

Poland Food and Drink Report Q1 2016

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Abstracts

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BMI View: We forecast positive growth in Poland's food and drink industry, with food consumption growth remaining strong over our five year forecast to 2019.

Investment from multinationals in the industry will be fuelled by positive growth in the country's macroeconomic conditions.

Russia's ban on Polish agricultural products will encourage new trade partnerships, which will boost the sales lost from the Russian market.

We expect premiumisation in alcoholic drinks to strengthen as consumer spending increases, with beer sales falling as a result of increased demand in wine and spirits.

Furthermore, in the CEE region, Poland's favourable market-size will encourage investment in the MGR sector.

Headline Industry Data (local currency)

2015 total food consumption growth (local currency): +1.7%; compound annual growth rate (CAGR) 2014-2019: +3.7%.

2015 per capita food consumption growth (local currency): +1.7%; CAGR 2014-2019: +3.7%.

2015 alcoholic drinks volume sales growth: -1.0%; CAGR 2014-2019: -0.5%.

2015 soft drinks volume sales: +1.1%; CAGR 2014-2019: +0.4%.

2015 total MGR sales growth (in local currency terms): +3.8%; CAGR
2014-2019: +4.9%.

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