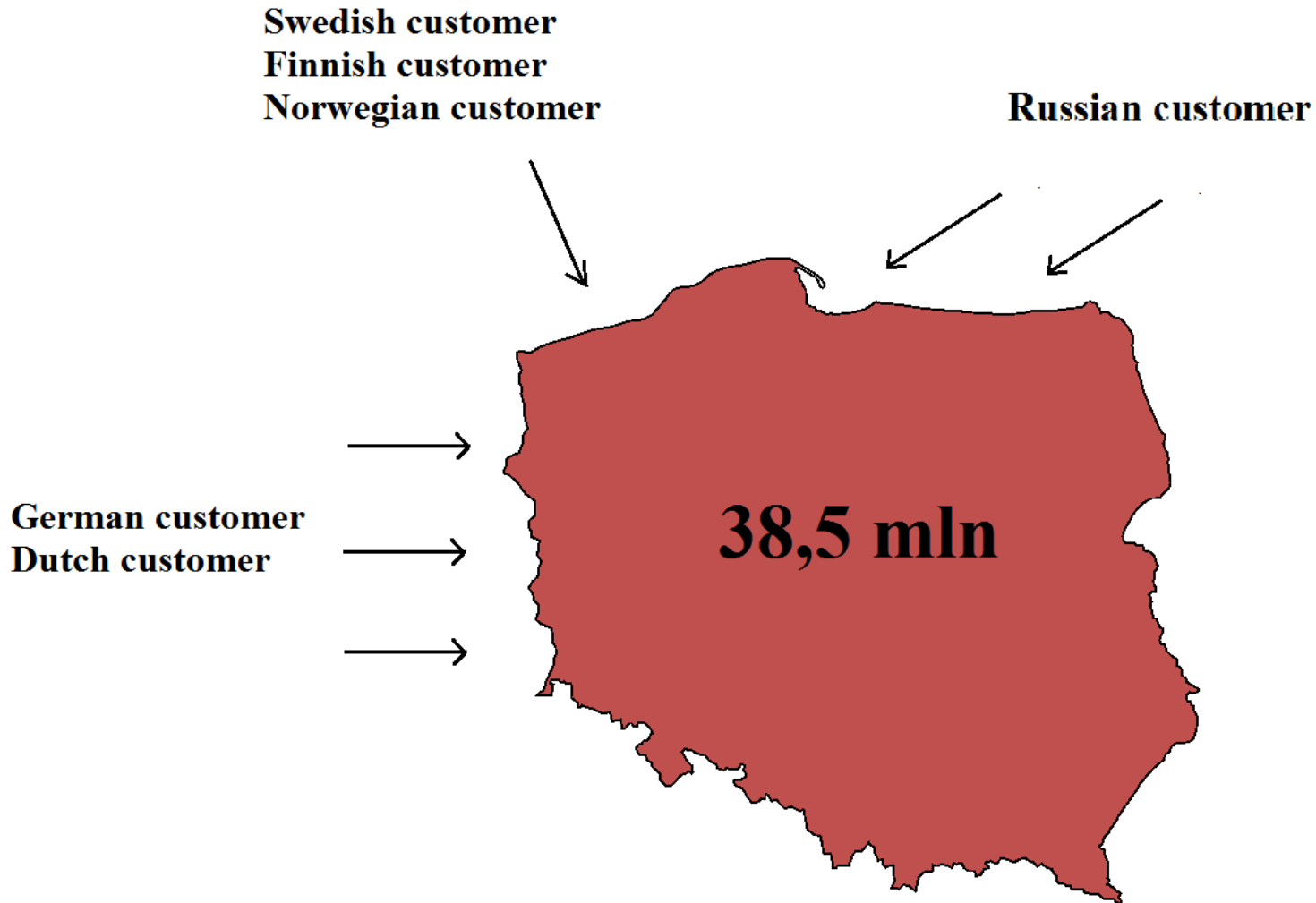


# How to enter Polish market

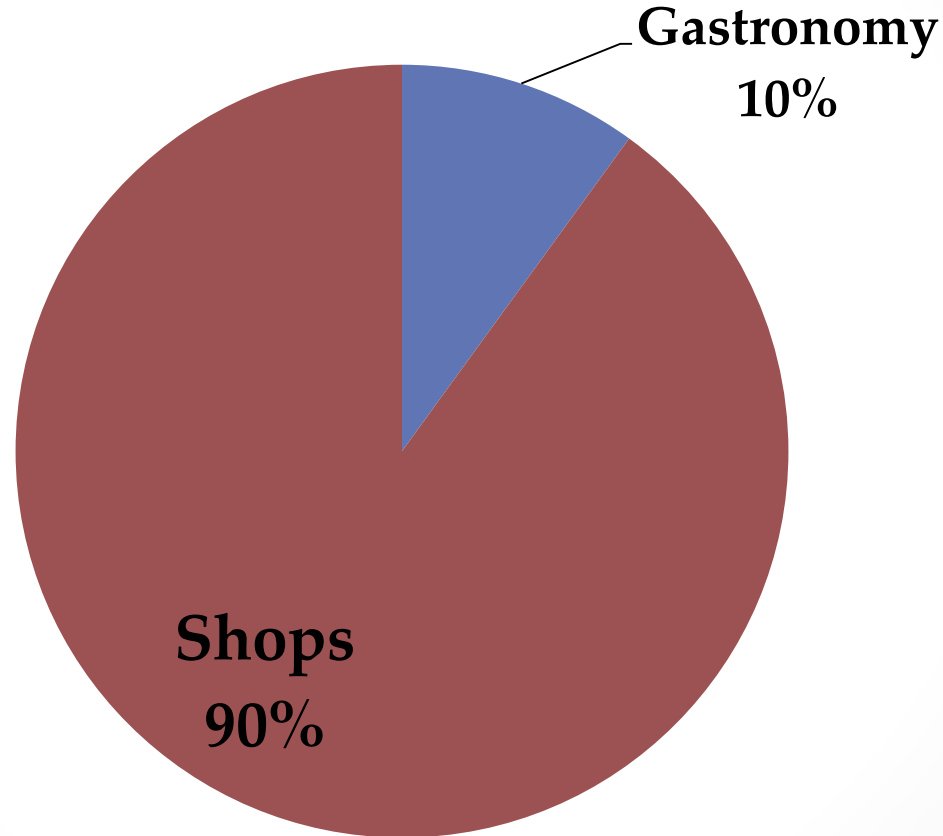
Presented by: Adam Bernaciak,  
Chairman of the Board of  
ABER sp. z o.o.

