Agriculture and Agri-Food Canada
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Consumer Trends
Cooking Oils in Poland



Growing Forward

Canada

MARKET SNAPSHOT

- Poland has the largest economy in the Eastern European Union. Growing health awareness and an aging population are resulting in consumers concerned with living healthier lifestyles. Rising disposable income and westernization are also creating growing demand for luxury and premium items (Reuters, 2012, Euromonitor International, 2011).
- According to the World Bank Group (2012), Poland's Gross Domestic Product (GDP) was US$514.5 billion in 2011. Throughout the past decade, Poland's GDP has maintained positive growth rates and increased 4.3% in 2011 over the previous year. This continued growth, combined with a consumer population of 38.2 million, has supported a growing oils and fats market, valued at more than US$1.7 billion in 2011 (Euromonitor International, 2011).
- Poland's imports of animal and vegetable fats, oils and waxes increased in value by 18.5% from 2006 to 2011, while volumes grew by 3.7%. Rapeseed, colza and mustard oil imports have also been increasing, representing 11.1% of Poland's total oils and fats imports and worth US$115.3 million in 2011.
- The oils and fats market in Poland had a compound annual growth rate (CAGR) of 4.4% from 2006 to 2011, and is supported by fairly stable demand, as these products are commonly used in meals in nearly all households, and consumed on a daily basis.
- Although this is a fairly stable market, a number of trends are evolving in the oils and fats category, with health and wellness expected to fuel growth in olive oil, and functional spreads and oils. This growth in demand for olive oil is also evident in the number of new olive oil products. Claims common on new product launches of oil have also included health-related attributes. However, premium, convenience and economy claims are also being used.
- With continued positive GDP growth of 2.3% estimated for 2012, Poland's expanding economy should support continued spending in the oils and fats market, which is predicted to continue to grow gradually (Reuters, 2012, Euromonitor International, 2011). Oil categories related to health and wellness are expected to grow the most in value and volume.
- Opportunities for Canadian oil exports may also exist for the wide range of food products that use oil as an ingredient. While new oil product launches have decreased from 2010, new product launches that contained canola/rapeseed oil increased from 2 launches in 2011 to 20 launches as of August 2012.

INSIDE THIS ISSUE

Oils displayed at a hypermarket/superstore (Carrefour) in Poland
Source: *Planet Retail, 2012*

TRADE

- Poland has a negative trade balance for oils and fats (HS15), with imports valued at US$1.0 billion and exports of US$0.5 billion in 2011. Poland's top imports of oils and fats were: palm oil products; margarine; animal/vegetable fats and oils; rapeseed, colza and mustard oil; and sunflower seed, safflower and cottonseed oil. Major import sources were Germany, the Netherlands, Ukraine, Italy, and Belgium. In 2011, Canada was Poland's 52nd largest import source for oils and fats, but ranked 35th as an import source in 2008 and 2010.

- Poland has a ready supply of rapeseed and exported US$230.3 million of rapeseed, colza and mustard oil (HS 1514) to the world in 2011. This represented nearly half (45.3%) of the country's exports of oils and fats. From 2006 to 2011, Poland's rapeseed, colza and mustard oil exports experienced a CAGR of 8.8% (Global Trade Atlas, 2012). Poland's rapeseed production was estimated to be 1.9 million tonnes in 2011, a 10.1% decrease from the previous crop year (USDA FAS, 2011).

- Poland's imports of rapeseed, colza and mustard oil products accounted for approximately 11.1% of the country's total imports of oils and fats in 2011 – valued at US$115.3 million – and representing a volume of nearly 84,000 tonnes. The country's major import sources for rapeseed, colza and mustard oil products in 2011 were Germany, with an import share of 38.2%, Czech Republic (31.3%), Belgium (10.0%), United Kingdom (4.2%), and Lithuania (4.1%) (Global Trade Atlas, 2012).

