



The Food and Drink Market in 2007/2008

(2008 Edition)

1. Introduction

1.1 Brief Summary

The total all food and drink market* in Poland was worth Euro 55.1 billion in 2007, made up of Euro 46.4 billion in retail (84.2%) and Euro 8.7 billion (15.8%) in foodservice. This overall market grew at an average annual real 1.46% over the 2002 - 2007 period. Altogether, 888 holding and independent companies plus key subsidiaries (having a different name) are cited in this report, together with their market shares by product (1263 cited) and brands. The Top-10 companies supplied 20.0% of the total market in Poland in 2007.

1.2 Key Country and Market Data

National Data:	2007
Population (millions):	38.11
GDP (Euro millions)	308.92
Food & Drink Market *	2007 Euro billions
- Food Expenditure	38.99
- Non-Alcoholic Beverages	5.75
- Alcoholic Drinks	10.39
- All Food & Drink	55.12
Real Annual % Growth	2006 - 2007
- Food Expenditure	4.2%
- Non-Alcoholic Beverages	6.0%
- Alcoholic Drinks	9.3%
- All Food & Drink	5.3%
Consumer Price Indices:	
2005 = 100	2006 2007
- Food Expenditure	100.5 105.4
- Non-Alcoholic Drinks	101.2 104.6
- Alcoholic Drinks	100.3 100.9
- All Food & Drink	100.5 104.5

Poland



Sources: Map: CIA; Population and GDP: IMF; Expenditure and Growth: FFT; CPI: Eurostat; Statistics Canada, USA Dept of Labor, IMF for Mexico, complemented by FFT research and calculations.

* Key Food & Drink Markets Definition

Market data refer to all products sold for final human consumption in retail, foodservice and artisanal markets (own-produced for own sale), thus excluding industrial and intermediate consumption and auto-consumption. Retail and foodservice buy-in prices are applied throughout. For product market definitions, see www.fft.com.

Matching FFT Reports

(by country, company, product sector or single product)

FFT maintains an interactive, continuously updated online database covering food & drink markets in 25 countries, from which all reports, large and small, are produced. Thus:

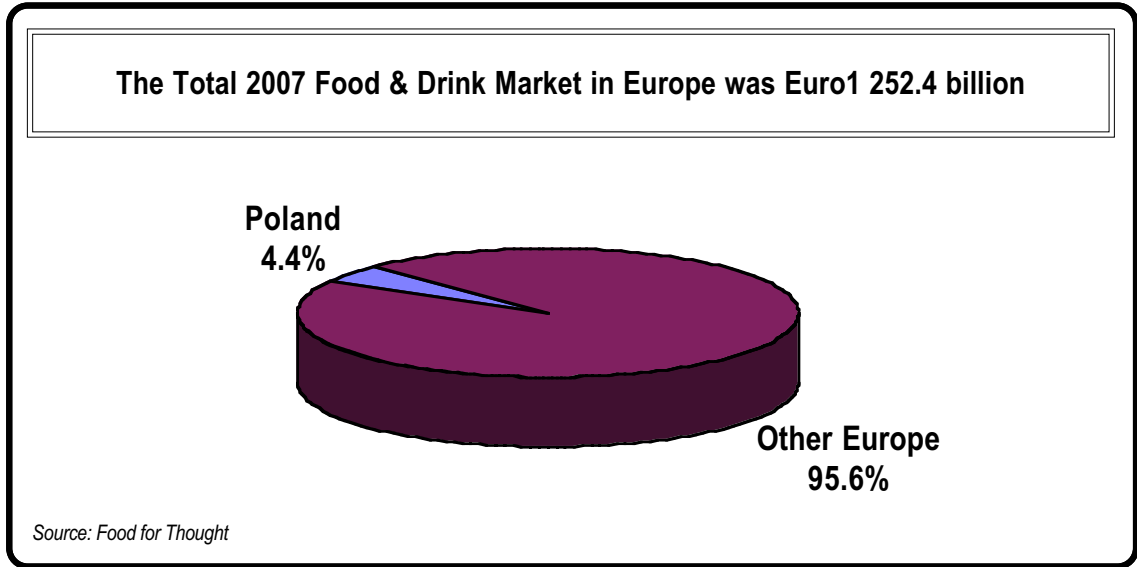
- This report is available for all countries.
- Any product sector below is available for any choice of countries, e.g. Ready Meals in France or in Central Europe.
- Any country/company/product/data selection is possible.



