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from

Polish Magazine for Professionals



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Hello!

Popularity of private label keeps growing across Europe. According to Nielsen (2016) **private label share in Poland is nearly four times as high as it was a decade ago.** In Czech Republic, Hungary and Slovakia private label volume share has increased to more than 30%. Volume share climbed to 35% in France and to over 46% in the UK. Market share in Germany, Austria and Portugal stays above 40%; in Switzerland and Spain over 50%. Scandinavian and mediterranean countries such as Denmark, Finland, Norway, Sweden and Italy, Greece and Turkey have also posted market share gains.

The data leads to the conclusion that PLMA trade fair is an essential FMCG event and the private label business is unique.

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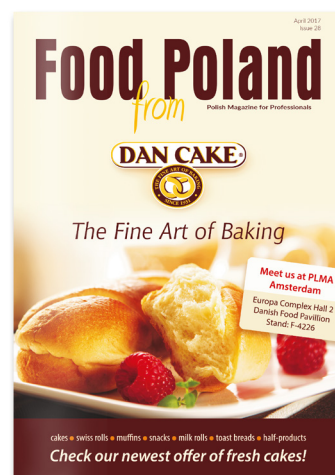
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PLMA – World of Private Label



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For thirty years, PLMA's annual "World of Private Label" International Trade Show has brought retailers together with manufacturers to help them find new products, make new contacts, and discover new ideas that will help their private label programmes succeed and grow. Today, the need for new products, contacts and ideas has never been greater. Private label market share stands at its highest ever. The future promises even more private label as retailers expand internationally and take a larger role in marketing themselves and the products that they sell. PLMA's 2017 "World of Private Label" International Trade Show will be held at the RAI Exhibition Centre in Amsterdam, The Netherlands, and will present over 4 300 exhibit stands including nearly 60 national and regional pavilions. Products on display will include fresh, frozen and refrigerated foods, dry grocery, and beverages as well as non-food categories, including cosmetics, health and beauty, household and kitchen, auto aftercare, garden, and housewares & DIY. The show floor is divided into separate food and non-food halls to help visitors make the most of their time.

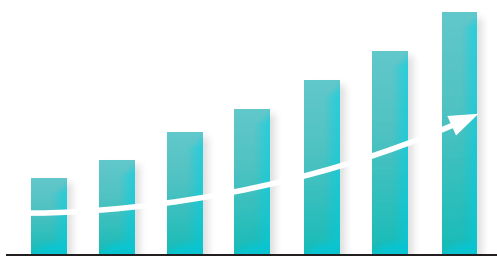
Good news for grocery retailers



There are some positive signs that 2017 may be a better year for grocery retailers. The latest quarterly FMCG figures from Nielsen show that the European grocery market increased at its fastest rate in a year. Grocery retailers surveyed in 21 countries reported a 1.8% year-on-year boost in sales of fast-moving consumer goods such as food, drinks, and toiletries. Although the year got off to a slow start, sales increased in the final quarter. "The value of the shopping basket has increased due to a number of factors including inflationary price rises, people buying more goods and changing their product mix by purchasing more premium and fresh foods," Nielsen said. Western Europe saw little momentum in volume sales, affected by unit value deflation in Spain and Italy and low inflation in France and the UK. Sales in Turkey increased 8.8% compared to a year earlier. Poland (+4.7%) and Hungary (+4.5%) also posted strong sales gains.

Ahold Delhaize reports gains

The newly merged Ahold Delhaize is off to a fast start. It reported strong sales growth for its fourth quarter and fiscal full year, saying that the integration of the Ahold and Delhaize groups is making good progress. Total turnover in 2016 reached 62bn euros, a 2.4% increase over the prior year. Operational profit also grew, up 3.9% to 1.9bn euros. Performance was especially strong in the Netherlands, where fourth quarter turnover grew 7.5% and full-year turnover went up 5% to 13bn euros. Albert Heijn's market share grew to over 35% and its Dutch like-for-like turnover climbed 4.1%. Results were not as strong in Belgium, Delhaize's home territory. Fourth quarter turnover dropped 1% and its full-year turnover increased by only 1.7% to 4.9bn euros. Delhaize's market share remained stable, at slightly over 24%.



Tesco grows organic sales



Britain's largest grocer is finding success with its organic products. Tesco reports that its total organic product sales increased 15% over the past year, as organic fish and dairy products proved more popular with shoppers. Organic meat and chilled foods sales increased by 13% over the past 12 months. "The popularity of organic food began with fruit and vegetables but are now seeing customers exploring areas such as grocery, fish and dairy, so you can now use organic produce for the whole meal," Tesco said.

Lidl spends in France Rema 1000 cuts brands



Lidl spent more money on advertising than any other large retailer in France, according to published reports. The retailer posted a 40% like-for-like increase in its advertising budget last year, with a total of 415m euros spent. The next-largest budget for a supermarket retailer was E.Leclerc, with 325m euros.

Rema 1000, one of Norway's leading retailers, is removing many major brands from its shelves, in favour of local suppliers and only a few national conglomerates. The retailer's so-called "best friends" strategy involves developing closer ties with selected suppliers and dropping others on a national basis, to cut costs. With higher volume for the "best friend" brands selected, Rema figures it will be able to sell them at lower prices and resume its position as Norway's lowest-priced chain, by Norwegian standards. Along with the new strategy, Rema 1000 is introducing the Rema Prima brand.

Edeka extends dairy range



Edeka Group is extending its range of dairy-based products, made with milk from cows that are fed GMO-free feed for a minimum length of time. The newly-launched or re-branded GMO-free milk-based products can be recognised by a green, diamond-shaped 'Ohne Gentechnik' seal, which is issued by the VLOG: the Verband Lebensmittel ohne Gentechnik, or the German Association of Foods (produced) without Genetic Engineering. In addition, Edeka is launching around 40 yoghurt and milk-based products under a new private label brand 'Good Food', which represents more sustainable and eco-friendly farming. To qualify for this label, products need to have been produced with milk from cows fed a GMO-free feed, which was produced in Germany, or at least the EU, as well.

MARKET RESEARCH

"Free-from" and organic foods sales climb.

Sales of "free-from" and organic foods keep climbing in Europe, according to new data from Euromonitor International. In Eastern Europe sales of free-from and organic products were up 10.6% and 8.8% respectively in 2016 compared to 2015. In Western Europe, free-from increased 11.5% while sales of organic rose 5.4%. Sales of organic across Europe reached almost 13.8bn euros last year, while free-from totalled just under 7.8bn euros. The products also had a great year worldwide, with organic up 7% to 33.8bn euros and free-from up 6.8% to 30.0bn euros. Globally, free-from gluten (up 12.9%), organic savoury snacks (up 12.7%) and organic soup (up 11.7%) posted the most impressive 2016 sales growth figures in Euromonitor's analysis. Not far behind were products free-from meat, with sales rising 11.4% to 2.4bn euros last year. Western Europe drove the growth with sales up more than 15% to 960m euros.

Aldi moves up in UK



Aldi is now the UK's fifth largest grocery retailer. Latest grocery market share figures from Kantar Worldpanel for the 12 weeks ending 29 January 2017 show that the discounter's sales were up 12.4% year-on-year with its market share increasing by 0.6 percentage points, overtaking the Co-op and clinching the fifth place slot for the first time. Kantar said: "Just a decade ago Aldi was the UK's tenth largest food retailer, accounting for less than 2% of the grocery market. Since then the grocer has grown rapidly, climbing the rankings by an impressive five places to hold a 6.2% market share. Underpinned by an extensive programme of store openings, the past quarter has seen Aldi attract 826,000 more shoppers than during the same period last year."

China slows down



China's FMCG market in 2016 grew by just 2.9% year-on-year, marking its slowest growth in the last decade, according to Kantar Worldpanel. In contrast, the market grew by 3.5% year-on-year in 2015. Kantar said the growth of modern trade (hypermarkets, supermarkets and convenience stores) slowed to just 0.7%, challenged by both a decelerating economy and a rapidly growing e-commerce channel. Market share for international retailers declined to 11.9%. The report found that 54% of Chinese urban families bought FMCG products online during the year, a 10-percentage points increase on the year.