Poland's Trade of Animal and Vegetable Fats, Oils and Waxes* by Value (Historic) in US$ millions

Category	2006	2007	2008	2009	2010	2011	2006-11 CAGR
Imports from the world	445.7	537.8	839.7	567.3	666.0	1,041.1	18.5%
Exports to the world	215.2	341.1	441.2	358.3	430.5	508.5	18.8%

Poland's Trade of Animal and Vegetable Fats, Oils and Waxes by Volume (Historic) in Tonnes

Category	2006	2007	2008	2009	2010	2011	2006-11 CAGR*
Imports from the world	577,313	523,256	578,251	503,674	543,169	693,935	3.7%
Exports to the world	258,041	361,639	322,176	364,283	437,903	378,451	8.0%

Source for both: *Global Trade Atlas, 2012.*
**HS 15: Animal or vegetable fats and oils and derived products; prepared edible fats; animal or vegetable waxes*

RETAIL SALES

Retail Sales Overview

- Poland's retail value sales of oils and fats reached US$1.7 billion in 2011, representing market expansion at a CAGR of 4.4% from 2006 to 2011. Volume sales grew at a slightly slower rate, with a CAGR of 2.4% over the same time period. Higher production costs were expected to lead to rising average unit price costs in 2011, across the oils and fats category.

- Demand in Poland for oils and fats is fairly stable, due to the common use of these products in the preparation of sandwiches, as well as breakfast and supper meals at home. This consumer behaviour results in oils and fats being consumed daily in almost every household.

- Canola/rapeseed oil is the most popular vegetable/seed oil in Poland, while sunflower and soya bean oils are gradually gaining market share as consumers diversify their oil products. Vegetable and seed oils experienced retail value sales of US$442.5 million in 2011, accounting for roughly a quarter of Poland's total oils and fats category (Euromonitor International, 2011).

- While functional spreadable oils and fats accounted for 2.3% of the spreadable oils and fats category and less than a 1% share of the oils and fats market, these products have experienced the most growth. From 2006 to 2011, functional spreadable oils and fats had a CAGR of 20.0%, and total growth of 148.7%. The next fastest-growing category was olive oil, with a CAGR of 5.7% (Euromonitor International, 2011).

Poland's Oils and Fats Market by Retail Value (Historic) in US$ Millions

Category	2006	2007	2008	2009	2010	2011	2006-11 CAGR
Total oils and fats	1,386.5	1,473.0	1,563.5	1,603.3	1,663.3	1,723.6	4.4%
Butter	409.6	432.2	458.1	467.3	490.6	510.2	4.5%
Cooking fats	45.5	46.7	48.0	48.4	48.9	49.5	1.7%
Margarine	100.3	103.3	106.5	107.1	107.8	108.9	1.7%
Olive oil	46.1	48.0	50.4	53.4	56.9	60.9	5.7%
Spreadable oils and fats*	396.5	440.8	483.6	503.9	527.8	551.7	6.8%
Vegetable and seed oil	388.5	402.1	417.0	423.3	431.3	442.5	2.6%

Note: Current prices at fixed 2011 exchange rates.
**Spreadable oils and fats: This is an aggregation of regular and functional/fortified spreadable oils and fats*

Poland's Oils and Fats Market by Retail Volume (Historic) in Thousands of Tonnes

Category	2006	2007	2008	2009	2010	2011	2006-11 CAGR
Total oils and fats	432.2	447.4	462.1	469.1	477.0	487.1	2.4%
Butter	70.1	72.7	75.6	76.7	76.0	76.7	1.8%
Cooking fats	7.5	7.6	7.6	7.6	7.7	7.7	0.5%
Margarine	45.6	46.0	46.4	46.5	46.7	46.9	0.6%
Olive oil	4.1	3.9	3.9	4.1	4.3	4.5	2.1%
Spreadable oils and fats	119.2	128.2	135.3	138.9	143.8	148.6	4.5%
Vegetable and seed oil	185.7	189.1	193.2	195.3	198.7	202.6	1.8%

Source for both: *Euromonitor International, Oils and Fats in Poland, 2011.*

Retail Sales Forecasts

- Value growth for oils and fats from 2011 to 2016 is expected to slow compared to the time period from 2006 to 2011. The CAGR is expected to remain slightly positive at 0.9% from 2011 to 2016. Continued cooking at home and the daily consumption of oils and fats by consumers, is expected to continue to drive positive growth in the market.

