assortment items. One of them is the production of sesame pulp, which, due to the technology of constant smooth roasting of sesame, maintains the batch uniformity with regard to the roasting grade, colour and taste. Recently, the offer of ROS-SWEET has also been expanded by ground poppy seed and grated walnut.

Our flagship brands have also undergone a facelift: Melbake's Good Seeds, Lulido, Almond Sliced, Almond Slivered, Groundnut, and Walnut Kernel.

The offer of ROS-SWEET is directed to bakeries, confectionaries or dried fruit packaging companies, processing and trading companies. Your customers also include recipients from Western, Central and Eastern Europe, the Baltic states, Russia. Do you plan an expansion of the geographic range?

ROS-SWEET Sp. z o.o. has been active in the wholesale market of dried fruit and seeds since 2006, systematically expanding the product offer and territorial range of its business.

Many years of experience have brought the company a stable position in the domestic and foreign market. The main export directions are: Germany, France, Belgium, the Netherlands, Austria, the United Kingdom, Russia, Ukraine and the Balkan states.

We hope that this year's participation in the IBA and Anuga trade fairs will allow us to reach a wider group of end recipients from the bakery and confectionary sector and to broaden the group of regular customers.

Thank you. (KP)



Bartłomiej Kulisz
Deputy Director
of the International
Cooperation Office
Agricultural Market Agency

THE QUALITY OF POLISH FMCG PRODUCTS

Polish products are attractive to consumers, not only due to their price but, above all, for their taste and quality, as Polish food is always made of high quality raw materials. Natural raw materials are the key to success. Polish producers of agricultural and food products enjoy superb conditions for the development of production and eagerly make use of available modern technologies and innovations, simultaneously preserving the traditional character of their products.

The high quality of raw materials also arises from the preservation of the traditional character of rural areas in Poland, but tradition plays an important role in farm management as well. As a result, our soils are not degraded by the excessive use of chemicals and fertilizers. All the factors mentioned above impact the quality, and quality is increasingly becoming a determinant in the decision making process of purchase, taken by end consumers.

TRADITIONAL RECIPES ARE THE STRENGTH OF POLISH FOOD

Our country, located for centuries at the crossing of the main north-to-south and east-to-west trade routes, where many cultures and nations had been coming into contact with each other for hundreds of years, has been a synonym of diversity and tolerance until this day. These very features – diversity and openness to "otherness" – attract people from various cultures, living in our territory. These influences are also visible in our culinary heritage. The recipes and manner of preparation of products, proven through the centuries, have been used until the present day

in the production of food in modern production plants meeting the highest standards of quality. These centuries of experience bring profits today, when consumers look for natural and traditional products offering top quality, unique flavours and aroma.

Another peculiar phenomenon is the Poles' attachment to their national cuisine and, consequently, to domestic products. Therefore, all Poles, going to the UK, Ireland, Germany or other countries, take this "attachment" with them, and Polish food gains ambassadors around the world. And these ambassadors are quite reliable, as they have been raised on Polish cuisine.

WE ARE PRESENT ON MOST FOREIGN MARKETS. WHAT DO FOREIGN CONSUMERS VALUE OUR PRODUCTS FOR?

First of all, for the high quality, for the unique taste of Polish products, for the variety of the offered products, for the ability to meet the expectations of the greatest gourmets.

The demand for Polish food products is still growing. Many years of promotional and informational activities conducted by the Agricultural Market Agency, the Ministry of Agriculture and Rural Development, as well as other institutions supporting Polish export, are already bringing tangible results. Today, in many parts of the world, Polish food is synonymous with guaranteed quality and a unique taste. Polish products are looked for and purchased increasingly often, and Polish food producers operate on foreign markets more often and more boldly.

WHAT CAN BE DONE TO MAKE POLISH PRODUCTS RECOGNIZABLE ON A WIDER SCALE, TO MAKE POLISH PRODUCTS UNAMBIGUOUSLY ASSOCIATED WITH GOOD QUALITY?

The recognition of Polish products is already very high, partly due to their high quality and unique taste. However, the practice shows that having a good product is often not enough to achieve international success. The product is important, but the way it is presented to a potential customer is not less significant. Polish food producers should additionally prepare for intense promotional activities, in which they can find active support from the Agricultural Market Agency (ARR).

The basic form of activities supporting Polish companies in foreign markets is the organization of trade missions, including participation in trade fair performances of the agricultural and food sector.

ARR is an active participant in the world's most important trade fair events enjoying great attention among entrepreneurs, both in the EU and in countries deemed to be particularly promising to Polish export worldwide. We direct our actions to all Polish entrepreneurs of the agricultural and food sector – producers, processors, traders.

ARR organizes Polish national stands, i.e. large, complex stands bringing together many agricultural and food sector companies under the common sign of POLAND. The structure of a national stand has a dedicated character and uniform visualization, which additionally enhances the recognition of the presented products.

Polish trade in commodities

CONFECTIONERY PRODUCTS WITHOUT COCOA CONTENT

Confectionery products without cocoa content include: chewing gum, licorice extract, white chocolate, tablets including sore throat lozenges, sugar-coated confectionery products, jelly products and jellies, boiled sweets including filled, toffee candies, caramels, confectionery products in the form of compressed tablets, and others, not mentioned above.

The volume of exports of confectionery products without cocoa content in 2014 increased by 10% to nearly 67.8 thousand tons. The value of exported goods increased slightly less dynamically, i.e. by above 9%, to nearly EUR 252.2 million (EUR 230.2 million in 2013). At the same time, nearly 49.9 thousand tons of these products (an increase by 8% from 46 thousand tons) were imported to Poland for EUR 152.3 million, which is 9% more in comparison with EUR 139.9 million in 2013. As a result, the positive account balance increased by 11% to EUR 99.8 million (in relation to EUR 90.3 million earlier). The volume showed a surplus of 17.9 thousand tons, and the balance increased by 16% from 15.4 thousand tons. The improvement of results in the foreign trade of confectionery products without cocoa content is a result of a slightly higher growth dynamics in export than import.

Stimulants export in mln EUR

Product groups	2013	% share	2014	% share	2013=100	balance 2014
Tobacco and tobacco products	1 534,0	55,6%	1 941,4	58,1%	127	1 374,0
Coffee, tea, extracts, cocoa and spices	662,0	24,0%	763,1	22,9%	115	-231,6
Alcohols	320,9	11,6%	337,7	10,1%	105	-180,9
Waters and soft drinks	239,5	8,7%	296,8	8,9%	124	211,1
Total	2757,1	100%	3339,0	100%	121	1 172,6

(FAMMU/FAPA), Foreign Agricultural Markets Monitoring Team – April 2015

CHOCOLATE PRODUCTS

As in the previous years, amongst the groups of goods analyzed in this chapter, chocolate products (confectionery products with chocolate content) were the most valuable item in Polish export and import of products in the sugar and confectionery industry. In 2014, the volumes of Polish foreign trade in these products ended with a positive balance amounting to EUR 611.2 million, constituting, however, a decrease year-over-year by more than 3% from EUR 633.1 million in 2013 (EUR 507.4 million in 2012). In terms of volume, the positive balance decreased even more dynamically, by 8% to 121.3 thousand tons (in comparison with 131.3 thousand tons the year before and 111.2 thousand tons in 2012). In previous years, the positive balance was growing year by year. The decrease thereof results from the limitation of exports to the UK, the main outlet for Polish chocolates.

In 2014, 248.7 thousand tons of these products were exported, for a value of EUR 1062.5 million (in 2013, 258.6 thousand for EUR 1067 million). The export volume was lower by 4%, and the export value dropped minimally, by 0.4%. At the same time, the import volume was stable at 127.4 thousand tons, but its value was higher by 4%, with an increase to EUR 451.3 million (127.3 thousand tons for EUR 433.9 million in 2013).

STIMULANTS – EXPORTS GROWING MORE DYNAMICALLY THAN IMPORTS

Stimulants have an increasing significance in the Polish agricultural and food trade. 2014 brought another increase in the qualitative change which had been observed since 2009: the value of exports in the group of commodities under consideration exceeded imports to an even greater extent than the year before; moreover, the high growth dynamics of exports were accompanied by a significantly lower increase of imports, which translated into an increase of the positive balance of trade exchange of these products. In the previous year, stimulants worth nearly EUR 3.34 billion were sent abroad, resulting in a 21% increase in relation to 2013. The growth dynamics were, therefore, higher than for food exports in general (+4.5%), and thus, the share of the export value of stimulants in total agricultural exports increased from 13.5% to 15.6% over the period under consideration. Foreign sales of goods from the group under discussion was still almost twice as high as e.g. the export of dairy products, which had been considered to be a major driving force of trade from the moment of accession to the EU. The import of stimulants in the previous year was almost 6%

higher than the year before, amounting to EUR 2.17 billion. At a less than 3.4% growth dynamics of overall agricultural imports, this meant a relative growth of significance of stimulants in the food imports (from 14.3% to 14.6%).

COMMODITY STRUCTURE OF TRADE

For several years, a decisive factor for the fact that Poland exports more stimulants than it imports has been the annually growing export of tobacco and tobacco products, the overwhelming majority of which are cigarettes. Exactly 55.6% of earnings from exports of stimulants is accounted for by the sales of these articles. The growth dynamics of this subgroup were +27% in the European currency, much higher than the growth rate of exports of overall stimulants (+21%).

