

Poland Food and Drink Report Q4 2015

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Abstracts

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BMI View: We hold a positive outlook on the Polish consumer over the next few years, after several years of sluggish growth. We expect robust real GDP growth fuelled by strong private expenditure in 2015 and 2016. In line with the recovering economic situation, we expect the Polish food market to register increasingly stronger growth rates in absolute and per capita terms over our forecast period from 2014 to 2019. However, Russia's ban on agricultural imports from EU countries will continue to damage fruit and vegetable producers in Poland, which export much of their produce to Russia. A reduction in exports to Russia is likely to drive down food price inflation in Poland, which will be beneficial to consumers.

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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