May 2014

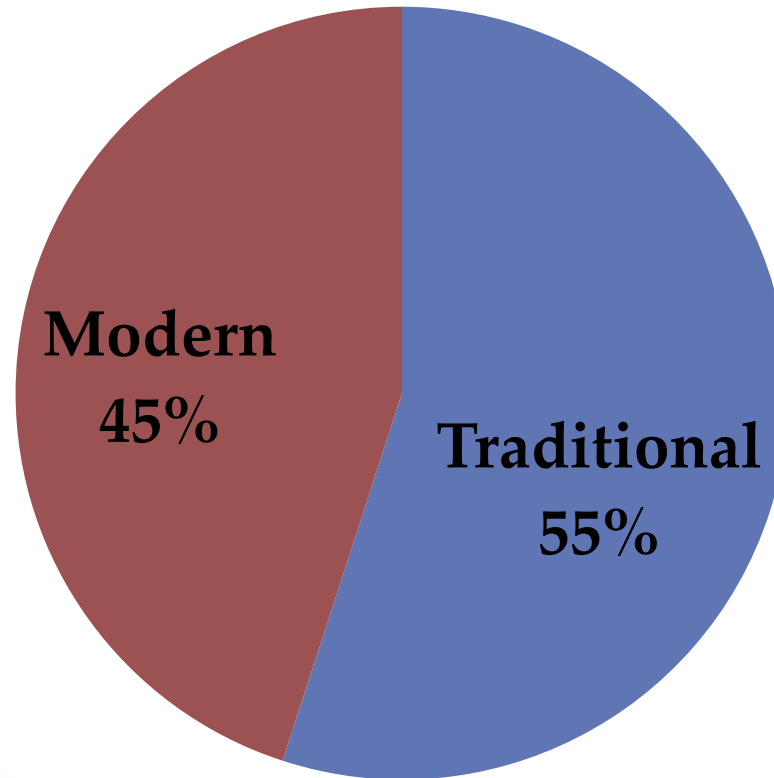
# Polish food market capabilities



# Polish market preference



# Food industry distribution channels



# Traditional Trade – Private Shops

- 2009 - 118 000 shops
- 2013 – 78 000 shops (48 000 franchise, 30 000 independent shops)
- PSS Społem: 4 000 shops
- Stokrotka: 210 shops
- Detal WM: 250 shops
- Żabka: 2 800 shops

# Modern Trade

- Discounters: Biedronka - 2245, Lidl - 500, Polo Market - 420, Eco - 300, Netto - 319
- Supermarkets/Hypermarkets: Tesco - 450, Auchan - 29, Carrefour - 300, E. Leclerc - 41
- Delicatessen: Piotr i Paweł - 104, Alma - 43,

# How to enter Polish market – Option I

## 1. Start a Ltd company

- Sales force: 4 region, 40 sales representatives, unlimited SCU
- Marketing: TV, Radio, Newspapers,
- Distribution: 1-3 warehouse,
- Finance: vindication,
- Examples: Coca Cola sp. z o.o., Unilever Polska sp. z o.o., Nestle Polska sp. z o.o.
- Modern/ Traditional Trade
- The most expensive method/ most possible to succeed



# How to enter Polish market - Option II

## 2. Sales Office in Poland

- Sales Department
- Marketing Department
- Logistic Department (transportation form Latvia)
- Modern Trade
- Expensive/ Difficult to proceed.



# How to enter Polish market - Option III

## 3. Polish Importer

- 1- 4 polish companies – distribution
- Own sales force, marketing channels, distribution channels
- Knowledge of traditional trade in Poland
- Traditional market focus
- The cheapest method/ no guarantee of succeeding



# Threats

- Crediting sales –debt collection, insurance of debts
- Taxes VAT 0%, 3%, 5%, 8%, 23%? –high influence on price, polish tax office
- New independent product –new market, recognition of the market
- Production capacity limitations



# Opportunities

- Large growing market (3,3% increase of GDP in I quarter of 2014, Inflation 0,3% in April 2014).
- Private Label
- Discovering new products for polish market (snacks, chips)
- Building your own distribution network



Thank you for your  
attention.