1.3 The Total Food and Drink Market in Poland

The total food and drink market in Poland in 2007 was Euro 55.1 billion.

In Europe, Poland had a 4.4% share of the market for a 7.7% share of the population

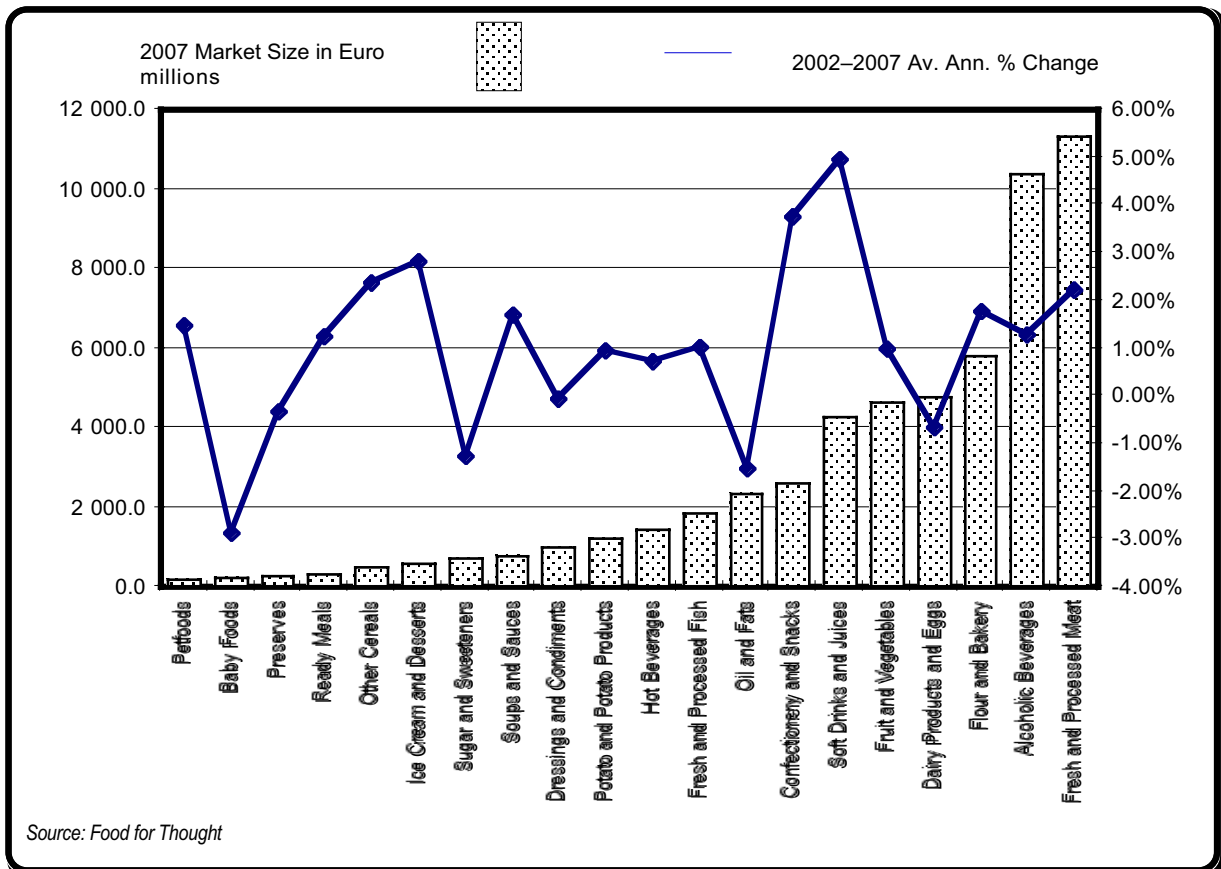


* See full "Key Definition" of Food & Drink Markets covered in box bottom of next page.

Altogether 22 country markets are covered, including all the 27 European Community (EC) members (excepting only the 3 Baltic states and Slovenia, Malta and Cyprus), plus non-members Norway and Switzerland. Belgium and Luxembourg are treated as a single entity.

1.4 Market Size and Growth by Product Group

Altogether 114 products markets are covered in this report, distributed among 20 product groups (see graph for market size and growth). These are analysed in detail in this Executive Summary.