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Interview with Joanna Gąsiorowska, President of the Management Board, Rarytas Sp. z o.o.

Certified quality – that is crackers, sandwich cookies and biscuits created with passion. Which of the offered products sell best and what are your development plans for the upcoming months?

The sales of our products are shaped very differently, depending on the preferences and tastes of our customers from different continents, countries, or even regions within a country.

For instance, taste preferences of the inhabitants in southern Poland are different than those of Poles from the north.

The former prefer our sesame crackers, the latter definitely choose the savoury ones. To sum up, the best-selling products are the mentioned 100 g and 200 g sesame crackers, as well as savoury crackers of the same weight. On the other hand, our Classic and Pikantne (Savoury) crackers in 100 g packages have settled excellently on the European market, while two other products from this series, Bekon (Bacon) and Cebula (Onion), are trying to catch up with them. An attractive package, convenient for serving “straight to the table” in a plastic tray and, of course, the taste are advantages that spark an increasing interest in these products in our partners at home and abroad. However, our greatest export “hit” seems to be the JOY crackers in a 200 g box. Due to its unique taste and the aesthetics of the packaging, purchase orders for possibilities to sell this products had already been reaching us at the stage of market research.

How does the private label development look like today and what export potential does it have?

Rarytas Sp. z o.o. cooperates with virtually all leading trade chains on the market, this is our great success.

I might not be very revelatory by saying that changes in development strategies for private labels, offered by trade chains, may prove beneficial to us, and surely to individual customers. We, as manufacturers, can already notice an increased “pressure” from private label owners for the quality of the manufactured products, as well as improvement in package quality of such products. The misconception that such goods are “inferior”, still present among the consumers, is to be changed. Such products are increasingly better exposed in shops, have a more attractive package, both their appearance and quality of production match the Premium class goods or Top Brands. Very often, private label products are promoted in trade chain newsletters or TV commercials, which would still have been unthinkable quite recently. Therefore, I can see much potential in the development of sales of private label products, both at home and abroad.

How important are exports in your activity? What countries do you supply with your products?

Our company, which should actually be true for every company, is built on solid foundations. One of them is export. This is the essential direction of development for every company in our sector. Moreover, due to the hard work of food producers, our products are being perceived increasingly better on external markets. A product from Poland means high quality, this is beginning to be a brand in itself. This also measurably affects the entire economy, since food is the no. 1 export product in our country. Rarytas focuses on exports through the development of the Export Department, and it constantly introduces new products intended for foreign markets. Currently, we are introducing a new, four-taste series “Feria Crackers” in portions of 100 g. These are crackers with Mediterranean tastes, i.e. sea salt and rosemary; herbes de Provence; dried tomatoes and oregano; garlic and pepper. A very important step in our development is the introduction of One.bite products to the German market and beyond, distributed by Lecker Snack GmbH. Thanks to these activities, our products can be found virtually all across Europe and on almost every continent.

Which products are best-selling abroad?

These are the cookies I have already mentioned, the 100 g cracker series: Classic, Bacon, Savoury and Onion. Another important place in sales (especially in trade chains) is occupied by sesame and savoury crackers, salted mix, crackers with caraway, or Mini Pizza. After such a good reception on the market, we strongly count on good the sales of Joy in the 200-gram box, and the “Feria Crackers 100 g” range.

“Zdrowy Rarytas” (For your health), or products made with the best ingredients, without hydrogenated fats or palm oil. What products with the “For your health” logo do you offer and how do sales look like?

Thank you that you have mentioned this quality and health-improving benefits are extremely important parts of our marketing strategy. All our new products already bear the “For Your Health” logo, we enjoy the fact that responsible nutrition awareness is growing amongst our consumers, and consequently, the interest in products with this marking is growing too. Moreover, the most popular, traditional Rarytas products, i.e. sesame, savoury or cheese crackers, are also produced in this new technology now, although the packages do not bear the “Zdrowy Rarytas – For Your Health” mark yet.

I have to announce the start of our investment – construction of a new production floor; when it is finished, all of our cookies will be sold with this logo. And which crackers already bear this mark?

For detailed information, please visit our stand F-5663 during the Amsterdam fair, as well as our website: www.rarytas.pl.

Thank you



Interview with Tomasz Kaniewski, Management Representative for Quality Management System, Hal Sp. z o.o.

For 10 years, the Hal company has been offering private label products. How has this market segment been changing over the years, and what were the changes in the offer and the products themselves?

Over the recent years, the private label market has changed quite considerably. Firstly, it has expanded with regard to product categories. Some private label products had not been the focus of the customers’ interest before. Secondly, the products themselves have changed over time, due to the increase in requirements and changes in the expectations of private label distributors. Additionally, the private label product consumers have started to see the products differently, their expectations concerning the appearance, functionality, and also price, have grown. As Hal, we started private label production with the Kolorado WC Fresh single-phase toilet rim block, currently, the hit of our private label production is the designer Roll Aroma toilet rim block – a triple-phase block containing active oxygen.

What is the extent of export activities at Hal and does the company intend to expand this in the nearest future?

Currently, Hal is present on more than twenty export markets, both in the EU and in Eastern European countries. Our customers are both distributors or large trade chains and owners of recognized brands in assorted countries. In the nearest future, the company intends to acquire new markets, not only in Europe but in the Middle East as well.

Please tell us about the major awards and distinctions you have received.

Hal, currently celebrating 25 years of operation, has been winning the “Gazelles of Business” for several years. Companies distinguished with this title are among the most dynamically developing small and medium businesses in Poland. In order to receive

the award, one has to demonstrate a year-to-year increase in trade. Another award worth mentioning are the FMCG Hits. This is a competition for retailers and wholesalers who appreciate the best-selling products in different categories. The Kolorado brand products have been gaining the recognition of sellers for several years; last year, the distinguished product was the Kolorado Roll Aroma toilet rim block.

How can a Polish private label compete on foreign markets?

The times when we would compete through price alone are long gone. Polish companies still have attractive prices, but additionally, the advantages of cooperation with Polish companies include production flexibility and, above all, product quality and development. Quality here is understood as the fulfillment of different customer requirements, use of proven ingredients and production compliant with strict quality standards. Hal has a certified quality system in place, based on the BRC Consumer Products standard. What also makes Polish suppliers stand out is good, modern design and professional consulting in the production of private label products.

Which products of Hal’s portfolio are particularly popular outside Poland?

Currently, the most popular products are toilet rim blocks, both single-phase and triple-phase; last year, it was predominantly Kolorado Roll Aroma. We hope our new, designer Kolorado Aromella air freshener will become as popular. The product answers the needs of consumers looking for a natural fragrance to fill their home, packed in an attractive, designer form. It is a modern air freshener for everyday use. It provides an opportunity to choose fresh and natural scents that will fill a bathroom, a living room or any other room.

Thank you



Interview with Marek Maciejewski, Sales Department Manager, Sertop Sp. z o.o.



What are the prospects of development for the Polish dairy industry? In what way has the private label changed the dairy market?

The current period is not easy for the dairy industry, the market is not stable and its condition is affected by many external factors. As we all know, the Polish dairy market does not vary much from the European standards, similarly evolving and responding to its environment. Nevertheless, it is constantly growing, and this trend is positive. Polish manufacturers are finding new markets, especially in the Middle East but also in the countries of far Asia, such as China, India, Vietnam, and South Korea. In search of new opportunities and market expansion, many manufacturers have decided to produce under the private labels of their customers. As late as several years ago, this category accounted for a small percentage of the products offered on shop shelves in Poland. Currently, private label products comprise a large portion of the shops' offer. Customers are increasingly eager to reach for products marked by a trade chain brand. For many manufacturers, production under a private brand means compensation for dropping sales of goods manufactured under producer brand.