- While some categories will experience negative growth, the growing trend for health and wellness will help to continue growth in categories such as olive oil and spreadable oils and fats. However, butter is also expected to have a positive CAGR from 2011 to 2016. The functional spreadable oils and fats category is predicted to remain the fastest growing category in the oils and fats market, due to its small market size in 2011 and new product launches.

- Average unit prices are expected to continue to rise across oils and fats from 2011 to 2016, due to rising material, fuel, energy, transportation and technology costs, leading to an overall increase in the costs of production (Euromonitor International, 2011).

RETAIL SALES (continued)

Poland's Oils and Fats Market by Retail Value (Historic/Forecast) in US$ Millions

Category	2011	2012	2013	2014	2015	2016	2011-16 CAGR
Total oils and fats	1,723.6	1,735.6	1,747.7	1,761.7	1,780.8	1,806.2	0.9%
Butter	510.2	517.2	521.8	526.4	534.1	545.0	1.3%
Cooking fats	49.5	48.7	48.2	47.6	47.1	46.5	-1.2%
Margarine	108.9	107.2	105.4	103.9	102.6	101.4	-1.4%
Olive oil	60.9	63.5	65.8	67.9	70.2	72.9	3.7%
Spreadable oils and fats	551.7	559.1	566.9	575.9	588.1	603.5	1.8%
Vegetable and seed oil	442.5	439.9	439.6	440.0	438.7	436.9	-0.3%

Note: Constant prices at fixed 2011 exchange rates.

Poland's Oils and Fats Market by Retail Volume (Historic/Forecast) in Thousands of Tonnes

Category	2011	2012	2013	2014	2015	2016	2011-16 CAGR
Total oils and fats	487.1	496.9	507.5	518.1	530.5	542.8	2.2%
Butter	76.7	78.4	79.7	81.6	84.1	86.9	2.5%
Cooking fats	7.7	7.8	7.8	7.8	7.9	7.9	0.6%
Margarine	46.9	47.3	47.6	47.6	47.8	48.0	0.4%
Olive oil	4.5	4.8	5.1	5.3	5.6	5.9	5.5%
Spreadable oils and fats	148.6	153.3	158.1	162.8	168.9	175.6	3.4%
Vegetable and seed oil	202.6	205.3	209.2	212.9	216.1	218.4	1.5%

Source for both: *Euromonitor International, Oils and Fats in Poland, 2011.*

Distribution

- Supermarkets and hypermarkets are the core distribution channel for oils and fats, and are expected to remain the key channels over the next five years. These retail formats provide a wide array of brands, available at a variety of price points, catering to a range of consumer tastes and preferences. Discount retailers are also expected to become an increasingly important channel for oils and fats, particularly as they target price-conscious consumers.

- Of store-based retailing in 2011, grocery retailers accounted for all retail value sales of oils and fats (99.6% of retail sales). Of grocery retail formats, supermarkets accounted for a 55.0% retail value share of oils and fats, followed by small grocery retailers (25.2% share), and discounters (19.4%). Internet retailing accounted for a 0.4% share of the oils and fats retail market (Euromonitor International, 2011).

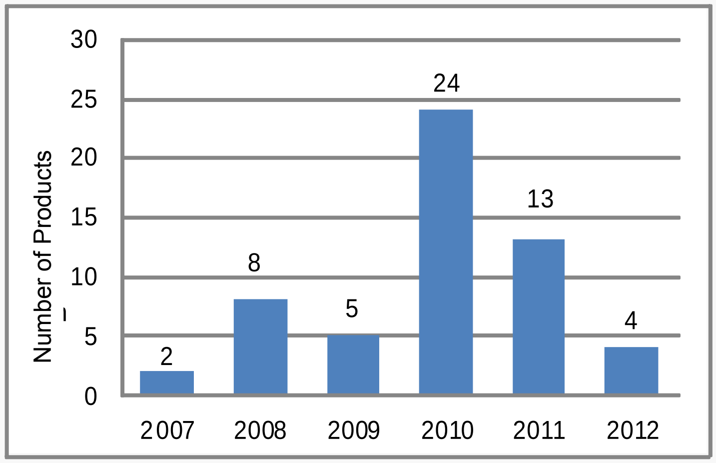
Oils displayed at a supermarket (Tesco) in Poland
Source: *Planet Retail, 2012*

NEW PRODUCT LAUNCHES

- According to Euromonitor International, new products have fuelled sales growth in the oils and fats category in Poland. Many of these new products target growing consumer interest in health and wellness and healthy living. These types of products are gaining in popularity and provide consumers with added health benefits, for example, products that claim to help reduce cholesterol levels and promote cardiac health. An increasing number of organic products are also expected in Poland's market (2011).