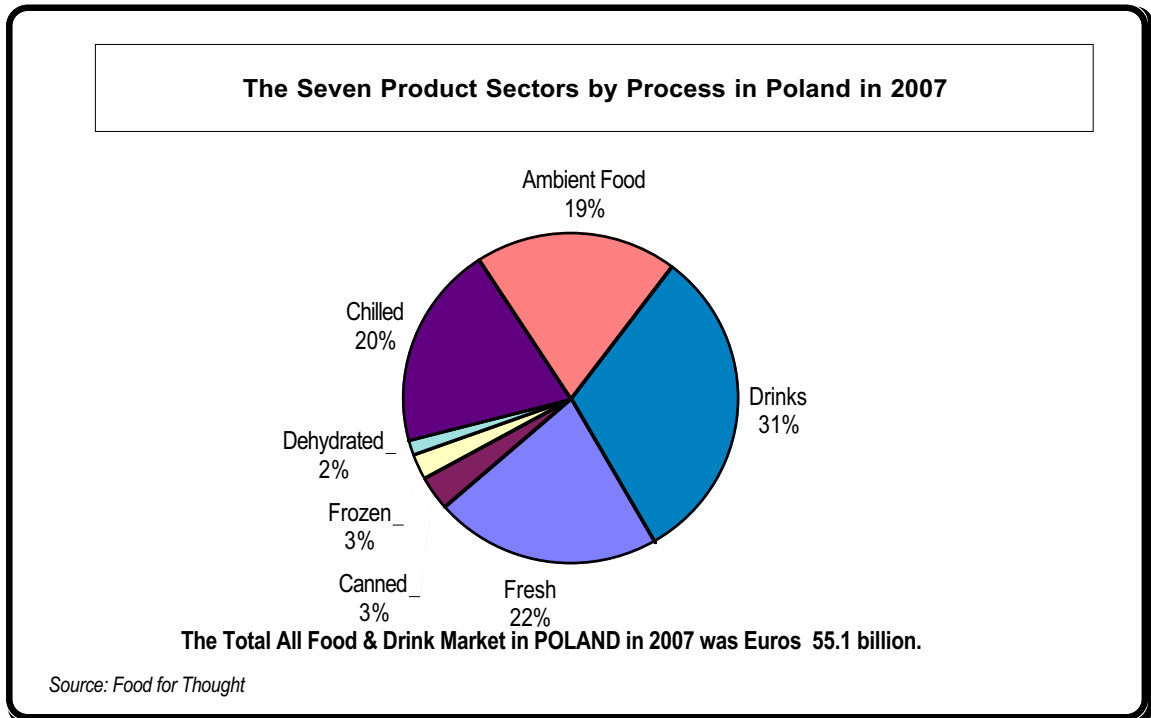


1.5 Market Size by Process

The 114 food and drink product markets covered in this report can be grouped into seven sectors by process: Ambient, Fresh, Canned, Chilled, Frozen, Dehydrated and Drinks. Clearly Fresh Products, with 22% of the all food & drink market by value, tends to distort the picture for packaged products. These process sectors are analysed in detail below.

The Seven Food & Drink Product Sectors by Process in Poland in 2007 *

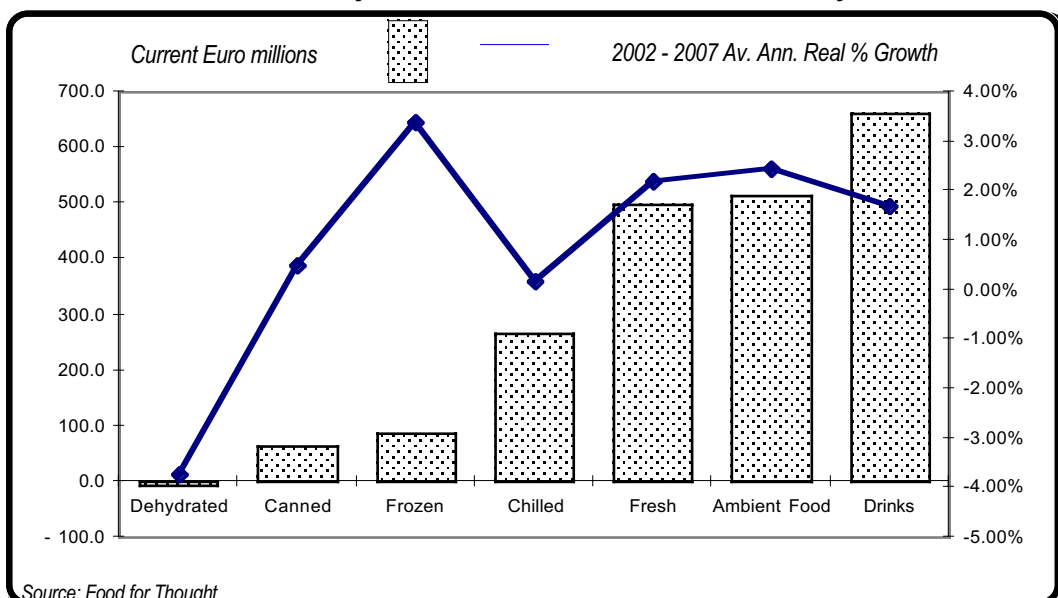
Fresh Products account for 21.9% of the total market.



