

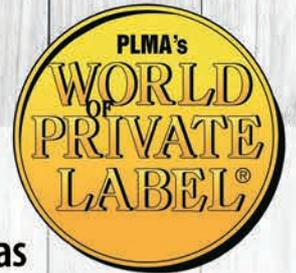
Food Poland

from

Polish Magazine for Professionals

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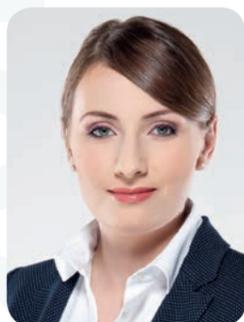
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Higher and higher Quality

Ten years ago, there was a distinct gap in the level of quality between private label and brand name products. These days that gap becomes more narrow than ever before. This leads to even more product innovations in almost every FMCG private label sector, so to be competitive concerning product quality.

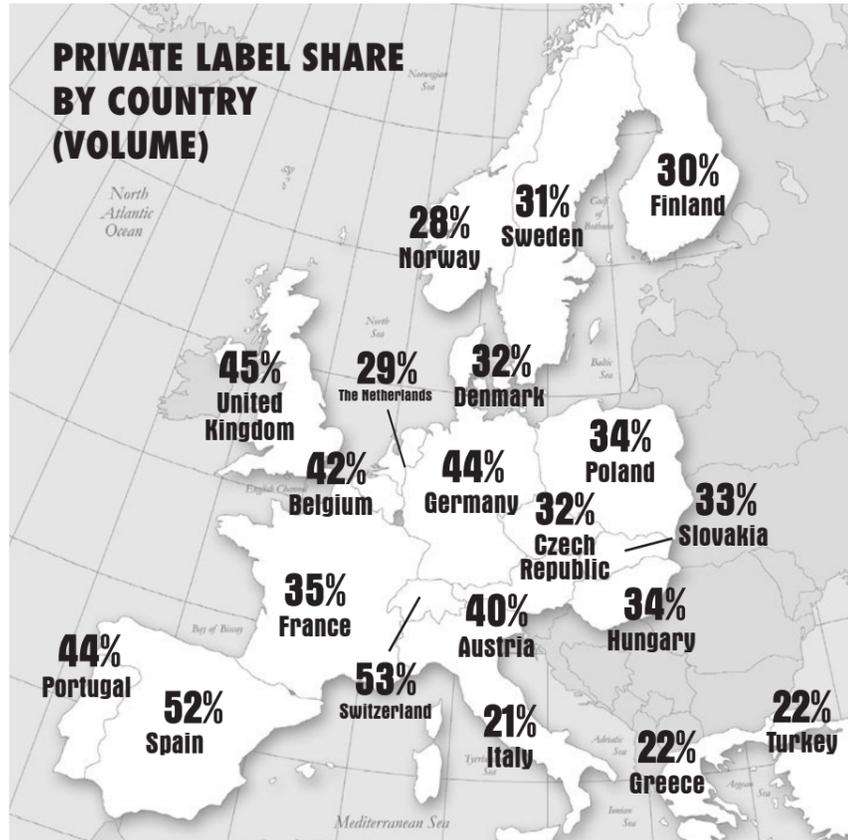
In the issue you are holding in your hands you may find insight in today's private label situation in Europe and in Poland. We present companies that may be worth considering when starting cooperation with Polish private label. At the end, there are Polish export products your customers may wish to buy.

Do not hesitate to start a cooperation with Polish companies.



Private Label

Private Label Today



Private label in Europe is getting more and more popularity. We present some facts on private labels.

POPULARITY KEEPS GROWING

Private label market share in volume gained in 14 out of 20 countries, according to the latest data in PLMA's 2015 International Private Label Yearbook and based on exclusive Nielsen data. Market share increases were posted across all regions. In the north, there were gains in the United Kingdom, Germany, The Netherlands, Belgium, Denmark and Norway. In the south, private label share increased in Spain, Italy and Turkey. Five central and eastern countries – Poland, Austria, Czech Republic, Hungary and Slovakia – all improved their private label performance. Switzerland (53%) and Spain (52%) recorded the highest volume shares.

Five countries – United Kingdom, Germany, Austria, Belgium and Portugal – achieved volume shares of 40% or more. Nielsen also found impressive gains in the value share of retailer brands. Seventeen of the countries recorded increases in value share, while only two countries declined. The United Kingdom, Spain and Switzerland all now have value shares of more than 40%. Private label has established a dominant market share position in several product categories. The Yearbook data shows retailer brands accounting for more than half of all the paper and hygiene products sold in 11 of the 12 countries reported by Nielsen. Private label also represents at least half of all frozen pro-

ducts sold in 10 countries and half of the pet products in nine countries.

WHAT ARE PRIVATE LABEL PRODUCTS?

Private label products encompass all merchandise sold under a retailer's brand. That brand can be the retailer's own name or a name created exclusively by that retailer. In some cases, a retailer may belong to a wholesale group that owns the brands that are available to only the members of the group.

WHAT PRODUCTS ARE SOLD AS PRIVATE LABEL?

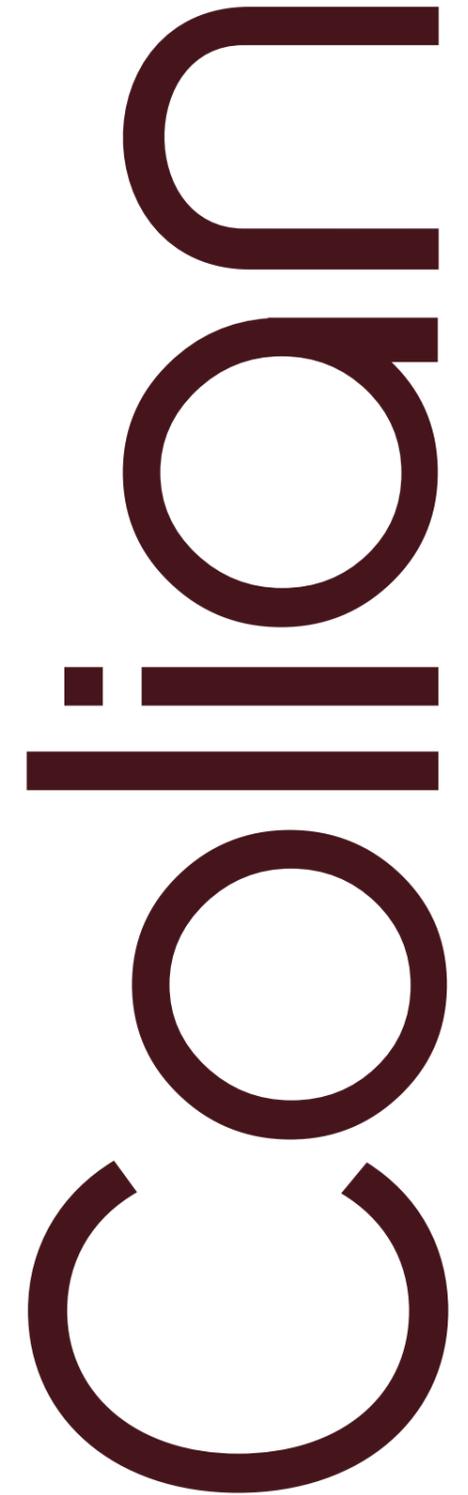
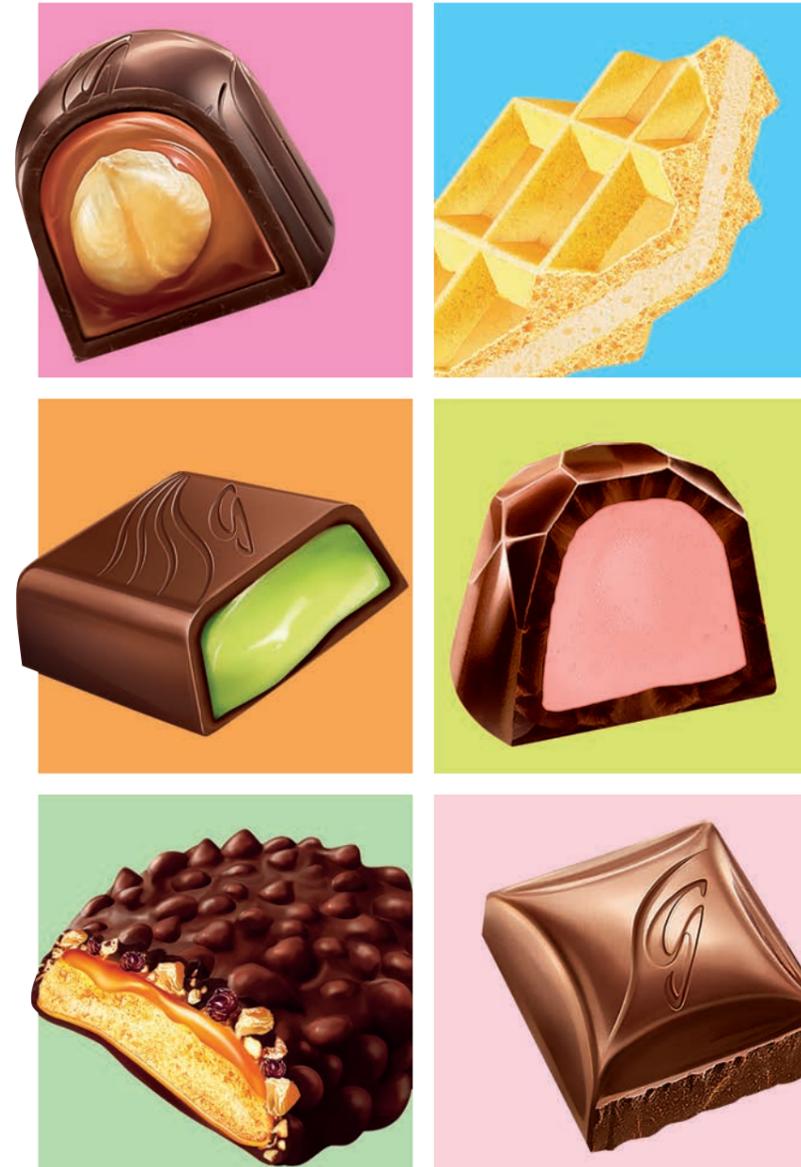
Major supermarkets, hypermarkets, drug stores and discounters today offer almost any product under the retailer's brand. Private label cover full lines of fresh, canned, frozen, and dry foods; snacks, ethnic specialties, pet foods, health and beauty, over-the-counter drugs, cosmetics, household and laundry products, DIY, lawn and garden, paints, hardware and auto aftercare.

