October 2016
Issue 26, SIAL Paris edition

# Food from Poland

Polish Magazine for Professionals


THAT'S HOW BLACK WORKS


# 170 years of Perła – Lublin Breweries

Perla - Lublin Breweries S.A is currently the largest regional beer manufacturer in Poland. This year celebrates the 170 anniversary of the uprising.

The history of the company dates back to 1846. Several hundred years of experience in beer brewing, the refined recipe, the selection of natural ingredients and the modern technologies guarantee the best quality of the offered products. In 2006 Perla Lublin Breweries was one of the first breweries in Poland to receive the ISO 22000 certificate.

In accordance with the quality policy of the company, great care is put in every stage of the production process Recognition for the products offered by Perła Lublin Breweries has grown with the brewery itself, and constant development of the distribution channels and the expansion into new markets are the effects of this growth.

The representative brand of the company is Perla Chmielowa with the characteristic bitter taste and the unique aroma – connected with Lublin Brewery for the longest time.

Recent years have been a period of the dynamic development of the company, which resulted first of all in extending tastes have been included in the offer.

# BEER FROM **POLAND**


Only regional ingredients. It all makes dark liquor from Lublin formed according to traditional recipes, with the participation of the latest technology growing in Europe. Perla feature the characteristic bitterness and unique aroma. This is only possible thanks to Lublin hops. The well know taste was appreciated not only for polish consumers, but also in Britain, French, Greece, Italy, Netherlands, Russians and even the America and the people of Africa and Australia.

Lublin Breweries are firmly rooted in the Lublin region and indeed are part of the region. Hence the emphasis on cooperation with suppliers of raw materials needed for the production of beer and a search for new business partners each time begins with the analysis of the providers of the services in the region of Lublin.

## Sial Paris: 5c G 163

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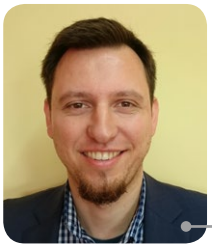






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# Look deeper

There are around 7 000 companies from more than 100 countries around the world in one place – SIAL trade fairs in Paris. Unique chance to establish new business relations and gain trade partners. But, every minute the world is changing. This is why, it is worth looking deeper, meaning narrowing down your goals so to fully achieve them.

We want to help you in that matter. In this publication you may find extract information on Polish FMCG market, interviews with Polish producers, expert's commentaries as well as the most worth-looking companies from Poland. Feel free to visit our stand **6 K 194** to be provided by more specific information.


(FAMMU/FAPA), Foreign Agricultural Markets Monitoring Team – May 2016

# Polish foreign trade in all commodities

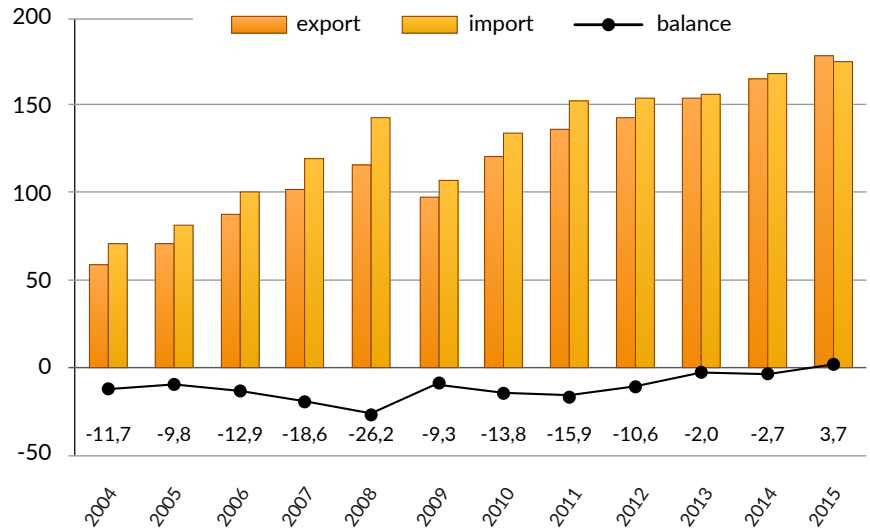
**The year 2015 saw a high dynamics of Polish foreign trade. A high growth rate of exports, combined with a much lower increase dynamics of imports, resulted in a considerable trade surplus in goods. Export grew by 7.8% to € 178.7 billion, and import by 3.9% to € 175 billion. As a result, after a decade of deficit in total foreign trade, a surplus of € 3.7 billion appeared, compared to a deficit of € –2.7 billion the previous year. The share of agricultural exports in total exports exceeded 13%, in the case of imports it was 9%. The significance of food exports in total trade did not change, and the significance of imports slightly increased. In the foreign trade of agri-food products, a high positive trade balance was recorded again.**

In 2015, the growth dynamics of total exports grew by 0.7 percentage points year-on-year to 7.8%, whilst in imports, it dropped by 3.4 pp to 3.9%. After the deficit years, a positive balance of total trade was achieved. In 2015, the share of total exports in developed countries increased by 2 pp to 86%, the significance of EU countries grew by the same value to 79%, the share of developed third countries dropped by 1 pp to 6% (exports to the EFTA declined in importance). In total, in the case of developed countries, 2015 saw a 9.8% increase in exports, i.e. significantly higher than in total exports, whereas exports to the EFTA declined by 2.9%, and the dynamics for developed countries excluding the EU and EFTA amounted to 8.1%, lower than the total of developed countries. On the other hand, exports to the EU grew dynamically, by 0.3%, however, they were 0.2 pp lower for the eurozone, and 0.5 pp higher for EU countries with national currencies, than for the EU in total. The share of the eurozone in exports increased by 1 pp to 56%. The high growth rate of exports should be explained by the good economic situation. According to the International Monetary Fund, GDP in 2015 grew by 3.1% worldwide and by 1.9% in developing countries. An improvement was also recorded by the main trade partners of Poland: Germany (+1.5%), France (+1.1%), United Kingdom (+2.2%), and in the eurozone, GDP increased by 1.5%. The overall share of third countries excluding the developed ones declined by 2 pp to 14% due to a 2.8% drop in exports. Exports to the CIS had a key impact on this situation, having dynamically decreased by 20.4%, while the share declined to 6% (2 pp less y/y). On the other hand, the share of third countries in exports (excluding developed ones and the CIS) grew by 1 pp to 9% due to a 13.8% increase in exports in this direction. As for imports, a much lower growth rate was recorded than for exports (3.9% in comparison with 7.8%). The highest growth dynamics of imports was observed in third countries excluding developed ones and the CIS, reaching up to 16.7%, and the share of this group of countries grew by 2 pp to 24%. This was conditioned predominantly by a 16% increase in purchases from China. In the CIS, a strong, 23.7% decline in purchases was recorded, and the share of this group in the commodity structure of imports decreased by 4 pp to 9%. This was due, above all, to a 26% reduction in purchases from Russia. 67% of imports (1 pp higher) reached Poland from the developed countries, whilst imports from the EU comprised 60% (+ 1 pp), and from the eurozone, 48% (1 pp higher as well). Purchases in developed countries increased by 5.0%, and in the EU by 5.1% year-on-year, whereas the positive dynamics of imports from the eurozone was 0.1 pp higher, and from non-euro EU countries, 0.6 pp lower than for the EU in total. In the case of imports from developed countries excluding the EU and EFTA, a

positive dynamics was recorded (6.9%) but the share remained unchanged (5%). Purchases from the EFTA declined slightly by 1.3%, but this did not affect the share in the commodity structure of imports from this direction (2%, unchanged). Due to the increase dynamics of imports being distinctly higher than of exports, the overall volume of Polish foreign trade in 2015 resulted in a considerable surplus amounting to $ 3.679 billion. In the previous years, the balance had always been negative, and in 2014, the deficit reached $ 2.659 billion. As for trade with the EU countries, a positive balance of € 37.1 billion was recorded (including almost € 17.3 billion for the eurozone, at a very high growth dynamics of 41.8% y/y); trade with developed countries excluding the EU and EFTA closed with a deficit of € 1 million, which was stable y/y. Overall trade with developed countries closed the year with a high positive balance (€ 36.5 billion). On the other hand, a large deficit was recorded for third countries excluding developed ones (€ -32.8 billion) and it widened by 5.7%. The negative balance of trade with the CIS dropped by 28.7% to € -6 billion, and with other countries (excluding developed ones and the CIS), it increased by 18.5% to € -26.8 billion.

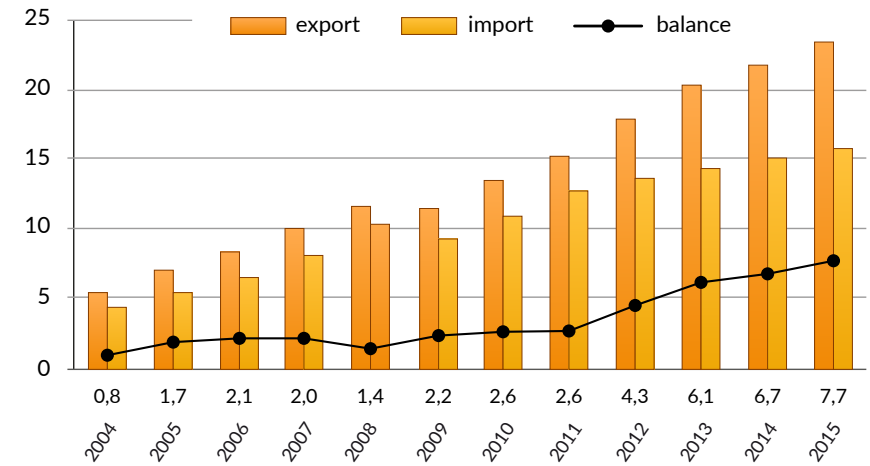
For many years, Germany has been Poland's most important trade partner, both in terms of exports and imports. In 2015, sales to the German market grew by 11% year-on-year to € 48.5 billion, whereas imports grew by 8% to € 40 billion. In both cases, the growth dynamics was higher than in total trade. Germany's share in the Polish trade with regards to imports and exports increased by 1 pp each, to 27% and 23%, respectively. Among the top ten largest outlets in terms of value, Russia (a 3% share) was the only non-EU country. In the case of imports, the top ten largest suppliers included three third countries: China (12%, the second most important supplier), Russia (a 7% share) and the USA (3%). Trade with the top ten partners constituted 66% of both total exports and imports. It is worth noting a high dynamics of trade with the USA: exports increased by 11% and imports by 14%, making it come 12th in the geographical structure of exports and 9th in imports.

**Polish foreign trade (2004-2015, in mld EUR)**




(FAMMU/FAPA), Foreign Agricultural Markets Monitoring Team – May 2016

**Polish foreign agri-food trade (2004-2015, in mld EUR)**

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2015 brought a minimal growth of the share of agri-food products to the total Polish foreign trade, whereas the growth rate of exports was comparable to that of total trade, and in the case of imports it was higher. The share of exports remained unchanged year-on-year, amounting to 13.2%, and the share of imports grew by 0.1 pp to 9.1%. The dynamics of in the changes of the share of food trade, in total trade, has undergone minimal changes in recent years. In 2015, the export of food increased 0.6 pp faster than the year before, and the growth dynamics of imports was 1.0 pp lower year-on-year. The balance of trade in foodstuffs has been positive for years, and in 2015, it increased dynamically, by 14.3% to € 7.708 billion. The results of the Polish foreign trade in food were affected by exports to the CIS (-34% y/y), including, above all, to Russia (-55%) and Ukraine (-17%), as a result of the Russo-Ukrainian conflict, the Russian embargo on EU foods (selected products) and the strong depreciation of the rouble and hryvnia. The share of the CIS countries in the geographical structure of Polish food exports dropped by 3 pp in 2015, from 8% to 5%.

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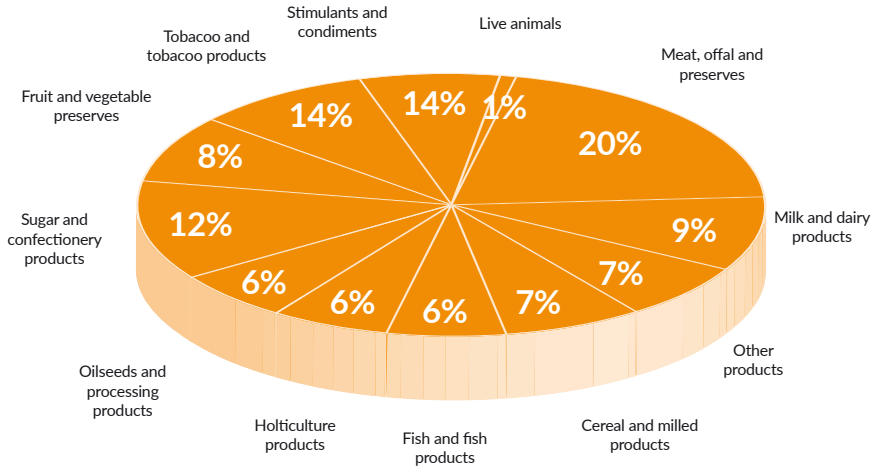
**Product structure of the Polish agri-food trade**

| Product group | Export (mln EUR) | | | | Import (mln EUR) | | | | Balance (mln EUR) | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 2014 | 2015 | % share in 2015 | 2015/14 change | 2014 | 2015 | % share in 2015 | 2015/14 change | 2014 | 2015 |
| Live animals | 165.4 | 161.9 | 1% | -2% | 634.5 | 536.9 | 3% | -15% | -469.1 | -375.0 |
| Meat, offal and preserves | 6 577.6 | 6 918.6 | 29% | 5% | 2 604.0 | 2 585.3 | 16% | -1% | 3 973.6 | 4 333.3 |
| Fish and fish products | 1 475.7 | 1 526.1 | 6% | 3% | 1 588.8 | 1 631.6 | 10% | 3% | -113.1 | -105.4 |
| Vegal feedstock | 2 683.3 | 2 834.3 | 12% | 6% | 2 524.1 | 2 624.3 | 17% | 4% | 159.2 | 210.1 |
| Holticulture products | 6 807.3 | 7 475.2 | 32% | 10% | 5 158.4 | 5 365.2 | 34% | 4% | 1 648.9 | 2 110.0 |
| Stimulants, beverages, other | 4 167.2 | 4 642.1 | 20% | 11% | 2 624.6 | 3 107.3 | 20% | 18% | 1 542.7 | 1 534.8 |
| **Total** | **21 876.5** | **23 558.3** | **100%** | **8%** | **15 134.4** | **15 580.5** | **100%** | **5%** | **6 742.0** | **7 707.8** |

(FAMMU/FAPA), Foreign Agricultural Markets Monitoring Team – May 2016

**Product structure of the Polish agri-food export in 2015**
(in terms of value)

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## COMMODITY STRUCTURE OF THE AGRI-FOOD TRADE

In 2015, the positive balance of the Polish agri-food trade increased by 14% annually to approx. EUR 7.7 billion. The trade balance in the categories of vegetable and animal preparations as well as vegetable raw materials greatly improved. In the animal category, there was mainly growth in the export value of poultry and poultry preparations, beef, eggs, as well as fish and fish preparations. The negative balance of trade in live animals improved due to a considerable decline in the imports of pigs. The export of cereals, rapeseed, starch, meal and malt, confectionery products, fruit and vegetable preparations, as well as vegetable oils and fats increased. Simultaneously, imports of cereals declined. On the other hand, lower receipts were observed on the export of fresh fruit and vegetables, considering higher expenditures on foreign purchases. A positive balance of trade in sugar rose noticeably due to a drop in imports. The positive balance of trade in stimulants slightly decreased.

The Polish agri-food exports in 2015 were dominated by low-processed products, accounting for 56% of their value. Highly-processed goods had a 25% share, and unprocessed products accounted for 19%. Compared to 2014, the share of highly-processed products in total exports increased by 1 pp at the expense of low-processed ones. The value of exports grew by 12% for highly-processed goods, by 6% for low-processed goods, and by 7% for unprocessed products.