A lower increase of exports (+15%) was recorded in the segment “coffee, tea, extracts, cocoa, spices”, the exports of which accounted for 24% of earnings from the total sale of stimulants in the period under consideration. In this subgroup, of greatest importance are coffee and tea extracts as well as coffee beans, while tea as well as cocoa products and spices (mainly pepper) are less important.

Since Poland, for geographical reasons, is naturally condemned to import these goods, the exchange balance still remains definitely negative. The significance of alcohol in the export

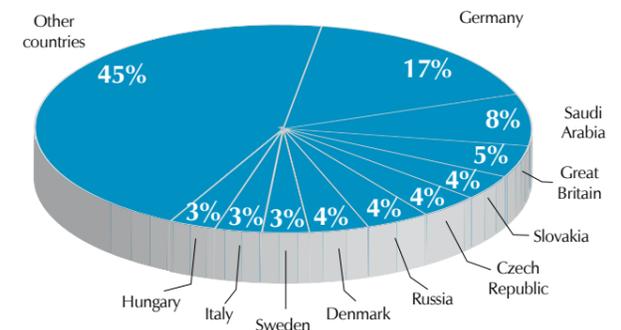
Stimulants import in mln EUR

Product groups	2013	% share	2014	% share	2013=100
Tobacco and tobacco products	474,7	23,2%	567,4	26,2%	120
Coffee, tea, extracts, cocoa and spices	962,5	47,1%	994,7	45,9%	103
Alcohols	518,2	25,4%	518,6	23,9%	100
Waters and soft drinks	87,6	4,3%	85,7	4,0%	98
Total	2 042,9	100,0%	2 166,4	100,0%	106

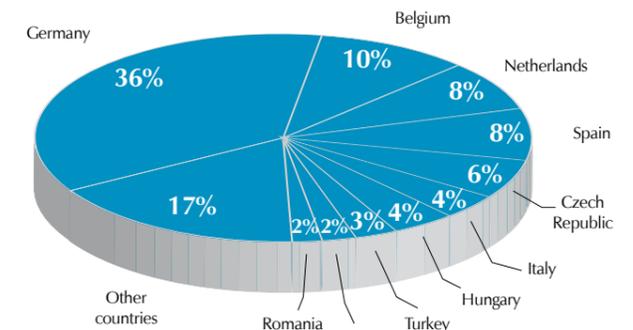
(FAMMU/FAPA), Foreign Agricultural Markets Monitoring Team – April 2015



Polish export of confectionery products without cocoa content in 2014 (in terms of value)



Polish import of confectionery products without cocoa content in 2014 (in terms of value)



(FAMMU/FAPA), Foreign Agricultural Markets Monitoring Team – April 2015

of stimulants dropped. Although there was improvement in exports (a 5% increase of value), its dynamics were so low in relation to other stimulant groups that the significance of alcohol dropped from 11.6% to 10.1%, while the stabilization of imports resulted in an improve-

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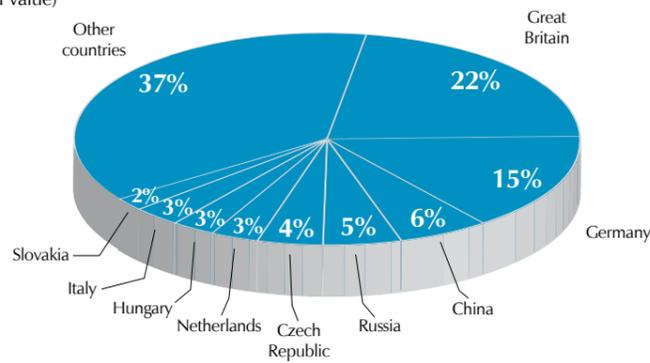
- pick & mix Wawel sweets
- make your own selection
- enjoy freedom of choice



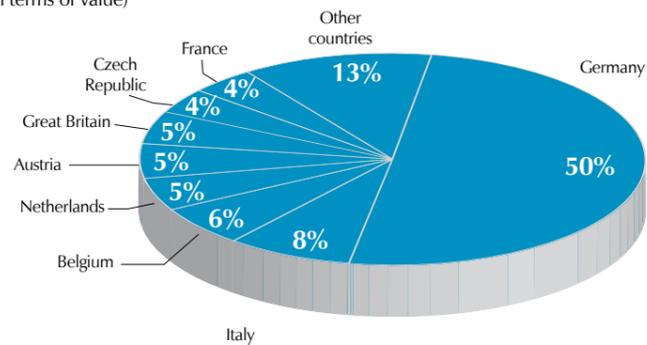
Wawel expositors -
new dimension of
selling bulk sweets



Polish export of confectionery products with cocoa in 2014
(in terms of value)



Polish import of confectionery products with cocoa in 2014
(in terms of value)



(FAMMU/FAPA), Foreign Agricultural Markets Monitoring Team – April 2015

ment of the trade balance which was nevertheless still negative. The export of waters and soft drinks were higher by 24% than in 2013, and their significance in the total export of stimulants increased from 8.7% to 8.9%.

In imports, products from the group of coffee, teas, their extracts, cocoa products and spices invariably remained the most significant. In the previous year, they accounted for nearly a half of expenditure on the purchase of all stimulants (47.1%). As in the case of the export of commodities from this group, the import was characterized by an increase in relation to the previous year's value, although the increase was less dynamical here (-3%). The imports of tobacco and tobacco products increased by 20%, and the import value of alcoholic beverages was almost identical as in 2013. The purchase of mineral waters and soft drinks dropped by approx. 2%, however, their share in the total stimulant import value is negligible, only 4%. The foreign trade value of stimulants (understood as the sum of the export and im-

port values) in 2014 was higher by 14.8% than the year before and reached EUR 5.49 billion. Trade in these articles grew at a considerably higher rate than the year before. France remained the most important partner, due to a 44% increase of the export value; moreover, the significance of Germany, Italy and the Czech Republic slightly dropped.

Geographical structure of trade in stimulants The export of stimulants is directed, above all (86.8% of value), to the countries of the European Union, including the former Fifteen, receiving 61.9% of the entire exports of stimulants in the previous year, in comparison with 60.6% the year before. In value terms, this meant an increase by 23.7%, to EUR 2.897 billion, for the entire UE-27. This reflects the growth rate of the total export of stimulants. On the other hand, there was a slight decrease in significance of the Commonwealth of Independent States, to which 3.1% of the total exported stimulants were sent in the period under discussion, in comparison with 4.7% the year

before. Outlets of low significance are still the groupings of ASEAN (stimulants worth EUR 1.7 million were exported there, mainly coffee beans and extracts) and Mercosur (EUR 2.97 million; coffee beans and unprocessed tobacco). A slightly higher share in the structure of recipients of Polish stimulants in 2014 was characterized by the Eurasian Economic Union (this direction saw exports of stimulants worth EUR 60.9 million, mainly alcohol and unprocessed tobacco to Russia, i.e. commodities which had not been covered by the import ban imposed by Russia in August) as well as Middle Eastern and North African countries (EUR 76.2 million, mainly Turkey and Israel). A specific feature of the trade in stimulants, both in export and import, is a quite fragmented geographic structure. Nevertheless, one can distinguish the most important markets for stimulants from Poland. Due to a growth of exports by more than 44% per annum, France remained the main recipient of Polish stimulants, and at a 6% increase of export to Germany, this country remained the second largest market for stimulants from Poland. Exports to Italy (for years, the third largest recipient of Polish stimulants in terms of value) increased by 16%. Exports to the Czech Republic increased by 19%, and to the Netherlands by 34%. An even more dynamic increase was recorded in Belgium, where 43% more stimulants were exported than in 2013. On the other hand, exports to Russia and the USA dropped (by 7% and 9%, respectively).

The main partners in the trade exchange of stimulants, who increased their imports from Poland, include Hungary, Austria, the United Kingdom, Slovakia, Romania, Lithuania. The significance of other EU countries was lower, not exceeding 2%. The major directions of export of Polish stimulants outside the Community countries in 2013 remained, as already mentioned, Russia and the USA. Ukraine remained another significant market.