WHAT ARE THE ADVANTAGES OF PRIVATE LABEL?

For the consumer, private label represents the choice and opportunity to regularly purchase quality food and non-food products at savings compared to manufacturer brands, without waiting for promotional pricing. Private label items consist of the same or better ingredients than the manufacturer brands, and because the retailer's name or symbol is on the package, the consumer is assured that the product meets the retailer's quality standards and specifications.

WHO MAKES PRIVATE LABEL?

Manufacturers of private label products fall into three general classifications: Large manufacturers who produce both their own brands and private label products. Small and medium size manufacturers that specialise in particular product lines and concentrate on producing



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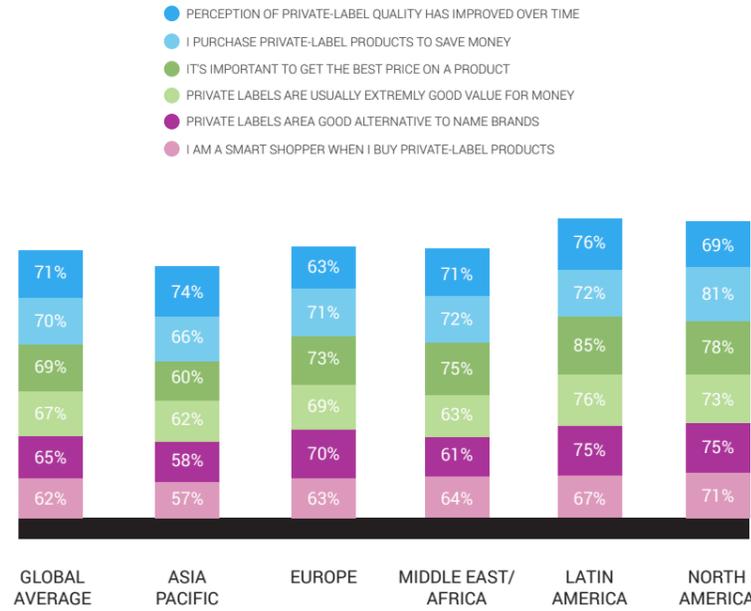
private label almost exclusively. Major retailers and wholesalers that operate their own manufacturing plants and provide private label products for their own stores.

A UNIQUE ORGANISATION FOR A UNIQUE INDUSTRY

The private label business is unique. It has its own needs and objectives. That's why there is a trade association that serves the industry exclusively. Founded in 1979, the Private Label Manufacturers Association is the international trade organisation dedicated to the promotion of private label brands. With offices in Amsterdam and New York, PLMA represents more than 3 500 manufacturers and suppliers worldwide, ranging from companies that specialise in private label to those that produce private label products in addition to their own manufacturer brands. PLMA offers trade shows, programmes, and services that are specifically designed for the industry.

POSITIVE PERCEPTIONS FOR PRIVATE LABEL ARE SHARED ACROSS THE GLOBE

PERCENT OF RESPONDENTS WHO SOMEWHAT OR STRONGLY AGREE



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Private labels in Poland

In 2014, the value of sales of private label products in Poland reached PLN 50 billion, accounting for a share of above 17% in the sales of FMCG. For several years, the annual dynamics of sales of private labels has been 18-22%.

This is a result of changes in consumers' shopping behaviour; dynamic integration processes in retail trade; as well as activities undertaken by retail enterprises, aimed at quality improvement of private label products; as well as manufacturers' activities who see benefits to their company in private label production. The consumers' approach to shopping is changing - price is not the sole product choice factor anymore. Consumers believe that private labels are of increasingly better quality and regard them as a possibility of "smart shopping".

The development of private labels in Poland is fostered by the dynamic growth of discount stores and integrated domestic

chains which, encouraged by the successes of foreign retail chains, are introducing private labels to their own stores. The largest share of private label products in total sales has been recorded by discount stores (54.3% in 2014), and the lowest one (3%) – by traditional stores, with a distinct upward trend, since private labels are also created by wholesale enterprises, not only introducing them to the wholesale chain stores but also offering them to independent outlets. Examples include Bać-Pol wholesalers as well as Piotr i Paweł supermarkets, who have jointly created the "Lubie" brand products available in traditional distribution channels.

IN RECENT YEARS, TRADING ENTERPRISES HAVE BEEN SHOWING MUCH ACTIVITY IN THE DEVELOPMENT OF PRIVATE LABELS, AS EVIDENCED BY THE FOLLOWING ACTIVITIES:

1. Enhancement and deepening of the assortment of private labels. Currently, most chains offer private label products on at least two price and quality levels: first-price products and premium products. The former have quality corresponding to brand products but are less expensive and ensure higher margins for the enterprise. Premium private label products are often used to change the image of a store into one offering products characterized by a favo-

urable quality-to-price ratio. Building the image of private labels, not as mere imitations of producer brands but in a way ensuring an independent place in the market, as well as strong promotion of private label products, result in consumers having problems with distinguishing a private label product from a manufacturer's brand product.

2. Quality improvement of private labels is used to build competitive advantage of a retail chain, based on the competitiveness of the assortment offer. Trading enterprises develop quality control of products, performed by accredited research laboratories and by the internal quality assurance department.

3. Introduction of innovative private label products. These are products targeted at precisely defined customer groups, such as hard-working young people, or bio- and eco-products under private labels, intended for persons caring for their health, as well as products from local suppliers, based on traditional recipes.

4. Strong promotion of private label products, often showcasing their high quality and freshness.

5. Own production of assorted articles by retail chains. For instance, the Intermarché stores offer preservative-free, high-quality cold meat products from their own smokehouses.

TRADING ENTERPRISES APPLY VARIOUS DEVELOPMENT STRATEGIES FOR PRIVATE LABELS:

- family brands, where all products of an enterprise are presented under one label. Its disadvantage may be the so-called brand dilution, in case of highly diversified operations of the company, as well as a risk in loss of the distinctive image of the chain and loss of confidence in all products bearing the same label in case of failure of just one of them;

- individual brands: branding of each product or product line with a different label, which involves high costs of communication with customers and promotion of the private label products;

- combined brand strategy, involves partial adoption of the principles applicable in the fa-

The Polish food industry achieves incredible success in exports, and records are being broken one by one despite many crises on the market. In 2015, the export of food increased by 7.7% to EUR 23.6 billion. Since Poland's EU accession in 2004, this result has increased by above 300%. Predictions show that in 2016, the value of agri-food exports from Poland may increase to EUR 25 billion.

Polish products are characterized by their quality-to-price ratio, very competitive in relation to producers from other countries, resulting from the high production scale achieved and the still present comparative advantages based on lower production costs. The unique taste and nutritional properties of many Polish products are hard to overestimate as well. It is expected that this year, foreign sales will be driven by processed goods: grain products and confectionery. The exports of poultry and probably beef will still be on the rise. There is also a chance for growth in the dairy sector.

In the recent years, the internal food market in Poland has become similar to the Western European markets and is currently characterized by concurrent existence of a group of global and local brands as well as private labels of retail distributors. The quantitative share of private labels of retail chains in the Polish trade market is



ANDRZEJ GANTNER

General Director of the Polish Federation of Food Industry – Employers' Union (PFPŻ ZP)

approx. 30%. In comparison with Western European countries (e.g. Germany), this is approx. 20% less, however, an upward trend can be noticed. This results from the fact that more than 70% of consumers are aware of the existence of private labels in retail chains, and one third of the consumers appreciates them. The largest distribution channel for private labels is the segment of discount stores, where private labels constitute more than 50% of sales. However, the share of discount stores is starting to decrease due to the growing share of fresh products and producer brands. On the other hand, the sales of private labels are growing at a fast pace in the distribution channel of small and medium chain stores.

family brand strategy and in the individual brand strategy.

THIS GIVES A LARGE DIVERSITY TO COMMERCIAL BRANDS WHICH PLAY VARIOUS ROLES. CONSEQUENTLY:

- flagship products, recently being replaced by chain brands (uniting the names of the brand and the store chain – e.g. Tesco, Lidl), have price advantage over producer brands;

- exclusive (discount) brands are currently second generation products, made similar to

brands of leading manufacturers with regard to their quality and packaging;

- first available price private labels, enabling a consumer to purchase a product at a price as low as possible on the market;

- private labels being exclusive brands of the chain, the goal of which is competition against a specific producer brand acting as leader on a given product market. They are also referred to as counterbrands.

THE DYNAMIC DEVELOPMENT OF PRIVATE LABELS IS ALSO



A COMPANY WITH TRADITION

TRADITION AND INNOVATION

Wawel SA is one of the biggest and most renowned confectionery producers in Poland. Its tradition dates back to the beginning of the 20th Century. It was then, in 1910, that Adam Piasecki established his Sugar and Chocolate Factory. Soon after World War II, following the merger of the factories of A. Piasecki, Suchar and Pischinger, Wawel gained even more experience in chocolate production. Wawel is a brand that combines the new with the traditional in a unique way — by drawing from the legacy of great confectioners and constantly introducing cutting edge technological solutions and top quality standards.

Wawel does everything to guarantee that its company brand claim “Wawel. Joy Raiser” is evident in all areas of operation. Proven recipes and surprising innovations bring about positive emotions among all generations of confectionery lovers. The Company is listed on the Warsaw Stock Exchange since 1998. In 2006 Wawel opened new, modern factory with cutting-edge production lines compliant with highest quality standards in Dobczyce near Cracow. However, some of the products made in this advanced production plant are still handcrafted, such as its legendary caramels or fudges.

QUALITY

The top quality of Wawel products is a result of unique recipes, carefully selected ingredients and dedication of top-notch specialists. Thanks to the experience of finest chocolatiers, Wawel products can satisfy even the most demanding connoisseurs. Modern factory, where the confectionery products are made, complies with the most stringent standards and undergoes strict quality checks. The highest quality of products is guaranteed by internationally recognised certificates such as ISO 9001:2008, BRC, IFS and the HACCP system.



INVESTMENTS AND DEVELOPMENT

There is more to Wawel than its extensive portfolio of superb products. The company is successfully implementing its strategy, constantly investing in development of new recipes and introducing new products. Wawel invest also in its production facilities, including constructing of second production plant that will enable to satisfy the demand for its products and to enter new confectionery segments.

VARIETY OF SWEETS

Wawel is well known for manufacturing excellent chocolate in many variants but it also produces huge variety of confectionery. Filled chocolates and pralines, chocolate covered candies, countlines, filled fruity jellies, jellies in chocolate, cream fudge, caramel candies, chocolate coated mint pastilles, dried fruits in chocolate, no added sugar wafers and chocolate, to name a few. Soon Wawel portfolio will expand including confectionery products from new categories.