In 2015, in the animal category, the positive balance of trade in red meat increased by more than half, mainly due to growth, by one fourth, in proceeds from beef exports. The export value of horse meat (+7%) as well as sheep and goat meat (+22%) was also higher than the year before, with a decline in exports of pork (-1%). The positive balance of trade in poultry meat grew by 20%, due to a further growth in the value of exports (+20%). There was also an increase in receipts from the foreign sales of meat preparations (+7%), fish and fish preparations (+3%), as well as eggs and egg preparations (+19%). On the other hand, the value of sales was lower than the previous year in the case of live animals (-2%), mainly pigs and cattle, as well as dairy products: milk (-18%), cheese and curd (-11%), and butter (-2%).

In the vegetable category, as in the previous years, the most important role in exports was played by processed products; their export value in 2015 grew by 10%. This group saw an increase in receipts from the sales of starch, meal and malt (+32%), confectionery products (+15%), sauces, soups and thickeners (+10%), fruit and vegetable preparations (+5%), oil meals, feed components and feeds (+4%), as well as vegetable oils and fats (+4%). On the other hand, the export value of sugar and molasses (-9%) as well as grain mill products (+1%) was lower than the year before. Once more, the group of vegetable raw materials recorded a considerable growth of 13% in the export value of cereals. The balance of foreign trade in cereals was positive again, and in 2013, after many years, Poland became a net exporter of cereals. The proceeds from rapeseed exports increased by approx. one third, whilst there was a 44% decline in the export value of fresh fruit (-11%), mainly apples, fresh vegetables (-2%) and potatoes (-62%).

The first item in the category of other products, and simultaneously a commodity of the highest value in the material structure of total agri-food exports, was traditionally cigarettes: their export value grew by 11% over the year. There was also an in-

crease in the re-exportation value of cocoa, coffee, tea and spices (+15%), exports of alcohol and alcoholic beverages (+14%), as well as waters and soft drinks (+17%).

Imports of agri-food products to Poland in 2015 were traditionally dominated by low-processed products (47% of the value of supplies). Unprocessed goods had a 34% share in the purchase value, while the share of highly-processed goods was 20%. Over the year, the value of supplies of low-processed goods grew by 2%, of unprocessed ones - by 5%, and of highly-processed ones – by 10%.

Products of vegetable origin accounted for a half of the entire value of the agri-food imports. The cost of supplies of vegetable products increased by 4% in comparison with 2014. Among raw materials, there was a decline in the supply value of potatoes (-33%) and cereals (-9%). On the other hand, expenses were higher than the year before for imports of oilseed (+15%), fresh fruit (+7%) and vegetables (+8%). In the group of vegetable preparations, expenses declined in the imports of sugar and molasses (-29%), vegetable oils and fats (-6%) as well as oil meals and feed components (-1%). Conversely, there was an increase in the purchase of fruit preparations (+29%), starch, meal and malt (+13%), confectionery products (+12%), grain mill products (+5%) as well as vegetable preparations (+4%).

The category of animal products in 2015 had an approx. 30% share in the value of total imports of agri-food commodities. Over the year, the value of imports of animal products dropped by 2%.

The commodity with the highest value in purchases on foreign markets was pork again, with a 2% drop in expenses in comparison with 2014. In the animal category, less was also spent than the year before on the purchase of butter (-20%), milk, cream and ice cream (-3%), eggs and egg products (-8%), as well as meat preparations (-3%). On the other hand, there was an increase in value of beef imports (+32%), poultry meat (+18%), sheep and goat meat (+28%), horse meat (+128%), cheese and curd (+6%), animal fats and meal (+6%), as well as fish and fish products (+3%). In the group of live animals, pigs remain the most prominent imported item. However, the import value of these animals (mainly piglets) to Poland dropped by more than one fourth on the annual scale. Expenses on the purchase of cattle (+6%), horses (+10%) and live poultry (+4%) were higher than the previous year.

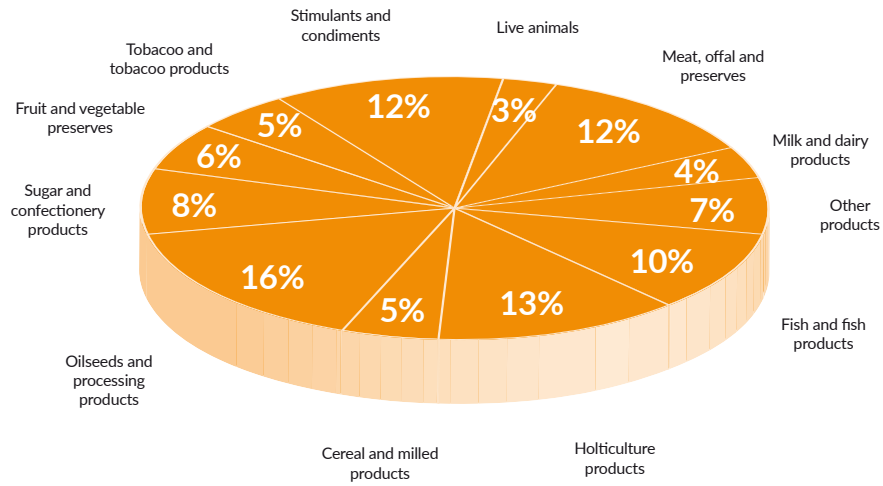
In the category of other products, the largest share in the value of imports (approx. 40%) traditionally comprised coffee, tea, cocoa and spices. In relation to 2014, expenses on these goods grew by 22%. There was a renewed growth in the purchase value of unprocessed tobacco for the production of cigarettes (+26%), alcohol and alcoholic beverages (+13%), as well as waters and soft drinks (+20%).

**Geographical structure of the Polish agri-food tarde**

| Formation | Export (mln EUR) | | | | Import (mln EUR) | | | |
|---|---|---|---|---|---|---|---|---|
| | 2014 | 2015 | % share in 2015 | change 2014=100 | 2014 | 2015 | % share in 2015 | change 2014=100 |
| **European Union** | **17 408.8** | **19 316.8** | **82%** | **11.0** | **10 487.6** | **10 806.2** | **68%** | **3.0** |
| "EU 15" | 12 976.5 | 14 353.0 | 61% | 10.6 | 9 013.1 | 9 236.1 | 58% | 2.5 |
| "EU 13" | 4 432.3 | 4 963.8 | 21% | 12.0 | 1 474.5 | 1 570.2 | 10% | 6.5 |
| Middle East and North Africa | 602.6 | 765.7 | 3% | 27.1 | 230.2 | 305.8 | 2% | 32.8 |
| EUG | 1 235.7 | 715.6 | 3% | -42.1 | 200.3 | 223.1 | 1% | 11.4 |
| NAFTA | 363.9 | 468.4 | 2% | 28.7 | 318.4 | 374.9 | 2% | 17.7 |
| Eastern Partnership | 407.9 | 348.4 | 1% | -14.6 | 397.4 | 424.4 | 3% | 6.8 |
| EFTA | 164.5 | 191.5 | 1% | 16.4 | 729.4 | 713.4 | 5% | -2,2 |
| PiK UE | 169.7 | 207.3 | 1% | 22.2 | 248.4 | 325.2 | 2% | 30.9 |
| ASEAN | 166.8 | 193.5 | 1% | 15.9 | 327.5 | 367.5 | 2% | 12.2 |
| Mercosur | 16.1 | 18.5 | 0.1% | 15.1 | 952.5 | 984.1 | 6% | 3.3 |
| Third countries | 1 340.6 | 1 332.6 | 6% | -0.6 | 1 242.8 | 1 325.9 | 8% | 6.7 |
| **Total** | **21 876.5** | **23 558.3** | **100%** | **7.7** | **15 134.4** | **15 850.5** | **100%** | **4.7** |

(FAMMU/FAPA), Foreign Agricultural Markets Monitoring Team – May 2016

**Product structure of the Polish agri-food import in 2015**
(in terms of value)




(FAMMU/FAPA), Foreign Agricultural Markets Monitoring Team – May 2016

## GEOGRAPHIC STRUCTURE OF THE AGRI-FOOD TRADE

In 2015, the countries of the European Union were traditionally Poland's most important partner in the agri-food trade. The balance of trade with this group increased by almost 23% due to the growth dynamics of exports being higher than of imports. The largest positive balance of agri-food trade with all countries was recorded in Germany, and the largest deficit – in Norway and Argentina.

In 2015, agri-food products worth more than EUR 19.3 billion were exported from Poland to the European Union countries, with a value 11% higher than the previous year, constituting an 82% share in the total Polish agri-food exports. In comparison with 2014, the share of the EU in-

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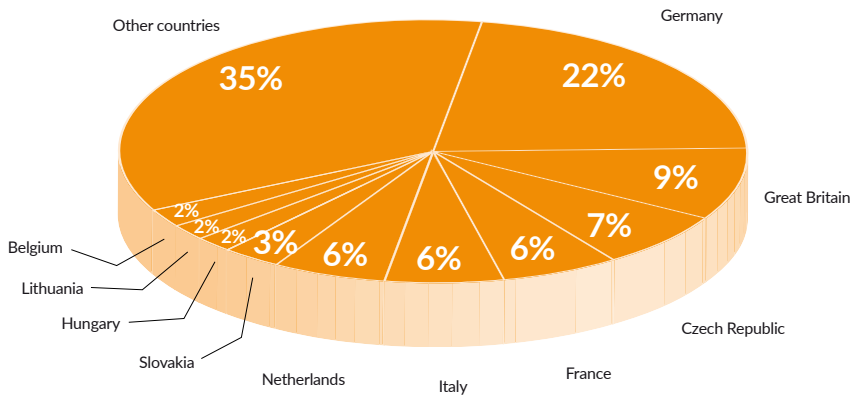
**The biggest recipients of Polish agri-food products in 2015**
(in terms of value)




(FAMMU/FAPA), Foreign Agricultural Markets Monitoring Team – May 2016

creased by 2 pp. The value of goods sent to the countries of the "old" EU-15 had a 55% share in total exports, and those exported to the new member states (EU-13), 19%. Once again, 2015 saw a positive balance of agri-food trade with the EU – it amounted to EUR 8.5 billion and was 23% higher than in 2014. The trade balance improved due to the growth dynamics of the value of exports (+11%) being higher than of agri-food imports from this group (+3%). Goods brought to Poland from all EU states had a value of approx. EUR 10.8 billion, accounting for a 68% share in the total Polish agri-food imports. The value of the goods imported from the "EU-15" comprised 58% of the total value of imports of these products, and in the case of goods imported from the "EU-13", the share was 10%.

The value of food sales to the EU-15 was approx. EUR 13 billion, over 8.5% more than the previous year. The amount of products imported from this direction exceeded EUR 9.2 billion and was 2.5% higher on the annual scale. This was similar with new member states: the value of exports in 2015 grew by 10% to EUR 4.4 billion, whereas import expenses grew by 6.5% to approx. EUR 1.6 billion. A positive balance of trade with the states of the EU-15 was EUR 3.7 billion, having increased by as much as 27% over the year. A positive balance of trade with the states of the EU-13 amounted to EUR 2.9 billion, being 12% higher than in 2014.

Taking the commodity structure into consideration, the main goods exported from Poland to the EU were processed vegetable products – worth approx. EUR 5.9 billion, with a 30% share in the total value of agri-food exports to the EU market, as well as processed animal products – EUR 5.4 billion (a 28% share). Major export items included: confectionery products – EUR 2.3 billion (a 12% share), cigarettes – EUR 2.1 billion (11%), red meat – EUR 1.9 billion (10%), poultry meat – EUR 1.5 billion (8%), as well as fish and crustaceans – EUR 1 billion (5%). The largest share in imports of agri-food products from the EU comprised processed vegetable products – EUR 3.5 billion (32%), and processed animal products – EUR 2.4 billion (22%). The value structure of imports was dominated by red meat – EUR 1.4 billion (a 13% share), confectionery products – EUR 1.1 billion (10%), fresh fruit – EUR 658 thousand (6%), coffee, cocoa, tea and spices – EUR 655 thousand (6%), as well as vegetable oils and fats – EUR 0.61 billion (6%).


## RECIPIENTS OF POLISH AGRI-FOOD GOODS

The most important recipient of Polish agri-food products has traditionally been Germany. In 2015, Germany purchased products in Poland worth EUR 5.29 billion, accounting for 22% of the total Polish agri-food exports and 27% of exports to all EU states. In comparison with 2014, the value of goods supplied from Poland to the German market increased by 7%. The highest receipts were achieved from exporting smoked fish and fish preparations (EUR 490 million), poultry meat (EUR 392 million), bakery products (EUR 274 million), rapeseed (EUR 271 million) and chocolate (EUR 222 million) to Germany.

The second most valuable outlet was the United Kingdom with an amount of approx. EUR 2 billion and a share of 9% in total Polish agri-food exports and 10% in exports to EU countries. In 2015, the value of agri-food products exported in this direction was 18% higher. The main goods imported from Poland by the British included chocolate products (EUR 298 million), poultry meat (EUR 224 million), meat preparations (EUR 141 million), and bakery products (EUR 104 million).

The leading recipients of Polish agri-

food goods also included the Czech Republic (EUR 1.61 billion, an increase by 18% on the annual scale), France (EUR 1.48 billion, a 1% decline), Italy (EUR 1.39 billion, +14%) and the Netherlands (EUR 1.33 billion, +22%). The main Czech expenses for purchases in Poland were connected with coffee, rapeseed oil, poultry meat and chocolate products. On our market, the French were predominantly procuring cigarettes, poultry meat and spirit-based beverages, the Italians – cigarettes, beef, pork and smoked fish, and the Dutch - cigarettes, beef, poultry meat and chocolate products. The highest growth dynamics of exports to the EU states in value terms was recorded by Malta (+64%), Croatia (+29%), Cyprus (+27%) and Greece (+25%). France was the only EU country for which we recorded a decline in agri-food exports in 2015. A negative trade balance only occurred in the case of Spain (EUR -315 million), Denmark (EUR -205 million) and Belgium (EUR -33 million).

The second group of countries, with a 3% share in the Polish agri-food exports, included the Middle East and North Africa. In this group, most receipts were gained on exports to Saudi Arabia, Egypt, Algeria and Israel. Exports to Arab countries were dominated by wheat. A large share in the value of exports to the Saudi market was also held by bakery and confectionery products as well as cheese and curd. Algeria also supplied itself on the Polish market with powdered milk and processed tobacco, and Egypt with cheese and curd, chocolate products and apples. In exports to Israel, sugar, sweetened waters and chocolate products were predominant.

The following recipients of agri-food products from Poland in 2015 were the countries of the Eurasian Economic Union (EAEU) – comprising Russia, Belarus, Kazakhstan, Armenia and Kyrgyzstan. In the structure of exports to the EAEU, the main commodities were fresh fruit, mainly apples (16%), confectionery products (16%), and vegetable preparations (12%). The value of exports to the EAEU reached EUR 715.6 million and was 42% lower than in 2014, mainly due to a decline in exports to Russia (-55%, to EUR 398 million). The most important items supplied to the Russian market were chocolate products, bakery products, frozen vegetables and fruit juices. The share of Russia in the total Polish exports of agri-food products was only 2%, dropping by 4 pp on the annual scale. However, we still recorded a positive balance of agri-food trade with this country, amounting to EUR 219 million, even though it has decreased by 70% in comparison with 2014. Due to the embargo on foodstuffs, in force since August 2014, the exports of Polish fruit and vegetables, red and poultry meat, as well as dairy products to Russia dropped to almost zero, whilst exports of meat preparations, fish preparations, as well as fruit and vegetable preparations declined as well. On the other hand, supplies of sugar, rapeseed, cereals and mill products rose. Exports of confectionery products dropped by 17%, however, they have remained at a high level. In 2015, the value of Polish agri-food exports to Belarus declined by 14% to EUR 234 million, and the commodity structure was dominated by apples, milk, fresh tomatoes and frozen vegetables.