- European Food Safety Authority (EFSA) regulations have also allowed for the use of health claims stating that plant sterols help reduce blood cholesterol levels. This allows manufacturers of functional spreadable oils and fats to use this claim and may also drive some new product launches in the oils and fats category (Euromonitor International, 2011).

New Oil Launches in Poland from January 2007 to August 2012 by Year



Source: *Mintel, 2012*

- According to the Mintel Global New Products Database, new oil launches peaked in 2010 when there were 24 launches, which represented 42.9% of the total 56 new launches in Poland between January 2007 and August 2012.

New Oil Launches in Poland from January 2007 to August 2012 by Top Companies and Brands

Company	Brand	Number of Products
Oleofarm	Oleofarm	15
Tesco	Cook's Kitchen	1
	Discount Brands Cook's Kitch-	1
	Discount Brands Zlota Kraina	1
	Tesco	1
	Tesco Organic	1
Davert	Davert	4
Costa d'Oro	Costa d'Oro	1
	Costa d'Oro Olisana Active Line	1
	Costa d'Oro Organic	1
Carapelli	Carapelli Firenze	1
	Carapelli Giglio Oro	1
	Carapelli Olys	1
Lidl	España	1
	Italiamo	1
	Vitasia	1
F.lli Ruata	Goccia D'oro Sport Line	1
	Goccia D'oro Vitosan	1
Compañía Alimentaria del Sur de Eu-	ArteOlivia	1
Compañía Oleícola Siglo XXI	La Chinata	1
Basso Fedele E Figli	Basso	1
Other companies	Other brands	18

Source: *Mintel, 2012*

NEW PRODUCT LAUNCHES (continued)

Claims

- Premium was the most common claim for the 56 new products launched during this period. Seven products had a premium claim, including four extra virgin olive oils, one organic olive oil, and one linseed oil. Several of these products also had additional claims, such as no added/preservatives, all natural, organic, kosher, ethical, and functional.

- The next most popular claim was kosher, which was used for five products. Two of these were extra virgin olive oils, while one each was a flax oil and an olive oil, and the fifth product was an oil comprised of five different oil types.

- Organic claims were made for two extra virgin olive oil products, one organic olive oil and a rapeseed/canola oil. However, organic products are too costly for most Polish consumers. The majority of other top claims for new oil products tend to be related to premium/specialty or health and wellness trends, with a small influence from convenience and economy trends (Mintel, 2012).

New Oil Launches in Poland from January 2007 to August 2012 by Major Claim

Claim	Number of Products
Premium	7
Kosher	5
Organic	4
Convenient packaging	2
Antioxidant	2
Economy	2
All natural product	2
No additives/preservatives	2
Slimming	1
GMO-free	1

Source: *Mintel, 2012*

Types of Oil and Flavours

- Of the top on-pack ingredients, olive oil was by far the most common. Extra virgin olive oil products were particularly notable among new launches and dominated oil products in the time period.

- Rapeseed oil was the second-most common on-pack ingredient, with a variety of other oils equally present, highlighting the diversity of oils present in the market. Flax, linseed, sunflower, safflower, and rice oils were all part of new product launches in the period, while oil blends were also present.

- The vast majority of new launches were unflavoured/plain products. However, there was a chili and garlic extra virgin olive oil product and two cereal and fruit oil products. Despite this, the focus for new product differentiation appears to be based more strongly on claims and less on flavours (Mintel, 2012).