EXPORT SALES

Wawel gains extremely positive reception of its products from customers outside Polish market. 2015 was very successful for the producer concerning export sales. Wawel products are exported now to over 40 countries and constantly gains new clients worldwide.



FOSTERED BY MANUFACTURERS WHO:

- regard cooperation with a chain as an opportunity for development, reduction of risks and costs of marketing a product, entering new geographic markets;
- through production under a private label, seek to improve the position of their brand in a given retail chain, treating production under a private label as investment into a producer brand;
- eagerly cooperate with a trading enterprise in the creation of products under a trade brand. Producers of private label products are often owners of brand leaders in the product category.

THE DEVELOPMENT OF PRIVATE LABELS AFFECTS THE SITUATION OF PRODUCER BRANDS BECAUSE:

- premium private labels become an alternative for consumers to products of strong brand producers;
- producers whose products bear a local brand and are positioned in the economy segment are "crowded out" by private labels;
- sales under a private label forces produ-



cers into constant cost reductions and results in a lower margin. A solution to this situation is innovativeness of producer brands.

Private label development strategies of trading enterprises surely affect supplier relations. In the 1990s, chain stores used to utilize private labels as a tool to impact the supply chain relations and to reinforce their negotiating power against manufacturers. A chain store would make use of its predominant position in

the supply chain. Currently, chain and private label suppliers are interested in harmonious cooperation. Global companies are increasingly more focused on brand portfolio management, delegating the production process to local enterprises characterized by more flexible operations and cost effectiveness. Appreciated suppliers are those who guarantee appropriate production capacity as well as high and repeatable quality of private label products.

This is reflected in the growth of Polish agri-food exports, mainly to the EU countries. The most competitive sectors, generating the highest revenues from exports, include the meat, dairy, confectionery, grain processing, as well as fruit and vegetable sectors. Poland is the largest exporter of apples and mushrooms in the European Union.

The value of exports of Polish products grows each year. Products offered under Polish brands are still barely visible on shelves of foreign stores. In the recent years, Polish entrepreneurs have increased the volume of exports, to a great extent through production under private labels for foreign contractors. Due to competitive prices and high quality of the offered products, it was the quickest

way to develop and increase the sales for many Polish companies. However, Polish entrepreneurs are aware that the possibilities for expansion, resulting from low prices, are slowly running out as labour costs in Poland are on the increase. They also understand the necessity and feel the need to build their own position on foreign markets. Therefore, they also put the emphasis on the development of sales abroad under their own brands. This may be seen in growing numbers of investments in the food sector, intended not only to increase production and reduce its costs but also to implement new and innovative products in order to fulfill the needs of increasingly more demanding consumers looking for organic, functional or premium food.



ŁUKASZ HOLUBOWSKI

President
Agricultural Market Agency

Polish products are appreciated by consumers due to their unique taste, high quality and affordable price. Polish food, manufactured from natural raw materials using modern technologies, competes successfully with food of other EU producers.



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Private labels as an opportunity to implement innovation and develop export

We are definitely experiencing a kind of transformation today – from “Private Labels” to “Own Brands”. Modern private labels compete with national brands not only with their price (although it still remains an important determinant for success) but through the creation of a unique offer implemented on many levels: from the specific nature of the product itself and the assortment, to entering new categories (which are, quite frequently, new on the market, not just in a given store chain), implementation of innovations on the level of packaging technologies and packaging design, to conducting strategic, refined and consumer-engaging marketing.

Such an approach is often a “to be or not to be” situation for a national brand being pushed out of the market by increasingly more effective and professional private labels. On the other hand, strong private labels, with stable, often very extensive distribution systems, are a perfect opportunity for suppliers producing at the request of store chains. By offering nationwide distribution, and in the case of global brands, also by opening export markets to many of their suppliers, chains provide excellent conditions for growth.

Private labels in Poland are also a stable and relatively inexpensive channel for the implementation of innovations, especially for smaller producers. Owners of private labels, trying to reach a wealthier and more demanding consumer, look for innovative and interesting products, eagerly utilizing ready solutions in this regard, offered by suppliers, or cooperating with them to elaborate unique solutions or optimize production costs.

Trade chains are also highly interested in niche segments (“free from food”, functional food/superfoods, bio/organic, ready to eat food, etc.) creating an opportunity to enter mass distribution for smaller and local producers. Thanks to the scale of activity, they also promote new product categories among consumers in Poland, influencing their nutrition habits, and the beneficiaries of this “educational” activity are both sides: both private labels and suppliers with their own brands.

Having spent 12 years observing the direction of development of private labels in Poland, growing appetites of trade chains for the creation of strong brands, and the resulting supplier activities, I believe that the development

of private labels has one more positive aspect which may be hard to notice in the everyday struggle for survival on the market. An expansion of private labels towards higher quality (of both product and consumer communication) causes Polish producers to wake up from a lethargy and learn to act flexibly and effectively. After this, it is just a short step to creating strong Polish brands, not just successful in the competition against private labels but showing a potential to appear on international markets.

Dorota Kałowska
Expert at the Polish Chamber of Trade, Partner & Strategy Consultant at Cobalt Spark, Coordinator of the FUTURE PRIVATE LABELS Programme

For 17 years, she has been providing advice to brand owners on the Polish market with regard to building brand value and effective brand communication. Cooperates with Polish brand owners, foreign producers and store chains. Conducts brand management courses. An active trainer and coach, author of numerous publications in specialist press.

The private label market in Poland is growing at a pace of above 6% annually – its current value is estimated at more than PLN 44 billion (above EUR 10 billion). The greatest challenge for the further development of this market is building of confidence in products. In comparison with producer brands, present on the market for a longer time and having higher promotional budgets, private label products have difficulties in gaining access to the consumers' awareness. In this context, an important thing is the appropriate positioning of private label products. Today's consumers not only expect private la-

bels to have an attractive price but pay increasingly more attention to the quality and composition of the products. Therefore, they need to be convinced that the reasonable choice is a private label product with the most favourable price-to-quality ratio.

The development of the private label market is unquestionably a great opportunity for Polish producers who, in the vast majority, are able to satisfy the quality expectations of both store chains – domestic and foreign – and consumers. This is unquestionably fostered by the size of the Polish market – it is so large that specialized companies have devel-



ŁUKASZ PARTYKA
Director of the Private Label Department, Eurocash

oped in virtually every product category and compete successfully in the international arena.

Commentary



ANNA BISKUP
PR Manager for Lidl Polska

We perform thorough analyses of customer opinions and market trends to use as a basis for the creation of our offer. We realise that today's consumer is a “smart shopper” – looking for good quality articles at a convenient price. Since this is also the philosophy of our chain of stores, all of our private label products, such as “Bluedino” cheeses, “Chrupiące z Pieca” bakery products, “Rzeźnik” fresh meat, “Świeża Ryba w Lidlu” fish, “Ryneczek Lidla” fresh vegetables and fruit as well as juices, “Saguaro” water, “Pikok” cold meats, or “Pilos” dairy products, are characterized by high quality, equal to brand products, and their price is much more attractive. The industry appreciation of

our outstanding quality is the most prestigious award – the “Teraz Polska” badge – granted to more than 50 products with Lidl labels. Thanks to a large presence of private label articles in every assortment category, they have become a keystone of the offer of our stores.

The activity of Lidl in Poland relies mainly on cooperation with Polish suppliers, and the sales of Polish food generates above 70% of the turnover of our company. We cooperate both with leaders in their respective industries, such as Tarczyński S.A. or the Animex Group, and with local suppliers, such as OSM Koło or SM Jana. The high and repeatable quality of Polish products available at a convenient price has also gained recognition abroad. We support our suppliers in the export of Lidl private label products to more than 20 countries, mainly Central-Eastern but also Western or Northern Europe. On special request, Polish suppliers manufacture, among others, sweets, juice, yoghurt, cheese, or meat products under labels such as Bluedino, Pikok, Pilos, or Tastino. This allows not only domestic consumers but also those from almost the entire Europe to enjoy the taste and high quality of Polish products available at convenient prices.



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Interview with Bogusław Kowalski, President of Graal Group.



Where does the success of a private label brand lie?

Until recently, FMCG manufacturers have not seen the threat posed by private label brands. This resulted primarily from the fact that they were identified with poor quality and taste. They were the cheaper substitutes of your favourite brands. However, retailers have noticed the need for changes caused by growing Customers' expectations, so they improved the formula. Recognizing the Customers' growing expectations; both in terms of quality and taste of products, made private label brands flourish. At present, many private label brands offer products which can compete with other brand products.

How does the private label segment evolve in Europe? What are the private label brand market forecasts?

Private label segment in Europe will continue to grow, however, the biggest growth of this category is said to be over now. Initially, private label brands included basic products, the most popular ones (of the economy group), yet today the premium private label brands sector is growing rapidly as well. Nowadays, private label brand products are really good quality products. The reason for this is the Consumer who becomes more aware and he/she expects high quality and exquisite

taste in addition to an affordable price. From the long-term perspective, one could risk saying that private label brands will drive out mid-range products of the market; these which are not reasonably-priced and lack the strong brand awareness as well as loyal Customers.

In case of private label brand products, the price-quality ratio is beneficial – is a consumer aware of that?

A growing number of Consumers make conscious and thought-out purchases. More and more of them are aware that the content of brand products and private label brand products might be similar. These Customers who put the greatest attention to the quality of consumed products, thoroughly analyse contents and check if the quality is similar. Obviously, in addition to quality, what also matters is the taste which often determines selection of a product out of several brands. Moreover, there is also brand loyalty which often influences the final decision of the Customer in the purchasing process. In spite of this, the number of people who decide to buy private label products is steadily growing. This is due to increasingly more beneficial price-quality ratio of these products.

Please tell us about quality of GRAAL products.

Our every plant has large R&D departments and we continuously launch new products on the market, which is appreciated by consumers. Our goods are unique due to their quality and safety. We constantly make investments to have our machine park retrofitted, so that we are able to meet these goals. Quality of our products is crucial as it determines their success on the market. Each of our plants has a Quality Control Department. The laboratory is the place where concepts of new products are created and where we work to achieve the highest possible quality and delicious taste. We also guarantee taste repeatability, as it is extremely important for Customers. Due to highly developed automation and perfect work organization, we achieve great results – the product of the highest quality and exquisite taste at an affordable price.

What type of actions are taken by GRAAL with reference to its brand recognition outside Poland?