The next group in exports of agri-food products from Poland in the previous year was the NAFTA (the United States, Canada and Mexico). The value of exports amounted to EUR 468.4 million, i.e. 29% more than the previous year. Exports in this direction accounted for approx. 3% of exports in value terms. The USA imported Polish goods worth EUR 362.5 million, 27% more than in 2014, mainly pork, meat preparations, confectionery products, alcoholic beverages, fruit juices, as well as fish and fish preparations. Canadians mainly imported confectionery products and pork from Poland.

The Eastern Partnership, comprising Ukraine, Moldova, Azerbaijan and Georgia, are the next group of countries importing Polish agri-food products. In 2015, the value of sales to these countries declined by 15% on the annual scale to EUR 348.4 million. The main items in the export structure were: fresh fruit, confectionery products, coffee, cocoa, tea and spices, as well as vegetable preparations. In 2015, we sent goods worth approx. EUR 298 million to Ukraine, 17% lower than the year before, predominantly animal feed, citrus fruits, chicks and apples.

In 2015, the Polish agri-food exports to the EFTA countries amounted to EUR 202.8 million, 15% more than in 2014, and the commodity structure was dominated by confectionery products, fruit preparations, tea, and fish fillets. The value of exports of agri-food goods from Poland to EU candidate countries grew by 24% to EUR 196 million. Exports to Turkey increased by 28% and comprised predominantly malt, beef and confectionery products. Of other countries, not aligned with any group, the largest recipients of Polish agri-food products were Hong Kong and China, mainly supplied with Polish poultry meat.

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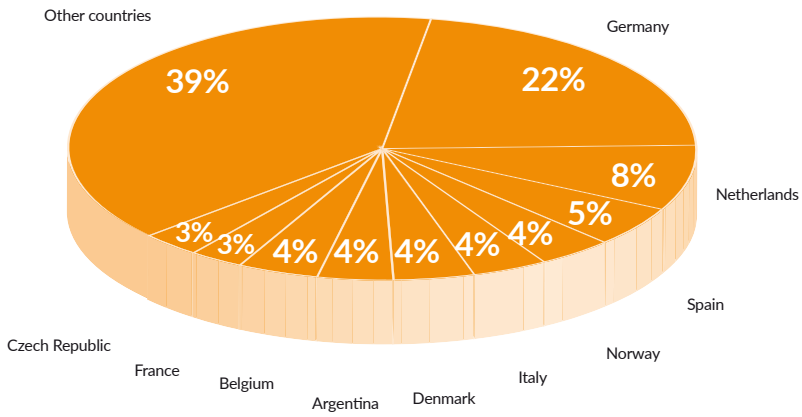
**The biggest suppliers of Polish agri-food products in 2015**
(in terms of value)




(FAMMU/FAPA), Foreign Agricultural Markets Monitoring Team – May 2016

## SUPPLIERS OF POLISH AGRI-FOOD PRODUCTS

For many years, the most important supplier of agri-food products to Poland has been the European Union, with a value of imports in 2015 reaching EUR 10.81 billion, accounting for a 68% share in global imports in value terms. In comparison with 2014, the value of supplies grew by 3%. The states of the EU-15 exported agri-food products worth EUR 9.24 billion to Poland, 2.5% more on the annual scale, comprising a 58% share. Imports from the new member states, the EU-13, had a 10% share, and the value of purchases reached EUR 1.57 billion, being 7% higher than the previous year. In the commodity structure of supplies from the EU-15, the main commodity was pork (a 13% share), followed by chocolate products, animal feed, pigs, bakery products, citrus fruits, vegetable oils and powdered milk. Exports by new member states to the Polish market included mainly animal feed, chocolate products, cereals, malt and powdered milk.

Germany has been the largest supplier of agri-food products to Poland for many years. In 2015, the value of products imported from this country grew by 2% to EUR 3.42 billion, comprising a 22% share in total Polish agri-food imports and a 32% share in imports from the EU countries. The supplies were dominated by confectionery products (a 15% share in the value of imports from this country), coffee, cocoa, spices (11%), pork (10%), animal feed (7%), dairy products (7%), vegetable oils and fats (6%), and fresh fruit (4%).

As in the previous years, Poland's second largest market for procurement of agri-food products in 2015 was the Netherlands, where goods worth EUR 1.27 billion were purchased – 1% more than the previous year. The largest shares in the commodity structure of supplies were plants, seedlings and flowers (18%), vegetable oils and fats (14%), pork (10%), cocoa, coffee, spices (9%), dairy products (7%) and fresh vegetables (6%).

The third largest exporter of agri-food products to Poland in the previous year was Spain, where we procured goods worth EUR 827 million, 5% more than in 2014. Spain has been traditionally supplying the Polish market with fresh citrus and other fruit (35% of the value of imports from this country), fresh vegetables (22%), as well as fruit and vegetable preparations (6%). Besides horticultural products, our imports from Spain included a lot of pork (a 14% share in the value of supplies) and wine (3%).

The fourth largest supplier of agri-food products to the Polish market in 2015, and simultaneously the largest one among third countries, was Norway. Imports from this country declined by 3% over the year, to EUR 680 million, and the products imported from this country were almost exclusively fish (99% of the value). Next in the lead of exporters to Poland included Italy (EUR 670.3 million, a 5% increase compared to 2014) and Denmark (EUR 670 million, -4%). Italy mainly supplied our market with confectionery products (18%), fresh fruit, particularly grapes (17%), wines (6%) and pasta (5%). Supplies from Denmark were dominated by pigs, mainly piglets (30%), pork (28%) and fish (12%).

Another third country importing to Poland in 2015, Argentina, had a decrease in the value of the exported products by 4% to EUR 572.8 million. Approx. 83% of the value of imports from this country comprised soybean meal, an essential component for the production of industrial feed; other commodities were peanuts (6%), citrus fruits (4%) and maize (3%). The largest deficit was recorded in agri-food trade with Norway and Argentina (EUR -578 and -571 million, respectively).

In the group of third countries, other major markets supplying agri-food products included Ukraine (EUR 382.6 million, +6% annually), the USA (EUR 314.6 million, +22%) and China (EUR 314.4 million, +2%). The imports from Ukraine were dominated by sunflower meal (20%), vegetable oils (13%), fruit and vegetable juices (6%) as well as rapeseed (6%). Products imported from the USA included mainly fish (17%), soybean meal (14%), tobacco (13%) and wine (9%). The Chinese sent predominantly fish (32%) and processed vegetables (17%) to Poland, followed by animal intestines, bladders and stomachs (9%) and honey (5%).

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POHiD
POLSKA ORGANIZACJA HANDLU I DYSTRYBUCJI

**Maria Andrzej Faliński,**
**Polish Organization**
**of Trade and Distribution**

Poland in the last decade became a hit on the food export market and has before her a good future as producer, bidder and distributor/seller of these products. On the other hand we must, however, be aware that against the major world market exporters, with just a 2% share, we are a country to reckon with but not yet a superpower. Let us remember that sales are due to our participation in the EU community market (approx. 2/3 of total shares) and this means not only the benefits of the common market, but compliance with the rules of the European law. Hence, the obligation for double prudence. Firstly, to take care of our position on the markets in the Union and to guard the correctness of the rules governing the Union, i.e. to adhere to these principles at home and react to violations of their correctness in other community countries – through diplomatic representation structures and by addressing the community directly through communication in companies and business organisations. Secondly, to widen Poland's presence on the so called third markets, which we are doing successfully, but it is still not enough. We are therefore successful, this is evident in the numbers on the foreign trade balance (a EUR 6mln increase) as well as the sales dynamics, which has doubled within a decade, but we still have a great task – not to lose the trend, meaning, broaden the expansion of the export sector not only by products, but also investment in facility sales.

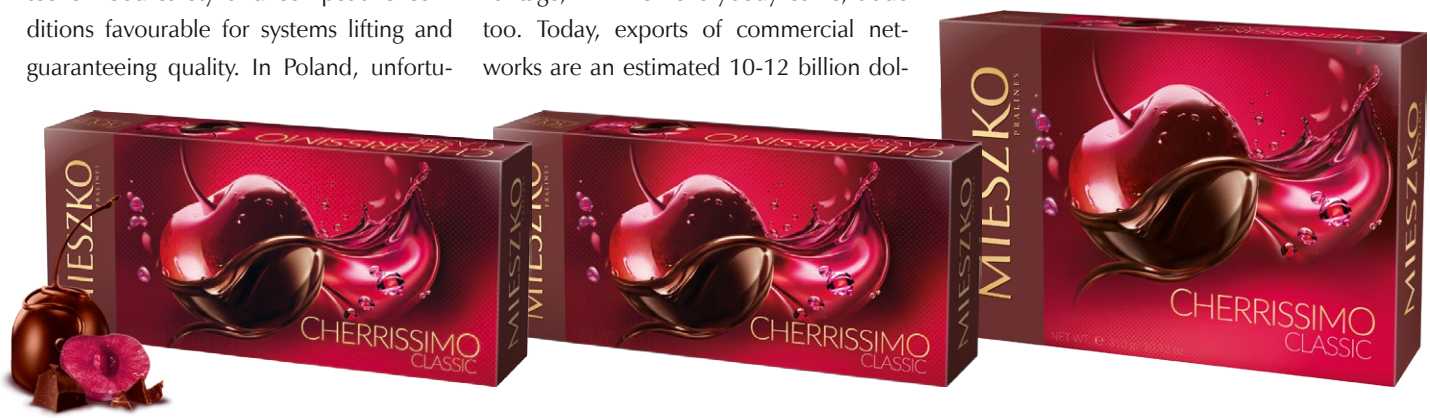
Europe unfortunately raises its head to protectionism, as exemplified by the reaction of some countries – sadly, including neighbouring ones – on Polish food exports. Of course the primary instrument to combat protectionism is to make an appeal to the law, whether be it within the Union to the European acquis, or in a broader plan to the WTO and bilateral agreements. This is not always enough, but it is the basis and needs to be made use of and defended. Poland's product offer of high values and generally lower prices, faces the undermining of its quality and safety, what is more doubtful is the given system of market protection also, and perhaps for the better, the implementation of common European standards for regulation and audit practice. The issue is the repeated actions in bad faith against competing Polish products hiding behind declarations, "in depth" product control as well as propaganda campaigns against our products. It is very painful and harmful, that the main competitive advantage is the quality of Polish food and the effective supervision system over the product throughout the supply chain. Effective export depends so much on the activities on external markets – commercial activities, communications, politics – on the internal situation, i.e. sector policies and the market situation in Poland. In exports, as in any business, specific competitive advantages count – of course, the circumstances are important, namely prosperity, opportunity, individual or competitor errors, but the most important depends on our concrete actions and resources created. The potential and the practice of companies, industries, countries, organizations. Above all, however, what counts is the product and its quality, consistent with the expectations of the recipient, assortment. They create and lend credence to technology, people, cash, infrastructure, culture and knowledge, industrial and recipe know-how, aesthetics and forms of communication with the customer. However, it all comes down to the country's economy, the state of the market and the distribution system, and – this is the most important – the level and structure of the domestic competition, that is competitiveness of the domestic food sector, tested by the trade and its customers, which includes, each one of us. Poland has all this – 25 years investing in the production, processing and distribution of food. Foreign investments and Polish companies – built the much appreciated product and company brands. And hence, the modern machinery, infrastructure, educational revolution of

entrepreneurs and employees at all levels, logistic boom. It is on this basis the major Polish industries and retail formats have been consolidated. The specific model of competitive manufacturing by companies of all sizes, effectively competing for the favour of wholesale and retail trade, have a unique structure, because competitive forces in Poland can boast not only great surfaces, but small areas integrated into thousands of attractive assortments and cost-effective sales networks penetrating both the domestic market as well as specific markets, local – urban and rural.

So, we have to deal with the unprecedented development of the manufacturer market and the wholesale and retail distributor markets in Poland. With the competitive process – which is the mechanism of effective modernization of productive resources in the food sector, covering not only the "supplier", i.e. the primary producers and those who process food, but also those who organize consumer demand, that is traders – grows the potential of Polish exports. Of course, we have to deal with external barriers, i.e. different administrative practices, propaganda and legislations of other countries (including the most painful, governed in the framework of the Community), but we also need to notice the internal barriers. In my opinion even more dangerous.

First and foremost, We should protect the market and should not give reason for supporting partners to say "you too...", and if they retaliate, it should be on a very hard base. Never also remove the guarantee of food safety and competitive conditions favourable for systems lifting and guaranteeing quality. In Poland, unfortunately, this doctrinal thinking is present and flows in state institutions. Remember that the enemy of the modern economy is populism – We should look after the "plebeian" sphere of management in the food sector, i.e. small businesses and small farms, but this must not be done at the expense of large companies that export approx. 2/3 of Polish food. Ostensibly in the interests of "small" there is a loosening of regimes in the sanitary and hygienic safety of products, e.g. through reckless ideas about direct sales. In the end, sooner or later, there will be scandals and a collapse of the export market for all. Frankly, the law which has been protecting Poland to date from propaganda attacks of some recipient countries giving at least a basis for intervention. However, it will not be good when it works against us, then they will be right. Regardless of patriotic cries...

Sufficient control on large-scale distributions will have a similar effect – whether Polish or – even worse, because this gives rise to claims of discrimination and xenophobia – foreign capital. Apart from state services, it also depends on – the mechanism of quality competing at a good price. If it is a sales channel for export markets and a communications platform to export clients, it is difficult to find a better resource sector, the more that it is an organised resource and operating in a large-scale on a multi-branch system. In order to compete on quality this is not a place for everyone but only for the best, it is obvious. Poland succeeds in doing so, having favourable indicators of comparative advantage, in which everybody earns, trade too. Today, exports of commercial networks are an estimated 10-12 billion dollars per year, of which the UK gets, through this channel, Polish food for approx. 5 billion, or about half of the food exports to this country. And we sell through this channel to well over 20 countries. Tax blows, reduction of working hours, planned unequal treatment in the commercial practices of commercial networks causes, first, serious consequences in the internal market, with inevitable outputs from the market and then a narrow channel for export. This is an unnoticed, but a very serious barrier to the development of Polish exports. Generally speaking – the economic policy of assuming conscious or unconscious discrimination, and the perception of unilateral protectionism is dangerous for exporting market participants in the food sector. Poland is experiencing the barriers in other markets – EU and not to mention Russia and resistant to removing restrictions on sanitary Asian countries. Doctrinal thus discriminating against some of the participants of the internal market must have consequences in the export markets. It is not a true thesis that if you tighten policies, e.g. to networks or large transnational processors, they lose competitive position on the market, in Poland they head towards exports. They simply exacerbate forms of competition, eliminating a number of potential and less resistant to worse conditions for cooperation with partners, eliminating them from the domestic and export markets in a relatively short time. This, fragmented, but balanced for now, Polish market may have the opposite effect to what was intended by the politicians.



