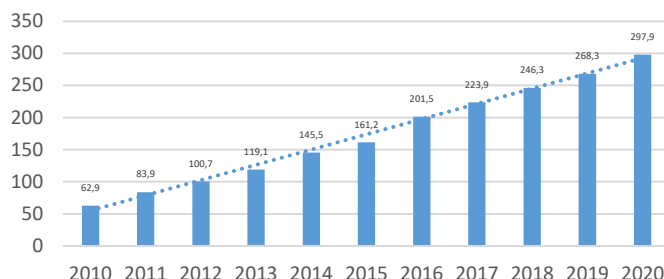


INTRODUCTION :

Today, Polish consumption is characterized by a growing concern for a better quality of food (1 in 3 Polish people are willing to pay more for quality products) and by the demand for a more and more diversified gastronomic offer. Among the growing sectors we can find organic, plant-based products and world cuisine. Eating well and healthy is becoming one of the main purchasing arguments for Poles - there are opportunities to be seized!

Market value of organic food

Market value of organic food in Poland (in million euros)



- The organic food market is the fastest growing segment of retail food sales in Poland (over 10% per year in recent years)
- There are more than 23,000 organic farms with an area of 507,637.13 ha, **but 70% of organic products are still imported.**
- All the country's supermarkets have developed organic sections and there are more than 850 shops specialized in organic products
- The leader is Organic Farma Zdrowia with 30 shops.
- Main players in Poland**



World cuisine

Poles are looking for food diversity and new flavors. As a result, world cuisine is becoming increasingly popular. There are now special sections with products imported from all over the world in almost all supermarkets (Auchan, Carrefour, Leclerc, Kaufland etc.), as well as „country weeks” where we can buy typical food specific for a country at discounters such as Biedronka, Lidl or Aldi. Among the most popular cuisines are of course French, Italian and Spanish, but also Asian (with an increasing number of Thai, Chinese, Vietnamese, Japanese and Indian restaurants) and Middle Eastern cuisine.



Chain of world cuisine shops (12 in Poland)



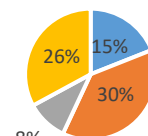
World cuisine section in the supermarket

Consumption of alcoholic beverages

+7% growth in the value of alcohol sales (EUR 9bn) in 2020

- Poles are increasingly looking for alternatives to traditional spirits (vodka) with strong growth in sales of foreign alcohol

Growth in alcohol sales (%)



- At the same time, local production of wine and craft beer is increasing:

- 35-fold increase in wine production between 2009 and 2020 with 530 wineries
- Craft breweries have increased their production by more than 19% in 2020

Vegetarian & vegan trends in Poland

20%

of Poles have reduced meat consumption over the last 10 years

4%

of Poles follow a plant-based diet

21,7 %

of 18-24 years old do not eat meat.



- Warsaw has been elected the 3rd vegetarian friendly city in the world with more than 80 vegetarian and vegan restaurants of which more than 50 are 100% vegan.



- Vegetarian and vegan restaurant chains are developing all over the country such as Krowarzywa, Falla.



- During the pandemic, more than 40% of Poles changed their eating habits, with one in four restricting their meat consumption and introducing plant-based alternatives.
- According to Uber Eats, the number of vegan orders in Poland has increased fivefold in the last three years

Environment

Poles are increasingly aware of the environmental impact of their consumption and prefer products with less and environmentally friendly packaging.

E-commerce and food products.

- Online sales of food products grew by 57.5% in 2020 and are expected to grow at an average annual rate of over 25% until 2026.
- With the pandemic, the sector has rapidly developed many solutions: Click & Collect, Click & Drop and Click & Drive

Example: the launch of the largest organic food warehouse in Poland, exclusively dedicated to online sales on Organic24.pl



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