We realise that brand awareness is very important both in Poland and abroad. Therefore, we have been participating in prestigious fair events for years. During such events we can present the offer of our company and be up to date with industry news. We can also present what Graal Capital Group does and show its respective brands. In addition to aforementioned, we also increase the sum of our exported goods thanks to our sales representatives who reside abroad.

Does the company implement quality systems that confirm compliance with the standards effective in the EU member states?

Of course – each of our production plants has Certificates that confirm quality and safety of the products we make. We hold such certifica-



tes as: HACCP, IFS, BRC, MSC; FDA (sales to Russia), AQAP certificate (it complies with NATO standards), GlobalGap, ASC, BIO certificate and ISO quality management system. In addition to the standards imposed by the EU, we also have to meet our internal standards, which are in many cases even more strict. Apart from this, we are audited by our Customers a few times a year.

What are the forecasts for export development of GRAAL products and private label brands?

Undoubtedly, export is of the utmost importance for us – it grows by several tens of percent annually. To a large extent, it is the increase of foreign sales turnover of our company that propels our financial investments. Foreign customers appreciate that quality and safety of products are extremely important for us. What is also significant is the fact that we create the fish market in Poland. Thus, export is our natural way of development. Moreover, we observe that the market is constantly changing and know that we need to change along with it. In order to maintain our strong position on the market, we have to be present in all the areas in which significant changes take place. Foreign markets are just that place at the moment.

**Thank you.
Monika Dawiec**

Graal Group Inc.

Graal Group is the biggest Polish manufacturer of fish products. We offer our customers a variety of fish products including smoked salmon, trout, tuna and halibut products as well as meat products and ready dishes.

We dedicate our utmost attention to make sure that our products are manufactured respecting highest quality and environmental standards. Graal Group has 4 production plants in Poland and employs 2500 workers. Since 2005 the company has been noted on the Warsaw Stock Exchange. After 27 years on the market, Group's brands are available in all networks of shops in Poland.

Our products may also be found under our partners' brands all over the world as export comprises 35% of our sales. All of our products comply with all European and American quality certificates.

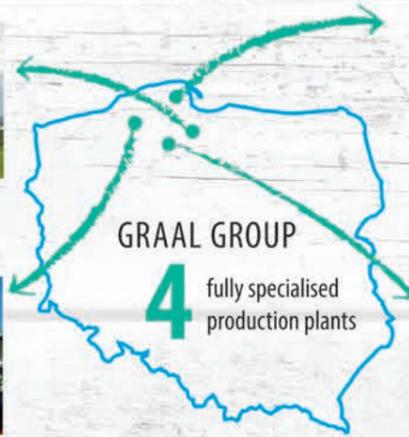
With **4 production plants** which area amounts to 42 000 m² and over 2500 employees, Graal Group is the biggest Polish manufacturer of fish products. After 27 years of presence on the market, Groups brands are available in all retail chain stores in Poland. We offer our customers a variety of fish products including smoked salmon, trout, tuna and halibut as well as meat products and ready meals.



KORAL TCZEW
Smoked salmon / Smoked fish



KORAL KUKINIA
Fresh fish / Smoked fish / Frozen fish / Sushi



POLINORD
Canned fish



KOOPEROL
Ready to eat products / Meat preserves / Fish marinades / Fish in jellies



Learn from yesterday, live for today, hope for tomorrow. The important thing is not to stop questioning. - Albert Einstein

Bogusław Kowalski
GRAAL Group CEO

POSITION OF OUR BRANDS*

41%
of the market in smoked products



38%
of the market share in canned fish products



16%
of the market share in ready meals



*source: AC Nielsen, February 2016

GLOBALLY KNOWN PARTNER

GRAAL Capital Group exports its products to **over 30 countries** all over the world. Our products can also be found under our partners brands both in Europe and as well as global markets. All of our products comply with European and American quality standards. Graal's plants have the following quality certificates: ASC, MSC, BIO, IFS, BRC, Global G.A.P.



Our products are available on all the continents

GRAAL'S CONSTANT DEVELOPMENT

Consolidation of the fish market in Poland began in 2005 with the decision of the Board of Directors of GRAAL Group to start acquiring smaller fish processing companies. This enabled us to quickly increase the production. The next step was to achieve production specialization of each plant.

HERE ARE SOME OF OUR PRODUCTS:

COLD SMOKED FISH



HOT SMOKED FISH



FRESH & FROZEN FISH

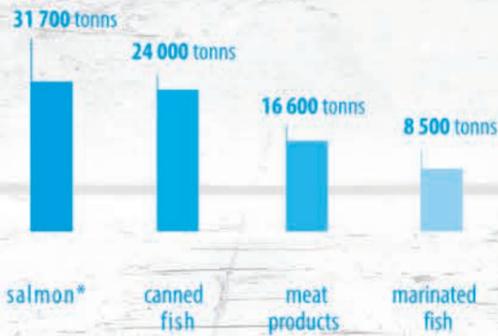


CANS



TOTAL ANNUAL CAPACITY

Due to the consistent realization of set strategy and constant investments, production capacity of Graal Group amounts to 80 800t.



* salmon: smoked / fresh / gravad

GLOBAL RESPONSIBILITY

GRAAL conducts sustainable business respecting natural environment and providing safe and friendly work conditions for our employees. We cooperate with suppliers who have MSC as well as Dolphin safe certificates and do not use any species of fish listed as endangered by WWF.



SUSTAINABLE GROWTH

(000 EUR)



GRAAL Group is the biggest fish processor in Poland. Our position has systematically evolved throughout the years in all fish market segments. With a clear vision of the business, we were able to gain the trust of our clients and develop several major brands recognized all over the world. We constantly look for new technologic solutions to develop and introduce new products corresponding to the continuously growing demands of the market and consumers.



Interview with Krzysztof Kasztelewicz, Export Manager at Sąddecki Bartnik.

Please tell us briefly about the history and motto of your company.

Sąddecki Bartnik is a family enterprise established in 1973 by the Kasztelewicz family. For us, beekeeping is more than just a job – it is our true passion. The seat of our company is in Stróże, a locality in southern Poland, in the heart of the picturesque Beskid Sąddecki mountain range. This ecological surrounding allows us to obtain honeys of pure quality, both delicate spring ones and dark honeydew ones. The natural environment is a real treasure of healthy, organic products. Living in harmony with nature, we can fully benefit from it, and bees' honey is universally regarded as a real miracle of nature. Hence the motto of our company – “Miód natury cud” (Honey is nature's miracle). Our advantage is an apiary of our own with more than 1500 bee colonies. However, to meet the demand of the market, we also purchase honey from trusted beekeepers, locally and from abroad. We take advantage of the health-benefitting properties of honey and bee products, putting the individual needs of our customers first. The main goal we have been following since the very beginning of our enterprise is to give our customers full satisfaction and to join the best companies in our sector.

The honey produced by Sąddecki Bartnik is sold throughout Europe. What is the key to success?

We are a company actively operating both in the Polish food market and abroad. Our honeys are appreciated by an increasingly wider group of consumers as well as stores that supply themselves with our products, and the “Sąddecki Bartnik” brand is among the most widely recognized honey brands in the Polish and European market, enjoying confidence and appreciation of consumers for a quarter of a century. Our enterprise is oriented to acquiring high-quality bee products and offering a safe and healthy product. Every honey batch undergoes complex physical and chemical tests at our laboratory. Following the standards enforced and our own high standards, we obtain quality which has already been appreciated by many domestic and foreign consumers, growing each year, for more than 20 years.

The Sąddecki Bartnik company has been uninterruptedly participating in Apimondia for 20 years. The international nature of this event allows us to discuss and exchange information with both beekeepers and companies involved in the purchase, sale and conditioning of honey and bee products. Thanks to these trips, we are continuously broadening our knowledge and introducing innovations in the area broadly understood as apiculture.

How are the origin and properties of the Sąddecki Bartnik products stressed in cooperation with foreign partners?

Sąddecki Bartnik, being an efficiently managed company, is developing very intensely, as it is oriented predominantly to quality, ecology and full customer satisfaction. The capital of the brand is the good quality of the products offered, professionally qualified employees, knowledge of the market dynamics, flexible response to changes occurring on the market, as well as courageous planning of investment and marketing activities.

Each year, the ecological awareness of society is radically increasing. This is true for virtually every aspect of life. We are aware of this and we are also trying to present our offer appropriately. We know that satisfied customers will be coming back for successful products. Confidence in the producer reinforces the consumers' certainty they have bought a good product.

We have ISO9001 and HACCP quality management systems in place, and we have obtained food safety standards certificates: BRC and IFS. Our products have won the “Teraz Polska” Promotional Badge and received the “Poznaj Dobrą Żywność” (“Try Fine Food”) label granted by the Minister of Agriculture and Rural Development. The granted certificates are a guarantee to our recipients that we meet all requirements to ensure the health safety of our products and a high level of quality.

What are the prospects of export development of the Sąddecki Bartnik products and private labels?

The company's products find recognition not only at home but on foreign markets, reaching mainly, Western Europe and Asian countries. The Sąddecki Bartnik Apicultural Farm is mainly focused on brand products, but we also produce private labels according to the customer's needs. We approach the preferences and requirements of our customers on an individual basis and strive to meet their expectations. We are flexible and open for cooperation proposals. And this creates perfect conditions for long-term and fruitful cooperation.

Which Sąddecki Bartnik products enjoy foreign consumers?

To our foreign customers, we offer a wide choice of natural honeys, from multiflower, lime or honeydew ones to honeys referred to as BIO-products and honeys from distant parts of the world, such as lavender or eucalyptus honey. When choosing honey, consumers tend, increasingly often, to follow not just its taste but the properties and prophylactic use of the honey as well. All our honeys provide an opportunity to reduce sensitivity to allergies, to improve the condition of the organism, and to develop natural resistance against cold, therefore, the interest in a given product depends, as a matter of fact, on the consumer's individual preferences.

Finally, I would like to say that both honeys and other bee products, such as propolis, bee bread, pollen and royal jelly, are real gifts of nature. They are a source of health, vitality and well-being for children and adults alike. Sourced from clean forests, meadows and fields, combined with perfect care for the condition of bee colonies, they ensure the highest quality of the offered products, and the society is aware that the less processed the product is, the better it is for health.

SAUDECKI BARTNIK®

Honey
the miracle of nature

www.bartnik.pl

BEE FARM
pure natural
HONEY
FOREST

BEE FARM
pure natural
HONEY
ACACIA

BEE FARM
pure natural
HONEY
BLOSSOM

SAUDECKI BARTNIK
FOREST
Honey

SAUDECKI BARTNIK
PURE NATURAL
Honey
MULTIFLOWER

FAMILY BUSINESS

HONEY



Interview with Bogdan Piasecki, Owner of Mazurskie Miody/ Destylarnia Piasecki Group.