In imports of stimulants to Poland, the countries of the Community continue to be the main partners. In the previous year, they had a 58.2% share in the value of total exports of the goods under consideration (56% in 2013), of which the countries of the former Fifteen ac-

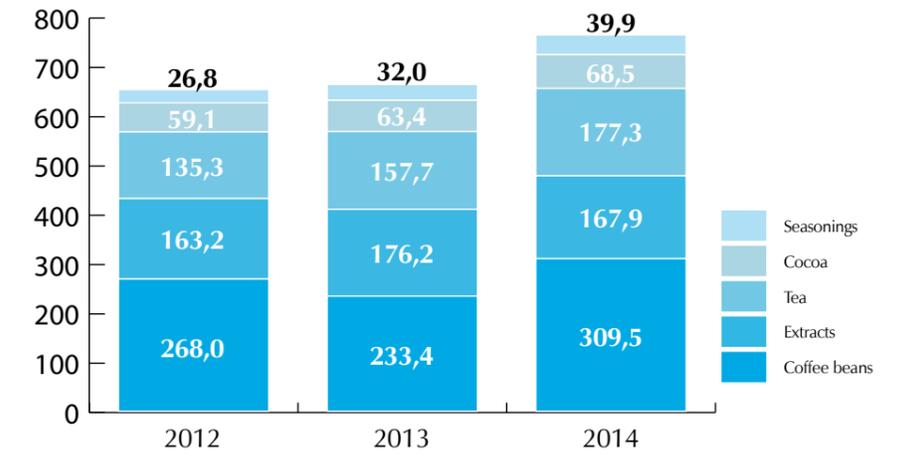
counted for nearly half of the overall imports of stimulants. A continually increasing role was played by developing countries, supplying mainly agricultural raw materials such as cocoa, coffee beans, or tea and spices. Here, of slightly greater importance than in exports are the groupings of ASEAN and Mercosur. The value of imports from the Association of South-East Asian Nations amounted to EUR 125.5 million, which is less than 3.8% of the overall import of stimulants (mainly coffee beans and pepper from Vietnam – EUR 89.6 million). Imports from the Mercosur reached a value of EUR 150.5 million, consisting mainly of coffee beans and unprocessed tobacco from Brazil.

Among the suppliers of stimulants to Poland, Germany remains the most important partner – in 2014, every fifth Euro spent on the purchase of stimulants reached our western neighbours, and the imported goods were, above all, coffee extracts and beans as well as spirits. Brazil remained the second largest supplier of these goods in 2014, sending stimulants to Poland with a 6% lower value than in 2013; those were, above all, unprocessed tobacco and coffee beans. The value of the imports of stimulants from the Netherlands (mainly cocoa etc.) increased by 36%, and from Ivory Coast (cocoa products) by 25%. There was a 1% increase in imports from Vietnam (coffee and pepper), and the value of stimulants imported from Italy (mainly wines, vermouths and unprocessed tobacco) increased by 18% in comparison with the levels of 2013. 5% more stimulants were imported from France (mainly wines and processed tobacco), whereas imports from the UK (tea, spirits) dropped by 21%. The purchase of stimulants from the USA increased by 4%. However, decreases were recorded in the case of Ecuador.

COFFEE, TEA, COFFEE AND TEA EXTRACTS, COCOA PRODUCTS, SPICES – EXPORT

Exports of the entire subgroup brought EUR 763.1 million in the previous year, 15% more than the year before. Traditionally, the most important item was the export, or practically re-export, of coffee beans (a 41% share in the sales value of the subgroup) with a 32.6% increase in

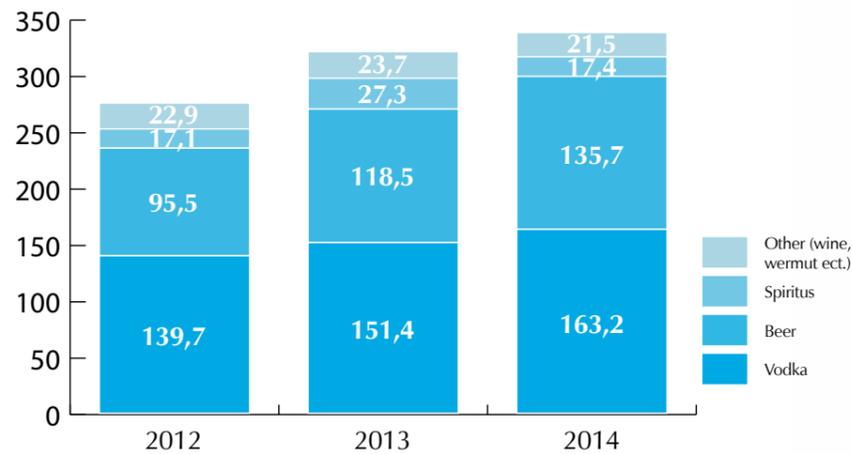
Product structure of coffee, tea, cocoa and seasonings – Polish export
(mln EUR)



(FAMMU/FAPA), Foreign Agricultural Markets Monitoring Team – April 2015

sales. At the same time, exports of coffee and tea extracts dropped by 4.7%, and exports of cocoa products (pulp and powder) increased by 8%. Increases were also recorded in exports of tea (+12.4%) and spices, mainly pepper as well as thyme and bay leaves (+25%). Countries of the European Union received 77.8% of the value of exports from this subgroup (in comparison with 72.6% the year before) worth EUR 635.8 million. The share of the countries of the Commonwealth of Independent States showed another slight decrease in the comparative period, from 11.2% to 12.7% (moreover, the value of exports to this group decreased in the period under consideration by 13.2% to EUR 70.74 million in comparison with EUR 81.4 million in 2013). The Czech Republic became the most important recipient of goods in the group under discussion. Exports in this direction increased in terms of value by 13.2% to EUR 70.74 million. Exports to the UK developed slightly less dynamically. The value of exports in this direction increased by 8.3% to EUR 44.1 million, mainly due to a near 23% increase of exports of tea (to EUR 17.2 million) and extracts (to EUR 17.07 million). These two product groups were the main commodities from the category of stimulants, exported in this direction. In the case of Hungary, a 55.6% increase to EUR 39.1 million was recorded (mainly extracts, tea and coffee), and exports to Slovakia increased by 47.7% to EUR 24.3 million. Sales to Russia and Ukraine dropped: in 2014, 11.3% and 12.7%, respectively, less products from the group "coffee, tea, coffee and tea extracts, cocoa products, spices" were sent there (in total, for EUR 32.7 million and EUR 28.3 million, respectively). In the case of Russia, the decrease was mainly connected with a considerable drop in the exports of extracts (-29% to EUR 8.98 million) and cocoa pulp (-52.06% to EUR 2.66 million), while Ukraine received 13.7% less coffee (worth EUR 11 million). Exports to Latvia were almost twice as high as the year before (EUR 27.3 million). There was also an increase in the value of exports to Lithuania (+41.5% to

Product structure of alcoholic beverages – Polish export (mln EUR)



(FAMMU/FAPA), Foreign Agricultural Markets Monitoring Team – April 2015

EUR 22 million), exports to the Netherlands increased by 61.4% (to EUR 19.9 million). Other quite significant EU recipients of stimulants from the subgroup under consideration are Italy (EUR 16.6 million), Sweden (EUR 15 million), Belgium (EUR 11.9 million), Bulgaria (EUR 11.4 million), Cyprus (EUR 10.9 million).

ALCOHOLIC BEVERAGES – EXPORT

In 2014, slightly higher quantities of alcohol were sent outside Poland than in 2013. The value of exported beer was higher by 14.5%, a 7.8% increase was recorded in the case of spirits such as vodka, whisky, etc. However, due to a decrease in the export value of rectified spirits by 36.4% and other alcohols (including wines and vermouths) by 9.5%, the total export value of alcohols increased by just 5%, and their significance in the export of stimulants dropped to 10.1% (from 11.6% in 2013). Products worth less than EUR 337.7 million were sent abroad. The most important outlets for Polish alcohol continue to be the EU market and North America.

Traditionally, exports included, above all, spirits (vodkas and similar products), bearing the code PCN 2208, the sales of which increased by 7.8% to EUR 163.2 million. In 2014, this segment had a 48% share in the value structure of the subgroup, in comparison with 47% in 2013, which means a certain increase in significance. It occurred despite a dynamic increase in the sales of products from the other signifi-

cant segment of alcohol exports – beer (code PCN 2203), sales of which increased by 14.5% to EUR 135.7 million, and the share in the entire subgroup increased from 37% to 40%. The share of the already mentioned denatured spirits (e.g. rectified spirit) – bearing the code PCN 2207 – in the value structure of the subgroup decreased from 9% to 5%, since the value of sales dropped by 36.4% to EUR 17.4 million. The export of “other fermented beverages” bearing the code PCN 2206 (including mead among others) decreased by 8.8% to EUR 12.5 million, and its role continues to be negligible. This is the case, at least for now, with wines (a 2.9% increase to EUR 7.9 million was recorded).

The change of the geographical structure of the export of alcohol, observed already in 2013, was maintained. The United States – for many years, the most important recipient of Polish alcohols, mainly vodkas and beer – continues to give way to the EU countries. Despite a drop in the value of exports of alcohol to the US market in the observed period by 11.2% to EUR 33.2 million, the USA was still more important than Germany and remained the second largest recipient of Polish alcohol products in terms of value. Exports to another North American country – Canada – decreased less dynamically, by 4.3% to EUR 7.6 million. In general, exports to the EU increased by 8.5% to EUR 254.3 million, and the share of member states as recipients of alcohol from Poland grew

from 73% to 75.3%. Sales (above all, of spirits) to France (the main recipient of Polish alcohol) increased by 18.7% to EUR 80.6 million. On the other hand, the value of exports to the Netherlands, which became the third largest recipient of alcohols sent from Poland, increased by almost two and a half (to EUR 33.1 million). In this direction, more beer was sent above all (a double increase, to EUR 31.7 million). However, there was a considerable drop in the value of exports of rectified spirits to the Netherlands (to just EUR 10.8 thousand, from EUR 1.97 million in 2013). Exports of alcohol to Germany decreased. The export value of 2013’s main product from the group of alcohols sent to our western neighbour – rectified spirits – dropped by 31.8% to EUR 9.8 million. On the other hand, there was a 22% increase in the export of beer – EUR 14.2 million.