New Oil Launches in Poland from January 2007 to August 2012 by Top Ingredients

Top Ingredients (On-Pack)	Number of Products
Olive oil	11
Rapeseed oil	4
Corn oil	3
Sunflower seed oil	3
Rice bran oil	3
Garlic	2
Grapeseed oil	2
Sesame seed oil	2
Low erucic acid rapeseed oil	2
Grain oil	2

Source: *Mintel, 2012*

Packaging

- Bottles were by far the most common packaging format, with four oil products using a can format and two using a carton format. The most popular package size was a 250 ml format in a coloured glass bottle, which represented 18 of the new products in the time period. The second most popular size was a 500 ml coloured glass bottle, accounting for eight new products, while the third most popular was a 1000 ml plastic PET bottle, representing five new products.

- By pack size alone, the most popular sizes were 250 ml, followed by 1000 ml and 500 ml, which represented the vast majority of new products in the time period. Plastic, glass and metal/steel were all used as packaging material in new product launches (Mintel, 2012).

NEW PRODUCT EXAMPLES

The following are some examples of new oil and fat products launched in Poland between January 2007 and August 2012, from the Mintel Global New Products Database (2012).

Extra Virgin Olive Oil with Chili and Garlic

Company: Olitalia
Brand: Olitalia
Date Published: December 2011
Launch Type: New product
Store Name: Piotr i Pawel
Store Type: Supermarket
Positioning Claims: None

Price (US$): 5.09
Package Type: Bottle
Package Material: Glass, plain
Pack Size: 250 ml
Storage: Shelf stable
Private Label: Branded
Ingredients: Extra virgin olive oil, dried garlic, dried chili, natural garlic aroma, natural chili aroma.

Product Description: Olitalia Oliwa z Oliwek z Chili i Czosnkiem (Extra Virgin Olive Oil with Chili and Garlic) is said to enrich the flavour of salads, spaghetti, vegetables and seafood dishes. The product retails in a 250 ml bottle.

Wok Oil

Company: Lidl
Brand: Vitasia
Date Published: July 2011
Launch Type: New product
Store Name: Lidl
Store Type: Supermarket
Positioning Claims: None

Price (US$): 3.55
Package Type: Bottle
Package Material: Plastic PET
Pack Size: 250 ml
Storage: Shelf stable
Private Label: Private Label
Ingredients: Refined sunflower oil, sesame oil, natural aroma (ginger, garlic)

Product Description: Vitasia Wok Oil is a mix of vegetable oils, including sunflower oil and peanut oil, blended with garlic and ginger. This aromatic combination of flavours makes the oil suitable for use in wok dishes and stir fries. This oil is retails in a 250 ml bottle.

Extra Virgin Olive Oil

Company: Terra Creta
Brand: Terra Creta Oh!Live
Date Published: July 2011
Launch Type: New product
Store Name: Bomi
Store Type: Supermarket
Positioning Claims: Slimming

Price (US$): 8.28
Package Type: Bottle
Package Material: Glass, plain
Pack Size: 250 ml
Storage: Shelf stable
Private Label: Branded
Ingredients: Olive oil

Product Description: Terra Creta Oh!Live Extra Virgin Olive Oil is a superior category of olive oil obtained directly from olives and solely by mechanical means. It is recommended for various types of meals, salads, vegetables or sandwiches. The product allows the consumer to control their calorie intake, as each spray provides one calorie. It is retailed in a 250 ml bottle.

***Source for all: Mintel**, 2012*

▶ NEW PRODUCT EXAMPLES (continued)

Cereals and Fruits Oil

Company: Carapelli
Brand: Carapelli Olys
Date Published: September 2010
Launch Type: New product
Store Name: Real
Store Type: Mass Merchandise/hypermarket
Positioning Claims: None

Price (US$): 5.11
Package Type: Bottle
Package Material: Plastic PET
Pack Size: 1000 ml
Storage: Shelf stable
Private Label: Branded
Ingredients: Cereal oil, (corn oil (certified non-GMO), rice oil, wheat sprout oil), fruit oil (nut oil, blackcurrant oil), aromas.

Product Description: Carapelli Olys Cereals and Fruits Oil is said to be a unique mixture of oils, which are rich in vitamin E, vitamin F, omega 3 fatty acids. The product is light and tasty, and available in a 1 L bottle.