Mazurski, Grzaniec na miodzie, Honey Wine, Bairille, Piasecki Cherry flavoured vodka.

Mazurskie Miody has a wide offer. Which products enjoy the greatest popularity and what new products have appeared in the offer recently?

We listen to the needs and expectations of our customers. Trójniak Rycerski Markowy took trade chains by storm. It is sought after by the best stores and retail chains, as it is the only brand mead in Poland.

Bairille – honey distillate – is a unique, world-class, aged distillate of attenuated bees' honey. We obtain it using specialist distillation apparatus. Our tanks are located underground, which creates a perfect microclimate for the seasoning of products in oak barrels. It was just three months ago when the three-year period of seasoning in oak barrels of the first Polish whisky, prepared at Destylarnia Piasecki, passed.

The quantity produced is rather of collector nature, however, its superb taste and aroma qualities have been appreciated by the best tasters in this field. Our newest idea is a delicate-taste czwórniak with characteristics of mild white wine. This product is already present on the market: Honey Wine – czwórniak.

Honey vodka and mead – what is the difference?

Honey vodkas of the "Piasecki" series are flavoured vodkas made of rectified alcohol, enriched with an addition of honey and appropriate fruit juices. The most popular one is the "Piasecki Cherry" honey vodka, available in the best specialist stores. This product is also an export hit, particularly appreciated by Western European connoisseurs.

Mead is a beverage made of fermented honey. Our most popular brands of unsaturated mead include the varieties of trójniak: Castelo, Mazurski, Kresowy, Basztowy; dwójniak: Palacio Mel, Grunwaldzki, Warmiński; as well as półtorak: Rodowy and Piasecki.

The Trójniak Mazurski mead has won the Gold Medal at the Mazer Cup International, the largest international competition in the USA.

It is the most prestigious, and the world's largest, competition devoted to meads. It has been organized for over 90 years.

In this year's competition, in the category of traditional sweet meads, the Gold Medal was won by Trójniak Mazurski Niesycony Miód Pitny. It has a golden amber colour with a taste and scent of honey and discernible spices. It stands out among other meads due to the traditional technology applied on unbrewed honeywort.

Monika Dawiec

Please tell us more about your distillery and your life passion.

The passion for distillation of spirits is the history of the Piasecki family, we used to own distilleries in the Polesie region. In the golden age of development in distillation, liqueurs and brandies used to be made in our Horodziec estate in Polesie. Later generations were brought up in the passion for the production of alcohol. I started over 50 years ago by setting up my first beehive. Then my first apiary came, and I continuously developed my apicultural skills over the years, until the passion became a business. Today, it is an efficiently operating family enterprise consisting of two business entities: Mazurskie Miody and Destylarnia Piasecki. Beside the closest family members, these companies employ the best specialists in marketing and fermentation technologies, as well as managers taken over from leading competitive companies. I am proud that these companies are a showcase of the Warmia and Masuria region, where pre-war tradition meets 21st-century modernity.

EXPORT PRODUCTS OF THE MAZURSKIE MIODY COMPANY RELY ON THE UNIQUENESS OF OUR PRODUCTS AND THEIR SUBTLE, MILD TASTE QUALITIES.

Polish meads are appreciated worldwide. How is the export developing? What is our advantage over the competitors?

Polish Mead and Vodka are our best products. Export products of the Mazurskie Miody company rely on the uniqueness of our products and their subtle, mild taste qualities. We present our products at the best exhibitions, such as: SIAL in China, Paris and New York; ANUGA in Cologne; Prowein in Düsseldorf; Alimentaria in Barcelona; PLMA in Amsterdam. The articles from Mazurskie Miody are recognized not only in Poland or in Europe but in Asia and America as well. As for the export hits, the most popular ones are: Piasecki Vodka, Masuria Vodka, Trójniak

IT WAS JUST THREE MONTHS AGO WHEN THE THREE-YEAR PERIOD OF SEASONING IN OAK BARRELS OF THE FIRST POLISH WHISKY, PREPARED AT DESTYLARNIA PIASECKI, PASSED.

Mazurskie Miody
rok zał. 1964

DESTYLARNIA
Piasecki

TRÓJNIAK MAZURSKI

THE GOLD MEDAL WINNER IN "THE MAZER CUP INTERNATIONAL MEAD COMPETITION 2016".

WWW.MAZURSKIEMIODY.PL WWW.PIASECKIVODKA.PL



www.golddrop.eu

Gold Drop - History

GOLD DROP has a long tradition, **over 24 years on the market**, in production of household chemical products.

The development of a reputed brand is based on **the philosophy of ethical and responsible business**, i.e. offering top-quality products to customers, maintaining a business-oriented relationship with contractors, cooperating with local communities and paying particular attention to protecting users and natural environment.

The history of Gold Drop shows its dynamic growth – a small company has transformed into an enterprise with almost **200 employees**.

Apart from manufacturing Gold Drop branded products, the company is also a valued private label provider. **Our products are successfully sold in over 26 countries!**

Eastern and Central Europe, also in countries like Armenia, Azerbaijan, Kazakhstan, Iceland, Norway, U.A.E., Sweden, Denmark, Croatia, Bosnia & Hercegovina, Slovenia, Montenegro, Greece, Georgia and Libya.

The company has substantially expanded its infrastructure since 1999 – a new production hall, warehouses, facilities and offices were built and investments were made.

The production process is guarded by the **ISO 9001 and 14001 Integrated Quality and Environmental Management System**.

Gold Drop is a membership of **A.I.S.E** (International Association for soaps, detergents and maintenance products) since 2012 and Polish Association of Cosmetics and Home Care Products Producers.

Considering the necessity of the environment protection, Gold Drop has decided to launch **“eco-line”** – a series of **environmentally friendly products**. These products have been **certified by the Polish Centre for Testing and Certification. Ecolabel (a flower)** – an EU marking of environmentally friendly products is a main distinction awarded in Europe to products meeting higher environmental standards.

Presently Gold Drop is implementing **the Nordic Ecolabel: “the SWAN”** certificate on a series of environmentally friendly products. The license process is made by Ecolabelling Denmark.

The company has already gained the Nordic Ecolabel license on the following products Eco line: all-purpose cleaner, window cleaner, toilet cleaner, bathroom cleaner, kitchen cleaner, dishwashing liquid and liquid hand soap. In near future Gold Drop is planning to expand the Nordic Ecolabel on laundry liquid detergent.

Cleanliness in line
with nature



GOLD DROP
ISO 9001
14001
BEST QUALITY

Interview with Paweł Tokarczyk, Sales Director of GOLD DROP



It all started out in 1991 by purchasing a metal warehouse with an area of one thousand square metres from a failing municipal company...

Exactly. It all started out in 1991 from the purchasing of a warehouse belonging to a failing municipal company; it was converted into a production plant. The first products made there were, successively, 'Lemon Fresh' dishwashing liquid, 'Window' cleaning liquid for windows and glass, and 'Floor' all-purpose cleaner. In the times when the Polish shelf of cleaning agents was very modest, Gold Drop was creating products supposed to help maintain cleanliness in every home after adding just a symbolic "drop" to water. After over 25 years in operation, Gold Drop has changed beyond recognition. Today, it owns a factory with an area of 11 000 square metres, and employment in the company has increased from the original nine to almost 200 people. The company of Limanowa currently manufactures nearly 60 products in more than 700 variants. They differ in composition, colour, scent, capacity or packaging type. Despite such a wide portfolio, the company constantly develops new products and searches for innovative solutions.

What percentage of production does enter foreign markets and what products are available to foreign consumers?

Almost over 33% of production reaches foreign markets. These are a wide array of products manufactured by GOLD DROP under private labels and under producer brands, including: an ecological series, all-purpose cleaners, professional preparations for various surfaces, window cleaners, mirror cleaners, synthetic starch, dishwashing liquids and gels, abrasive cleaning milks, pipe unblocking gels, descalers, toilet gels and disinfectants, as well as washing liquids and gels, concentrate and liquid fabric softeners, floor and carpet cleaners, furniture preparations, car maintenance products and liquid soaps.

On the other hand, approx. 20% of private label products reaches foreign shops in relation to the total exports.

Private labels and "brand" products - how are they perceived by consumers in Poland and in European markets?

The market of private labels in Poland is still relatively young. Nevertheless, it is developing very dynamically. In just over a dozen years, private label products have acquired shares in the FMCG market, estimated to approx. 24% of the sales. It is still less than in other European countries where the estimates vary from 45 to 50% of shares. Most private label products have undergone a metamorphosis changing the way they are perceived.

From products regarded as cheap and of poor quality, they have become synonymous with quite good quality for a reasonable price. Of course, the quality of a private label and its perception by customers mostly depends on the label's owner. Some manufacturers put special

emphasis on the development of private labels and do not confine themselves to the so-called copying of market leaders, instead they create alternatives to brand products themselves. Therefore, customers in Poland, just like in other countries, trust private label products increasingly more and willingly reach for them.

What are the prospects of development for Polish small and medium companies, connected with the production of private labels?

As I have already said, the private label market is developing very dynamically, so increasingly more manufacturers offer their services in this regard. There is no less competition in the market of private label producers than in the area of producer brands. To gain a customer, a given producer must show its advantage over the others with regard to the quality of the offer, service or, obviously, price. Nevertheless, the large presence of small and medium companies manufacturing for private labels evidences the fact that Polish companies fare very well in this market. They are aware that the flexibility and relatively low operating costs of small and medium enterprises may be a significant advantage in the struggle for production of private labels. Looking at the shares of private labels in the markets of Western European countries, one can assume further dynamic growth of this market in Poland as well.

Do you intend to enter new markets (also with private labels)? Please tell us about the development of the export branch at the company.

For many years, the export department of Gold Drop has been one of the key branches in the functioning of the company. Currently, we cooperate with customers from 24 countries, in Europe, Asia and Africa. We sell products bearing the Gold Drop logo, as well as provide comprehensive customer service in the area of private labels. In order to develop itself, a company must constantly pursue new customers and outlets. Therefore, Gold Drop, in its activity, is not satisfied with what it already has but tries to reach potential customers with its offer. Soon we will put major emphasis on developing cooperation with European markets.

**Thank you for the conversation.
Monika Kociubińska**



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Interview with Małgorzata Rytel, Member of the Management Board of PPH MAXPOL Sp. z o.o.