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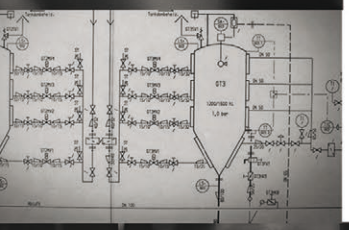

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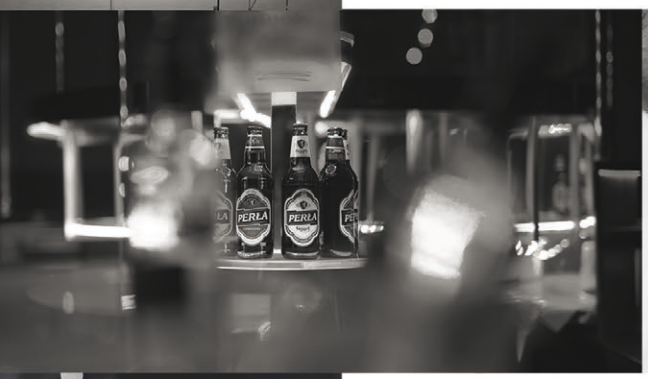



PERŁA

Dorota Kałowska
Expert of the Polish Chamber of Commerce
Strategist at Cobalt Spark, brand consulting

*For 17 years, she has been helping Polish and international companies consolidate their brands, and for more than 10 years, she has been supporting trade chains and suppliers with regard to implementation of the private label offer. She conducts numerous lectures and trainings in the area of branding, effective use of packaging in brand strategy, as well as private label image management. Contact: d.kalowska@cobaltspark.pl*


# Polish food exports – challenges and opportunities

The dynamic growth in Polish exports is a fact, and obviously a welcome one. Polish producers, who previously concentrated on provision of raw materials and unprocessed products or on contract production for private labels of foreign contractors, have now gained the necessary experience for further development of exports. Unfortunately, considering a longer time perspective, competition on foreign markets based predominantly on price is a strategy far from being prospective and hard to maintain, due to the rising labour costs in Poland, among others.

On the domestic market, the situation is not simple either – the ubiquitous price war between trade chains, trade consolidations, growing shares of private labels, as well as the development of own production by trade chains, are only some of the phenomena affecting the condition of Polish brands and producers. Therefore, many of them are now facing a completely new challenge of developing strategies to enable consolidation of one's position on export markets as well. One can sell more through building one's own distribution, increasing supplies to the current contractors, or establishing cooperation with new partners. This statement is neither new nor revealing, yet every company seriously concerned with the development of exports must answer the question whether it is fully prepared for the new situation, with regard to assortment, logistics and marketing alike.

Analyzing the structure of Polish food exports, it is easy to see that sales of Polish brands account for only a few percent of the total trade – the rest is made up by raw materials and unprocessed food, semi-finished products, as well as production for a contractor's private label. Why have so few Polish producers succeeded, so far, in introducing their brands to foreign markets? Reasons are many and it would be hard to mention all of them here, yet it is worth taking a closer look at what we can do to make Polish brands struggle effectively for their place on export markets.

## DEVELOPMENT OF A UNIQUE OFFER

In view of the growing price pressure, a possible defense strategy is the development of a unique offer which would be hard to compare directly with competitive products. In this area, Poland really has a lot to offer – from regional dishes and products, through preparations, with particular focus on pickles, cured meats, vodka, high-quality dairy or cereal products.

In the Global Pricing Study 2016, conducted by Simon-Kucher & Partners, as much as 66% of the companies surveyed in Poland anticipate that the implementation of new products and innovations will minimize the adverse effects of direct price competition. Here, it is legitimate to ask: if a large part of Polish producers are prepared to implement innovations on the domestic market, why not use this flexibility to compete efficiently on export markets as well? I use the word 'flexibility' for a reason, since it is the adaptability and quick response I would see as a source of potential success.

## UNDERSTANDING OF CONSUMER NEEDS AND EXPECTATIONS

Building a unique offer must affect all of its areas – assortment is just one of them. An obvious challenge for Polish brands on export markets is the development of a unique and innovative image. The communication of the quality and values carried by the brand needs to be improved as well. Particular attention should be given to packaging, in view of often limited promotion possibilities, an essential element carrying the values and telling the story of a brand. Unified mainstream products will always remain just one of many alternatives on a row of similar products on the shelf. We have excellent designers, a rich culture and traditions which can and should be drawn upon when working on the image of national brands. As long as the producer does not decide to implement a strategy based on an imitation brand, there is no reason for him to be consciously exposed to direct price wars by offering ordinary, inconspicuous products.

On almost every market, efficient competition also requires good understanding

of consumer needs and expectations. This is why close cooperation with distributors is so important in consolidation of the position of Polish brands on export markets. Distributors have the necessary knowledge of consumers, and on their part, they expect support and a coherent concept of brand promotion on a specific export market. The very presence of Polish brands on the shelves is just half of the success, yet with lack of a unique image, this half is most likely to become a potentially lost opportunity.

### COHERENT PROMOTION POLICY OF QUALITY AND POLISHNESS

A separate question that should be addressed here is the brand strength of Poland and the Polishness of products, as elements distinguishing our brands internationally. Unfortunately, for the last 25 years, we have failed to develop a coherent image of Poland, due to which, the Polishness of products does not usually bring unambiguous positive associations.

However, Polish food is characterized by really high quality appreciated worldwide. On a macro level, all we need is a coherent and consistently implemented policy for the promotion of Polish food in the international arena – the first steps in this direction have already been taken, both at the central level and in individual sectors. On a micro level, on the other hand, all producers have to find their own answer to the question whether their products have the potential to offer a new, unique value on a given market. On a totally subjective note, I can only state that, working on an everyday basis with Polish producers, I can see tens


of products with potential to be noticed and appreciated on export markets. Before that however, producers themselves have to believe they can provide really unique and highly competitive products. This is a totally necessary prerequisite to build the strength of our national brands in the international arena.

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# Exports of Polish food products

PFPŻ

Andrzej Gantner, CEO of PFPŻ ZP

Since Poland's accession to the European Union in 2004, exports of food and agricultural commodities increased by almost 360 percent. In 2015, foreign sales of food products reached 23.9 billion euros and was 9.2 percent higher than the year before. Last year's record was achieved despite the Russian embargo, introduced in August 2014, on the main food products from the European Union, including Poland, and the restrictions on the export of pork due to the detection of cases of African swine fever in our country. Also considered behind the success of the industry is the annual increase of positive balance in foreign trade, every year. Last year it amounted to almost EUR 8 billion which was ten times higher than when our country accessed the European Union.

### OPPORTUNITIES AND THREATS FOR POLISH EXPORTS

Forecasts indicate that once again in 2016 there will be a record in the export of food and agricultural commodities from Poland. The main factors favouring the increase in agri-food exports are: the very good relation between the quality of Polish products to price, favourable exchange rate of the zloty to the euro, good economic growth in the euro area, especially in Germany our main trade partner, as well as steps taken by the government to support exports to new markets. Among the most promising export markets for the agri-food industry are the following Asian countries: China, Malaysia and Indonesia; as well as African countries, i.e. Algeria, Egypt, Morocco and South Africa. Also, a very good perspective is the Canadian market because of the agreement signed on free trade. Given that still more than 80% of the export of Polish agri-food products is to the countries of the EU, the threat to the further development could be intensifying protectionist measures in domestic markets. Protectionist barriers existing in the respective markets of EU countries are not effectively and quickly controlled, and new restrictions are often systemic in nature and are associated with modifications in the law of the country.


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**Since the beginning of the company when it mainly offered dessert products, some time has passed. How has the company developed since then? What does your current portfolio look like?**

FoodCare's history began more than three decades ago with the production of desserts under the brand name Gellwe. Thanks to the traditional recipe used, these products have gained a permanent group of loyal consumers, Gellwe has expanded its portfolio of products to include, among others, cake mix, baking additives and condiments as well as other loose products. Thanks to the dynamic development of FoodCare over the years, the company has started its activity in the segment category of energy drinks (BLACK Energy Drink, N-GINE) ISOTONICS (4MOVE), juice (the reactivation of the FRUGO brand). In a short period of time, these brands have achieved a strong position on the market. Frugo drinks, almost a year after returning to the store shelves, trampled the results of the current leader, and at the moment the brand BLACK Energy Drink is the market leader in the energy drinks sector in Poland. In 2007 the company successfully entered the cereals market with the muesli brand Fitella, packed in small disposable packaging. With its innovative concept and interesting strategy developed in just an annual presence on the market, it has become the market leader with regard to the number of packages sold.

**BLACK is the leader in the energy industry in Poland. What is its position on foreign markets, is it also so highly valued by foreign consumers? Which other brands have gained a lot of interest outside the country?**

Last year, the sales of BLACK in Poland increased by 22%, achieving the largest increase among the leading brands. Proof that we listen carefully to consumers and that we are moving in the right direction, is the reason that Poles most often choose BLACK Energy Drink. BLACK Energy Drink is available in almost 60 countries, and in some of these countries the growth is so dynamic that we are conducting extensive marketing campaigns with Mike Tyson. The numbers point to the fact that this is a growing market and that the BLACK brand is strengthening its position each year on foreign markets. We are constantly looking for new export markets, this autumn we are planning to introduce the brand to the German, Russian and Chinese markets.

The prevailing trend for an active, healthy lifestyle, certainly benefits the energy and isotonic category of drinks and creates good prospects for the future. In connection with this trend the brand 4Move is very popular among consumers outside the country. The strategy for this brand is based on recommendation from the best coaches in the world. Recently, one of the most famous coaches in the world – Jose Mourinho endorsed the 4Move drinks with his image.

**Which countries are strategic for the FoodCare Company? Do you plan to expand into new foreign markets?**

As mentioned above, BLACK Energy Drink is available in almost 60 countries. Our goal is for the Polish brand to conquer the world. We are growing successfully on all the continents, year by year we expand our distribution.

**How important is export for the company and what part of the sales revenue is allocated to it? Is a further increase in exports projected?**

Export is very important for the company, that is why our brands are promoted by international celebrities worldwide. Compared to other Polish companies, what distinguishes us is that from the beginning we have been thinking of global sales. Our ambition has always been to create international brands. FoodCare results show that this objective is being effectively implemented and, of course, we make every effort to ensure that our brands are being developed well beyond the country's borders.

**How will further development of the FoodCare company be supported? Innovation, portfolio expansion or perhaps a new strategy? What is the key to success of the FoodCare company?**

Our goal for the next 10 years is to create FoodCare into a global concern. We stand out, because from the beginning we have been thinking of global sales. New investments are a step towards higher levels of product quality and an expansion of the company's product portfolio. We are focusing on developing and investing in the brands and products that we believe are the strongest, like BLACK, Frugo, Gellwe, 4Move or Fitella. The development of both existing and new products increases not only our competitiveness in the market, but above all allows to meet the growing expectations of customers in all the markets with which we operate.

**Thank you.**

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# Herbapol – Yours by Nature

## About tea and other excellent products of Herbapol-Lublin S.A.: an interview with Evangelos Evangelou, President of the Board.

**Together with the Big-Active brand, you are the leader in the area of functional and fruit teas in Poland. Does the strong entry into the black tea market through putting two new brands: Big-Active Black Tea 100% Pure Ceylon and Nasza on the market augur a beginning of your pursuit for the leading position in this category as well?**

Presence of black tea, Poland's most popular kind of tea, on the market gives us wide prospects of development. Studies show that consumers look increasingly often for high-quality mixes or diverse flavours and are not afraid to reach for new brands. Big-Active Pure Ceylon tea, containing no redundant flavours and characterized by a deep, velvety taste, answers the needs of even the most demanding customers, being prepared in accordance with the company's mission. On the other hand, Nasza brand is a family tea with the Herbapol quality guarantee. A large, resealable family pack of 40 or 90 bags ensures preservation of the tea aroma for a long time. Nasza is also a diversity of tastes – our offer includes classic black tea as well as fruit teas in Poles' favourite flavours – raspberry, strawberry, cherry, and forest fruit.

**Experts claim that the black tea market is rather stable, and development can only take place through seizing shares from other participants. What is your opinion on this matter?**

The tea market in Poland is characterized by considerable fragmentation, whereas its shape and directions of further development are determined by several large producers. Herbapol-Lublin S.A. is one of them. Most consumers make conservative purchasing decisions, but a gradual change in their behaviour can also be noticed. Big-Active Pure Ceylon black tea has a unique taste and top quality – containing no artificial flavours or colourings used so often by our competitors. Quality will always convince a consumer – whether he or she is a fan of Big-Active brand or just a customer interested in trying something new.

Introduction by Herbapol-Lublin S.A. of new products in the segment of black tea was preceded by detailed analyses, not only of a quantitative nature. The proposal of Big-Active Pure Ceylon was evaluated very positively by focus groups with regard to taste, package design and suggested packing variants. This allows us to assume an optimistic scenario for this product.

**What is the current market share of Herbapol and Big-Active black tea? What share would you deem satisfactory in the future?**

Herbapol-Lublin S.A. is the leader in six categories. As Herbapol brand, we occupy the first place in the segment of fruit and herbal teas, as well as in fruit syrups. Big-Active brand, on the other hand, is the leader in the category of green and red teas. Both brands dominate in the segment of functional teas. We also aim high in the segment of black teas. Big-Active Pure Ceylon runs for a place in the top three, and the first sale results fulfill our assumptions in this regard.

**Will the development of the segment of black teas be limited to the domestic market, or do you also plan to develop exports? Which export directions in this category are you interested in? Which editions of foreign food trade fairs are best suited for the export products of Herbapol?**

Our priority is to build the brand of Big-Active Pure Ceylon black tea on the local market, the next step will be export development of this tea and all our activities will be focused on this goal. Currently, exports account for approx. 10% of our company's trade,

and we observe a considerable volume growth year-on-year. We can also see an increased interest in Herbapol jams, Big-Active teas, as well as bulk-packed herbs – especially on North American markets. The main sales markets of Herbapol-Lublin S.A. are England, Germany and North America.

**What marketing strategy have you adopted for the next years for other tea segments?**

We will build our competitiveness through the introduction of further innovative products. Simultaneously, this may cause a renewed increase in consumers' interest in assorted product categories and slowdown or return to growth. We are the leader in the segment of fruit, green, herbal and red teas, so consequently, stimulation of growth through innovative market solutions is our obligation. Another important strategy is maximization of the quality of our product portfolio. We are proud of it and we believe our products are the best in this regard.

Herbapol-Lublin S.A. conducts active media support in television, being an undisputed leader in Poland on this subject. For yet another year in communication, we focus on the taste and appetising effect of our products, characteristics so important, in particular, to the younger generation of consumers. The slogan of our campaign: "Pleasure. Yours by nature" references the positive sensations accompanying everyday consumption of products of Herbapol brand. As a family brand, we also encourage the consumers to share the unique taste of our products with their close ones, thanks to which moments spent together will gain exceptional flavour.

In the case of Big-Active brand, we also focus on its pleasure-oriented nature. The next stage of the campaign "Complement of good moments" focuses on the communication of green teas and black aromatized teas.

**"Herbapol – Yours by nature" – is a slogan featured on every product of Herbapol-Lublin S.A. company. How do you ensure the high quality and excellent taste of the products (raw materials, technology, certificates)?**

We consider the phrase "Herbapol – Yours by nature" our mission. We stand guard over the richness of nature and we wish to share it with the consumers. Since its establishment, the company has been connected with Lublin. It is in the Lublin Region that the local, varietal Polish fruit are acquired, exclusively from proven and trusted suppliers. These fruit provide the unique taste of the Herbapol products. Nature is not just a source of raw materials but also an inspiration for new products, appetizing taste combinations and practical solutions increasing consumer comfort. The company also stands out with its unique system of acquiring raw materials through its own collection centres, supporting natural cultivation of herbs in Poland.

**Appropriate shop shelf's arrangement is a very important element in retail trade. Please tell our readers why the products bearing Herbapol and Big-Active logos should have their own, prominent place on the shelves in every store.**

These are best-selling products in their segments; their absence on the shelf or improper exhibition may result in consumers purchasing their favourite product elsewhere.

It is worth remembering that the trust of consumers, enjoyed by the products of the Herbapol brand, resulted in being granted Dobra Marka (Good Brand) honourable mention in 2016 for Dżemy Klasyczne (Classic Jams) Herbapol, as well as the Złoty Paragon (Golden Cash Receipt) awards in 2016 for Owocowa Spiżarnia Raspberry Syrup and Herbaciany Ogród Raspberry Tea.

On the other hand, Big-Active is an excellently developing brand, as best demonstrated by the prestigious awards won by our products. Three times in a row, we have received a honourable mention in the Złoty Paragon vote for the Big-Active Green Tea with Quince (2013), Earl Grey with Citrus Fruit (2014), as well as Green Tea with Raspberry and Passion Fruit (2015). These tastes have been extremely well received by consumers and found their appreciation, therefore, it is worth ensuring that the customers can always find them on the shop shelf. After all, we are leaders in almost every product category.