What does the situation on the processed cheese market look like? What are the consumer and market trends?

Processed cheese consumers, especially in Poland, are rather conservative in their choices, particularly in regard to the cheese types and flavourings used in production. However, their expectations have been changing in the recent years; therefore, we constantly seek to adapt and change our offer. We introduce new tastes or package forms. In the recent period, we have expanded our offer with new items in the 100 g "Jak dawniej" series of long block packed products, as well as the 280 g circle in the family version, i.e. a double-layer package with 16 wedges in a single box. The export market, European or global, is not homogenous. We have to continually adapt our offer to the expectations of local markets. Three attractive tastes: Edam, Z wędzoną Goudą (With Smoked Gouda), and Camembert, are currently available. Nevertheless, different consumer behaviour and preferences can be observed in different countries. They result from varied cultural or historical conditions. For instance, the traditional 100 g block, still the mainstay of the offer in Poland and the Czech Republic, is completely unknown in other European countries. This mobilizes us to create products to find recognition abroad.

What conditions have to be fulfilled so Polish dairy companies could truly compete on the global market?

Sertop is a company with a 100% Polish capital, operating and offering its products for more than 50 years. It also has considerable

experience with regard to finding its way on a difficult market. The competition is huge, and we find competition from global companies to be a particularly serious challenge. For such a manufacturer as Sertop, it is extremely important to have support in promotional activities at home and abroad. All kinds of support in participation in foreign exhibitions, trade fairs, or missions is surely great help.

Private label – what are the facts and myths? Are Polish and foreign market consumers well educated on this matter?

Private label products of trade chains have appeared in Poland quite recently. Initially, it seemed that customers treated them warily, as products of a considerably lower quality. However, intense advertising activities undertaken by the chains in the promotion of "their" products have changed this approach. On the other hand, activities of trade chains, aimed at improving the quality of private label products, have also been noticed by the consumers. Currently, such products find many customers. Of great importance is also the affluence of Polish consumers: let us be honest, what makes Poles eager to reach for these goods is their low price. However, in the recent period, a trend can be noticed to reach for Polish products made by Polish manufacturers. Any actions helping to promote Polish goods, smartphone apps, etc. are increasingly popular and constitute a valuable initiative in the area of educating customers. Similar trends, i.e. moving away from the fascination with "Western" food, can be observed on the neighbouring markets. Therefore, Polish products have to compete, above all, through quality and price.

How was the company's abroad image created? How does cooperation with business partners look like?

Sertop Sp. z o.o., in the legal form it has today, has been present on the market for 25 years, yet its traditions date far back to 50 years ago. Over that time, Sertop managed to maintain its share in the market and has been constantly developing, increasing its potential as well as its presence on foreign markets.

We seek to create an attractive offer, helping us to maintain our position. Nevertheless, an important part we are constantly developing is export.

We are concerned with acquiring "footholds" in countries with a high consumption of processed cheese, i.e. the Arab countries. We work on the adaptation of our products to the requirements of their markets. A considerable role in these activities is played by our partners and distributors on those markets. It is them who are best oriented in the expectations of local markets. Therefore, strict cooperation by listening and adapting to the partners' expectations is extremely important.

Thank you

50 years of tradition and taste

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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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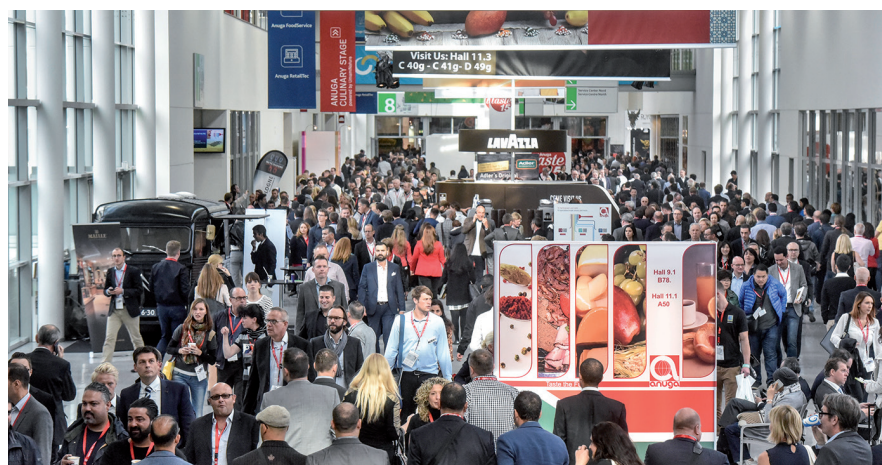


The MAXPOL Company was established in 1990. Its business profile currently includes the organization of participation of Polish companies in international trade fairs and exhibitions abroad, as well as the organization and service of conferences and meetings for the purposes of presentation. For five years, we have also been involved in the construction of exhibition stands, providing our exhibitors with both standard and custom-made fittings, the latter made according to our own or the exhibitor's design.

Our exhibitors can benefit from a full package of services, obviously, of the exhibitor's choice. This package includes a full range of services connected with rental of exhibition space, arrangement of electric connections, water supply to stands, accreditation of the company together with entry into the fair catalogue, as well as the preparation of the stand design and equipment or ordering entry passes, invitations or parking tickets. We also assist in booking accommodation and airline tickets. Another service of ours is the transportation of the customer's exhibits from Poland to the place where the fair is to be held, including direct delivery to the stand. Additionally, at the entrepreneur's special request, we mediate in the hiring of interpreters and hostesses for the duration of the fair, and we provide rental of conference rooms for free and relaxed negotiations and displays. We also offer full advertising activities in fair and exhibition catalogues as well as in professional publications in a given country.

Our first trade fair, held in Lviv, Ukraine in 1990, was the fair that initiated our entry into Ukraine; later, we would organize fairs in Russia. Currently, we organize fairs worldwide, also providing exhibition stand fittings. Customers themselves make decisions concerning the choice of foreign fairs, depending on their interest in new outlets – often in very distant places in the world.

Our offer includes many prestigious trade fair events, such as: ANUGA in Cologne, PLMA in Amsterdam, IFE in London, ISM in Cologne, Yummex in Dubai, or SIAL in Paris, Shanghai and Canada.



You will find recommendable fairs in our schedule, both in this issue of Food from Poland and on our website.

At many of the fair events mentioned above, exhibition space is booked one year in advance, and companies even book the same space during the fair.

Customer satisfaction has been our creed since the very establishment of our company. Systematic growth of the number of exhibitors and expansion of the group of regular customers participating in many trade fairs each year has allowed us to gain recognition of professional institutions. Our activity has been positively evaluated and honoured with the prestigious title Leader of Exhibition Services. We also hold a recommendation by the Polish

Chamber of Exhibition Industry.

The professionalism of customer service at our company is high. We help companies decide on their participation in trade fairs, we are always available, we treat our customers seriously, we think ahead, solve and prevent problems on an ongoing basis, we have a comprehensive approach to the customer and a good reputation among them.

As we know, the success of an enterprise is based on the financial results, achievements of the intended goal. But in our opinion, the success is also impacted by people – customers, employees, and suppliers. It is them who shape positive results. Such cooperation also translates to the exhibition industry. This is why we look optimistically into the future.