As the leader in exhibition services, you have already been organizing a worldwide range of events for 26 years. Which of them would you deem particularly interesting and prestigious for Polish exhibitors?

Every fair is of great importance to an exhibitor who chooses it to establish new contacts and consequently, cooperation with contractors. The most prestigious events we participate in include such fairs as ANUGA in Cologne, SIAL in Paris, IFE in London, Yummex in Dubai, the Shanghai fair, and the greatest private label fair, PLMA in Amsterdam, where we are present now. The PLMA fair is among the most attended, and the number of exhibitors increases each year. This year, MAXPOL is servicing 32 companies from Poland.

To which fairs are you currently recruiting exhibitors?

Our company is currently conducting recruitment to the very prestigious "SIAL 2016" food industry fair in Paris, which will be held on 16-20 October. We have also started subscription for the "YUMMEX Middle East" confectionery fair in Dubai (7-9 November of this year). As for the next year, we have already started recruitment to the highly popular ISM confectionery fair in Cologne (29 January – 01 February) and the largest fair in the British Isles,

IFE 2017, that will take place in London on 19-22 March. Space is selling rapidly at the fairs I have just mentioned, however, when ordering exhibition space, priority is always given to companies that have participated in previous editions.

Are customers in this industry loyal to the organizer, or do they often change partners?

Customers are different. There are companies that only go with us to fairs. They have full confidence in us and know their stand will be handed over in accordance with their expectations and on time, so they have nothing to worry about. There are also companies that change their organizer to see if it is able to prepare the stand better and at a lower cost... and they often come back to us. Constant cooperation as well as reliable and professional answers to the needs of customers increase the level of their loyalty.

What is the essence of professionalism in customer service at Maxpol?

Above all, MAXPOL's professionalism consists of professional assistance to companies in the selection of appropriate industry fairs they should take part in. It is also about the availability of all our employees, including the President of the Board. Our professionalism is prospective thinking

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.

in solving and preventing problems, as well as a comprehensive customer approach consisting of constant and reliable cooperation, winning of trust and consequently, good opinion among customers. These values contribute to a double win – for the company and for the customer. And this is very rewarding!

Has MAXPOL, after 26 years operating in the exhibition market, changed the customer approach in this industry?

Since the very beginning, customer satisfaction has been our creed. Systematic growth of the number of exhibitors and the expansion of the group of regular customers, participating in many fairs each year, allowed us to gain recognition from industry institutions. Our business has been positively evaluated and awarded the prestigious title "Leader in Exhibition Services". We have also been granted the Recommendation of the Polish Chamber of Exhibition Industry.

What do you predict for the "fair" business in the coming years?

I look into the future with optimism. I think there is no replacement for fairs and they will keep developing. The Internet is unable to substitute participation in fairs. It is just a tool to transfer information and to correspond with partners, this is but a fraction of marketing. Participation in fairs enables direct contact with customers, familiarization with products, or negotiation of conditions for potential cooperation. Polish enterprises look for new outlets virtually worldwide. We are recognized as manufacturers of many excellent products. Industries such as dairy, confectionery or meat are our key exports.

What advice would you give to entrepreneurs and company managers who would like to enter foreign markets with their products?

The success of an enterprise is made up of financial results, achievements of the assumed goals, and enrichment. I believe that success is more than just getting income higher than expenses. It is an effect of cooperation with people, customers, employees, and suppliers. It is them who create the positive results. Such cooperation is also reflected in the exhibition industry. We advise companies where and how they should present their products. As we know, medium and small businesses are the foundation of our economy. In the first place, Polish entrepreneurs must perform good research of the market where they want to sell their products. And the way to research and evaluate is presence at fairs. Here, it will be clear if the goods are of interest to recipients. If the entrepreneur manages to initiate business meetings, it will be the first step to export.

What aspects should an exporter pay attention to then?

Everything depends on the country and the export possibilities of our products, e.g. whether there is no embargo in the given country, whether many certificates are needed and lastly, whether transportation to these countries is possible and viable. But the most important aspect is the contracting of products.

Thank you very much for our conversation and I wish you further success.

Tomasz Pańczyk



Fair schedule available on page 43

AMSTELHAL, STAND 6752

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EXHIBITION – THE BEST TOOL OF DIRECT MARKETING

This motto stays with our company since 1990 - the year in which the company has begun organizing participation of Polish companies in international fair. At the beginning we were on the eastern markets, nowadays in the whole Europe and outside Europe too. Last time, we organize the international fairs in few dozen countries of the world for thousands of exhibitors.



ZMB Białystok is a manufacturer of ripening meat and high-quality meat products for example: KINDZIUK, KUMPIAK, PASTURMA, COUNTRY HAM, COUNTRY BACON, COUNTRY NECK. From the very beginning, we paid special attention to the quality. Due to specialized and experienced personnel we are able to offer our customers quality products. The excellent flavour owes its taste to the location of the ZMB Białystok which is placed in a green, clear and ecologically oriented part of the country, near Białowieza Forest and Knyszynska Forest. It is undoubtedly one of the greenest part of Europe. What makes the unique taste of the products are also vast meadows, vast forests, national parks and the absence of heavy industry.

excellent flavour owes its taste to the location of the ZMB Białystok which is placed in a green, clear and ecologically oriented part of the country, near Białowieza Forest and Knyszynska Forest. It is undoubtedly one of the greenest part of Europe. What makes the unique taste of the products are also vast meadows, vast forests, national parks and the absence of heavy industry.

Kindziuk



Legend of the original Kindziuk dates back to ancient history. Produced through the traditional recipes, from generations it is synonymous with exquisite taste. A method of preserving meat by ripening and drying had been known for a long time in the areas of Podlasie. Also, production of cured meats using this process appears to be older than preparing them through steaming or just smoking. It has become a specialty of the highest quality at our company.

Kiełbasa szlachecka



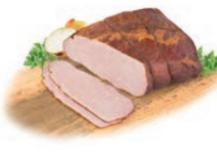
This is a sausage in natural intestine, prepared with the highest quality meat from pork ham. Smoked with alder or beech wood smoke giving it a golden color. The unique flavor notes sausage owes the addition of garlic, pepper and mixed herbs. Consumers will appreciate the great taste of our sausage.

Palcówka



As a result, it has a unique flavor and aroma. This name comes from the process of pushing meat stuffing with fingers into small intestine, because the original Palcówka were made by hand without mincer to grind meat and funnels for stuffing. It was said that this is a sausage of poor people, because it was not smoked, and were prepared with pork trimmings. Palcówka was especially widespread in the borderland cuisine. Now it often occurs as a regional product.

Szynka przedwojenna



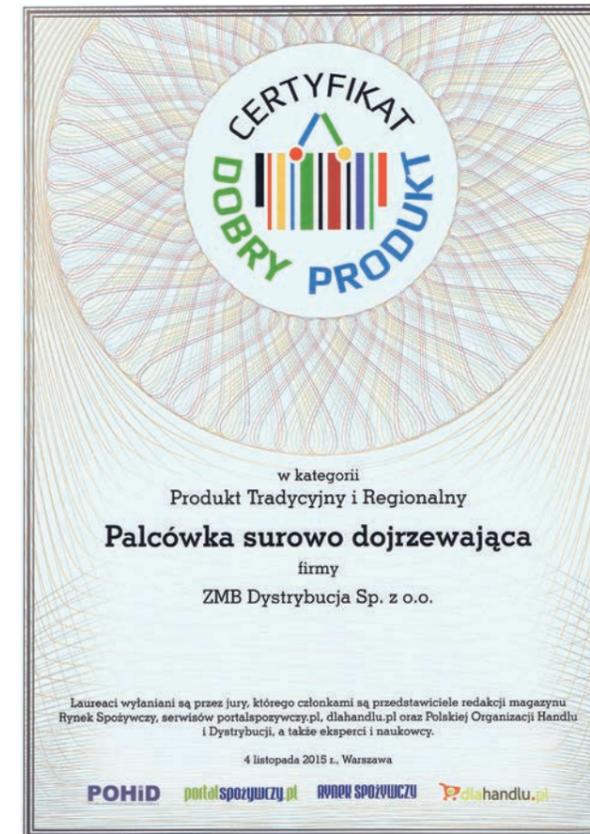
Smoked products made from whole muscle pork ham. Fragile, delicate and aromatic ham made from high-quality meat and carefully selected composition of spices. Smoked natural smoke of alder or beech so that owes its intense aroma and unique taste. Recommended for traditional Polish smoked meats' enthusiasts.

Kumpiak



Excellent dry-cured ham ripening made from whole muscle pork ham, cold smoked in the smoke of alder or beech. Ham is rubbed with rock salt and a mixture of spices and then matures. After this period, it shall be subjected to the smoking process which causes drying of the product. The result of this process is obtained durability of meats. Produced ham has a unique flavor and the right consistency. The product resembles a ham produced by manufacturers many years ago, and now enjoys great popularity among the followers of such meats.

Our products have been appreciated by consumers, which is confirmed by awards: which is confirmed by obtained awards and distinctions:



Customer satisfaction is something that ZMB always puts in the first place. The plant IFS certificate confirms that the highest sanitary and technical requirements are met, ensuring the production of safe products with a defined repeatable quality.

ZMB BIAŁYSTOK
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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.

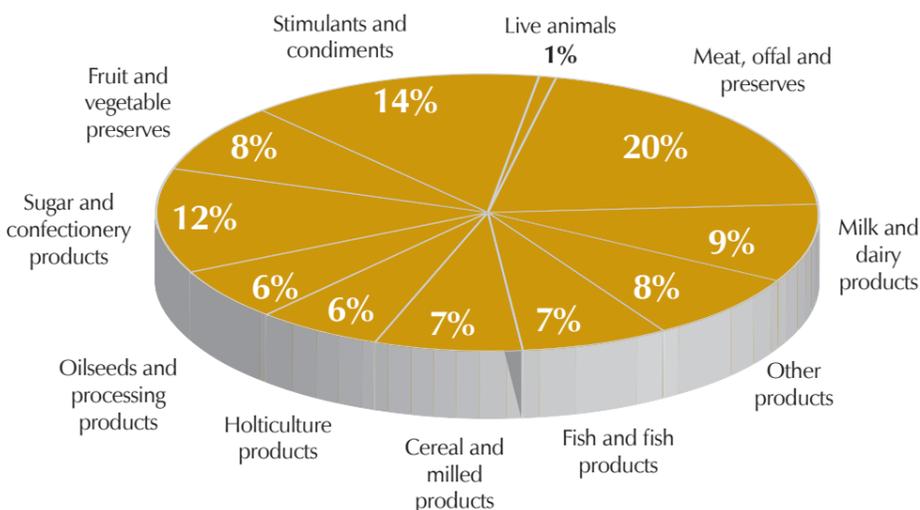
COMMODITY STRUCTURE OF THE AGRICULTURAL AND FOOD TRADE

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.