The significance of other countries of the Community was relatively lower. Exports to Hungary (mainly of beer) decreased by 10.7% to EUR 17.5 million. To Italy, goods from the subgroup under consideration were sold for EUR 14.6 million (+20.1%), and to the Czech Republic, for EUR 12.2 million (11.1%) mainly beer and wines. Exports to the UK (mainly of beer and vodkas) increased by 21.7% to EUR 10.7 million, and Lithuania showed a 31.6% drop to EUR 9.9 million (mainly due to a 40% decline in exports of beer, to EUR 1.1 million). Exports to Ireland (mainly of beer) increased



by 7.7% to EUR 8.8 million, and in the case of Romania, a 1.67% decline in the exports of alcohol (mainly beer), to EUR 7.9 million, was recorded. Export (mainly of beer) to Bulgaria increased by 9.9% to EUR 5.3 million.

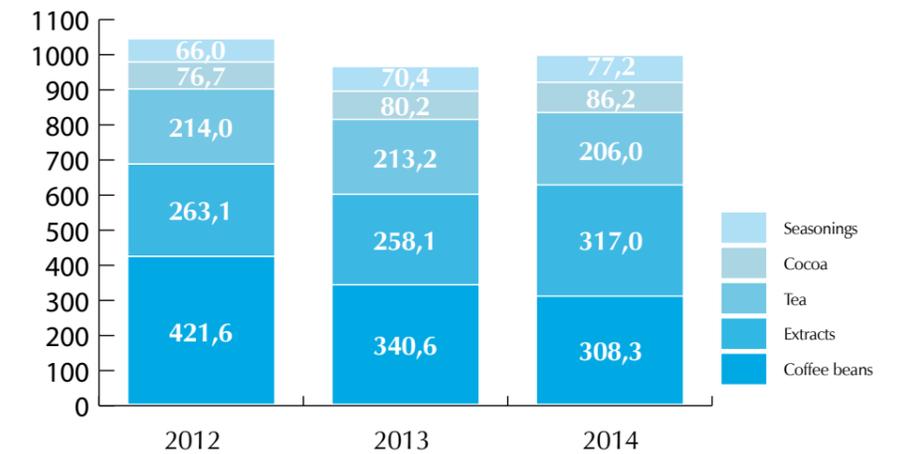
The export of alcohols to less significant markets was in decline – the value of exports to Slovakia was lower by 16.7% than the year before (EUR 5 million; mainly beer), a 5.2% decrease was recorded with Cyprus (to EUR 4.8 million; beer), and alcohols sent to Mexico had a value lower by 37% than in 2013 (EUR 2.7 million). A decrease by 0.1% was recorded in the case of exports of goods from the subgroup under discussion to Chile (to EUR 2.2 million). In Belgium, a 67.4% decline was recorded, to 1.8 million. On the other hand, there was an increase in exports to less significant recipients of Polish alcohol: Greece (+112.8% to EUR 1.5 million), Austria (+34.6% to EUR 1.5 million), Israel (+58.6% to EUR 1.4 million). Alcohol products worth EUR 14.7 million (+3.3%) were directed to customs warehouses, for stores and supplies.

MINERAL WATER AND SOFT DRINKS

The value of exports of water and soft drinks amounted to EUR 296.8 million in the period under analysis and was almost 24% higher than the year before. The commodity structure of trade in this subgroup is dominated by sweetened, carbonated and other beverages, accounting for approx. 93.8% of the trade value. The sales take place mainly within the Single Market (79.2% of value) and is implemented in many directions.

In 2014, the Czech Republic remained the main recipient of Polish soft drinks and water, with a 48% increase in the value of water exported from Poland, to EUR 47.8 million. The second place in this regard, with an 8.6% increase, was occupied by the UK (EUR 31.4 million). Another significant direction was Slovakia; water and beverages worth EUR 26.9 million were sold there (+15.8%). Among significant importers of mineral waters and soft drinks from Poland, increases were recorded in Germany (+28.7% to EUR 20.7 million), Israel (+8.7% to EUR 17.3 million), France (+99.5% to EUR 15.9 million), Hungary (+47.2% to EUR 11.8 million), Romania (+4.6% to EUR 11.5 million),

Product structure of coffee, tea, cocoa and seasonings – Polish import (mln EUR)



(FAMMU/FAPA), Foreign Agricultural Markets Monitoring Team – April 2015

Bulgaria (+46.6% to EUR 8.5 million), the USA (+1.2% to EUR 7.7 million), as well as Latvia, Italy, United Arab Emirates and Estonia. In Lithuania, the situation was stable (EUR 18.2 million), and the export of water to the USA showed a 5.7% decrease. Outside the Community, besides Israel, the USA and the UAE, certain quantities of mineral water and soft drinks were also sent, among others, to Russia (-11.5% to EUR 3.8 million) and Turkey (where the export value of water doubled to EUR 2.7 million).

IMPORT – COFFEE, TEA, COCOA AND EXTRACTS STILL AT THE LEAD IN THE COMMODITY STRUCTURE

In the imports of stimulants, the most important were still the products from the subgroup “Coffee, tea, cocoa, spices”; this segment showed a 3% increase in the value of imports, to EUR 994.7 million. Less than half (45.9%) of the amounts allocated for the purchase of all stimulants was spent in the previous year on commodities from the subgroup under consideration. The value of imports of coffee beans dropped by 9.5%, mainly due to a decrease in purchases from the main suppliers - Germany, which provided 8.6% less (for EUR 110.25 million), as well as Vietnam (by 9.2% to EUR 66.3 million) and Brazil (by 15.14% to EUR 45.9 million). Certain quantities of coffee were also imported from Italy (EUR 13.6 million; +20.1%), Uganda (EUR 7.56 million), the Czech Repu-

blic (EUR 6.71 million), the UK (EUR 5.57 million), Honduras (EUR 4.44 million). Imports of coffee extracts in terms of value dropped by 3.4% to a level of EUR 206 million. The main supplier of such products remained Germany with a 2.7% decrease in imports (to EUR 61.1 million). As in the year before, Ecuador came second (-15.8% to EUR 46.3 million); further places among the suppliers of extracts to Poland were occupied by: France (EUR 18.6 million, +39.4%), Spain (EUR 12.8 million, +42.5%), the UK (EUR 11.3 million, -12.6%), Columbia (EUR 9.4 million; +22.7%), as well as Brazil, Vietnam and Hungary (above EUR 5 million). Cocoa products showed a 22.8% increase to EUR 317 million. They were imported, above all, from Ivory Coast (EUR 101.56 million, +24.4%), the Netherlands (EUR 92.76 million, +68.7%), as well as Germany (EUR 53.97 million, +15.1%), France (EUR 22.19 million; +153%) and Ghana (EUR 20.67 million, -49.1%). Imports of cocoa products from other directions did not exceed the value of EUR 10 million. Imports of tea increased by 7.5%. Sri Lanka became the main supplier, despite a 3% drop (EUR 12.41 million), with Germany coming second with a 71% increase of the import value of tea to Poland. The previous year’s leader, Kenya, dropped to the third position (EUR 11.9 million; -16%). Imports of tea increased from India (+9.6% to EUR 10.7 million), China (+59.7% to EUR 10.45 million)

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LUBUSKI VODKA

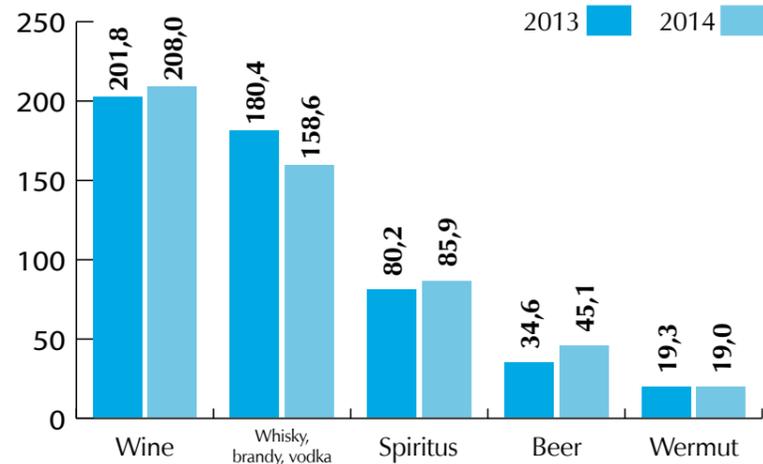
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Alcohol import to Poland
(mln EUR)



(FAMMU/FAPA), Foreign Agricultural Markets Monitoring Team – April 2015

and the United Arab Emirates (+26% to EUR 2.84 million). A decrease was also recorded in Indonesia (-16% to EUR 5.9 million) and Vietnam (-10.1% to EUR 3.7 million).