1.6 Market Growth by Process

Drinks were the fastest growing sector over the 2002 - 2007 period, increasing by Euro 660 million per year, or a real average annual 1.70% during the five-year period. Frozen products however achieved a higher average annual percent growth rate of 3.38%.

Product Markets by Process: 2002 - 2007 Market Growth by Value

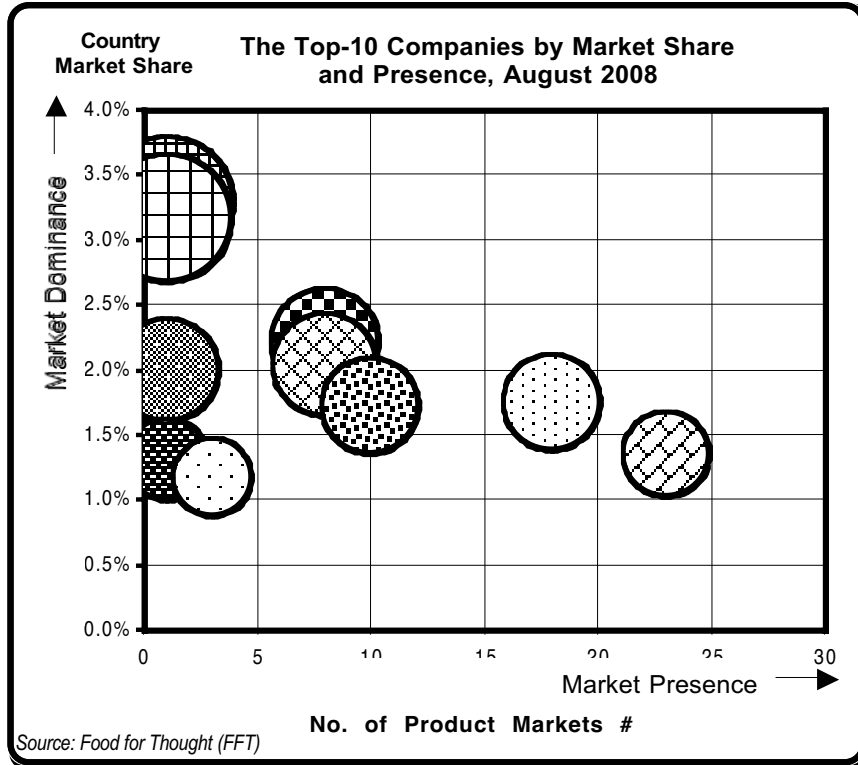




1.7 The Top-10 Companies in August 2008

A total 693 holding and/or independent companies are identified in this report, plus another 195 key subsidiaries with a different name, or 888 companies altogether.

The Top-10 Companies account for 20.0% of the All Food & Drink Market



The Top-10 Players in Poland		
by Market Share & No. Mkt Shares		
		<u>No. Mkt Shares</u>
	1. SABMiller 3.3%	1
	2. Heineken 3.2%	1
	3. Saturn Nordic 2.2%	8
	4. Smithfield Foods 2.0%	8
	5. Fyffes 2.0%	1
	6. Unilever 1.7%	18
	7. Kraft Foods 1.7%	10
	8. Nestlé 1.3%	23
	9. Carlsberg 1.3%	1
	10. Pernod Ricard 1.2%	3

114 Single Product Markets are covered in this survey and chart (the other 32 products being Product Groups grouping the above Single Products into 20 individual Product Groups).

1.8 The Total Retail & Foodservice Markets

The total retail market was Euro 46.4 billion and foodservice Euro 8.7 billion in 2007.

The 2007 Food & Drink Retail and Foodservice Market in Poland