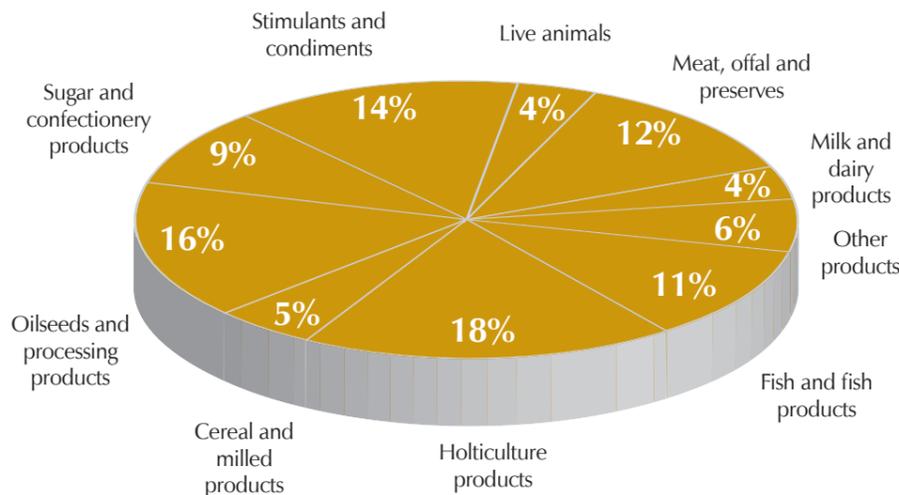
The export value of low-processed products increased by 4%, and that of highly-processed products – by 8%, and of unprocessed products – by 3%. In 2014, the animal section saw a 13%

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 horsemeat (-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%.

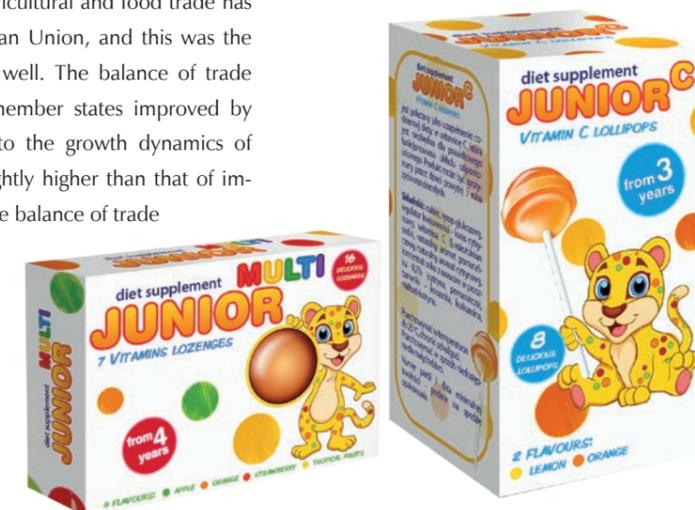
Once again, the commodity with the highest value in purchases on foreign markets was pork, with a 4% decrease in expenses in comparison with 2013. There was a significant increase per annum in the value of imports of poultry meat (+21%), milk, cream and ice cream (+14%), cheese and curd (+12%), beef (+9%), sheep meat (+40%), horsemeat (+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.



Polish companies

EUROPAHAL, STAND 4734



BIFIX Wojciech Piasecki Sp. J.

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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.

EUROPAHAL, STAND 5639



Colian Sp. z o.o.

1 Zdrojowa Street
62-860, Opatówek, Poland
export@colian.pl
www.colian.pl

We are a group of confectionery products cooperating under: Jutrzenka, Goplana Solidarność and other brands. Aggregated experiences, technologies and production potentials let us achieve a position of one of the biggest confectionery producers on the Polish market.

We are constantly exploring our client's needs, keep high quality, unique taste and nutrition values of offered products.

Through participation in various development programs, effective creation of product categories and efficient service we want to be perceived as an innovative company and an effective partner for many years.

BAKERY: HALL 8, STAND 9319 CONFECTIONERY: DANISH PAVILION, 4226



Dan Cake Polonia Sp. z o.o.

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mobile: +48 601 085 777
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export@danecake.pl
www.danecake.pl

Dan Cake Polonia is a major confectionery manufacturer in Poland. As a part of the international Dan Cake group the brand is recognized on the European market as a solid and innovative private-brand manufacturer of toast, milk rolls, muffins, tartlets, cake bases, sponge cakes, foil cakes, round cakes and yeast cakes. Dan Cake employs modern production methods, follows the lean manufacturing philosophy in terms of costs and manufactures its products in large quantities. Dan Cake Polonia follows the rules of the „clean label” policy and eliminates the use of additives, including artificial flavourings and colouring agents. The plant in Poland is also certified with the IFS quality standards.

NOT PRESENT ON PLMA FAIRS



EUROHANSA Sp. z o.o.

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export@eurohansa.com.pl
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Eurohansa is a family company established in 1989. For more than twenty-five years we have been producing chocolate covered fruits and nuts specialities in Puławy. With about 70 employees competent in production we are optimally positioned to meet the high requirements of our customers.

EUROPAHAL, STAND 5551



EWA Krotoszyn S.A.

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EWA Krotoszyn SA has existed for over 60 years. Through all these years we assemble a lot of experiences connected with production of sweets. We manufacture our products according to UE regulations. High standard of production confirms implemented and certified ISO 22000 System.

EWA Krotoszyn SA specializes in the production of hard candies, soft candies, toffees and lollipops which are used for different kinds of packaging for instance bags, displays. Our goods are traditional products, which are appreciated by many customers. Manufacture is based on verified and valued formulas perfected over the years. The quality of products and customer satisfaction is always our main goal.

NON-FOOD, STAND 853



GOLD DROP Sp. z o.o.

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„GOLD DROP Ltd.” was established in 1991. We specialize in the production of a wide range of cleaning agents. „GOLD DROP” has substantially expanded its infrastructure since 1999 – a new production hall, warehouses, facilities and offices were built and investments were made in the area of new technologies. The production process is guarded by the ISO 9001 and 14001 Integrated Quality and Environmental Management System. The company is a member of AISE Charter for Sustainable cleaning. The development of a reputed brand is based on the philosophy of ethical and responsible business, i.e. offering top-quality products to customers, maintaining a business-oriented relationship with contractors, cooperating with local communities and paying particular attention to protecting users and natural environment.

HALL 8, STAND 9017



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Graal Group is the biggest Polish manufacturer of fish products. We offer our customers a variety of fish products including smoked salmon, trout, tuna and halibut products as well as meat products and ready dishes. We dedicate our utmost attention to make sure that our products are manufactured respecting highest quality and environmental standards.

NOT PRESENT ON PLMA FAIRS



Mazurskie Miody/ Destylarnia Piasecki

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The cornerstone of the company Mazurskie Miody was founded in 1964 by Bogdan Piasecki, a man fascinated by beekeeping, who is indulging in his passion and at the same time preserving a family tradition. In 2006, Mazurskie Miody build new company's headquarters in Tomaszkowo, in the Warmia and Mazury region. Piasecki Distillery is a company created on the base of knowledge and experience of Mazurskie Miody company. The basic idea of the company was building a branch related to the offered alcohols. Nowadays you can find under the brand of Piasecki Distillery the products whose high quality and perfection are guaranteed by Janusz Luty, one of the best technologists in. The quality and uniqueness of company products have been confirmed by numerous prestigious awards in Poland and abroad.

EUROPAHAL, STAND 5676



Gospodarstwo Pasieczne „Sądecki Bartnik” Sp. z o.o.

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bartnik@bartnik.pl
www.bartnik.pl

We are a leading Polish company that offers a broad range of natural honey and bee products. Our beekeeping farm „Sadecki Bartnik” is a family run business founded in 1973 by Kasztelewicz family. We have over 40 years of experience in manufacturing honey and we continuously seek to develop new product concepts to meet our customers demands. We are promoting our products on the domestic and foreign markets, offering delicious taste and the highest quality. Thanks to highly qualified staff, state-of-the-art factory and our own laboratory the products remain healthy, ecological and without dangerous ingredients. Most of the honey comes from the region of Carpathian Mountains where the environment is still natural and clean.

EUROPAHAL, STAND 5571



ZMB BIAŁYSTOK Sp z o.o. Sp. K.

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facebook.com/zmbdystrybucja

ZMB Białystok is a manufacturer of ripening meat and high-quality meat products for example: KINDZIUK, KUMPIAK, PASTURMA, COUNTRY HAM, COUNTRY BACON, COUNTRY NECK. From the very beginning, we paid special attention to the quality. Due to specialized and experienced personnel we are able to offer our customers quality products. The excellent flavour owes its taste to the location of the ZMB Białystok which is placed in a green, clear and ecologically oriented part of the country, near Białowieza Forest and Krzyszowska Forest. It is undoubtedly one of the greenest part of Europe. What makes the unique taste of the products are also vast meadows, vast forests, national parks and the absence of heavy industry.

HALL 8, STAND 9225



WAWEL S.A.

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Fax: +48 12 254 21 47
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www.wawel.com.pl

Wawel SA is one of the most renowned Polish confectionery producers. It offers a 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 a modern production process. Permanent care for high quality and global standards resulted in an 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 the joy of life with every bite of its delicious sweets.

NOT PRESENT ON PLMA FAIRS



WILBO S.A.

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Gdynia 81-029, Poland
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export@wilbo.pl
www.wilbo.pl

Wilbo SA is a producer of fish products of the highest quality in the brand Neptun. The company was founded in 1987. As a joint stock company has been listed since 1998 on the Warsaw Stock Exchange. The main company's activity is production and sale of canned fish and frozen fish. Since 2000 Neptun is the most recognizable brand among canned fish and determines market trends. The company is located in neighborhood to the sea and works in the maritime climate. The main feature of Neptun brand is the highest quality guaranteed by a HACCP system and standards of BRC and IFS, which together gave a confirmation that the production process is permanently monitored and controlled. Wilbo SA has also permission entitling to export to the EU market and the other markets of the world.