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- preparing and assembling the individual stands, stands arrangements;
- forwarding and customs clearances of company's products with the delivery directly to the stand;
- such professional services for fair participants as: flights, accommodation, local transfers in the city of the fair.



| FOOD FAIRS IN 2017 | | | |
|---------------------------------|----------------------|---------------|-------------------------|
| BELAGRO | BELARUS | MINSK | 6-10 June |
| ALIMENTEC | COLOMBIA | BOGOTÁ | 12-15 June 2018 |
| SUMMER FANCY FOOD SHOW | USA | NEW YORK | 25-27 June |
| SPECIALITY & FINE FOOD ASIA | SINGAPORE | SUNTEC | 18-20 July |
| SPECIALITY & CHOCOLATE ASIA | SINGAPORE | SUNTEC | 18-20 July |
| FIPAN | BRAZIL | SÃO PAULO | 25-28 July |
| CONFITEXPO | MEXICO | GUADALAJARA | 1-4 August |
| VIETFOOD & BEVERAGE / PROPACK | VIETNAM | HỒ CHÍ MINH | 9-12 August |
| FOODAGRA TANZANIA | TANZANIA | DAR ES SALAAM | 22-24 August |
| ANUFOOD CHINA | CHINA | BEIJING | 30 August - 1 September |
| SPECIALITY & FINE FOOD FAIR | GREAT BRITAIN | LONDON | 3-5 September |
| WORLD FOOD (GIDA) | TURKEY | ISTANBUL | 7-10 September |
| FINE FOOD AUSTRALIA | AUSTRALIA | SYDNEY | 11-14 September |
| WORLD FOOD | RUSSIA | MOSCOW | 11-14 September |
| ANNAPORNA - WORLD OF FOOD INDIA | INDIA | MUMBAI | 14-16 September |
| BIOFACH AMERICA | USA | BALTIMORE | 14-16 September |
| YUMMEX | UNITED ARAB EMIRATES | DUBAI | 18-20 September |
| ANUGA | GERMANY | COLOGNE | 7-11 October |
| TALLINN FOOD FAIR | ESTONIA | TALLINN | 25-27 October |
| INDAGRA FOOD & DRINK | ROMANIA | BUCHAREST | 25-29 October |
| WORLD FOOD | KAZAKHSTAN | ALMATY | 1-3 November |
| MIDDLE EAST NATURAL & ORGANIC | UNITED ARAB EMIRATES | DUBAI | 7-9 November |
| INTERFOOD & DRINK | BULGARIA | SOFIA | 8-11 November |
| PLMA CHICAGO | USA | CHICAGO | 12-14 November |
| FOODEX SAUDI | SAUDI ARABIA | JEDDAH | 12-15 November |
| SIAL INTERFOOD | INDONESIA | JAKARTA | 22-25 November |



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Maria Andrzej Faliński
– Expert

Polish private labels – role, functions and development prospects

The primary advantage of a private label is that it enables both the manufacturer and the brand owner to build their image as providers of quality and affordable goods, and to promote their brand identity on the domestic and foreign markets.

In other words, it supports brand recognition and authenticity among consumers. In a way, private-label products are shared products with a shared identity built through joint responsibility for customer relations and a competitive advantage domestically and exports-wise. Exporting from Poland, we might add, is unusually preferential due to the favourable terms of trade (pricing terms domestically and abroad) for companies and the

beneficial situation in terms of the comparative advantages for the sector and the economy at large. Poland is, then, a good market for private labels. This includes both the manufacturers and the retailers/suppliers, as well as dynamic exporters enjoying solid relations with retailers and wholesalers on foreign markets. Contrary to what some people believe, private-label companies are not doing any harm to the economy or consumers by having

contract manufacturers produce their goods under their own label and distributing these goods in Poland. Usually, but not exclusively, this includes products which are either not manufactured, or unknown, in Poland, but representing commercial and cultural potential.

CHANGING IMAGE

Private labels, mainly in the food sector, have relatively quickly upgraded from be-



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CMR Data

According to CMR data, in 2016 products offered under private labels of trade chains or distributors could be found in every fifteenth shopping basket in small-sized shops up to 300 m², yet their share in the total turnover of such kind of shops was only 2%. At least one private label product can be purchased in 9 out of 10 small-sized shops. Usually, private labels appear on shelves with cookies, oil and pasta – such products, branded by a chain or a wholesaler, are available at nearly a half of all small-sized shops.

In supermarkets with an area between 301 and 2500 m², the offer of private label products is significantly richer, and the less expensive counterparts of brand products can be found in almost every category. Private labels are a regular item in the assortment of such goods as pasta, oils, cookies and groats – they can be found in 9 out of 10 supermarkets. Wider availability and a wider offer translate into higher shares of private

labels, both in the shops' turnover (almost 7% in 2016) and in the total number of transactions (in the period under consideration, private label products appeared nearly on every third cash receipt).

Both in supermarkets and smaller shops, the greatest significance of private labels is noticed in such categories as savoury snacks, cereal products (e.g. groats or rice), as well as paper products. On the other hand, private labels do not enjoy popularity in such categories as chocolate sweets or alcohol.

In supermarkets, nuts accounted for a half of the value of private label sales and rice for almost 30% of the sales. Customers are also willing to reach for milk (almost a 24% share in the value of sales in this category), oil (approx. 20%), cookies, or pasta marked by the trade chain's label.

In small-sized shops up to 300 m², definitely the greatest importance of private labels is observed in the category of paper goods,

such as toilet paper, towels or tissues. Private labels are also very significant in the turnover of categories such as rice (18%), groats (13%), and pasta (8%).

The CMR data show that in 2016 customer expenses for private label products in supermarkets were lower by approx. 12% than the previous year, whereas in small-sized shops, this decline was slightly lower than 8%. In smaller shops, large declines were observed, in categories such as dairy desserts (a drop by 95%), processed cheese (by 44%) and chocolates (by 34%). On the other hand, products that sold significantly better than in the previous year included frozen products offered under private labels – expenditure for frozen vegetables and fruit increased by more than 90%, and for frozen flour products – by approx. 50%. Customers of small-sized stores spent 30% more than the year before on private label chips and crackers.

ing synonymous with cheap and usually low-quality products to being successfully positioned as standard and premium products. What's remained, however, is the pricing edge over comparative brands. While previously it was common practice for private labels to imitate the characteristics and colour patterns of branded products, now private labels have forged their own identity, image and qualities. Moreover, the sales of branded products in retail chains are to some extent boosted by the presence of private labels. Private labels with a strong market position, including especially retail and wholesale private-label product lines, keep sales going. It is these labels which position a store (or a chain) as a strong market player, and, in a way, elevate other products, including branded products. Rather than pushing branded products out of the market, private labels support them in specific categories, including most often premium

categories. So, it's a win-win situation – for the chains (and their stores) – by earning a reputation for offering good products (private-label and branded) – for the manufacturers, both own-brand and private-label contractors, – and, of course, for the consumers, who in addition to buying quality products, can mark their social status as rational buyers. The icing on the cake is the cost leverage which a private label can give over traditional branded products. This development can be seen not only in Polish discount stores, which are now on a firm course to succeed on the deli market, but also in exports of FMCG and some non-food products, e.g. furniture.

A LITTLE BIT OF HISTORY

It's worth taking a look back at how it happened. In the early 21st century, private labels grew quietly, off the mainstream, being considered an invention of discount chains. They were positioned as

low-priced and standard products, and held in ill repute (often undeservedly). Private-label premium items were the exception to the rule, finding their way mostly into deli stores. Underlying this exception was the enormous competitive challenge posed for Polish-owned chains by the growing bulk-sale market (discount stores, supermarkets and hypermarkets, which then led in sales volume). In response to this challenge, the "Polish" part of the retail market – both small and medium-sized franchise chains, and emerging supermarket chains owned by single companies – made an effort to bolster their position by pitting high quality, tradition and familiarity against the foreign mass scale and low quality. Riding this wave of opportunity, Polish chains developed their own products and marketed them as "craft", "traditional", "regional", or "Polish", "family", "home-made", etc. This way,