There was a 9.6% increase in the imports of spices, purchased, above all, in Vietnam (EUR 23.8 million, +19.9%), as well as in Germany (EUR 9.67 million, +24.4%), India (EUR 6.37 million, +39.6%), China (EUR 5.57 million, +6.5%), Indonesia (EUR 5.29 million, -28.8%) and Spain (EUR 4.88 million, -17.5%). The Community countries accounted for 51.2% of stimulants from the group “coffee, tea, coffee and tea extracts, cocoa products, spices” imported to Poland. On the purchases of these goods within the Single Market, Polish traders spent a total of EUR 504.1 million, which is 9.9% more than the year before. Although a considerable part of the group under discussion comprise raw materials, the leader of the suppliers remains a highly developed EU country – Germany (EUR 246.9 million), re-exporting the imported goods to Poland after processing.

ALCOHOLIC BEVERAGES – IMPORT

In 2014, with an almost identical export value as in 2013, alcohols remained the second most important subgroup of imported stimulants. Wines (code PCN 2204) continue to be the most significant item, with a 40% share – the value of imports increased by 3.1% to EUR 208 million. Imports of spirits (whisky, brandy, vodka, etc.),

bearing the code PCN 2208, are very important as well, although purchases in this segment decreased quite dynamically (-12.1% to EUR 158.6 million). On the other hand, the import of denatured spirits with the code 2207 (rectified spirit) showed a 7.2% increase in value to EUR 85.9 million. The import value of beer (code 2203) increased by 30.2%, its share in the purchase structure of alcohol increased to 9%. The value of imported vermouths (PCN 2205) decreased by 1.1%.

The geographical structure of the import of alcohol is quite fragmented, yet 81.9% of the amounts were spent on products from the Community states. With an increase of value by 18.5%, Germany was the most important supplier – EUR 111 million. The main goods imported from this country included, above all, rectified spirit as well as wines and spirits. Imports from the UK dropped by 19% to EUR 65.1 million (mainly whisky etc.), while the value of imports of alcohol from Italy increased by 8% to EUR 58.9 million (wines and vermouths). In the case of imports from France, a 3.7% increase to EUR 37.5 million was recorded, comprising, obviously, wines and, to a certain extent, spirits such as brandy, cognac, etc. The value of imports from Spain dropped by 7.2% to EUR 23.7 million (mainly wines), and imports from Finland (mostly vodka) decreased by 25.4% to the value of EUR 16.9 million. Also, imports from Hungary (mostly wines) were higher than the year before – by 59.7% (reaching a value

of EUR 16.4 million). Large quantities of alcohol within the Community were also imported from Portugal (EUR 13.8 million), Bulgaria (EUR 13.3 million), the Czech Republic (EUR 13.2 million), Estonia (EUR 9.7 million), the Netherlands (EUR 9 million), Ireland (EUR 8.7 million), Greece and Lithuania (EUR 6.2 million each), Sweden (EUR 5.8 million), Belgium (EUR 4.8 million), Austria (EUR 1.8 million).

Among the non-EU countries, the most important supplier of alcohol (mainly wines and spirits) was the USA –EUR 50.1 million was spent on purchases, 15.1% more than the year before. Certain batches of such products also reached the Polish market from Chile (EUR 13 million, +7.3%), Moldova (EUR 7.2 million, -0.1%), Australia, Georgia, Mexico, South Africa, Argentina and other directions.

MINERAL WATER AND SOFT DRINKS

The value of mineral water and soft drinks purchased abroad in 2014, EUR 85.7 million, was 2% lower than the year before. These products are still quite an insignificant component of imports (with only a 4% share in the import structure of stimulants), and are imported, above all (87.8%), from the EU. The top of the list of suppliers of water and soft drinks to Poland, with a 23.3% share in the geographical structure, is occupied by Germany – purchases from this direction increased by 42.7% to EUR 20 million. Similar decrease dynamics were recorded in the second leading partner in 2014 – Austria (+45.3% to EUR 16.3 million). The third largest country in terms of value of imported mineral water and soft drinks, with an only 0.4% increase in value, became the previous year’s leader – the Czech Republic (EUR 15.2 million). The significance of other directions was lower. Imports from Hungary dropped by 21% to EUR 7.9 million, while imports from the Netherlands decreased even more dynamically, by 60% to EUR 4.6 million, and a 5.2% increase to EUR 3.1 million was recorded in the case of France. Imports of water and soft drinks from South Korea more than doubled (EUR 2.7 million). Other major suppliers include Italy, Taiwan, Canada, the USA, Belgium, Croatia (for EUR 1.1– 1.9 million).



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Light beer FULL
Alcohol content: 6%
Perła Chmielowa is the leading product of the brewery. The finest quality ingredients, the use of the best hops of the Lubelskie region, and the original centuries old recipe have the greatest influence on the unique attributes of this beer, its characteristic bitterness and the golden color. Owing to this Perła Chmielowa is able to meet the demands of the most exacting gourmets and boast worldwide appreciation.
www.PERLA.pl



Chocolate Muffins

Chocolate Muffins flavored cocoa with pieces of real chocolate, are a delicious snack for any occasion. Delicate muffins are baked only from natural ingredients, without preservatives. We can grab them on the way, eat with coffee or serve to our guests as a fantastic dessert.
www.DANCAKE.pl



Milk Rolls

Milk rolls Dahli are a sister recipe of Dan Cake buns. These are delicious sweet rolls that are winning the hearts of the Europeans. They can be served with butter, jam, different kinds of sandwich sweet creams, as well as in the basic version. They are a great alternative for lunch, they can also serve as a snack at school, at work and at home. They are manufactured from the highest quality ingredients, based on a unique recipe and technology developed over the years, so their flavour is still unique.
www.DANCAKE.pl



American Cookies 135g

Are sure to please chocolate lovers off all kinds, with a delicious blend of both milk and dark chocolate!
Chocolate chips cookies, delicate and chocolate at the same time. It's a nice taste experience for breakfast and for coffee break.
Bogutti guarantees high quality and promises maximum satisfaction with the unique chocolate taste.
www.BOGUTTI.com



Choco GuTTi 160g

Crunchy cookies, delicate and chocolate at the same time, it promises maximum satisfaction and long leave of original chocolate, hazelnut, toffee or orange taste!
www.BOGUTTI.com



Rolnik Premium Line

Products are especially for gourmets of original cuisine who delight in the exotic flavour of olives, the aroma of cherry pepper and unique taste of pattypan.
www.ROLNIK.pl



BiFix Premium Line

BiFix Premium is a set of tea manufactured exclusively from natural dried fruits. We offer 14 original flavour compositions of this tea. Bi Fix Premium tea has no preservatives. This series of tea has been created for demanding connoisseurs, who value the highest quality, exceptional and original taste and aroma. The highest quality of brew is achieved thanks to double teabags packed in hermetic outer envelopes. They are offered with string and label.
www.BIFIX.pl



Fresh & Fruity

Discover these delicious fruity jellies with a sweet gooey center, coated in a fine sugar crust. Fresh & Fruity are perfect combination of multiple fruity flavors, now available also in sour and cola variant. Individually wrapped, can be sold in bags or loose, by the weight.
www.WAWEL.com.pl



Wawel chocolate

Premium Wawel chocolate tablets owe their exceptional taste to highest quality of ingredients, original recipes and modern production process combined with over a century of experience. Dark chocolates with a high content of cocoa are perfect choice for true chocolate connoisseurs.
www.WAWEL.com.pl



BiFix Green Tea Premium Line

If you appreciate the unique properties of green tea and its beneficial effects on the organism and at the same time you would like to enjoy the great taste of fruit, a series of leaf green teas Bi fix is made just for you. These green teas are made for discerning connoisseurs who appreciate not only the health benefits of green tea, but also superbly selected mix of fruit. It's the perfect drink for you and your family that will take you to the sweet land of dreams!
www.BIFIX.pl



BiFix Classic Line

BiFix Classic is recommended to demanding consumers, who value both taste and smell of natural fruits. This series of tea is perfect mixture of carefully chosen dried fruits. Each brew gives the abundance of homogeneous and strong taste of fruit. Paper bag inside each packaging guarantees, that aroma stays fresh and strong.
www.BIFIX.pl



PRODUCTS

Frankfurters

Frankfurters produced from chicken breast by ChMW brand is an ideal proposition for customers who value subtle flavors. Manufactured from the highest quality of poultry meat which is an excellent source of easily digestible protein.