**Apart from teas, the offer of Herbapol-Lublin S.A. also includes syrups, Green Up energy drinks, as well as jam products, introduced to the market in 2014. What development strategy have you adopted for each of these categories?**

As we know, each product must have its Unique Selling Point used to promote it among the consumers. We build our strategies on the strength of our brand, the quality of products, and trade contacts of the company. The goal is to achieve as high sales results as possible.

**A personal question: Which products of Herbapol and Big-Active do you reach for most frequently?**

I admire tea and everywhere I go, I look for the best tastes, I experiment and scrutinize consumer choices with curiosity. As most Poles, I prefer black tea, so I drink Big-Active Pure Ceylon in the evenings. For the day, I choose the very tasty Green Tea with cherry of Herbapol brand, or Big-Active with Raspberry and Passion Fruit, brewed for exactly three minutes – such infusion provides excellent refreshment, has a stimulating effect and gives energy. Sometimes, instead of a coffee after dinner, I choose the peppermint leaf tea from Zielnik Polski (Polish Herbarium) line of Herbapol brand. It has an excellent effect on digestive process and eases the sense of fullness; I brew it, exceptionally, with two bags.

**Thank you for interview, Tomasz Pańczyk.**


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# Market and export directions of dairy products

The current period is not easy for the dairy industry, the market is unstable and affected by many external factors. Abolition of milk quotas, the "Russian" embargo and other similar external conditions make the prices on the market change dynamically. As we all know, the Polish dairy market does not differ from the European standards, evolving and responding to its environment similarly. Nevertheless, it is still growing and this trend is positive. Changes, particularly those related to the Russian embargo, forced Polish producers to look for new export directions. In particular, Polish producers are finding new markets in the Middle Eastern countries, but also in far Asia, by which I mean China, India, Vietnam or South Korea.

## Interview with Marek Maciejewski – Sales Department Manager at Sertop

### What consumer trends are present on the processed cheese market? What are the expectations of Polish consumers and of foreign ones?

Processed cheese consumers, especially in Poland, are rather conservative in their choices, particularly in the case of the cheese types and flavour additions used for their production. However, their expectations have been changing in the recent years; therefore, we are continuously striving to adapt and change our offer. We introduce new tastes or packaging forms. The export market, be it European or worldwide, is not homogenous. We have to adjust our offer on an ongoing basis to the demands of local markets. Recently, we have expanded our offer by three new items in the "Jak dawniej" series of products packaged in 100 g long cubes. Currently, three attractive tastes are available: Edam, Smoked Gouda and Camembert. Nevertheless, we observe various consumer behaviours and preferences in different countries. They result from different cultural or historical conditions. For instance, the traditional 100 g cube, still being the "cornerstone" of the offer for Poland and the Czech Republic, is virtually unknown in other European countries. This mobilizes us to create products to be appreciated outside our territory.

### What are the most attractive outlets for Polish dairy products?

Outside the Polish market, the most attractive markets are still the nearest ones, i.e. the Czech Republic, Slovakia, as well as Romania and the Balkan countries. Our products continue to enjoy much popularity in Israel. Recently, we have commenced deliveries to Sweden. We wish to go beyond the nearest countries – we are thinking about the Middle and Far Eastern markets. We are expanding our offer with new products and package types. Products packed in 140 g wheels of 8 wedges have a large and continuously growing share in sales to the export markets. We offer a wide range of these products, recently joined by two new ones, initially marketed to customers from the Balkan countries and currently, to other markets as well. We have also expanded our offer with a new packaging version, the so-called Family Pack. It is a 280 g wheel of 16 wedges in one economic package – two products: "Śmietankowy" cream processed cheese and "Mazurski" processed cheese analogue. Both of them have already found their recipients at home and abroad.

### Please tell us about the most important awards and certificates granted to Sertop.

For many years, Sertop has been certified for quality standards. It is worth mentioning that we were the first processed cheese producer in Poland to obtain a quality certificate for the ISO Standard. But this is history. Currently, we are certifying for standards compliant with BRC and IFS. Our plant has a HACCP system in place for the entire production.

Last year, we were granted various awards and honorary mentions, including:

- Statuette for outstanding quality for the "Jak dawniej" set of processed cheeses with the taste of: Smoked Gouda, Edam and Camembert at the Mleko–Expo Fair, Warsaw, Palace of Culture and Science.
- The honorary patronage of the fair was the Minister of Agriculture and Rural Development.
- "Outstanding Exporter 2015" – Congratulatory Letter, Title and Cup of the Association of Polish Exporters - for the Export Product of the Year 2015, i.e. export of processed cheese, at the 14th Congress of Polish Exporters, Ministry of Economy, 19 November 2015.
- "Fair Play Enterprise" 2015 certificate as well as the Platinum Statuette for conformity with legal standards, universally accepted social norms and standards of fair conduct in mutual relations with customers, contractors, employees and local society.

However, the most important award is the favour and recognition our customers reflect on an everyday basis in stores, through their purchasing decisions.

### What are your export plans?

The Sertop Sp. z o.o. company, in its current legal form, has been active on the market for 25 years, yet it has 50 years of tradition. Over this period, Sertop has managed to maintain its market share and has been constantly developing, increasing its potential and its presence on foreign markets.

We try to create an attractive offer, helping us maintain our position on the Polish market. Nevertheless, exports are an important and constantly developing part of our market.

In the nearest future, we plan to participate in the EU programme "Go to brand", intended to support export activities on new markets. We are concerned with the acquisition of "bridgeheads" in countries with high consumption of processed cheese, i.e. the Arab countries. We are working on the adjustment of our products to the requirements of those markets. We hope that the support we gain will help us make efforts to enter the Asian countries and acquire customers in these distant regions.

SERTOP TYCHY ®

- POLAND -

# 50 years of tradition and taste







YOUR BRAND

**Sertop company is one of the main producer of processed cheese in Poland.**

From many years the company produces high quality products keeping precise quality control.

**Sertop offer includes wide range of products:**

- processed cheese,
- cheese-like products,
- quark cheese products,
- fried cheese in different tastes and packaging.

**SERTOP** offers their products on Polish market as well as on European Union markets, USA, Canada, Middle East countries, South Korea.

*The company has BRC Certificate Global Standard and IFS Certificate (International Food Standard).*

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mp trade

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# Interview with Ewa Bartnicka-Wilusz, Export Director of MP Trade

**What does the pasta market in Poland look like compared to Western Europe?**

We enjoy watching the Polish pasta market grow successively and develop constantly. We will observe further growth in this category. Today, the Poles are much more eager to reach for pasta in their cuisine, which unquestionably motivates us for further work in the development of our products. Importantly, Poles have become conscious consumers, they read labels and do not just compare prices but, above all, the quality, composition and origin of available products. This consciousness increasingly more often causes Polish consumers, just as our western neighbours, to choose top quality, healthy and functional products.

**Which outlets are strategic for the company?**

According to the development strategy adopted by our company for the next 5 years, we have decided to focus, above all, on European, African and Asian markets.


Currently, our products are available in most European countries as well as in Africa, and export sales are growing by approx. 30% year-on-year.

To maintain the upward trend, we are focussing on the acquisition of new contractors and on the development of cooperation with the current partners. In order to achieve this, we have met the customers' expectations as well as prospects and made a decision to expand our offer with a new brand, intended for export markets: Novelle, which, in my opinion, has a chance of conquering global markets due to its high product quality and unique design makes it stand out among the assortment currently available on the market.

**Your export hits are...**

We carefully observe the trends emerging in Europe and worldwide, and we expand our product offer in accordance with the demands and expectations of our consumers. We seek inspiration during both business and private travels, to make, with the help of our R&D department, products that will attract our customers and appear on the tables of consumers worldwide. This is why we offer new products, including, among others, flavoured pastas that are already in our offer, or BIO products, made of raw materials provided exclusively by certified suppliers. We also put much hope in apple chips intended to replace the traditional salty snacks. It is a 100% natural product with no colourings and preservatives. Unquestionably, wholemeal and spelt flour pasta enjoys much interest as well. It results from the current trends for a healthy and balanced diet.

In my opinion, the main features that a product should have in order to stay in a consumer's menu for good are its uniqueness, functionality and attractive packaging, and this is what we try to focus on.

**The company's plans for the next months, years...**

For several years, we have been putting an emphasis on the development of exports, we wish to continue our expansion to new markets. In order to achieve this goal, we care for the development of cooperation with the current partners, continuously looking for new contractors at the same time. As the consumers are becoming increasingly more demanding, this is quite a serious challenge. Our plans include, above all, the introduction and development of the Novelle brand, and this is what I would focus on. We concentrate our activities on the development in the area of healthy and ecologic products. Simultaneously, the company intensifies its marketing and R&D activities. Moreover, investments in all 3 production plants are planned for the next several years, aimed at increasing competitiveness and expanding the portfolio of the offered products.

**Thank you.**

# Interview with Zdzisław Kunicki, President of the Board, ZMB Białystok

**Is Polish quality identified with excellent taste?**

The excellent taste of Polish food is a result of its high quality, which should be considered its main advantage.

This is due to many years of effort, not only in the meat sector but in the entire food industry. High quality and unique taste are the main goals of the producers who feel responsible for the manufactured products and wishe to be recognizable on the market, they care for the image of the brand. Good and tasty food cannot be produced without caring for high quality production.

**Quality also involves certificates. Please tell us about the most important ones.**

Participating in various industry events and fairs, we are appreciated for the quality of our products, especially for Kindziuk and our dry-cured palcówka sausage.

We can boast awards for these products, received at the World Food Expo Warsaw, "Doceń Polskie" Top Produkt certificates granted by the Ministry of Agriculture and Rural Development, Dobry Produkt certificate granted by a jury made up of representatives of the publishers: "Rynek Spożywczy", portalspozywczy.pl, dlahandlu.pl as well as the Polish Organization of Commerce and Distribution. We also hold the IFS (International Food Standard) food safety management system certificate.

**What are Polish consumers like, what do they expect and what is the difference between them and Western consumers?**

Polish consumers know what they want and they are becoming increasingly demanding. Their decisions on the purchase of a product are not exclusively based on price. More and more consumers pay attention to taste, high quality and safety. One can notice much more often that consumers are concerned about what they buy, where it comes from and what it is made of. The difference between a Polish consumer and a Western one is therefore not as perceptible as it used to be. Both consumer groups rely on quality and safety of the purchased food. This is why a producer cannot rest on laurels and has to meet the requirements set by consumers. Consumers await novelties that will satisfy their tastes, and this is true for Polish and Western consumers alike.

**The interest in regional products fuels constant development in this market segment.**

Yes, this is true. Consumers are becoming much more aware when making purchasing decisions; firstly, this results from their increased knowledge, their decisions are also impacted by market trends – such as naturalness and a healthy lifestyle being fashionable. They also choose the highest quality natural food products made of natural raw materials and which are not highly processed. They pay increasingly more attention to the regional origin of the purchased products because these products predominantly meet their quality requirements; additionally, consumers associate a regional product e.g. with the place where they live or have lived, or have other positive associations with a given place.

**Białostocki Kindziuk is your flagship product.**

This is true. Since the establishment of the company, we have been relying on the quality and recognizability of the ZMB brands. Kindziuk is one of the products, belonging to the premium category of long-cured sausages. The key to our success is the preparation of Kindziuk from selected pork ham muscles, with an addition of garlic and spices. The original, traditional recipe and smoking with alder wood give a unique aroma and taste to Kindziuk. Thanks to this, more people are becoming interested in our Kindziuk.

**What are the company's plans for the following months or years?**

Of course, ZMB Białystok in its long-term plans, just as any other company, intends to systematically increase income, optimize the production processes and be appreciated by consumers for our products. Our short-tem plans involve changing the location of the current production plant.

**Thank you.**

**ZMB Bialystok** 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 Bialystok which is placed in a green, clear and ecologically oriented part of the country, near Bialowieza 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:


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**Palcówka surowo dojrzewająca**

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ważny do: 31.10.2017 r.
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Białystok
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KINDZIUK
przyznany w programie *"Doceń polskie"*
Patronat honorowy
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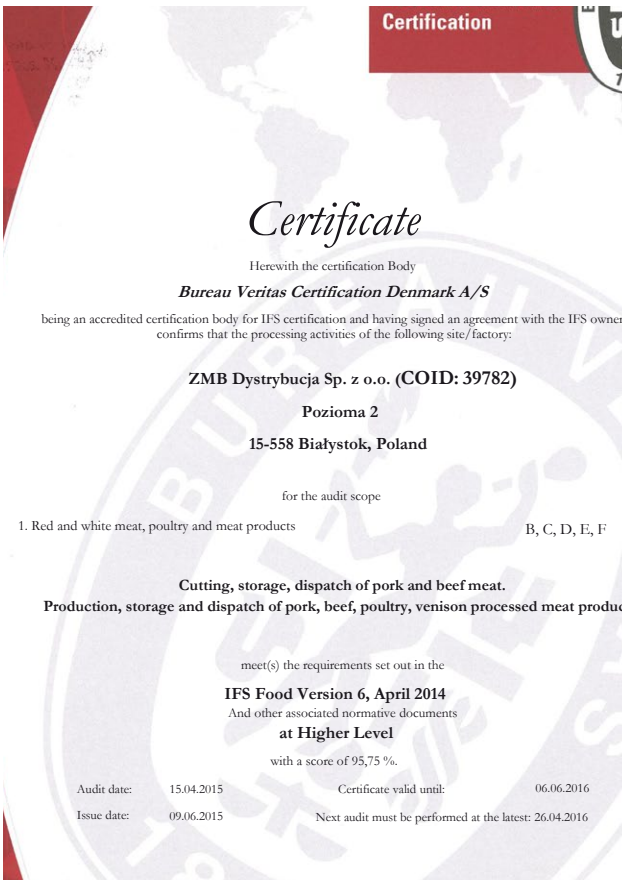
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**Pozioma 2**

**15-558 Białystok, Poland**

for the audit scope

1. Red and white meat, poultry and meat products B, C, D, E, F

**Cutting, storage, dispatch of pork and beef meat.**
**Production, storage and dispatch of pork, beef, poultry, venison processed meat produc**

meet(s) the requirements set out in the

**IFS Food Version 6, April 2014**
And other associated normative documents
**at Higher Level**

with a score of 95,75 %.

Audit date: 15.04.2015 Certificate valid until: 06.06.2016

Issue date: 09.06.2015 Next audit must be performed at the latest: 26.04.2016

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**
**Spółka z ograniczoną odpowiedzialnością Sp. K.**
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# Interview with Marek Bryl, Head of Export at Magnolia

**Years of experience has allowed you to create a wide range of products. Please tell us about your company portfolio?**

The company Magnolia has been present on the market for 36 years and through the older generation of Poles is known for such iconic products as Mulatek wafer , rolled Delezja and the Lubuskie block. Currently, we are not just known on the Polish market as a producer of wafers sandwiched with cream but also as a member of a group of plants owned by Joerg Stenger. The group consists of four production plants, where cooperation has enhanced the portfolio of Magnolia's assortment of wafers to ice-creams and gluten-free wafers. Magnolia specializes in the manufacture of wafers with cream and in this respect we are constantly researching on new products, which enables the introduction of novelties to markets, both Polish and foreign. The flagship products are wafers layered with cream weighing from 100 g to as much as 3 kg, packed in both single units and in bulk, popular not only in Poland but also abroad. Of course, I cannot omit dry wafers, perfect for paper thin wafers, and as a healthy replacement for chips. The entire range of impulse products weighing from 20 to 50 grams should also be remembered.

**Which products are the most popular and which new products have you recently put on offer.**

Every market has its specifications – some products are popular in the Czech Republic and others, with a different flavour, in Germany. Therefore, the best solution is plain cream layered wafers. It cannot even be coated in chocolate, because this also depends on the recipient country, however cream wafers are invariable.