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COMMENTARY



Carrefour Polska

It is estimated that approximately a third of the products in Poland are created for private labels of trade chains. This means that in comparison with such countries as Spain or Switzerland, where this ratio amounts to 50%, the Polish private label market shows a potential for growth. Further development of private labels in our country is affected by changing consumer trends. Customers have stopped identifying these products with lower quality and less technologically-advanced production. In the long-term perspective of market development, the composition and regionality of products will gain importance. Among Polish customers, the awareness of buying healthy goods is gradually growing as well. Carrefour Polska constantly seeks to satisfy this need through the expansion and enhancement of the assortment. The best example of cooperation with Polish vegetable and fruit suppliers under a private label is the "Jakość z Natury Carrefour" (Carrefour Quality by Nature) product line, developed since 1997. In this range of products, the company's priority is to promote tasty local

products. The "Jakość z Natury Carrefour" assortment comes from small local farms in Poland's cleanest areas, and due to the natural seasonal cycle being preserved, these products have valuable nutritional values. They are created in cooperation with thoroughly selected and often long-term partners. Since 2015, the offer has been expanded to include tomatoes, pears, free-range chicken, butter, as well as juice pressed from fresh apples. The remaining products in this line include: quark, trout, carrot, potatoes, onion, apples, honey, as well as imported products: serrano ham from Spain and salmon from Norway. The "Jakość z Natury Carrefour" product line includes between 10 and 20 products from 56 predominantly Polish producers. Carrefour Polska is also in constant search of new suppliers to meet the criteria of the "Jakość z Natury Carrefour" line. A separate trend is the development of private labels in the premium segment. They can include both imported products and those acquired from regional suppliers. Polish consumers increasingly reach for new tastes and

traditional products from other countries, as well as top quality products. In 2016, Carrefour Polska enhanced its premium private label assortment with two new products: Montmartre coffee and Nello children's hygiene products, as well as a new range of Spanish products: De Nuestra Tierra. The new offer has enriched the hitherto available brands, Reflets de France and Terre d'Italia. At Carrefour Polska, private label products are made for customers who pay attention to quality but do not want to overpay. They are less expensive than their brand counterparts, while simultaneously preserve quality at least equal to comparable brand products. In 2016, the assortment of all private labels available in the Carrefour chain amounted to approx. 3,000 references in such categories as: food products, beverages and alcohol, traditional fresh products (vegetables, fruit, cheese, cold meat, fish, poultry, bread, etc.), drugstore, perfumery, industrial products, household products, sports goods, toys, seasonal products, audio-video and household appliances, as well as textiles.

deli stores created the notion of product uniqueness, whose message was quickly embraced by small and family stores, both single and chain. While this was largely a marketing device, it resonated with the public pretty well, and made a case for pushing up prices. Even if consumer behaviour did not reflect this shift – most people shopped in mass stores, which continued to sprout up – a certain

sentiment remained, which would later have a significant impact on the developments in the retail market we see today. It is a highly competitive market, which is committed to offering reasonably, but not the lowest, priced goods. Competition on this market, then, is driven by quality and by the familiarity factor behind various products, including private-label products.

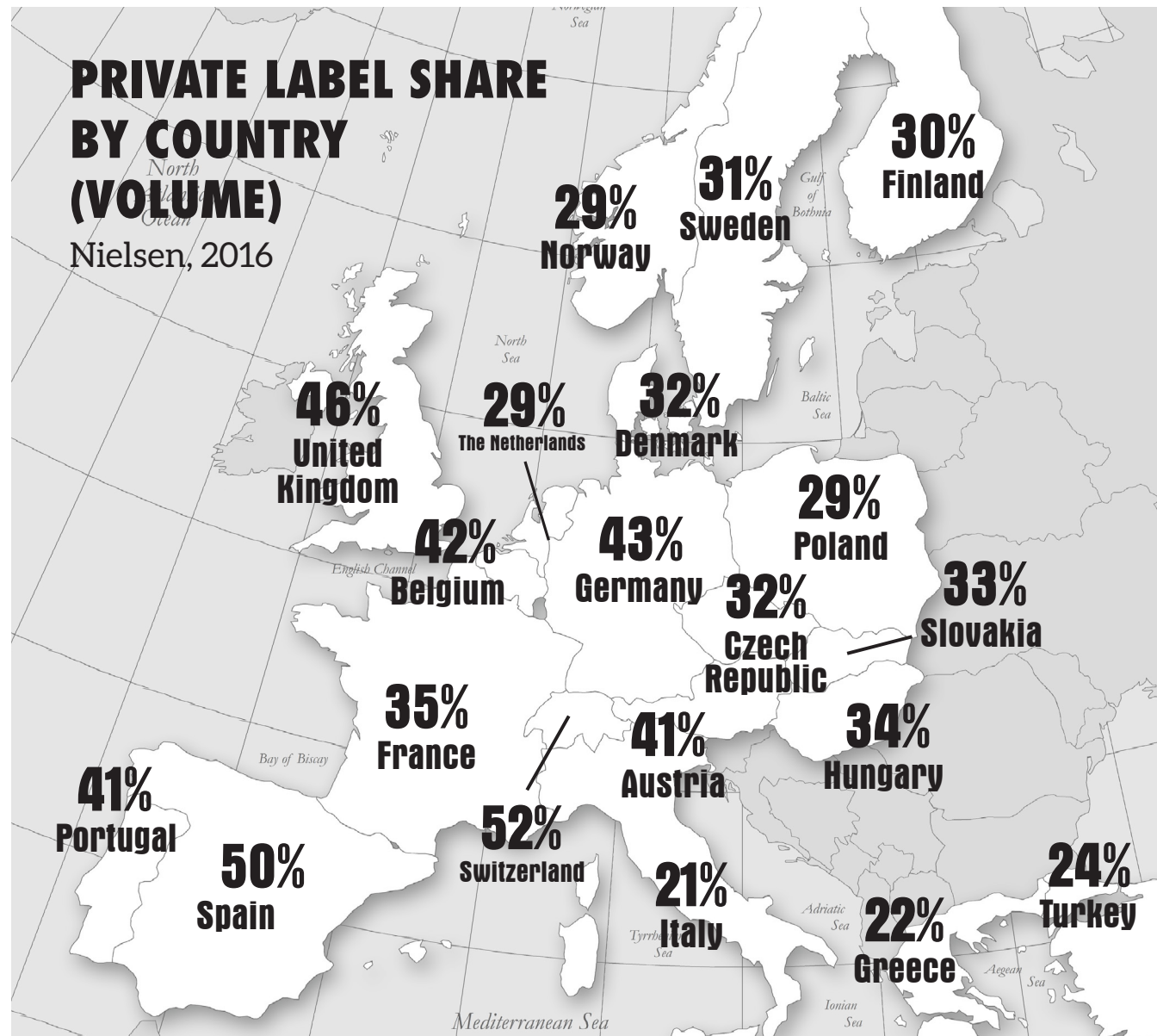
Underlying this development was the 2008 crisis, and, while Poland did not slip into recession at the time, experiencing only a slowdown, the crisis set in motion a significant economic process within the distribution sector. On the one hand, businesses began to cut corners, while desperately trying not to lose their customers and sales. On the other hand, customers were not willing to cut down on consumption,

Traditional polish taste



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but they also couldn't manage to pay the prices they had paid until not long before. This was a perfect opportunity to tap into the potential of private labels and export cheaper products to the western Europe, where our products would be clearly cheaper without being inferior. It proved to be a successful strategy, particularly for recognised importers and retail distributors rolled into one. These managed to drum up substantial business and generate substantial value. In these circumstances mass-scale stores, mostly discount stores, embraced the competitive strategy of upscale stores by developing their own standard and premium brands. Taking advantage of their scale and distribution

capabilities, they quickly set in motion a process whereby deli products found their way into large retail chains. From then on, no retail player could be successful without launching their own premium line of private-label products. So, it was quality (and good price) which helped discount chains rise to the top, and which caused the emergence of the upscale range for all in other formats, including smaller formats franchised by wholesalers.