Advantage of frankfurters:

- No casing
- Gluten free
- Long expire date because of pasteurization system

Available in the packaging of 100 g and 250 g.

www.CHRZANOWSKAMANUFATURA.pl



Szynka Krucha z Chrzanowa

Szynka Krucha z Chrzanowa is made from the highest quality and selected raw material with the addition of a unique composition of spices, no added phosphates. The smoking process using alder and beech allows to get an unique aroma and attractive dark color of ready product. Characteristic fragility attributed to the unique technology which is using in ChMW brand. 100 g of product was prepared from 131 g of meat.

www.CHRZANOWSKAMANUFATURA.pl



Cedrob Qualität – Geese Breast & Krakauerland – Geese Leg



www.CEDROB.com.pl

Cedrob Qualität – Whole Young Goose



www.CEDROB.com.pl

Sarepska Mustard

Sarepska Mustard is all-natural and high-quality product. It is produced from superb mustard seeds meeting up with particular quality standards and compliances.

www.OCTIM.com.pl



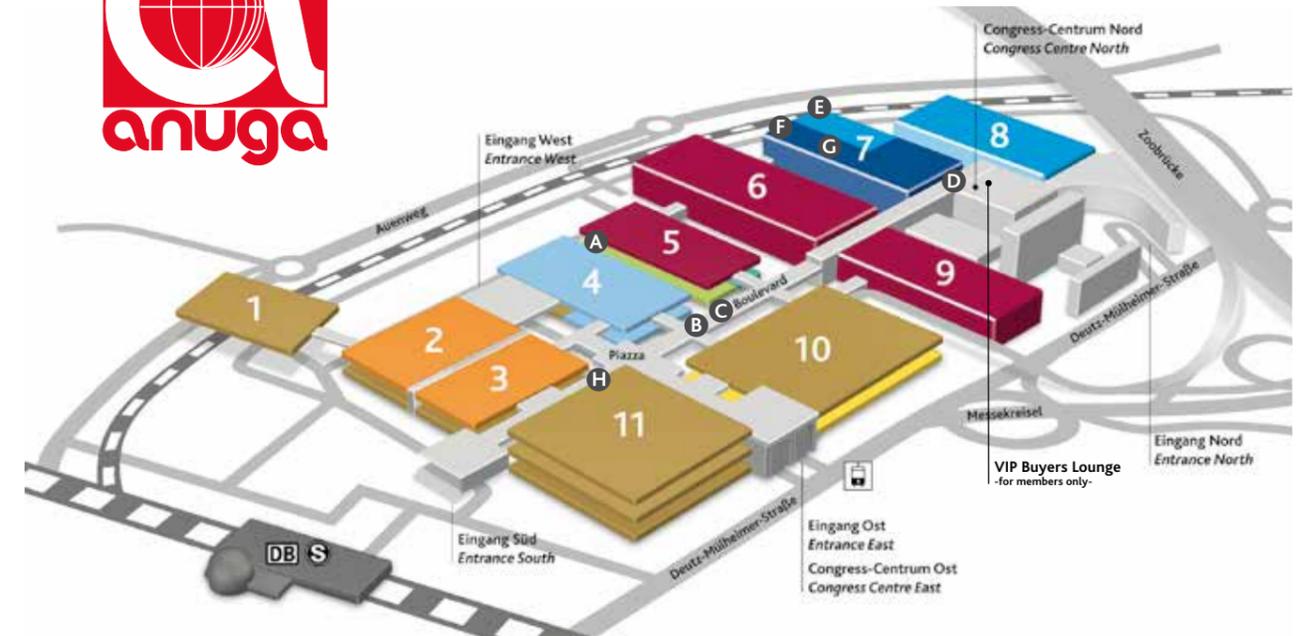
Apple Vinegar

Apple Vinegar is produced by fermentation of cider manufactured from Polish apples. Poured into elegant bottles.

www.OCTIM.com.pl



List of Polish Exhibitors



Activ Sp. z o.o.	11.1 C050 C058
Agencja Rynku Rolnego	11.1 C050 C058
Agram S.A.	04.2 C009
Agros Trading Confectionery S.A.	02.1 D041
Agros Nova Sp. z o.o.	02.1 D028
Agus	10.2 F079
Aksam Sp. z o.o. Sp. K.	02.2 A012
Ano Sp. z o.o.	11.1 C050 C058
Aves Sp. z o.o.	09.1 B071 C070
Bakalland S.A.	10.2 A089
Bakoma Sp. z o.o.	10.1 C061
Beer Fingers Sp. z o.o.	02.2 E057a
Biernacki Meat Planet	06.1 D016

BIFIX WOJCIECH PIASECKI SP. J. 08.1 D045



BIFIX Wojciech Piasecki Sp. J.

Górki Małe
ul. Dworska 33
95-080 Tuszyn
fax +48 42 614 41 20
bifix@bifix.pl
www.bifix.pl

Bifix has been producing fruit and herbal teas since 1992. Our fruit teas are perfectly composed blends of fruit dried at low temperatures, which makes it possible to retain all active substances and organic acids, microelements and vitamins (especially vitamin C). We work in accordance with HCCP system requirements and possess the certificates of : ISO, BRC, IFS as well as PETRE eco-guarantees.

Bifood Sp. z o.o.	02.1 E029a
Big Brands Group	08.1 A039
Bimiz	04.1 D039
Bioconcept Gardenia Sp. z o.o.	04.2 C091
BM Grupa Sp. z o.o. Sp. K.	07.1 A074
Brand Distribution Poland LTD Sp. z o.o. Sp. K.	01.1 B039
"Brzesc" Sp. J. ZPC Wieslaw Sipa i Wspólnicy	02.1 E013

CEDROB S.A.

09.1 E068



Cedrob S.A.

Plocka Street 5
06-400 Ciechanów
Trade office: Ujazdówek 2a
06-400 Ciechanów
Phone: +48 23 672 44 11
Fax: +48 23 675 03 59
se@cedrob.com.pl
www.cedrob.com.pl

Cedrob S.A. is a leader in meat and processed poultry production. It is also the largest company in the business with the domestic capital. The beginning of the company dates back to 1991. Business has been developing dynamically over the years.

Colian	02.1 E021
Corpo Sp. z o.o. Sp. K.	11.1 B060
Crispy Natural Sp. z o.o. Sp. K.	02.1 A023
Cukiernicza Spodzielnia Inwalidow Slowianka	11.1 C050 C058
Dairy Group in Lowicz Okregowa Spoldzielnia Mleczarska w Lowiczu	10.1 A050
Damak Kebab Sp. z o.o.	09.1 C083

DAN CAKE POLONIA SP. Z O.O.

03.2 B049



Dan Cake Polonia Sp. z o.o.

Transportowców Street 15
32-500 Chrzanów
Phone: +48 32 626 39 00
sekretariat@dancake.pl
www.dancake.pl

Dan Cake Polonia's ambition is to be the most respected leader in the bakery and confectionery in Poland in terms of:
- The quality of our products.
- The quality of customer service.
- The Professional process management (including financial).

Zpow Dawtona	02.1 E021b
Dawtona Frozen Sp. z o.o.	02.1 E021a
Derrien & Fils Sp. z o.o.	05.1 A082
Dijo Sweet-Horeca Service Sp. z o.o. Sp. K.	02.2 A016
Dr Gerard LLC	02.1 D024
PPHU Eldom A. Rozwadowski, W. Swiatek Sp. J.	04.2 A060
PPH. ELPOL Lukasz Luzniak	11.1 D049
Euroser Dairy Group	10.1 H011
Ewa Krotoszyn S.A.	01.1 D081
Fanex Sp. z o.o.	02.1 D022a
FANO Sp. z o.o.	07.1 A120

FOOD FROM POLAND FISCHER TRADING GROUP 02.1 D026A

Food Poland

Food from Poland Fischer Trading Group

Bagno Street 2/218
00-112 Warsaw
Phone: +48 22 847 93 67
redakcja@foodfrompoland.pl
www.foodfrompoland.pl

Food from Poland is an English-language professional FMCG sector Magazine published by Fischer Trading Group Ltd. since 2009. We write about Polish FMCG market, marvelous Polish export products and producers who represent our national food industry among other international exhibitors and trade fair's visitors around the world.

Food Service Sp. z o.o.	06.1 D121
Friego Logistics Sp. z o.o.	04.2 A028
FROST Barbara Wengeke	04.2 B022
GPW Bober Sp. z o.o. Sp. K.	05.1 A019a
GRAAL S.A.	05.1 A038 B039
Grana Sp. z o.o.	02.2 E032b
GRECO KOSMOS	07.1 C095
Greek Trade LTD	02.1 E029
F.H.U. Green	09.1 E009
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Huzar Sp. z o.o.	Passage Hall 2 Hall 3 3
INDROL Sp. z o.o. Sp. K.	09.1 E041
Indykol S.A.	09.1 B071 C070
Instanta	02.2 D049
Ircom Sp. z o.o.	09.1 A030
Sredzka Spoldzielnia Mleczarska "Jana"	10.1 C051
PPHU Kampol Krzysztof Luzniak	11.2 G057
KAMPOL-FRUIT Sp. z o.o.	08.1 A036
ZM Henryk Kania S.A.	06.1 D100
KASKAT LTD.	10.1 E034a
Koliber Sp. J.	04.2 C092
Konspol Holding sp. z o.o.	06.1 D029
Zaklady Drobiarskie Koziegłowy Sp. z o.o.	09.1 B071 C070
Krajowa Rada Drobiarstwa – Izba Gospodarcza	09.1 B071 C070
Krynica Vitamin S.A.	08.1 D041
Kupiec Sp. z o.o.	01.1 D069
Kutnowskie Zaklady Drobiarskie Exdrob S.A.	09.1 B071 C070
Lactima LTD	10.1 B031
Leipurin Poland Sp. z o.o.	04.2 B035

Zaklady Miesne "Lmeat-Lukow" S.A.	09.1 B071 C070
Lotte Wedel Sp. z o.o.	03.1 B031
Luzyckie Praliny Sp. z o.o.	02.1 E027
PPH Magnat Sp. J. M.Jarocki, K. Dabrowski	02.1 E013
Majami Sp. z o.o.	02.1 D022

MAKARONY POLSKIE S.A. 11.1 C050 C058



Makarony Polskie S.A.