One of our newest products is the round, crunchy, chocolate coated wafer, Rondelini. As well as „Koffinki" a coffee flavoured wafer, which we introduced as one of the first novelties to our portfolio. Apart from these there are several products which are innovative to the market, but are produced under our clients' own brand, for example, wholemeal wafers, sugar free wafers, wafers high in protein or wafers free from palm oil.

**What percentage of your products reach the foreign markets and which products are available to consumers abroad?**

As is the case of many Polish production companies, export is one of the most important development paths for us. This does not mean that we neglect the Polish market, but we are constantly working on developing export sales. Currently, exports account for about 40% of total production.

All the products available on the Polish market, can also be found abroad, under the brand name Magnolia and under our clients' brand as well.

**Do you intend to enter new markets? Please tell us about the export development of your products.**

We are constantly working on the development of export sales, working on new products offered to our partners and participating in overseas trade fairs. Because flexibility plays a key role in obtaining new markets, we are in dialogue with our partners, which results in a product tailor-made to the specific needs of the consumer markets. Thanks to this we are present throughout Europe, the USA, Australia, Africa and the Middle East.

**What is the secret to producing high-quality products and simultaneously respond to the needs of customers? Modern technology or perhaps a secret ingredient?**

Of course, the key to success is a secret ingredient, the recipe is closely guarded, so we cannot write about it, because it is a secret.

On a serious note, food production is a complicated process. It is important to work together with partners on the composition of the products, use high quality raw materials from reliable suppliers, and last but not least, entrust the difficult task of production to an experienced crew.

Many people assume that quality does not go hand in hand with affordable price. This is a common misconception, which can be confirmed by growing consumer confidence in the own brands of networks such as Tesco, Lidl and Biedronka and the growing share of private labels on the food market. Quality at an affordable price is one of the principles we follow. The high quality of our products are confirmed by the IFS, BRC, RSPO certificates as well as the trust given to us by the largest retail chains. We are constantly striving to improve our processes and are looking for ways to increase efficiency. I think that our current position on the market reflects all of the above features.

**Thank you.**

# Interview with Łukasz Dominiak, CEO of the National Poultry Council

**Poland is the European leader in the production of poultry meat. What have the results and growth dynamics of exports been like over the recent years?**

According to the data of the Central Statistical Office, the production of poultry meat in our country in 2015 reached 2 159 000 tons, of which 42%, i.e. 909 000 tons of meat and poultry preparations, were scheduled to be exported. As shown by the data above, nearly a half of the Polish poultry reaches foreign markets. For comparison, exports of poultry meat from Poland in 2004 were estimated at 131 000 tons. Thus, over 11 years, exports have increased almost sevenfold, giving Poland a leading position in the European Union. Currently, as much as 15 per cent of broilers reared in the EU, on which production of poultry meat in this area relies on to a great extent, come from Poland. Our products are sent, above all, to Germany and the UK. Polish poultry products also enjoy much popularity in Asia, including China, where we are currently the sole supplier of European poultry.

**How about predictions for the next years?**

We can notice a constant rise in the volume of consumption of poultry meat, both on the domestic and the global market. This results from many factors. Poultry meat is cheap to produce, widely available, easy to prepare and widely accepted by consumers. Contrary to some other kinds of meat, it is allowed by all religions. Therefore, it is an essential source of protein for consumers worldwide. To illustrate this fact: according to the data from the Institute of Agricultural and Foods Economics, the consumption of poultry meat in Poland last year was larger than the previous year, amounting to 28.3 kg per citizen. This year, the upward trend will continue, since, as estimated by the experts of the IAFE, consumption of poultry meat in 2016 will achieve the level of 28.8 per citizen. The situation is similar in other countries of the Community. Consumption of poultry in the EU in 2015 reached, on average, 22.5 kg per citizen. Predictions for 2016 claim that both consumption and production of poultry will maintain an upward trend, reaching a level of 13 505 thousand and 13 993 thousand tons, respectively. Moreover, as stated in the report of the European Commission "Prospects for agricultural markets and income in the EU for 2014-2024", this trend is long-term – within the following 10 years, production and consumption of poultry in Europe would still be on the rise.

**What is our advantage over the competition?**

The main advantage of poultry meat, both from Poland and other countries of the European Union, is high quality, resulting, on the one hand, from market expectations, and on the other hand, from stringent legal regulations binding the poultry producers, processors and distributors. Full control over

the production process "from field to table" (at each stage of the agri-food chain – from rearing to slaughter, packaging, transportation and consumption) as well as effective enforcement of domestic and European regulations make the meat from Polish poultry farmers not just tasty but also completely safe to consume. The development of production facilities has enabled Polish producers to obtain a significant excess of supply and, as a result, to provide high quality, tasty poultry at competitive prices to the global market, due to adopting the high EU production standards. An essential characteristic of the Polish poultry production is the high degree of vertical integration of the sector, guaranteeing full traceability and control over each stage of production. Compared to Europe and the world, the Polish offer stands out with its unique production flexibility – most producers offer cuts and methods of packaging tailored to the demands of their customers.

Polish poultry products are allowed on numerous markets of third countries – including China, South Africa or Vietnam.

### What challenges are faced by the Polish poultry sector?

Currently, we struggle with several challenges. One of them is strong competition from the United States and Brazil. Another problematic issue are non-tariff barriers applied in international exchange; in many cases, they are not legally authorized and can be difficult to predict, since they can suddenly disturb the structure of exports.

There are several factors the emergence of which would seriously threaten the Polish poultry industry. They include a risk of introduction of a European ban on the use of GMOs in animal feed, which would prevent farmers from composing healthy, high-protein feed at costs enabling maintenance of the market prices of poultry. It is all the more harder to accept that neither eggs nor meat of poultry fed with GMO feed are classified as GMO food – there is no scientific evidence that genetically modified material can pass from poultry feed to the meat of animals. This means that meat of poultry fed with foodstuff containing an addition of GMOs is no different in any way from products of animals fed with conventional feed.

We can see a certain threat in negotiations with the USA under the Transatlantic Trade and Investment Partnership (TTIP). Our industry opposes total trade liberalization. The legal regulations applicable to the poultry sector in the USA are much less stringent than the European ones, allowing use of growth promoters in rearing, maintaining lower standards of animal welfare, and tolerating meat disinfectants deemed controversial in Europe. The USA also lack plans on the control of contagious poultry diseases (e.g. salmonella). Poland does not wish to abandon the high quality and safety of products to match the prices of the cheaper American offer, since it would mean violation of the previously followed principles concerning healthy, safe and environmentally-friendly production. Therefore, we struggle to protect the European market from being flooded with American poultry, through such measures as creating a list of sensitive products, which should include assorted elements of poultry meat.

### Major outlets for Polish poultry.

The main trade partners for Polish poultry producers are the states of the European Union. 80% of our exports reach these countries, mainly Germany, the United Kingdom and the Czech Republic. Such a high percentage of recipients within the EU results, above all, from clear principles of cooperation, guaranteeing coexistence in the common market. As we believe that diversification of sales directions is essential as well, a part of our export is directed to third country markets. Virtually every year, based on veterinary audits, Polish poultry establishments gain export opportunities for new countries. Recently, Polish companies received accreditations for exports to South Africa, we are also finalizing agreements with such countries as Taiwan and Singapore. It is in the new, non-European outlets that we can notice the most development potential for the Polish poultry sector.

### Please tell us about the campaigns promoting Polish poultry.

The first promotion campaign for Polish poultry that should be mentioned is surely the "European Poultry – quality is strength" campaign, financed from the resources of the European Union. A promotional and informational action running from 2016 to 2019 takes place in China, Hong Kong, Vietnam and the United Arab Emirates. We also conduct a number of promotional projects financed from sectoral funds, e.g. participation in foreign trade fairs and economic missions or communicational projects oriented towards education, added value development and protection of the image of the domestic poultry sector.

Thank you.

KRD IG
25 YEARS
NATIONAL POULTRY COUNCIL
CHAMBER OF COMMERCE

**THE NATIONAL POULTRY COUNCIL - CHAMBER OF COMMERCE (KRD-IG)** is the largest poultry organisation in Poland. It has been operating incessantly for 25 years and has nearly 70 members from such fields as: farming, breeding, hatching, production and trade of raw and processed poultry meat and eggs. Members of KRD have a nearly 70% share of the national market and nearly 90% shares of the export.
KRD is a member of the **most important international poultry organisations**: a.v.e.c., CLITRAVI and ELPHA.

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**The National Poultry Council - Chamber of Commerce** invites you to visit the stand:

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Come and taste delicious dishes made from the Polish poultry by the Chef Artur Moroz.




# Interview with Małgorzata Ryttel, Member of the Management Board of PPH MAXPOL

*Two years have passed and we meet again at the SIAL trade fairs in Paris.*

We know that this year, MAXPOL has organized attendance to the SIAL trade fair for 23 companies from Poland. Can you name these companies and the sectors they represent?

Yes, it is true. This year, through our intermediation, 23 companies from Poland are participating in the fair. There is, traditionally, ŁOWICZ, a company that needs no introduction – a renowned dairy producer. A second dairy company which is BARTEX. A coffee producer – GRANA, vegetable preparations have been brought by AGROSIK, vinegar by OCTIM, LUBAWA brought jams and vegetable preparations, BONA – mayonnaise and ketchup, PSZCZELARZ KOZACKI – honey. Savoury and other snacks have been brought by RARYTAS and PIEKARNIA GALICYJSKA. Cookies and other confectionery arrived with PRIMART, dried fruit with BAKALLAND. Chips have been presented, as the name suggests, by CHIPS & SNACKS. CISOWIANKA and USTRONIANKA brought soft drinks, PERŁA brewery from Lublin – beer, OSHEE – energy and isotonic drinks, DRINKTECH and EKO-VIT – energy drinks. Meat is exhibited by WIPASZ, and meat preparations by RAB-JAŻYNIEC.

Do other editions of SIAL trade fairs, organized by your company, enjoy as much interest from exhibitors as SIAL in Paris?

Yes, of course. I have to admit that increasingly more companies take part in other editions of the SIAL fairs we organize, namely: SIAL Canada, SIAL China, SIAL Asean, SIAL Interfood, SIAL Middle East. From year to year, not only are our exhibitors increasing in number but we can hear increasingly more often that their products conquer these markets and are recognizable. An example of a trade fair at which the number of Polish exhibitors have been systematically on the rise is the SIAL China fair in Shanghai.

Soon, that is next year, ANUGA 2017, another very prestigious trade fair, widely popular among Polish exhibitors, will take place in Cologne. Have you already begun selling the exhibition space?

Yes, we have already been selling space for the ANUGA 2017 fair for two weeks. Companies are very well aware that the available space will disappear in no time, and the German organizer is unable to expand the halls to provide additional space. Of course, our regular exhibitors have priority in getting space. We suspect that within a month, we will have already sold the entire space and we regrettably cannot accept other interested parties, thereafter.

How about the development of the Private Labels fairs? Which ones of them enjoy most popularity?

The Private Label fairs, just as ANUGA, are selling rapidly. This year, at the PLMA trade fair in Amsterdam, we facilitated the participation of 34 companies from the food and chemical sectors. These fairs develop in a similar way as ANUGA, therefore, as the current edition of the fair is over, virtually all space for the next one has already been sold out. Therefore, companies reserve space while still being present at the fair. Apart from the Private Label fair in Amsterdam, we also recruit exhibitors for similar events in Japan, the USA and China. These fairs also enjoy much interest.

What trade fair events have you prepared for 2017? Are there any new fairs to which an exhibitor should pay attention?

For 2017, we have prepared many pro-



*sample stands*

posals of events taking place both on an annual and bi-annual basis. They include the largest London exhibition, IFE – a food fair, as well as a packaging event for the food industry – Pro2Pac. Both take place at the same location and time. These fairs attract very much interest, not just because a lot of Poles live in the British Isles, longing for excellent Polish products. Natural product fairs also undergo very active development – the two well-known ones, are Biofach in Nuremberg, and the Middle East Natura & Organic fair in the United Arab Emirates. Novelties include the fairs we have opened in Singapore, namely, Speciality & Fine Food as well as Speciality & Chocolate Asia. I recommend browsing the schedule of our events, available in the Food from Poland magazine, or reading the schedule on our website.

**How has the increased participation in fairs affected a possibility for small and medium businesses to obtain cofinancing?**

It has affected very significantly. This stimulus has an unquestionably positive effect. An entrepreneur who wants to succeed cannot rely on positive financial results alone, it must be remembered that this is not just the excess of income over expenses but, above all, an effect of cooperation with people, employees, customers and suppliers. Therefore, thanks to cofinancing of fair events, it is easier to allocate funds for the development and demonstration of a company and its products abroad.

**What advice would you give to entrepreneurs and managers in companies who would like to enter foreign markets with their products – what would you suggest to them?**

Above all, one should become well acquainted with the market and think where and at what trade fair the company should present its products. Subsequently, it should prepare well for such a presentation, check the functionality of packaging, the amount of samples to be shown, and their proper arrangement at the stand. Success is also a matter of a well-designed stand – and we will obviously help the exhibitors with that.

**What is the essence of the professional service provided to exhibitors by your company?**

Professionalism, within the meaning of our company, consists, above all, of: assistance to companies in deciding on their participation in industry trade fairs; availability of our employees, both at the level of the President of the Board and ordinary workers; a serious approach to the problems of our customers; long-term thinking in solving and preventing difficulties; a comprehensive customer approach; constant and reliable cooperation; gaining trust; and, of course, good opinion among the customers. Such values contribute to a double success: of the company and of the customer, which pleases us very much.

**What are your predictions connected with the trade fair business for the next years?**

Fairs will not disappear. They have no successor and their development will continue. The Internet cannot replace fairs. It is just a tool for transfer of information and for correspondence between partners, yet these two things are but a fraction of marketing. The advantages of participating in fairs include: an opportunity for direct contact with customers, so-called B2B meetings; a direct opportunity for becoming acquainted with the products; a possibility to negotiate the conditions of potential cooperation.

Systematic growth in the number of exhibitors and the expansion of the group of regular customers participating in many fairs each year both prove that trade fairs will continue developing.

**What more can I say but to wish you further successes and, of course, many satisfied and regular customers. Thank you very much for our conversation.**

STAND: **1 A 092**

## BIFIX Wojciech Piasecki Sp. J.

Górki Małe
33 Dworska Street
95-080 Tuszyn, Poland
Fax: +48 42 614 41 20
**bifix@bifix.pl**
**www.bifix.pl**

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

STAND: **1 A 092**

## Bogutti Sp. z o. o.

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05-504 Złotokłos, Poland
Phone: +48 783 956 466
Fax: +48 22 266 01 19
**export@bogutti.com**
**www.bogutti.com**

The BOGUTTI company specializes in production of high quality, rich cookies, baked according to the best Italian technologies. Cream fudge is something for the Polish to be proud of... Cream fudges are still the most recognisable Polish export product. Bogutti is also a producer of the traditional Polish cream fudge recognisable on the international market. We offer three types of cream fudge: MILK, CHOCOLATE and BUTTER. The secret of Bogutti's cream fudge is its exceptional taste. We would like to invite you to try our products at the ISM Fairs.

## Dega S.A.

Karnieszewice 5
76-004 Sianów, Poland
Phone: +48 94 36 15 100
Fax: +48 94 36 15 105
**info@dega.pl**
**www.dega.pl www.salatki.pl**

Dega run a family business since 1992, and we specialise in production and distribution of herring, vegetable and meat salads, fried fish in sauce and marinade, tinned fish and sandwich spread. The unique flavor combined with the high quality is a considerable asset in shaping the culinary preferences of consumers. The Company has implemented and maintains a certified food safety and quality system in line with the requirements of the standards IFS and BRC, whose application determines e.g. implementation of health safety product system HACCP.
Dega products – Fish (herring) in Greek style & Fish spread with rice were awarded ''Teraz Polska" emblem , which is under the patronage of the President of Poland, "Try Fine Food" mark, awarded by the Minister of Agriculture and Rural Development, Consumer Quality mark Q, West Pomeranian Product of the Year.