COMPETITION

But what about the various forms of delicatessens – from small, Colonial-type delicatessens, to deli supermarkets? Well, they found themselves in a tough competi-

itive environment, since their “competitive Wunderwaffe” (familiarity combined with quality) had become commonly available. So, those who managed to bring out cheaper products and catch up with the market leaders price- and strategy-wise have pulled through and continue to grow, whereas those who clung to their old model too long have dropped out of the market, as was the case with a well-known and respectable upscale supermarket chain from Kraków. Either way, the Polish market holds its door open to new private-label concepts and sales strategies. What is currently all the rage is the concept of umbrella brands, or family brands, or even exclusive brands that are almost private labels. Indeed, cooper-

COMMENTARY



Aleksandra Robaszekiewicz
PR Manager
Lidl Polska

Since the beginning of operation of the Lidl company, we have regarded the creation of our own private labels as important. For many years, we have been working on providing the customers with high-quality assortments at attractive low prices. Currently, we have more than 100 brands on our shelves. The most important ones include: Pikok cold meats, Pilos dairy, Bluedino cheeses, Chrupiące z Pieca bread, Rzeźnik meat, Świeża Ryba w Lidlu fresh fish, as well as a wide range of fruit and vegetables available under the Ryneczek Lidla brand. Apart from food products, we offer excellent W5 cleaning products, Toujours diapers, Cien cosmetics, as well as textiles – Esmara, Livergy, Lupilu, and Pepperts.

As a company, we are innovative and we set trends on the market, including the area of private labels. Our products achieve recognition among customers, which is connected with the trend of smart shopping – customers look for promotions and attractive offers, while simultaneously paying attention to high quality. We are continuously building awareness of the advantages of private labels and thoughtful shopping, e.g. through the use of our marketing concepts.

For several years, we have observed growing trends in an interest in healthy foods and natural ingredients. To address the needs of our customers, we regularly introduce new private label goods, falling into the category of products with a positive impact



on health, into sale. Our permanent offer includes products from the BIO line, such as coconut oil, linseed oil, coffee, olive oil, muesli, yoghurts, bread, and a wide range of ecologic fruit and vegetables. The needs of our customers are also addressed, among others, by Pikok Pure products, containing no preservatives or artificial colouring agents – wieners made of extra ham, sliced baked tenderloin, as well as such goods as lactose-free Pilos milk, rice beverages, or soy beverages. Lidl's novelties also include hummus without preservatives (under the “Pomysł na każdy dzień” brand) and tofu (Toppo brand).

The assortment, including private labels, is a pillar of our activities in the area of corporate social responsibility. Caring for the health of customers, we have accepted an undertaking to reduce the content of salt and sugar added to Lidl private label products by 20% – this goal is scheduled to be met by 2025. We have also decided to withdraw the sale of eggs from caged hens by 2025. All bread and rolls available in our offer are preservative-free. We also make sure the assortment of our shops include, as much as possible, products distinguished with certificates confirming high social standards and environmental protection – such as: EU ORGANIC BIO LOGO (including bananas, apples, carrots, dairy products of the Biotrend brand), Rainforest Alliance (e.g. all pineapples available in the chain stores, or the Bellarom chocolate with almonds), UTZ (many Lidl private label products containing cocoa or cocoa solid, e.g.

Fin Carre chocolates), as well as MSC (fish products).

Another trend we have embraced are the “to go” products as well as “ready” products that only need thermal processing. Therefore, we have created the “Pomysł na każdy dzień” (“An Idea for Every Day”), including such articles as hummus, dumplings, pancakes, spreads, salads, or dinner dishes. Through a line of such products, we meet the needs of people who do not have much time to prepare meals – so healthy snacks, original salads or quick dinners would be perfect for them.

It is worth stressing that more than 70% of the company's turnover is generated by products from Polish suppliers. We offer above 50 private label products bearing the “Teraz Polska” quality logo. On the other hand, 100% of fresh meat under our “Rzeźnik” brand is comprised by products from Polish suppliers, as indicated by the marking “polski chów, polska produkcja” (Polish farming, Polish production). We value Polish products and we seek to promote their consumption. We cooperate with, among other suppliers, the Sady Grójeckie (Grójec Orchards) Association, providing the Lidl stores with premium-class apples from the Grójec region, bearing the EU register certificate – Protected Geographical Indication.

In the future, we will continue the strategy of providing the customers with high-quality products at attractive, low prices. We intend to surprise the consumers with new, original private label products, including the healthy food category.

COMMENTARY

Jerónimo Martins Polska – Biedronka

Private label products, developed in cooperation with the best manufacturers, have been a pillar of the brand strategy of Biedronka for many years and they make its offer stand out on the market. Private labels are present in all categories offered to customers who visit the stores of the chain. Due to the business profile of JMP, most private label products are found among foods, yet they are also present in the industrial assortment supplementing the main offer. Private labels enjoy high recognizability among the customers, and many of them have become undisputed market leaders in their respective categories.

Example private labels available in the assortment of Biedronka include: Mleczna Dolina, Światowid, Miami (all three of them representing dairy products), Kraina Wędlin and Kraina Mięsa (cold meat and meat), Marinero (fish), Polaris (mineral water), Vital Fresh (juices and salads), Pastani (pasta), as well as Queen (hygienic articles), DADA (diapers and children's cosmetics), and BeBeauty (cosmetics). In 2016 alone, Biedronka introduced 441 private label products into its assortment. These are goods responding to the needs of customers and simultaneously illustrating the current trends. Currently, consumers search for quick and convenient solutions of prepared dishes based on high-quality fresh products. Increasingly, they are people with special dietary needs, who buy gluten-free or lactose-free products, or those who consciously look for articles with specific nutritional benefits, e.g. with a high content of dietary fibre. Another distinct group consists of customers



interested in the premium offer and in discovering the tastes of cuisines of the world. The products that fulfill such expectations include, in the case of prepared dishes, the "Zupy z naszej kuchni" (Soups from Our Kitchen) series, or the slow-cooked meat series. Lactose-free products available in Biedronka include milk, cheese, or butter, and the gluten-free goods include pasta, canned fish, rice cakes. The premium assortment usually accompanies festivals of the world's cuisines from countries with established culinary traditions, such as France, Italy, Portugal or Spain. They mainly include cold meats, dairy products, desserts or wine. Among the products coming from Polish suppliers, an example can

be the Kraina Wędlin brand of cold meats in the Tradycyjny Smak (Traditional Taste) line, entered in the list of the Ministry of Agriculture and Rural Development. In the case of industrial goods available in limited-time offers, Biedronka also regularly presents products by well-known designers, prepared exclusively for its customers, thus referencing the worldwide trend of presence of leading fashion designer brands in popular distribution channels. So far, the offer has included, among others, HOME & SPA bathroom textiles by Maciej Zień, POP ART bed linen collection by the BOHOBOCO duo, or the Just for Fun footwear and accessories collection by Loft37.

active business strategies are on the rise on both the supply side (production and imports) in the manufacturing and commercial sectors, and the demand side (attracting customers domestically and abroad). Mind you, the former case does not involve only marketing and sales support, or logistics, but also joint investments in commercial or manufacturing infrastructure.

PREDICTING FUTURE

It's safe to assume that the next stage, and the prevailing recipe for success, for private-label chains will be about investing in medium-sized food manufacturers. These manufacturers have been mostly

overinvested during the last decade, due to easily accessible EU funds – as technologically sophisticated as they have become, they can't cope with the pricing reality of the market, which is dictated by large manufacturers. Faced with the pricing and volumes driven by the largest manufacturers, medium-sized enterprises have to rescue themselves either by going into specialised sales, preferably export, or by looking for capital partners to open up mutually beneficial access to sales channels and drive competitive prices. If the powers don't come up with any regulations to stall this development, the coming years will see the emergence of

vertical conglomerates, which will manufacture excellent-quality products for their own chains – for the internal and export markets of their own chains. A number of hypothetical scenarios can apply here – one possibility is the emergence of a retail/manufacturing system mainly based in Poland and focused on exports; the other involves foreign investors' taking over in order to source products for other markets. It also cannot be ruled out that manufacturers will take over local chains, although not on a comparable scale. Wholesalers with franchise chains will play a significant role here. Whatever happens, some interesting times are

ahead for private labels. It seems that they will consolidate their market position, the more so because of the vertical consolidation processes, since these will involve the search for effective competitive solutions.