Podkarpacka Street 15a
35-082 Rzeszów
Phone: +48 17 875 30 10
Fax: +48 17 875 30 20
Export office:
export@makarony.pl
www.makarony.pl

"Makarony Polskie S.A." is one of the leading and dynamically growing pasta producers in Poland, with long tradition and reach experience. The registered seat of the Company is located in Rzeszów, whereas the production plants are in Rzeszów and Czestochowa.

MAKRO Kosiorowski & Kosiorowski Sp. z o.o.	05.1 F037
Malpol S. Mallicki	02.1 E023
Marino Sp. z o.o.	05.1 E001 F008 & 08.1 A071
Masfrost Sp. z o.o.	04.2 B019
Meat Team Poland Sp. z o.o.	06.1 C121
Melvit S.A.	11.1 C050 C058
Mitmar Sp. z o.o.	06.1 A009
Spoldzielnia Mleczarska Mlekovita	10.1 C041
SM "Mlekol" w Grajewie Dairy Cooperative	10.1 D050 D058

MOKATE SP. Z O.O. 02.2 B021



Mokate Sp. z o.o.

Strażacka Street 48
44-240 Żory
Phone: +48 32 434 97 00
Fax: +48 32 434 97 17
mokate@mokate.com.pl
www.mokate.com.pl

MOKATE is one of the leading manufacturers in the Polish and European food industry and a recognised exporter of branded and high quality food products (coffee mixes, cappuccino, latte, instant coffee, roast and ground coffee, coffee beans, chocolate drinks, creamers and all types of tea). In the rapidly developing sector of food ingredients the company also plays strong role and is perceived as a proven supplier on B2B market.

NERO Sp. z o.o.	09.1 A071
OBRAKO Sp. z o.o.	02.1 E019
Okechamp S.A.	04.2 D051 D059
Okregowa Spoldzielnia Mleczarska w Bieruniu (OSM)	10.1 A024
C. Olsen Trading Sp. z o.o.	10.1 C053
Zaklady Miesne "OLEWNIK-BIS" Sp. z o.o.	05.2 A031
Zaklad Piekarniczy "Omar"	04.1 E075
Omida Sp. z o.o.	Passage Hall 3 Hall 11 2
Oshee Polska Sp. z o.o.	Boulevard A006
OSM Sierpc	10.1 C063
P.D. Drobex Sp. z o.o.	09.1 B071 C070
PPH.U. "Astra" Sp. z o.o.	02.1 D026

Pago Sp. z o.o.	04.2 A048
Pamapol S.A.	02.1 D024a
Papagrin Sp. z o.o.	05.1 D036
FPH Paula Sp. z o.o. Sp. K.	02.1 A023
Zaklady Miesne "Pekpol Ostoleka" S.A.	09.1 C078
PPS. "Pepees"	11.1 C050 C058

PERLA LUBLIN BREWERIES S.A. 08.1 D043



Perla Lublin Breweries S.A.

Bernardyńska Street 15
20-950 Lublin
Phone: +48 81 71 01 200
Fax: +48 81 71 01 202
perla@perla.pl
www.perla.pl

Perla Lublin Breweries is one of the largest regional beer producers in Poland, and Perla the biggest independent beer brand. The company consists of the production facility located at Kunickiego 106 St and the headquarters of the company's board situated in the historical brewery in Bernardyńska 15 St in Lublin.

Piatnica Dairy Cooperative	10.1 A068
Pini Polonia Sp. z o.o.	06.1 E048
Pod Telegrafem S.A.	02.2 D044
Polagro Trade Sp. z o.o.	06.1 C123
Polan Polish-French Company	11.3 B038
Polish Beef Association	09.1 B071 C070
Polmlek Group	10.1 B079
Polski Koncern Miesny Duda S.A.	09.1 E068
POSM Factory Sp. z o.o.	07.1 A048
PPH Maxpol Sp. z o.o.	02.1 D026a
Provitus Dabrowscy Malesa Sp. J.	02.1 E025
Przedsiębiorstwo Drobiarskie Grzegorz Wyrebski	09.1 B071 C070

PUH PILOT UNLIMITED SP. Z O.O. SP. K. 01.1 D063 08.1 E069



PUH Pilot Unlimited Sp. z o.o. Sp. K.

Mokotowska Street 15a
00-640 Warsaw
Phone: +48 22 205 25 40
Fax: +48 22 205 25 41
office@puh-pilot.com
www.puh-pilot.com

PILOT company is active in the FMCG sector continuously since 2000. For 15 years, we have been responding to the tendencies of development in the Polish and foreign markets. PUH Pilot Unlimited is a company with its registered office in Warsaw engaged in trade of FMCG products of recognized global brands. Its specialty is the import and export of foodstuffs, cosmetics and cleaning products. We have been reaching out to our customers, invariably showing a dynamic in our sales figures. Furthermore, one of our main goals is to constantly improve the quality of the services we provide, as well as to enlarge the number of products on offer. Throughout the period of our activity, our customers, both domestic and international, very quickly started to consider us as a reliable company.

Quadrum Foods Sp. z o.o. Sp. K.	04.2 D069
RAB Jazyniec Adam Moder, Boguslaw Jozwikowski Sp. J.	09.1 E058
"Rarytas" Sp. z o.o.	01.1 D089
Rene Coffee Pads / Celmar	Passage Hall 2 Hall 3 4

Res-Drob Sp. z o.o.	09.1 B071 C070
Roldrob S.A.	09.1 E018 D019
Roleski Sp.j.	11.3 B035

F.H. ROLNIK SP.J. 02.1 D043



F.H. Rolnik Sp.J.

Przelotowa Street 7
43-190 Mikołów
Phone: +48 32 326 28 31
Fax: +48 32 326 28 28
rolnik@rolnik.pl
www.rolnik.pl

Rolnik company is a leading manufacturer of a wide range of fruit and vegetable preserves as well as meat ready meals. Over 20 years of experience has earned us a recognition of our brand both on the domestic market and abroad. High quality products, innovative packaging, delicious recipes are just a few of many advantages which our customers experience. Food safety is one of our main goals which has been proved by the implementation of HACCP system and meeting the requirements of IFS and BRC standards. Rolnik is continuously expanding its activity in using the latest technologies as well as improving the taste of its products.

ROS-SWEET SP. Z O.O. 11.3 D038



Ros-Sweet Sp. z o.o.

Podzwierzyniec Street 27a
37-100 Łańcut
Phone: +48 17 860 51 50
Fax: +48 17 225 06 22
office@ros-sweet.pl
www.ros-sweet.pl

Since 2006 ROS-SWEET has been a wholesaler of dried fruit nuts and edible seeds, systematically expanding its range of products and area of activity. ROS-SWEET's landmark products are: MELBAKE'S blue poppy seeds, LULIDO bakery poppy seeds, MELBAKE'S linseeds, ALMOND SLICED, ALMOND SLIVERED, WALNUT KERNEL with care, sesame paste, hulled sesame seeds, pumpkin seeds, almonds, raisins, dried cranberries and prunes. The company's long-term experience led to achieve a strong position both in Polish and foreign markets.

Run Chlodnia WE Wloclawku Sp. z o.o.	04.2 D022
"Sadecki Bartnik" Bee Farm and Honea	01.1 D085
Sante A. Kowalski Sp. J.	03.2 A010a
Schepens & Co. N.V.	10.2 C092
SECPOL Sp. z o.o.	02.2 E052c
Silesian Grain Sp. z o.o.	02.2 E033
Silesian Flour Sp. z o.o.	02.2 E033
Sklodowscy Sp. z o.o.	06.1 B009
SNS Foods Sp. z o.o.	09.1 E078
Sokolow SA	06.1 B040 C049
Spoldzielnia Obrotu Towarowego Przemyslu Mleczarskiego	11.1 C050 C058
P.W. "Spomet" Sp.J	02.1 D020a
Stovit Group Sp. z o.o.	02.1 C016
Superdrob S.A.	09.1 B071 C070
Tago Przedsiębiorstwo Przemyslu Cukierniczego Tadeusz Golebiewski	02.2 D028
Tan-Viet International S.A.	03.1 C009
Turka Invest	02.2 A010
UNIFREEZE Sp. z o.o.	04.1 E018
Union of Producers and Employers of the Meat Industry	09.1 B071 C070

Urbanscy Sp. z o.o.	02.2 E010
Ustronianska Sp. z o.o.	08.1 D045a
Van Pur Sp. z o.o.	08.1 D049
VICTORIA CYMES Sp. z o.o.	08.1 D004
Vitalpol P.P.H. Marek Wieczorek	11.1 C050 C058
Voda Naturalna Ltd.	07.1 G061
WARWIN S.A.	07.1 F098
Przedsiębiorstwo Handlowo Produkcyjne Wiesław Wawrzyniak	07.1 G071
WIPASZ S.A.	09.1 E081
Wody Mineralne Ostromecko	11.1 C050 C058
Z.P.C. Chocomoco Rzepcka Kinga	11.1 C050 C058
Zakład Przetworstwa Miesnego ZACZYK	06.1 D029
Zakłady Miesne Henryka Stoklosy Sp. z o.o.	11.1 C050 C058
Zakłady Miesne Viando Sp. z o.o., BK	11.1 C050 C058
Zbyszko Company Sp. z o.o.	08.1 A078b
ZPH "Argo" Sp. z o.o.	02.1 E013
ZPOW Orzech Sp. z o.o.	11.1 C050 C058
ZPS Jamar Sp. J.	02.1 D020

WAWEL S.A.