STAND: **5C E 002**

## FoodCare Sp. z o. o.

4 Spokojna Street
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**export@foodcare.pl**
**www.foodcare.pl**

FoodCare Group has been represented on FMCG market for over 30 years. It's one of the biggest producer on FMCG market in Poland and one of the largest manufacturer of private labels in the dessert categories in Central Europe. Currently, the company has a number of brands in it's portfolio: instant desserts Gellwe, cereals Fitella and drinks: BLACK energy drink, isotonic drinks 4MOVE and fruity FRUGO.
FoodCare Group employs approximately 900 highly qualified, experienced specialists and manages production of apprx. 800 different SKUs with overall production of 3 mln pcs a day. Our strength is the highest quality of the products, competitive prices and effective distribution. Consumers appreciate our products not only for the perfect taste, but also for the attractive product packaging.

## Herbapol-Lublin S.A.

25 Diamentowa Street
20-471 Lublin
Phone: +48 81 74 88 304
Fax: +48 81 74 39 670
**eksport@herbapol.com.pl**
**www.herbapol.com.pl**

Herbapol-Lublin S.A., current tea market leader in Poland, was founded 67 years ago. Drawing upon what is best in nature, it produces exceptional products bringing positive emotions and moments of pleasure to its consumers.
Company's portfolio includes Herbapol and Big-Active brands.
The Herbapol brand is a perfect combination of tradition and innovation. Brand portfolio includes teas, syrups, jams, confitures and other jam products.
Big-Active is known for exotic fruit mixed teas with unique flavor combinations, black teas, high quality and very good taste.
Things have changed in the last several decades. However, Herbapol-Lublin S.A. continues to only use the best and natural ingredients for unique tasting experience and seek innovative solutions to maintain its leadership position.

STAND: **6 L 084, 6 M 084**

Has been operating incessantly for 25 years and has nearly 70 members from such fields as: farming, breeding, hatching, commercial production of poultry and eggs, processing and trade of poultry meat, its preparations and eggs, poultry feed production, related production, scientific and educational activities associated with the poultry sector. Members of KRD have a nearly 70% share of the national market and nearly 90% shares of the export.
KRD aims at developing and modernizing the Polish poultry industry, at protecting the interests of poultry farmers and producers and poultry meat processors, their integration, representing the national poultry industry before national and non-governmental organisations. KRD is a member of the most important international poultry organisations: a.v.e.c., CLITRAVI and ELPHA.

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**www.krd-ig.com.pl**

Magnolia – we are experienced wafer-manufacturer with over 35 years of tradition on different markets. We offer our international customers a wide assortment of the finest wafer products – from dry wafer sheets to delicious filled layered wafers and rolls in a variety of flavors, as well as chocolate-coated wafers.
A wide range of package size is availables for every need – from attractive impulse products to bulk packs. Our product range also includes ice cream cones, sugar bowls and wafer cups – also as gluten-free. Our partners include renowned international retail chains as well as regional retail partners in the Polish market. See for yourself and let us know your needs and requirements. Our flexible standardization gives our customers custom-tailored products for successful sales.

**Magnolia Sp. z o.o.**
3 Transportowa Street
68-300 Lubsko, Poland
Phone: +48 68 457 23 05
**magnolia@magnolia-wafle.pl**
**www.magnolia-wafle.com**

STAND: **1 A 092**

On 28 September 2015 Management Board of Makarony Polskie SA made its decision to bring to life MP TRADE company, which is dedicated to sales and marketing tagets of producer brands. An important element of MP Trade is the provision of consulting and marketing services for FMCG, especially for the food industry. Our Partners guarantee collaboration by comprehensively developed market strategies. We provide services to create marketing plans for our customers and the development of tools for their implementation, as well as services widely understood in terms of marketing and branding. Moreover, the services we provide are conducted on the basis of individually negotiated and tailored solutions based on our customers' expectations, which makes us the ideal partner in your business.

**MP Trade Sp. z o.o.**
**Grupa Makarony Polskie**
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35-082 Rzeszów, Poland
Phone: +48 22 460 24 00
**export@makarony.pl**
**www.mp-trade.pl www.makarony.pl**

Mieszko is a renowned expert in the production of pralines and chocolates for any occasion with a tradition going back more than 70 years.
It offers innovative products based on high quality natural ingredients. The most popular Mieszko brands include Cherrissimo, Amoretta, Magnifique, Chocoladorro and the well-known Michaszki.
Different publications emphasise the fact that the "Mieszko" group is a young, but dynamic and thriving confectioner. They point to a tradition dating back to 1993 when the company as we know it today was established. It is certainly true, but only partially, due to the fact that Mieszko has a history much longer standing than this. The company began operating under the brand of Mieszko, thus continuing a half century long tradition of confectionery production in the Ślązak and Raciborzanka plants.
Today Mieszko has 3 production facilities: 2 in Racibórz and 1 in Warsaw.

**ZPC Mieszko**
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**www.mieszko.pl**

STAND: **5C G 163**

**170 years of Perła – Browary Lubelskie**
Perla – Lublin Breweries S.A is currently the largest regional beer manufacturer in Poland. The history of the company dates back to 1846. This year celebrates the 170 anniversary of the set up.
The representative brand of the company is Perla Chmielowa with the characteristic bitter taste and the unique aroma – connected with Lublin Brewery for the longest time. Recent years have been a period of the dynamic development of the company, which resulted in numerous offer extension.
The well known taste was appreciated not only by Polish consumers, but also in Great Britain, France, Greece, Italy, Netherlands, Russia as well as in other continents such as: North America, Africa and Australia.

**Perla Lublin Breweries S.A.**
15 Bernardyńska Street
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## Sertop Sp. z o.o.

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**www.sertop.com.pl**

Sertop company is one of the main producer of processed cheese in Poland.
From many years the company produces high quality products keeping precise quality control.
Sertop offer includes wide range of products: processed cheese, cheese-like products, quark cheese products, fried cheese in different tastes and packaging.
Sertop offers their products on polish market as well as on European Union markets, USA, Canada, Middle East countries, South Korea.
The company has BRC Certificate Global Standard and IFS Certificate (International Food Standard).

STAND: **5A H 139**

## Wedel

28/30 Zamoyskiego Street
03-801 Warsaw, Poland
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**export@wedel.pl**
**www.wedel.com**

Wedel is the oldest chocolate brand in Poland, providing pleasure to consumers with its products for over 160 years. Emil Wedel was an unwavering optimist who infected others with his attitude.
Since 2010 Wedel has been part of the Japan-based Lotte Group, an international company founded in 1948 and initially focused on the chewing gum market.
The Wedel brand means flavor and superior quality chocolate with an intense, familiar taste. This recognizable, deep flavor of chocolate has been winning rankings for the most consumer-recommended brand in Poland for years. Anticipating customer expectations, Wedel continues to expand its portfolio, with international availability as one of the focus areas. Wedel sweets are currently exported to Great Britain, USA, Canada, Germany, Kuweit, Algeria, Australia and many other countries. Wedel's products are gaining more and more fans abroad, and the brand continues to expand its markets.

STAND: **5B H 039**

## Tan-Viet International S.A.

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TAN-VIET Capital Group engages in the import and distribution of instant soups and meals as well as oriental products in 60 countries all over the world. TAN-VIET is a producer and distributor of the branded products VIFON and its own brands TaoTao, Tokyoto, Ammko and Polka. The VIFON brand is a leading player in the category of instant soup in the Polish market, No.1 in Slovakia and Hungary. The Tao Tao brand is a definite market leader in the category of oriental sauces, actively building its position in other markets. All of our products are imported from the Far East, paying attention to their origin and traditional recipes based on natural ingredients while observing European quality standards.

## Wawel S.A.

14 Władysława Warneńczyka Street
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Fax +48 12 254 21 47
**export@foodcare.pl**
**www.foodcare.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.

STAND: **1 A 092**

## ZMB Białystok Sp. z o.o.

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**exportzmb@zmbbialystok.pl**
**www.zmbbialystok.pl**

ZMB Bialystok is a manufacturer of ripening meat and high-quality meatproducts for example: KINDZIUK, KUMPIAK, PASTURMA, COUNTRY HAM, COUNTRY BACON, COUNTRY NECK. From the very beginning, we paidspecial 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 Bialystok which is placed in a green, clear and ecologically oriented part of the country, near Bialowieza 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.

commercial information

## Perła Export

Light beer FULL

Alcohol content: 5,6 %

A refreshing beer which is the result of the traditional methods of production and the newest solutions used in the brewing industry. It has a characteristic, definite taste, a golden color and the subtle smell of the aromatic hop plants. These qualities make Perła Export a popular product among the young consumers. It is destined for foreign markets, but it is also available in Poland, especially in the Lubelskie region and the select distribution canals around the whole of Poland.

www.PERLA.pl


commercial information

## Perła Chmielowa (Hop)

Light beer FULL

Alcohol content: 6%

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

www.PERLA.pl



## 4MOVE

4MOVE is a unique composition of vitamins, micro and macro elements that meets 100% of our daily requirements of these ingeriends. Signed by one of the greates coaches in the history of football, izotonic is among leaders on the Polish market.

www.FOODCARE.pl


## BLACK Energy Drink

Mike Tyson presents: BLACK – premium energy drink with taurine and caffeine. If you need “energy kick” that gives: strenght to act, sharpens the senses and mobilization – choose BLACK! With BLACK Energy Drink you can unleash your potential and get whatever you want!

www.FOODCARE.pl

## No Added Sugar chocolates by Wawel


In a special line of Wawel chocolates with no sugar added we offer four chocolate bars of excellent quality and delicious taste: Milk chocolate, Dark Chocolate, Dark chocolate with pieces of orange and Milk chocolate with coconut. Reach for sweets without added sugar and enjoy favourite flavuors with no regrets. Discover ideal proportions of the excellent ingredients used in the careful production proces and savour our light chocolate when you feel like having a moment of sweet relaxation.

www.WAWEL.com.pl

## Wawel Premium chocolates


Premium chocolates by Wawel owe their highest-quality standards to classic recipes and careful production processes. Real Wawel chocolate has been seducing succeeding generations of gourmets for 100 years. The secrets are the traditional recipes, ingredients of the highest grade and experience gained over the years. Wide variety of Wawel Premium chocolates is now available in a new graphic line and more elegant shape with logo on each chocolate square. Trust our experience and enjoy sweets we have been manufacturing for over a century.

www.WAWEL.com.pl

## Cherrissimo Exclusive

What do you think will happen when a juicy cherry meets gentle, almond amaretto, dry wine or warming rum? The answer is certainly pleasingly. The result is an absolutely unique treat in which the taste of cherry is enriched by a distinct drop of a few popular kinds of alcohols. On top of that is delicious chocolate which will put you and your loved ones in a good mood.

If you are ready for an explosion of cherry energy, treat yourself to this delicacy for a change. It's an intriguing proposal that you are bound to return to some time...

Net weight 157g.

www.MIESZKO.pl


## Amoretta Desserts

If it were ever possible to fall in love with a gift, it would have to be a box of Amoretta Desserts pralines. Behind the elegant packaging there is a fine selection of pralines which include true masterpieces of confectionery. Their rich fillings have been inspired by the most fascinating desserts of the world, such as Creme Brulee with caramel crisps, Tiramisu with natural aromatic coffee and Panna Cotta with strawberry.

Net weight 157g.

www.MIESZKO.pl


## BiFix Green Tea Premium Line

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

www.BIFIX.pl


## BiFix Classic Line

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

www.BIFIX.pl


## American Cookies

American Cookies 135g BOGUTTI Ltd. – are sure to please chocolate lovers off all kinds, with a delicious blend of both milk and dark chocolate! Chocolate chips cookies, delicate and chocolate at the same time. It's a nice taste experience for breakfast and for coffee break. Bogutti guarantees high quality and promises maximum satisfaction with the unique chocolate taste. Bogutti offers cookies in three kinds: dark & milk chocolate chips 135g, chocolate & hazelnut 135g, chocolate & raisins 135g, American Cookies – 37% chocolate 150g.

www.BOGUTTI.com


## Choco Fit

New line CHOCO FIT 40g – really good and simple oat cookies, inspired by family kitchen, based on the traditional home recipe. They are a great alternative for breakfast, can be also serve as a snack at school or work. Cookies are manufactured from the natural ingredients: not contain preservatives, 0 Trans Fat, Contains Oat and Corn Flaces. Cookies look nice and attractive. Shelf-life of the products is 12 months.

www.BOGUTTI.com


## HERBAPOL FRUIT SYRUPS

Herbapol fruit syrups is a tasty option rich in fruit, perfect for both hot days and cold evenings. Preservative and artificial color-free, the appealing composition of flavors contains concentrated fruit juices. Thanks to high quality and efficiency, they have reigned in Polish households for generations. Syrups portfolio includes Fruit Pantry brand with over 20 flavors for all family members, as well as A double dose of health syrups with a unique composition of ingredients known for their beneficial properties. Herbapol-Lublin also offers MAX syrups for HoReCa channel.

With 33% market share, Herbapol fruit syrups remain unquestionable leader on Polish market.

www.HERBAPOL.com.pl

## BIG-ACTIVE 100% PURE CEYLON TEAS

Big-Active 100% Pure Ceylon Teas are a high quality proposition for those who seek fully natural products. Lacking artificial or additional aromas, the uniqueness of this blend comes from deep and rich flavor combined with traditional hand picking methods. Originating from Ceylon, the cradle of finest teas, Big-Active products offer exceptional experience even to the most demanding consumers. Big-Active 100% Pure Ceylon brand portfolio includes black tea, both loose and in tea bags, as well as Earl Grey enriched with bergamot oil, available in tea bags. Recently added to company's portfolio, Big-Active 100% Pure Ceylon Teas have a strong growth prognosis.

www.HERBAPOL.com.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


## 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


## Fish (herring) in Greek style

Herring fillets sunk in Greek sauce, are a delicious combination of taste, that knows every Pole. Perfectly fits today's busy times – just remove from the carton, decorate and serve right away. It is also ideal for various family celebrations, as well as holidays (eg. Christmas).

www.DEGA.pl


## Fish spread with rice

Product that connects generations. The combination of rice, meat, fish, tomato, onion and spices – they create a delicious product in pate form. This product can be consumed with bread or can be the ideal base for other dishes.

www.DEGA.pl

## Koffinki

Koffinki are unique wafers with dark leaf and coffee filling with small pieces of coffee grains inside.
www.MAGNOLIA-WAFLE.pl


## Rondelini

Delicate crispy round wafers covered in dark chocolate.
www.MAGNOLIA-WAFLE.pl


## Noodles

This new line of products impresses with distinctive tastes and aromas. Product absolutely stands out in the category of traditional pasta for soups. It will enrich flavors of traditional meals and give you whole new ideas for cooking. Available in three flavours: parsley, with dill and with lovage.
www.MAKARONY.pl


## Ribbons

With our flavoured pasta ribbons you can invite tastes from all over the world to your kitchen. Perfect for sauces and as a side dish. Available in seven flavours: pepper & chili, curry, spinach & garlic, cocoa, cinnamon, rosemary and mushroom. Just use your imagination to create your favorite meal.
www.MAKARONY.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.ZMBDYSTRYBUCJA.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 specialty of the highest quality at our company.
www.ZMBDYSTRYBUCJA.pl

## Tao Tao Noodle Konjac

Light and tasty addition to many dishes? Noodle Konjac! Plant origin, 100% gluten free, low-calorie (only 29 calories/100g). Perfect as addition to salad, soy sprouts, fried courses, meat, and vegetable dishes even in pairs with fruits. Shelflife: 14 months. Storage: without cooling. Diet – friendly and tasty without cooking!
Noodle Konjac: Perfect reply of the brand TaoTao to new market trends.
www.TAN-VIET.com.pl