The processes and trends outlined above can be illustrated by numbers. Between 2009-2013, private labels grew by more than 2 percentage points a year, and 2013 saw them claim 33 percent of the consumer market, a whopping increase from the 28-percent share a year before. Deflation slowed down this process a little, as all prices started to fall and private labels lost some of their edge. With a 37-percent market share in the last year, though, they are doing pretty well. Private-label leaders such as Switzerland, with a 53-percent market share, and Spain (52 percent) are way ahead of Poland. Germany, though, with a 44-percent market share, seems to be within our reach. Moreover, having

embraced the deli-oriented strategy, the Polish market can evade the trap of the "poor" retail sales model of ALDification, which Germany fell into in the 1990s and struggled to free itself from, with Government support, for almost a decade. Private labels – as the entire model of affordable and relatively high consumption (as for the income level in Poland; the EU average is 60% of per-capita income) – are a new phenomenon. Over a relatively short period of a decade, these products have managed to shake off the label of "niche" (initially, they were perceived as such by about 40 percent of consumers). A 2013 on Board Group survey showed that 97 percent of the respondents were aware of this type of product. However, only about 40 percent of the respondents were willing to admit that they purchased private brands, so more work had to be done on the image of these brands. The situation has changed

substantially since 2013; as a number of recent surveys have shown that about 70 percent of the respondents admitted to buying private labels. The deli-oriented strategy of discount stores deserves a lot of credit for this. The impact which private labels have had on developing the economy and driving upward trends can be seen in commercial exports (mainly intra-community). Estimated at about PLN 10 bn, these exports go mainly to the UK, Germany, the Czech Republic and the Benelux countries. About 80 percent involves food, with about 70% being private labels or branded products, tailor-made or exclusive products, or umbrella brands. This means that brands have great potential. This potential is a major driving force for the economy in both the accounting and marketing sense, and it can be measured by sophisticated investment and consumption ratios.

Maria Andrzej Faliński

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We are also famous of: gingerbreads, sponge biscuits, crunchy cookies, breakfast biscuits, American cookies, cookies with liquid cream and many more. We continue the development of our diversified portfolio to meet new trends introducing such products as: gluten or sugar free. In 2017 a new brand was introduced – Delisana in order to combine all cookie categories under one name.

The top quality of our products is the result of unique recipes, carefully selected ingredients and dedication of top-notch specialists. The high quality of products is guaranteed by certificates: ISO, BRC, IFS or RSPO.

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Our family business was founded over 25 years ago and now the second generation of owners lead the business. We offer a wide variety of coffees and teas under our brands René and Celmar.

We have been a coffee producer since 1991. We offer coffees packed in several kinds of universal single – serve systems – Coffee Pads, Compatible Coffee Capsules (Nespresso, Dolce Gusto, K-Cup). We offer a wide variety of different bean coffees including Single Origin, Fairtrade and Organic which can be selected for roasted bean, ground or any of the single serve options. We have our own large roasting and packaging facility. Our manufacturing process covers each activity within the supply chain, from the purchasing of green coffee beans, roasting, grinding , packaging and distribution.

We sell our products not only under our brands and Rene, Celmar and Castello, but also as a private-label products under retailer's and distributor's labels or brands. We sell our coffees and teas throughout Europe, in the Middle and Far East. We also produce all kinds of teas (black, green, herbal, fruit) packed in pyramids also tea-capsules as well as double chamber teabags.

EWA Krotoszyn S.A is a company with over 60 years of tradition in manufacturing of confectionery, dietary supplements and pharmaceuticals. The products are manufactured in accordance with the European law. High standard of production is confirmed by implemented and certified ISO 22000:2005 system, pharmaceutical GMP/GDP and IFS Food as well.

Our company specializes in the production of hard boiled candies, stuffed candies, soft candies, toffees, sugar crisps and lollipops. We offer full services in terms of dietary supplements production based on wide variety of readymade recipes but also declare our readiness to develop your own, unique product. Recently introduced, new products range, called functional food, which are candies fortified with herbal essences, vitamins, minerals, natural dyes and aroma can also be an alternative.

Our manufacturing solutions are based on continuously verified and valued formulas perfected over the years and appreciated by many customers. The quality of products and customer satisfaction is always our main goal. Feel free to contact us. Let's start to act together.

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Since 2004, Dan Cake Polonia has been part of the international Dan Cake Group, which operates production facilities in Denmark, Poland and Bangladesh.

The newest production facility, located in Poland, consists of seven process lines. These are used to make toast breads, milk rolls, muffins, tartlets, cake bases, sponge cakes, fruit cakes and, most recently, yeast cakes.

We remain loyal to the best of traditional baking practices and we have been drawing on the baking tradition for over 80 years to give pleasure to our customers every day. We are investing in innovative technology to ensure the safety of our products. In line with the Clean Label policy, we are working all the time to eliminate the presence of additives in our products. The production process complies with strict safety and hygiene standards, which is confirmed by our IFS certification.

HAL is a family business established in 1991 in Poland. It has been producing toilet blocks, gel air fresheners, cleaning accessories: cloths and sponges and bath sponges since 1996.

HAL's portfolio is divided into two cleaning brands: "Hippo" and "Kolorado", and a separate brand "Ocean" for bath products. Each of these brands has its own character and is tailor-made for different customers' groups. In addition, we cooperate with our clients within Private Label production.

The company offers a modern and innovative products, successfully competing on domestic and foreign markets. HAL has implemented a quality management system according to the standard BRC Consumer Products. The company was successfully audited in last years receiving quality system certificate BRC Consumer Products. In the future, HAL will continue investments and expansion to new markets, while preserving family nature of the business. Development of chemical divisions, both of HAL brands and of Private Labels, is a priority for the nearest future.

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Dega Spółka Akcyjna has been in business since 1992. The company specialises in the production of mayonnaise salads, fried fish in Greek sauce, sterilised canned products and sandwich spreads. Delicate and unique flavour combined with high quality is a considerable asset in shaping the culinary preferences of consumers. The company has an implemented, maintained and certified integrated Quality Management System for compliance with the requirements of IFS and BRC, the proper operation of which is determined by i.a.: implementation of HACCP product health safety.

During the 20 years of our operation we have been awarded numerous prizes, awards and certificates. The most important of them include: "Teraz Polska" (Now Poland) promotional logo, which is under the patronage of the President of Poland and "Poznaj Dobrą Żywność" (Try Fine Food).

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

One of the biggest advantages of MOKATE's business model is the wide offer, providing the customers opportunity of buying an extensive range of products and categories from one producer platform served by professional and experienced Team.

Mokate holds the majority of the quality certificates available: IFS, BRC, IQNet, HACCP, ISO 9001, HALAL, KOSHER included and its products have been awarded with numerous medals and prizes in Poland and abroad.



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Mondi Consumer Goods Packaging is a producer of tailor-made flexible packaging solutions serving some of the world's biggest brands in categories as diverse as pet care, food, and home and personal care. Our high quality product range includes pre-made bags, versatile stand-up pouches and high-performance barrier materials (any combinations of films, foil and paper). State-of-the-art production systems enable us to do extrusion, lamination, printing, slitting and converting in-house. To offer our customers the best solutions, we invest substantially in leading-edge innovation. Supported by our own R&D Centre and 19 production facilities across North America, Europe and Asia, we offer protective and appealing packaging concepts.



Rarytas Sp. z o.o.
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Rarytas, a company based in Stargard (north-west part of Poland), was established in September 1960.

Since 1974 we launched, as one of the first Polish companies, production of original small CRACKERS, available in various shapes and flavours that became very popular among our customers. To meet expectations of our clients and following to latest nutritional trends, Rarytas created a special project:

Our products with this logo does not contain palm oil, and they have radical reduction its content for: acrylamide, 3 MCPD, glycidyl esters, saturated fatty acids, they are produced in new innovative technology.