WAWEL S.A.
Władysława Warnencyzka Street 14
30-520 Cracow
Phone: +48 12 254 21 41/48
Fax: +48 12 254 21 47
export@wawel.com.pl
www.wawel.com.pl

Wawel S.A. is one of the most renowned Polish confectionery producers. It offers wide portfolio of chocolate tablets, chocolate bars and pralines, candies, caramels and fruity jellies. Wawel owes its success to over a century of experience along with continuous development and modern production process. Permanent care of high quality and global standards resulted in exceptional growth and development. Today Wawel's products are available in about 40 countries worldwide and the number of loyal consumers is constantly growing. Wawel's mission is to trigger joy of life with every bite of its delicious sweets.

BOGUTTI



Bogutti Sp. z o.o.
Henryków-Urocz
48 Gromadzka Street
05-504 Złotokłós
Phone: +48 783 956 466
Fax: +48 22 2660119
export@bogutti.com
www.bogutti.com

BOGUTTI LTD company specializes in production of high quality, rich cookies, baked according to the best Italian technologies and made of selected raw materials. BOGUTTI offer: Cookies with liquid cream "LA Gustosa", "TweETT", "Choco GuTTi", Butter Cookies, American Cookies, Oat Cookies Choco-Fit.

OCTIM WYTWÓRNA OCTU I MUSZTARDY



OCTIM Wytwórnia Octu i Musztardy Sp. z o.o.
Zielona Street 2
11-015 Olsztynek
Phone: +48 89 519 21 01
Fax: +48 89 519 22 75
octim@octim.com.pl
www.octim.com.pl

„OCTIM” vinegar and mustard manufacturing company Ltd. in Olsztynek was established on 1 April 1994 as a result of privatization of state company. It focused mainly on producing all-natural high-quality vinegars, mustards and ketchups. The company specializes in manufacturing spirit vinegar. Produced by conventional biological acetous fermentation it is stored in traditional larch vats. Another leading product is apple vinegar which is also produced by fermentation of cider manufactured from Polish apples. Still another well-know product widely used in Polish cuisine is OCTIM mustard. It is produced from superb mustard seeds meeting up with particular quality standards and compliances. The fundamental goal the company pursues is to supply its customers with high-quality produce manufactured according to traditional recipes of Warmia and Mazury region.

CHRZANOWSKA MANUFATURA WĘDLIN SP. Z O. O. S.K.



Chrzanowska Manufatura Wędlin Sp. z o. o. Sp. K.
Powstańców Styczniowych Street 9
32-500 Chrzanów
Phone: +48 32 6257410 ext. 283
+48 32 6257410 ext. 668
export@chrzanowskamanufaktura.pl
sieci@chrzanowskamanufaktura.pl
www.chrzanowskamanufaktura.pl

Chrzanowska Manufaktura Wędlin is well known because of the highest quality of produced meats. Products with the logo Chrzanowska Manufaktura Wędlin represent perfect products manufactured by original recipes. Their characteristic feature is the high meatiness and unique flavor. Portfolio of Chrzanowska Manufaktura Wędlin is very extensive. It includes smoked meats, thin sausages and thick sausages.

Polish exhibitor stands organiser & designer:

PPH MAXPOL SP. Z O.O. 02.1 D026A



PPH MAXPOL Sp. z o.o.
Puławska Street 479
02-844 Warsaw, Poland
Phone: +48 22 628 06 21
+48 22 625 14 08
+48 22 629 96 21
Fax: +48 22 621 03 73
maxpol@maxpol-targi.com.pl
www.maxpol-targi.com.pl

PPH MAXPOL Sp. z o.o. offers:

- Designing stands for individual exhibitors as well as for national groups,
- Preparing and assembling the individual stands; stands arrangements,
- Forwarding and customs clearances of company's products with the delivery directly to the stand,
- Such professional services for fair participants as: flights, accommodation, local transfers in the city of the fair.

POLSKI KONCERN MIĘSNY DUDA S.A. 09.1 E068



Polski Koncern Mięсны Duda S.A.
Kłobucka Street 25
02-699 Warsaw
Retail:
Phone: +48 65 547 70 40
Fax: +48 65 547 70 46
handel@pkmduda.pl
k.czub@pkmduda.pl
www.pkmduda.pl

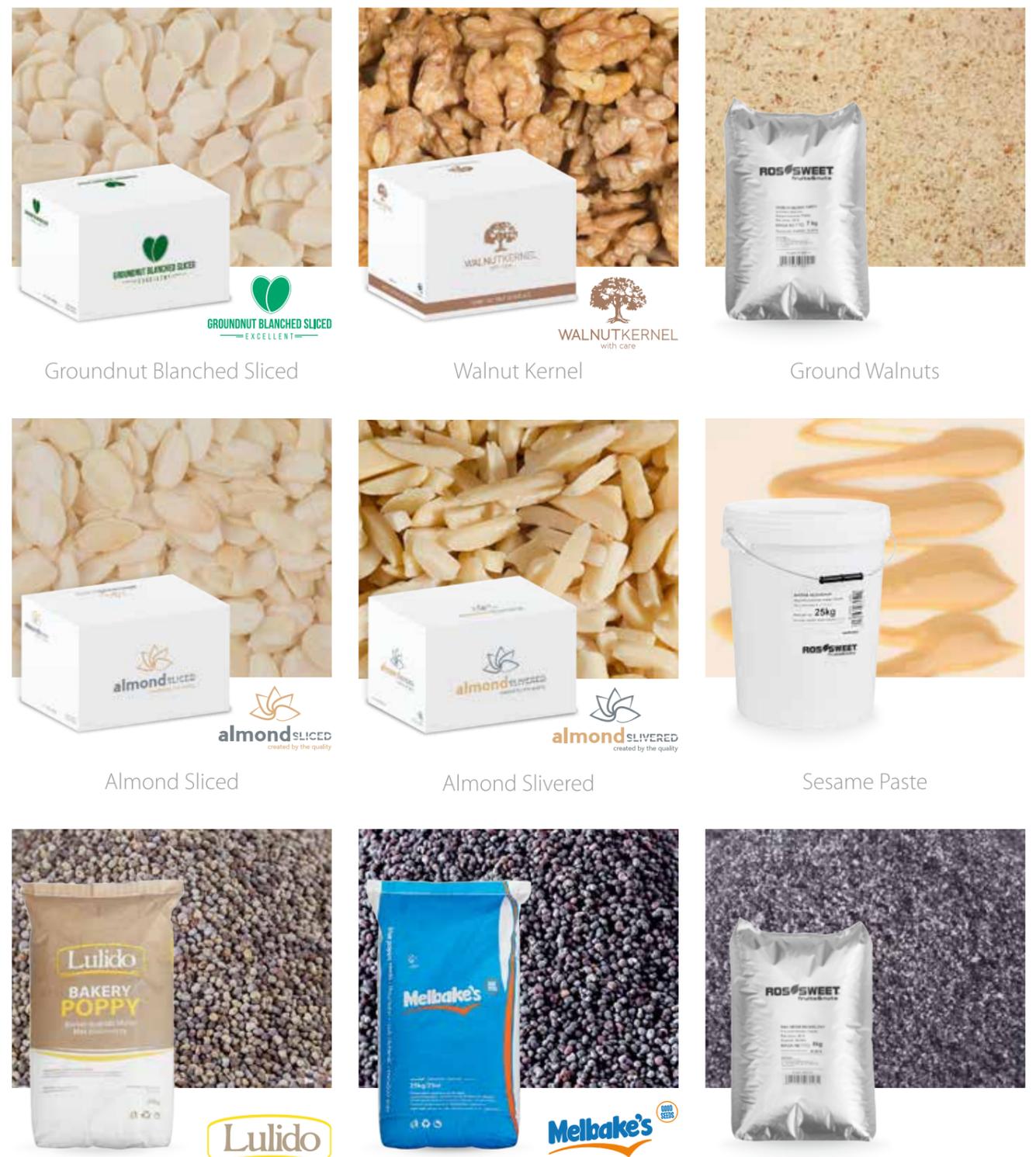
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PLMA Amsterdam
24 – 25.05.2016

SIAL Paris
16 – 20.10.2016

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Walnut Kernel
WALNUTKERNEL with care

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Almond Slivered
almondslivered created by the quality

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Melbake's

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ROS SWEET

ROS-SWEET Sp. z o.o.
37-100 Łańcut, ul. Podzwierzyniec 27A, Poland
e-mail: trade@ros-sweet.pl www.ros-sweet.com

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Join us!
We invite you to cooperate
with us.