## Vifon Gluten-free soup

Completely amazing: gluten – free soups in paper cups with rice noodles! Tasty answer to the demand of the market. Available in three new flavours: Shrimp (with whole shrimp), Hot-sour (with whole shrimp), Vegetarian. The leading player in a related category – instant soups, a strong, easily recognizable brand, a high brand awareness among consumers.
www.TAN-VIET.com.pl


## Milk chocolate with Tiramisu flavour filling 293g

Wedel desserts flavour chocolate range – combination of high quality milk or dark chocolate and modern desserts flavours. Attractive, catchy, must try proposition incl. such flavours as Tiramisu, Panna Cotta, Crème brûlée and Brownie.
www.WEDEL.pl


## Milk chocolate 100g

Milk chocolate with traditional, recognizable, deep flavour that is owed to cocoa from Ghana. Other solid chocolate tablets offered by Wedel are: dark chocolate, dessert chocolate, white and caramel white chocolate.
www.WEDEL.pl


## Polish pultry meat

Polish poultry meat can successfully compete with the offer of world leaders by:

√ competitive pricing – which you can expect from Polish producers and which becomes the key factor, when the product is of impeccable quality in relation to the price;

√ exceptional quality and taste, resulting from full control of the production process "from farm to fork";

√ wide selection of poultry products: chickens, turkeys, geese, ducks and other types of poultry, offered as fresh meat: carcasses and different cuts (available also as frozen meat) and offal and preparations.

www.KRD-IG.com.pl

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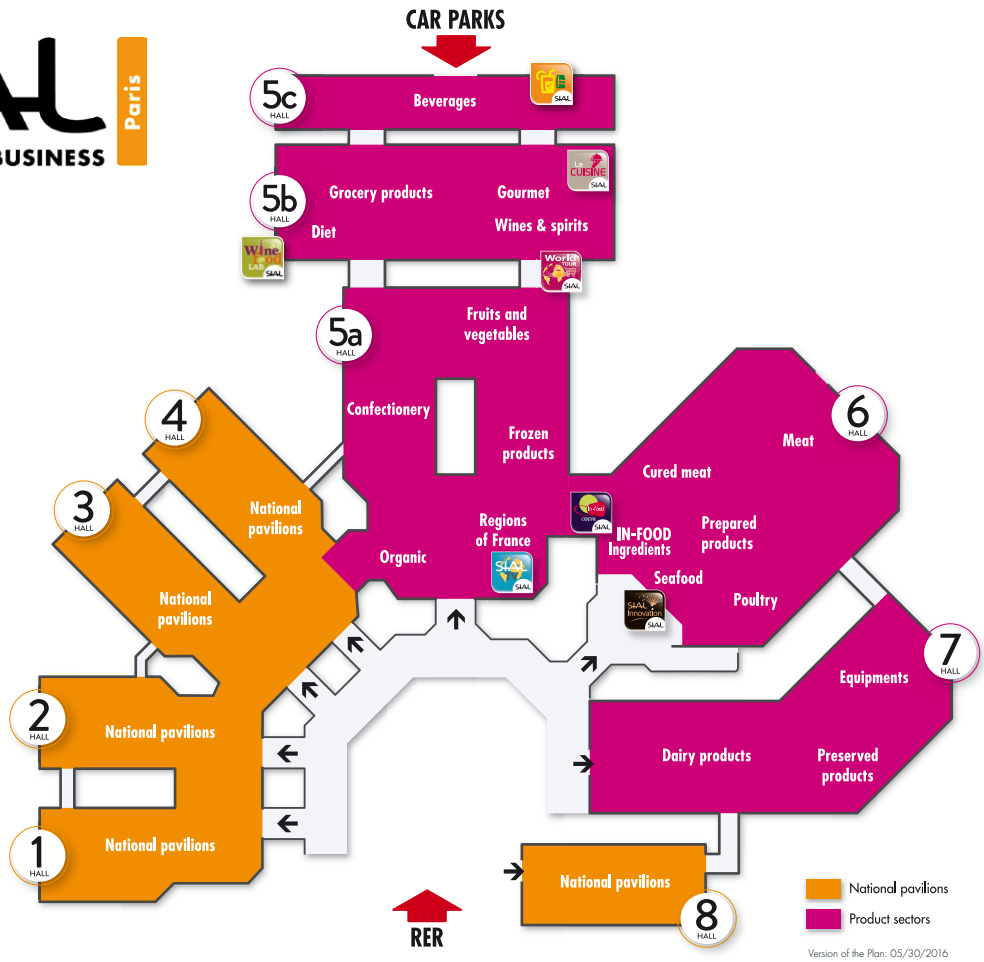


# List of Polish Exhibitors

| Exhibitor | Stand |
|---|---|
| A-GROSIK JACEK WOLKOWICZ FOOD PROCESSING AND TRADE SPECIALITY FOODS | 5b P 093 |
| ACTIV | 5a J 027 |
| AGENCJA RYNKU ROLNEGO | 1 A 092 |
| AGRICO POLAND | 6 C 234 |
| AGROS TRADING CONFECTIONERY | 5a L 051 |
| ARSENAL | 5b P 169 |
| ARSENAL PL | 5b H 061 |
| ARTETA | 5b M 182 |
| ASSOCIATION OF POLISH BUTCHERS AND MEAT PRODUCERS | 6 L 100 |
| AVES | 6 L 084 |
| BAKALLAND | 5b M 186 |
| BAKOMA | 7 B 193 |
| BARTEX | 7 B 247 |
| BIELMAR PRODUCTION OF MARGARINES AND VEGETABLE OILS | 5b P 137 |
| BIERNACKI MEAT PROCESSING PLANT | 6 D 213 |
| BIFIX | 1 A 092 |
| BIG BRANDS GROUP | 5C E 102 |
| BONA ZAKLADY SPOZYWCZE | 5b M 194 |
| C. OLSEN TRADING | 7 B 183 |
| CARMI FOOD | 6 L 084 |
| CELIKO | 1 A 092 |
| CHIPS AND SNACKS SEBASTIAN RYCZKOWSKI SP.K. | 5b M 198 |
| CHOCOMOCO | 1 A 092 |

| Exhibitor | Stand |
|---|---|
| CRISPY NATURAL | 5b H 205 |
| DAIRY IN LOWICZ POLAND | 7 B 243 |
| DAMAK KEBAB PRODUCTION | 6 K 189 |
| DAWTONA | 7 C 261 |
| DERRIEN SANDWICH-BURGERS | 6 G 115 |
| DIASPOLIS | 5a M 251 |
| DIET-FOOD | 4 N 026 |
| DRINKTECH | 5C E 250 |
| DROSED GROUP | 6 J 084 |
| EFARM MACIEJ ROSNER | 6 L 084 |
| EKO-VIT | 5C E 254 |
| ELIS ALI ESKI | 1 A 092 |
| ELKOPOL | 6 L 100 |
| EWA-BIS | 1 A 092 |
| EXDROB | 6 L 084 |
| FAGUMIT | 7 D 335 |
| FANEX TRADE | 5C G 190 |
| FOOD FROM POLAND (PRESS) | 6 K 194 |
| FOOD SERVICE | 6 M 188 |
| FOOD4GOOD "ZYWNOSC DLA ZDROWIA" | 1 B 073 |
| FOODCARE | 5C E 002 |
| FORTUNA | 7 B 184 |
| FRIGO LOGISTICS | 6 B 083 |
| GENATA EUROPEAN GOODS | 5b P 190 |
| GRANA | 5b P 089 |

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## INVITES YOU TO PARTICIPATE IN FOOD INDUSTRY FAIRS

| FOOD FAIRS IN 2016 | | | |
|---|---|---|---|
| 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 SHANGHAI | CHINA | SHANGHAI | 7-9 December |
| MAFEX/ PACK 2 PACK | MOROCCO | CASABLANCA | 7-9 December |
| **FOOD FAIRS IN 2017** | | | |
| FOOD HOSPITALITY WORLD | INDIA | MUMBAI | 19-21 January |
| WINTER FANCY FOOD SHOW | USA | SAN FRANCISCO | 22-24 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 |
| EXPO ANTAD & ALIMENTARIA MÉXICO | MEXICO | GUADALAJARA | 8-10 March |
| INTERNORGA | GERMANY | HAMBURG | 17-21 March |
| FOOD EXPO GREECE | GREECE | ATHENS | 18-20 March |
| IFE | GREAT BRITAIN | LONDON | 19-22 March |
| FOOD & DRINK EAST AFRICA | KENYA | NAIROBI | 4-6 April |
| INTERNATIONAL PRIVATE LABEL SHOW | RUSSIA | MOSCOW | 5-6 April |
| WINE & GOURMET | JAPAN | TOKYO | 12-14 April |
| ANUFOOD EUROASIA | TURKEY | ISTANBUL | April |
| SIAL CANADA | CANADA | TORONTO | 2-4 May |
| FOOD AND HOSPITALITY AFRICA | REPUBLIC OF SOUTH AFRICA | JOHANNESBURG | 7-9 May |
| PLMA'S WORLD OF PRIVATE LABEL | HOLLAND | AMSTERDAM | 16-17 May |
| SIAL CHINA | CHINA | SHANGHAI | 18-20 May |
| ALIMENTARIA & HOREXPO LISBOA | PORTUGAL | LISBOA | 21-23 May |
| WORLD FOOD/INGREDIENTS | AZERBAIJAN | BAKU | May |
| THAIFEX | THAILAND | BANGKOK | 31 May-4 June |
| WORLD OF COFFEE & TEA | THAILAND | BANGKOK | 31 May-4 June |
| WORLD OF FOODSERVICE | THAILAND | BANKGOK | 31 May-4 June |

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# List of Polish Exhibitors

| Exhibitor | Stand |
|---|---|
| HORECA SERVICE | 5a J 131 |
| INDYKPOL | 6 L 084 |
| INSTANTA | 5b L 036 |
| INTER EUROPOL PIEKARNIA SZWAJCARSKA | 5a R 158 |
| KASKAT | 7 E 160 |
| KOZACKI HONEY (PSZCZELARZ KOZACKI) | 5b M 200 |
| KRAJOWA RADA DROBIARSTWA – IZBA GOSPODARCZA | 6 L 084, 6 M 084 |
| KRYNICA VITAMIN | 5C G 194 |
| KSC | 1 A 092 |
| KUPIEC | 4 HJ 032 |
| LACTIMA | 1 A 092 |
| LMEAT-LUKOW MEAT COMPANY, JSC | 6 L 100 |
| LOTTE WEDEL | 5a H 139 |
| LYOFOOD FREEZE-DRIED MEALS & POWDERS | 1 A 092 |
| LYOVIT FREEZE-DRIED INGREDIENTS | 1 A 092 |
| MAJAMI | 5a J 205 |
| MAKARONY POLSKIE | 1 A 092 |
| MAKRO KOSIOROWSKI & KOSIOROWSKI | 4 J 020 |
| MALBI FOODS EUROPE | 5a J 206 |
| MALPOL | 1 B 073 |
| MAMUT | 1 A 092 |
| MAREK CHMIELEWSKI | 1 A 092 |
| MASPEX WADOWICE GROUP | 5C E 173 |
| MEAT PROCESSING PLANT "PEKPOL OSTROLEKA" | 6 M 084 |
| MEAT TEAM POLAND | 6 F 165 |
| MELVIT SA | 5b P 194 |
| MICROFOOD PIOTR BARCZYK | 1 B 073 |
| MITMAR | 6 L 156 |
| MLEKOVITA SPOLDZIELNIA MLECZARSKA | 7 E 151, 6 M 188 |
| MLEKPOL IN GRAJEWO – POLISH DAIRY COOPERATIVE | 7 E 242 |
| MORELLO | 7 A 250 |
| MR.POLBEE | 5a E 077 |
| NATURAL FOOD | 1 B 073 |
| NERO | 6 H 165 |
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| OCTIM WYTWÓRNIA OCTU I MUSZTARDY | 5b M 194 |
| OKECHAMP | 7 D 286 |
| ORZECH | 1 A 092 |
| OSHEE COMPANY | 5C EF 249 |
| P.D.DROBEX | 6 L 084 |
| P.P.H. PRIMART MAREK LUKASIEWICZ | 5a H 232 |
| P.P.H.U. "FASOLEX" S. JASIAK I S-KA | 5a K 235 |
| P.P.H.U. MARK'S | 6 JK 196 |
| P.W. SPOMET | 5a J 199 |
| PAMAPOL | 5b P 200 |
| PAULA | 5b H 205 |
| PERLA - BROWARY LUBELSKIE | 5C G 163 |
| PERLAGE | 5C F 182 |
| PIEKARNIA GALICYJSKA | 5b M 190 |
| PLANET FOOD | 5b L 006 |
| POKOJ COOPERATIVE | 1 A 092 |
| POLAGRO TRADE | 6 D 170 |
| POLAN | 7 DC 306 |

| Exhibitor | Stand |
|---|---|
| POLANDFRUITS | GA6 012 |
| POLISH BEEF ASSOCIATION | 6 L 100 |
| POLMLEK | 7 B 184 |
| POLSKIE MIESO I WEDLINY LUKOSZ | 6 L 084 |
| PPH MAXPOL | 6 K 194 |
| PREMIUM DISTRIBUTION | 1 A 092 |
| PRZETWORNIA OWOCOW I WARZYW ROBERT KOWALKOWSKI | 5b M 200 |
| QUADRUM FOODS | 5a N 108 |
| QUICKER | 1 A 092 |
| RAB JAZYNIEC ADAM MODER, BOGUSLAW JOZWIKOWSKI | 6 K 198 |
| RARYTAS | 5a H 234 |
| RENE COFFEE CAPSULES & PADS | 5b L 001 |
| RES-DROB | 6 L 084 |
| SADECKI BARTNIK HONEY | 1 A 092 |
| SANTE A. KOWALSKI | 5a H 055 |
| SMAK TRADYCJI IRENA OLEJNICZAK | 1 B 073 |
| SNAILS COMPANY | 1 A 092 |
| SNS FOODS | 6 K 201 |
| SOT DAIRY TRADING COOPERATIVE | 1 A 092 |
| SPA | 1 B 073 |
| SPOMASZ PLESZEW | 1 B 073 |
| STAN PRODUCER OF PICKELD CUCUMBERS & SAUERKRAUT | 1 B 073 |
| STOVIT GROUP | 7 C 303 |
| SUPERDROB | 6 L 084 |
| SYMPATIC | 5a D 145 |
| SZALPOL ANDRZEJ SZALA | 7 E 021 |
| TAGO P.P.C. TADEUSZ GOLEBIEWSKI | 5a H 200 |
| TAN-VIET CAPITAL GROUP | 5b H 039 |
| THE LODZKIE REGION | 1 A 090 |
| THE POLISH MEAT ASSOCIATION | 6 L 100 |
| THE REGIONAL DAIRY COOPERATIVE IN KOLO | 1 A 092 |
| TURKA INVEST | 5a J 235 |
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| VAN PUR | 5C D 012 |
| VAXMAN GROUP | 5C G 078 |
| VICTORIA CYMES | 5C EF 253 |
| VIN-KON | 5C F 112 |
| VITALPOL | 1 A 092 |
| VODA NATURALNA | 5C E 082 |
| WIELKOPOLSKA REGION | 1 B 073 |
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| ZACZYK | 6 D 169 |
| ZAKLADY DROBIARSKIE KOZIEGLOWY | 6 L 084 |
| ZBYSZKO COMPANY | 5C G 048 |
| ZLOTO POLSKIE MAREK WOLNIAK | 1 B 073 |
| ZM NOWAK | 6 L 084 |
| ZMB BIALYSTOK | 1 A 092 |
| ZPC FLIS | 5a J 213 |
| ZPS "JAMAR" SZCZEPANIAK | 7 D 296 |


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