Everything can change but the quality and the taste an of our crackers, they must remain unchanged... and we even improved it.

This is for you to judge, we invite you to try our products!



Sertop Sp. z o.o.
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The company SERTOP is one of the leading manufacturers of processed cheese on the Polish market.

The company has more than fifty-year tradition of producing high quality products based on proven recipes while maintaining strict quality control. For the production are used only natural ingredients, it does not apply any preservatives and colorings. SERTOP offer includes more than 20 flavors of processed cheese in a variety of formats, such: round boxes 140 g and 280 g, cubes 100 g and 30 g, blocks 100 g and 100 g sausages.

SERTOP company meets all the requirements for the sale of processed cheese on the Polish and foreign markets. SERTOP sells its products to the Polish market and the markets of the European Union and the United States, Canada, countries of the Middle East, South Korea.

The company is certified BRC Global Standard Certificate and IFS (International Food Standard).

Processed cheese MIX "Your... favourite" – 140g round box

www.SERTOP.com.pl



Processed product MAZURSKI – 280g round box

www.SERTOP.com.pl



advertisement

Our newest products : Superb taste – innovative technology.

www.RARYTAS.pl



advertisement

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HURT & DETAL
MAGAZINE

CONQUER@FTGROUP.PL

CIRCULATION:
70 000



American Cookies

American Cookies 135 g 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 135 g, chocolate & hazelnut 135 g, chocolate & raisins 135 g, American Cookies – 37% chocolate 150 g.

www.BOGUTTI.com



Next

New line NEXT – really good and simple 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, zero Trans Fat, zero Cholesterol. Cookies look nice and attractive. Shelf-life of the products is 12 months.

www.BOGUTTI.com



Dega Vegetable salad

Salad with potatoes, carrot, parsnip, peas, cucumber and spices.

www.DEGA.pl



Dega 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



Coffee with Collagen

Roasted ground coffee in Nespresso® compatible capsules. A blend of perfectly roasted, rich-flavored coffee with the addition of bioactive collagen proteins that stimulate the natural functions of the body. The addition of collagen helps to maintain healthy skin and hair and promote the slow down of natural aging.

www.CAFERENE.pl



Lungo Coarrara

Roasted ground coffee in home compostable, barrier Nespresso® compatible capsules. Environmentally friendly capsules containing special coffee blend with a rich aroma and intensive taste which owes to perfectly roasted, selected coffee beans. Ingredients: natural organic ground coffee. Contents: 10 biocompostable capsules containing freshly ground coffee. Decomposes within 33 weeks in home conditions.

www.CAFERENE.pl



Delisana Crunchy cookies

Fall in love with Delisana a new cookie brand within Grupa Delicpol portfolio.

Delisana represents an excellent quality cookies baked with love and passion, cookies that follow your life style. We offer a huge variety of cookies for those who accept not only pleasure, but also pay attention to their health: gluten or sugar free jaffa cakes, new variants of breakfast biscuits: milk, musli, forest fruits and also crunchy cookies full of grains, vitamins and natural ingredients such as amaranth, chia seeds or black cumin.

A tasty enjoyment to all cookie lovers, for every occasion. Fall in love with Delisana. Choose the best cookie for yourself.

www.DELICPOL.pl



Mini Biroche with cocoa filling

Dan Cake Mini Brioche is a muffin-shaped yeast cake snack. Available in multiple versions of filling: cocoa, sweet curd, marzipan, cinnamon, vanilla flavour pudding and classical with crumble. The product is available both as ambient and deep-frozen for defrosting.

www.DANCAKE.pl



Yeast cake with curd cheese

Dan Cake Brioche is a 400-450 g yeast cake of mildly sweet aroma, covered with crumble and offered in filled and regular versions.

The product contains no preservatives and can be offered both as ambient and deep-frozen.

www.DANCAKE.pl



Dietary supplement Junior Travel

Junior Travel is a orange-flavoured dietary supplement recommended to people suffering from discomfort when travelling by car, bus, train, ship or plane. This supplement is suitable for children over 4 years of age and adults. **Ginger** is a natural ingredient well-tolerated by children, youths and adults. It reduces discomfort suffered from when travelling

(nausea, vertigo).

www.EWA-SA.pl



Dietary supplement Junior Throat Sugar-free

Junior Throat Sugar-free is a raspberry-flavoured dietary supplement suitable for children over 4 years of age and adults with voice problems, soreness, dryness, hoarseness. Contains plant ingredients – **herbal extracts and raspberry juice concentrate**. Also contains **vitamin C**. Marshmallow covers and shields the mucous membranes in the throat and protects them from irritants. **Thyme** boosts mucus production, helping to alleviate dryness and moisturise the

mucous membranes in the upperrespiratory tract. **Sage** has a beneficial effect on the throat, larynx and vocal cords. **Raspberries** are rich in antioxidants, boosting the immune functions of the body. **Vitamin C** helps the immune system to work properly.

www.EWA-SA.pl



Kolorado Aromella

Kolorado Aromella is an answer for your need of natural fragrance that gives your home a pleasant addition and makes it so special. Colorful and specially designed decorative feature will embellish any room and color coding will help you recognize and choose the right scent that is perfect just for you. Aromella scent does not fade away, it will stay with you up to 4 weeks.

Air freshener is available in several scents and colors:

Lime and Bergamot, Salty Breeze, Gardenia and Tuberose, Red Berries and Green Vetiver.

www.HAL.com.pl



Kolorado Roll' Aroma

Kolorado Roll' Aroma is a modern rim block with designer shape cage. Product works very actively, effectively cleans and fills toilet with pleasant scent. Contains "active oxygen" that helps hygienic cleaning. It has a specially designed form and energetic colors that emphasize its unique, modern character. Available in fragrances: Lavender Field, Blue Aquatic, Intense Forest, Cristal Lemon, Exotic Flowers. Weight of product: 51g. Works for about 400 flushes.

Product offered in single and double packs.

www.HAL.com.pl



Mokate Gold Premium

NEW Mokate Gold Premium is exceptional - it enchants with its aroma and deep flavour hidden under a thick, white foam. A perfect combination of top quality ingredients enclosed in a convenient sachet, guarantees pleasant flavour sensations, and each cup makes you want to taste more and more of it.

It has been produced with passion and love for perfect taste.

Carefully selected ingredients, advanced technology, and first of all - the best quality and true love for coffee make us deliver an ideal product and a genuine treat to our customers.

www.MOKATE.com.pl



Loyd

Try out our finest and premium quality loyd tea Only selected teas, which have earned the highest tea selector's grades can be packed into our newest red label LOYD box. Their selection is carried out under strictly defined conditions and usually only one in a hundred samples will be qualified for the final product. This process, makes our red label tea exceptional and remarkable.

www.MOKATE.com.pl



CornerPack and StripePack

With CornerPack and StripePack Mondi is taking convenience to a new level. CornerPack is designed for easy and controlled opening with semi-circular scoring lines at the pack's corner. Apart from avoiding spills, CornerPack enables users to pour the pack contents easily and control the size of the opening. To help consumers enjoy the product for longer by retaining both taste and aroma, Mondi also developed StripePack, a convenient solution to address the growing demand among snack brands for easy-open packaging. Among the key benefits are effective, easy and straight opening, quick and easy access to the product as well as partial opening of the pack. Both packs are also available with a reclose feature and represent an ideal solution for multi-finger chocolate bars and chocolate tablets.

www.MONDIGROUP.com



Your partner in Private Label



Visit us at PLMA 2017: EuropaHal, Hall 5 - Stand F-5643

www.delicpol.pl

rim blocks



air fresheners



**Visit our stand:
N 752, Holland Hall**

Producer: HAL Sp. z o.o., ul. Spokojna 8, 05-532 Baniocha, Poland
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