

**Food For Thought (FFT)
Strategic Information Services**

The Dry Pasta Market in Poland

2011 Edition

Disclaimer

Disclaimer and © Copyright: Whilst every possible care has been taken in the compilation, preparation and presentation of the information published in this report, no liability whatsoever can be accepted for the contents or their accuracy. No part of this work may be reproduced or utilised in any form or by any means, electronic or mechanical, including photocopying, internet or any other information storage or retrieval system, without prior written permission of the publishers.

© 2011 Food For Thought (FFT) S.A.

www.fft.com

sales-service@fft.com

FOREWORD

LEGAL, DISCLAIMER and COPYRIGHT

- Legal:** This report is governed by the "Terms of Service" and "Legal & Disclaimer" sections to be found on FFT's online website at www.fft.com.
- Disclaimer:** Whilst every possible care has been taken in the compilation, preparation and presentation of the information published in this report, no liability whatsoever can be accepted for the contents or their accuracy.
- Copyright ©** No part of this work may be reproduced or utilised in any form or by any means, electronic or mechanical, including photocopying, internet or any other information storage or retrieval system, without prior written permission of the publishers.

OVERALL DEFINITIONS

- General:** Market data refer to all products sold for final human consumption in retail, foodservice and artisanal markets (own-produced for own sale, e.g. independent bakers), thus excluding industrial and intermediate consumption, and auto-consumption.
- Product:** All product markets are carefully defined so as to be comparable across all countries. Special cases in a few country and product markets are specified.
- Prices:** Retail prices (including VAT, excise and other indirect taxes) and foodservice buy-in prices are applied throughout.

METHODOLOGY

All countries are surveyed in the field regularly, during which extensive company and other interviews are carried out. FFT also systematically gathers all publicly available data (from trade associations, government institutions and publications, the press and other media). The definition above (final human consumption) ensures that there is no double-counting among product markets. In turn, this enables comparisons across all country/product markets on a per capita or unit value or real growth basis, and allows all data to be summed by product, by country, or by category, allowing extensive cross-checking for verisimilitude. Foodservice Markets: The total (retail + foodservice) human consumption market is established first. An estimate of the food-service market share, derived from multiple sources and industry interviews, is then applied to this total. Owing to the extremely fragmented nature of the foodservice market, specific foodservice surveys are not considered feasible or reliable.

FULL COVERAGE

There are NO gaps. Volume, Value and Company Market Share data are provided for ALL country and product markets. FFT provides its own carefully assessed estimates in the absence of any available data source.

DATA COLLECTION PRINCIPLES

- 1 End-Use Definition:** Final Human Consumption (see above). This ensures NO double-counting and that any and all data can be added up.
- 2 Wide Coverage:** All demand & supply - including retail, foodservice and direct supply - provides a fixed frame into which all elements must fit in a logical manner.
- 3 The 100% Rule:** Company market shares must add up to no more than 100%, and wide coverage means that all significant supplier market shares must be fitted in, squeezing many company claims!
- 4 Cross-checking:** To ensure verisimilitude, extensive country comparisons are made of per capita consumption and expenditure, real growth rates, etc., and against 10-year historical trends. Data "outliers" are singled out, and if necessary re-checked in the field.
- 5 Critical Review:** All publicly available data - the trade press, associations, government surveys, etc., are exhaustively collected & collated, and many amended or rejected, applying the above principles.
- 6 Original Sourcing:** Extensive field surveys, company interviews and store checks are carried out every year, and all data is "fitted" to a realistic overall picture of total supply and demand.
- 7 Software:** Complex, internally-developed computer programs provide a unique dynamic interlocking data grid.
- 8 Russian Doll:** Internal consistency and coherence is provided by data adjusting automatically to data changes elsewhere.
- 9 Client Feedback:** Continual improvements are incorporated in each annual edition at clients' suggestions and remarks, thus fine-tuning the database to market realities.
- 10 Strategic View:** Strategic View: Presentation techniques favoring a global vision of food & drink markets are systematically applied.

THE DRY PASTA MARKET IN POLAND

TABLE OF CONTENTS

Dry Pasta Market Profile, Poland	3
Periscope for Dry Pasta in Poland	3
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Dry Pasta, Poland	4
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2010-2015	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Dry Pasta, Poland	4
Retail, Foodservice and Total Demand, 2005, 2009 and 2010	
Total demand 5-year growth rates, 2005-2010	
Per capita retail, foodservice and total market consumption, 2010	
Total Market Value, Dry Pasta, Poland	4
Retail, Foodservice and Total Demand, in Polish Zlotys and Euros, 2005, 2009 and 2010	
Total demand real 5-year growth rates, 2005-2010	
Per capita retail, foodservice and total market expenditure, 2010	
Company Market Shares, Dry Pasta, Poland	5
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Dry Pasta, Poland	5
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2011	
Major Brands, Dry Pasta, Poland	6
Major Brands Listing by Company and Subsidiary, 2011	
 Supplementary Analysis	 7
Especially important where FFT has identified more than 10 holding companies	
Company Listing for Dry Pasta in Poland	7
All Holding Companies identified for this market listed	
Key Local Subsidiaries identified	
Company Market Shares and Rankings provided	
Goliard Redziny to Sulima	7
Wienox to ZKS Wodzislaw	8
Major Brands Listing for Dry Pasta in Poland	9
Who Owns Whom: All Key Local Subsidiaries identified	
Major Brands by Holding Company and Key Subsidiary listed	
Major Brands by Product Market	9
1.72 Dry Pasta	9
Major Brands by Holding Company	11
Goliard Redziny to ZKS Wodzislaw	11

(blank page)