Polish products

Cereal bars for health

Excellent cereal bars with quinoa, chia and acai which provides with precious ingredients like amino acids, vitamins, Omega 6 and 9 acids which are necessary for the body functioning and the vital energy. They reduce also tiredness and slow down the aging process.
www.EUROHANSA.com.pl



AMARESTI

Discover these delicious and unique mix of almonds, fruits and nuts covered chocolate in beautiful boxes which are excellent for the gift for special occasion.
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Fresh & Fruity Pure, Fresh & Fruity Sour

Fruity filled jellies are a perfect combination of multiple fruity flavors with a sweet gooey center, coated in fine sugar crust. It's the ideal proposition for those who prefer light fruity snacks. There are also available sour and cola variants that are perfect refreshment for hot days.

www.WAWEL.pl



Choco & Peanut, Choco & Fruity

Wide variety of Wawel candies and jellies in chocolate is now available in a new consistent graphic line. Choco & Peanut are a combination of noble dessert chocolate and nutty filling. Their secret lies in the traditional recipe and the highest-grade ingredients. The Choco & Fruity is one of the best known and beloved Wawel products. Fruity jellies and delicate dessert chocolate together create a gentle and fresh composition. There are four fruity flavors of jellies: sour lemon, ripe orange, sweet raspberry and exotic pineapple.
www.WAWEL.pl



Milk rolls

Delicate rolls containing 21% of milk. Fresh and tasty – manufactured according to original Dan Cake recipe. Ideal for breakfast, lunch or just as a snack during the day.
www.DANCAKE.pl



Mini Brioche

New product in the offer! Unique recipe and original taste. French mini brioche can be combined with favourite sweet jams or, butter, cheese or ham to become a great companion during breakfast or as a mid-day snack.
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| WORLD FOOD (GIDA) | TURKEY | ISTANBUL | 1-4 September |
| SPECIALITY & FINE FOOD FAIR | UNITED KINGDOM | LONDON | 4-6 September |
| FINE FOOD AUSTRALIA | AUSTRALIA | MELBOURNE | 12-15 September |
| WORLD FOOD | RUSSIA | MOSCOW | 12-15 September |
| ANNAPORNA – WORLD OF FOOD INDIA | INDIA | MUMBAI | 22-24 September |
| BIOFACH AMERICA | USA | BALTIMORE | 22-24 September |
| AGROFOOD | TAJKISTAN | DUSHANBE | October |
| SIAL PARYŻ | FRANCE | PARIS | 16-20 October |
| TALLINN FOOD FAIR | ESTONIA | TALLINN | 27-29 October |
| INDAGRA FOOD & DRINK | ROMANIA | BUCHAREST | 28 October-1 November |
| WORLD FOOD | KAZAKHSTAN | ALMATY | 2-4 November |
| YUMMEX MIDDLE EAST | UNITED ARAB EMIRATES | DUBAI | 7-9 November |
| INTERFOOD & DRINK | BULGARIA | SOFIA | 9-12 November |
| SIAL INTERFOOD | INDONESIA | JAKARTA | 9-12 November |
| SIAB EXPO | MOROCCO | CASABLANCA | 9-12 November |
| PLMA CHICAGO | USA | CHICAGO | 13-15 November |
| ANUFOOD CHINA | CHINA | BEIJING | 16-18 November |
| SWEETS & SNACKS CHINA | CHINA | BEIJING | 18-20 November |
| FOODEX SAUDI | SAUDI ARABIA | JEDDAH | 21-24 November |
| MONTE CARLO GASTRONOMIE | MONACO | MONTE CARLO | 25-28 November |
| MIDDLE EAST NATURAL & ORGANIC | UNITED ARABIC EMIRATES | DUBAI | 29 November -1 December |
| SIAL MIDDLE EAST | UNITED ARABIC EMIRATES | ABU DHABI | 5-7 December |
| PLMA SZANGHAI | CHINA | SHANGHAI | 7-9 December |
| MAFEX/ PACK 2 PACK | MOROCCO | CASABLANCA | 7-9 December |

FOOD FAIRS IN 2017

| | | | |
|---------------------------------|----------------|---------------|-----------------------|
| WINTER FANCY FOOD SHOW | USA | SAN FRANCISCO | 22-24 January |
| FOOD HOSPITALITY WORLD | INDIA | MUMBAI | 19-21 January |
| ISM | GERMANY | COLOGNE | 29 January-1 February |
| PRODEXPO | RUSSIA | MOSCOW | 6-10 February |
| BIOFACH | GERMANY | NURNBERG | 15-18 February |
| PRIVATE LABEL TRADE SHOW | JAPAN | TOKYO | 16-19 February |
| FOODEX JAPAN | JAPAN | TOKYO | 7-10 March |
| INTERNORGA | GERMANY | HAMBURG | 17-21 March |
| EXPO ANTAD & ALIMENTARIA MÉXICO | MEXICO | GUADALAJARA | 8-10 March |
| FOOD EXPO GREECE | GREECE | ATHENS | 18-20 March |
| IFE | UNITED KINGDOM | LONDON | 19-22 March |

WINNER



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Alibi Max

Milk chocolate bar with rice crisps, caramel and wafer.
www.COLIAN.pl



Family's. Nut wafers

Delicious, crispy wafer.
www.COLIAN.pl



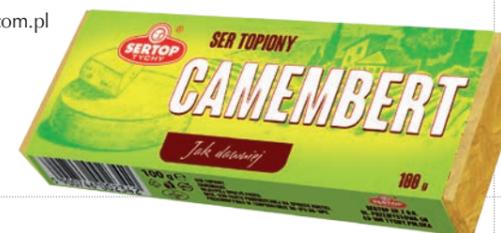
Processed cheese Camembert

Camembert is a delicious taste of melted cheese offered in the series "Like in the Old Times" beside of other favorites products such as smoked Gouda and Edam.

The product has a characteristic taste and aroma, creamy texture achieved by the addition of blue cheese Camembert.

Our new product is offered in the rectangle block 100g and it's an example of a modern product, which can enrich the taste of many dishes and will inspire new culinary discoveries in every kitchen.

www.SERTOP.com.pl



CONTACT



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www.sertop.com.pl

The company SERTOP is one of the leading manufacturers of processed cheese on the Polish market. The company has more than fifty-year tradition of producing high quality products based on proven recipes while maintaining strict quality control. For the production are used only natural ingredients, it does not apply any preservatives and colorings. SERTOP offer includes more than 20 flavors of processed cheese in a variety of formats, such: round boxes 140g and 280g, cubes 100g and 30g, blocks 100g and 100g sausages. SERTOP company meets all the requirements for the sale of processed cheese on the Polish and foreign markets. SERTOP sells its products to the Polish market and the markets of the European Union and the United States, Canada, countries of the Middle East, South Korea. The company is certified BRC Global Standard Certificate and IFS (International Food Standard).

Norwegian Sardines (Sprat Sprattus Sprattus) with piri

Delicate Norwegian sardines with spicy additions. Mild meat of Norwegian sardines dipped in a golden oil with a hint of piri-piri.
www.WILBO.pl



Neptun Delicate Salmon pieces in delicate dressing with dried tomatoes, garlic and basil

Delicious and large pieces of wild salmon dipped in an aromatic, delicate dressing with dried tomatoes, slices of garlic and flavored with basil. It is a delightful snack for lovers of fish specialties.
www.WILBO.pl



SERTOP "Your ...favourite"

"Your favorite ..." is a wealth of sophisticated and full aroma and flavor processed cheese. Their proper selection makes them ideal for use not only on the sandwich but also as a simply snack.

The product is available in packaging of type of round box 140g, with 8 portions of processed cheese inside.

www.SERTOP.com.pl



"Bee Farm" Honey

The collection of "Bee Farm" honey boasts simplicity and clarity of composition. This special offer comprises of the following honey: multiflower, acacia and honeydew honey. Minimalist labelling with a modern design does not overwhelm us with too much information.

www.BARTNIK.pl



Palcówka

As a result, it has a unique flavor and aroma. This name comes from the process of pushing meat stuffing with fingers into small intestine, because the original Palcówka were made by hand without mincer to grind meat and funnels for stuffing. It was said that this is a sausage of poor people, because it was not smoked, and were prepared with pork trimmings. Palcówka was especially widespread in the borderland cuisine. Now it often occurs as a regional product.
www.ZMBDYSTRYBUCA.pl



Kindziuk

Legend of the original Kindziuk dates back to ancient history. Produced through the traditional recipes, from generations it is synonymous with exquisite taste. A method of preserving meat by ripening and drying had been known for a long time in the areas of Podlasie. Also, production of cured meats using this process appears to be older than preparing them through steaming or just smoking. It has become a speciality of the highest quality at our company.
www.ZMBDYSTRYBUCA.pl



New Evitta candies

The company Ewa Krotoszyn SA has launched a throat herbal candies to the market. They present perfect combination of natural effect of herbs and interesting flavours. Evitta candies appear in two versions, sugar and sugar-free and 5 varieties of flavours: lemon+lime & mint, wild rose & honey, wild rose & elderberry, sage + lemon & elderberry and sage + lemon & honey. All support properly function of immune system by the content of vitamin C. Additionally herbs such as: sage, mint, chamomile have soothing and calming effect on the throat. Unique flavour complements the whole. The product is available in 60g bags. They perfectly fill as well classic as health food shelf.

www.EWA-SA.pl



Piasecki Vodka

Original Polish vodka made from best quality grain alcohol subjected to multiple distillation and based on crystal-clear water, filtered through maple charcoal. It guarantees the highest quality and recognition among experienced connoisseurs. Alcohol content 40% vol. www.PIASECKIVODKA.pl



Commercial information

Masuria Vodka

MASURIA vodkas made from top-class grain alcohol which combines in ideal proportions with crystal clear water to create a delicate taste of vodka. Regardless of the location and the weather, within Masuria vodka you will find what is best in Mazury. www.PIASECKIVODKA.pl



Commercial information

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 packagings guarantees, that aroma stays fresh and strong. www.BIFIX.pl



Booster

Booster Concentrated Fabric Conditioners are efficient and cost-effective products to be used for all types of fabric. They make them uniquely soft and fluffy, providing fresh and durable fragrance. Their antistatic properties prevent static build-up. The delicate formula does not cause any allergic response or skin irritations. The hypoallergenic version has been extensively dermatologically tested. Booster Aroma Orchid with cashmere proteins and Booster Aroma Rose with silk proteins make up a line of scented concentrated fabric conditioners. www.GOLDDROP.com.pl



Floor 1L

Floor with soap and Floor with baking soda all-purpose cleaners are state-of-the-art liquid detergents suitable for use on any washable surface. The products remove stains efficiently and the coconut soap content helps to clean dirty surfaces with ease, without any scrubbing. They do not require washing away, leaving a lasting and fresh fragrance. www.GOLDDROP.com.pl



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