Oil

Company: Costa d'Oro
Brand: Costa d'Oro Olisana Active Line
Date Published: March 2010
Launch Type: New product
Store Name: Unknown
Store Type: Unknown
Positioning Claims: Antioxidant, kosher

Price (US$): 4.19
Package Type: Bottle
Package Material: Glass plain
Pack Size: 500 ml
Storage: Shelf stable
Private Label: Branded
Ingredients: Grape seeds oil, canola oil, rice oil, corn oil, sesame seed oil.

Product Description: Costa d'Oro Olisana Active Line Oil, which is made with five different types of oils, is recommended for cooking and dressing. It claims to be very healthy, delicate and rich in antioxidants, vitamins, and unsaturated fatty acids. The product has been awarded an innovative product award in Italy and Poland. It is certified kosher, recommended by nutritionists, and available in a 500 ml bottle.

Rapeseed Oil

Company: Davert
Brand: Davert
Date Published: December 2008
Launch Type: New product
Store Name: Unknown
Store Type: Unknown
Positioning Claims: Organic

Price (US$): 5.15
Package Type: Bottle
Package Material: Glass coloured
Pack Size: 500 ml
Storage: Shelf stable
Private Label: Branded
Ingredients: Rapeseed oil

Product Description: Davert Rapsol (Rapeseed Oil) is made from the first cold pressing of certified organic rape seeds. The product contains no refined oil and is rich in omega-3 fatty acids. It is retailed in a 0.5 L bottle. Also available are: Distel Ol (Thistle Oil); Back Und Bart Ol (Baking and Frying Oil); Sonnenblumenol (Sunflower Oil).

***Source for all: Mintel**, 2012*

▶ NEW PRODUCT EXAMPLES (continued)

Vegetable Fat Spread

Company: Raisio
Brand: Benecol
Date Published: July 2008
Launch Type: New variety/ range extension
Store Name and Type: Unknown
Positioning Claims: Cardiovascular (functional), low/no/reduced fat, low/ no/reduced transfat, stanols/sterols

Price (US$): 4.88
Package Type: Tray
Package Material: Plastic PP
Pack Size: 225 g
Storage: Chilled
Private Label: Branded
Ingredients: Water, selected vegetable oils and fats, vegetable stanol ester (vegetable stanol 8.0%), refined olive oil (7%), extra virgin olive oil (3%), emulsifiers (lecithin, mono and diglycerides of fatty acids), salt (0.5%), preservative (potassium sorbate), acidity regulators (citric acid, sodium hydrogen carbonate), aromas, colourant (beta-carotene), enriching substance (vitamin A), vitamin D3.

Product Description: Benecol Benecol Z Oliwa Z Oliwek (Vegetable Fat Spread) contains added olive oil. This product has a low-fat content and is claimed to contain vegetable stanol esters, that help to reduce cholesterol which is clinically proven. According to the manufacturer, 25 g of Benecol reduces the cholesterol level. This trans fat free product is retailed in a 225 g tub.

Herbal Butter

Company: Meggle
Brand: Meggle
Date Published: January 2009
Launch Type: New product
Store Name: Unknown
Store Type: Unknown
Positioning Claims: No additives/ preservatives

Price (US$): 2.06
Package Type: Tube
Package Material: Metal aluminium
Pack Size: 80 ml
Storage: Chilled
Private Label: Branded
Ingredients: Butter (29%), rape oil (28%), milky fat, onion, sunflower oil, parsley (6%), garlic (3%), palm oil, iodized salt, starch, spices, herbs, natural aroma, citric acid.

Product Description: Meggle Die Krauter Tube is a herbal butter that contains fresh herbs and finest butter. The product is preservative-free and contains no flavour enhancers It is available in an 80 ml tube.

Margarine with Vitamins and Fibres

Company: Malpka
Brand: Benevita
Date Published: August 2012
Launch Type: New variety/range extension
Store Name: Intermarché
Store Type: Supermarket
Positioning Claims: No additives/ preservatives, vitamin/mineral fortified.

Price (US$): 1.48
Package Type: Tub
Package Material: Plastic PP
Pack Size: 225 g
Storage: Chilled
Private Label: Branded
Ingredients: Refined oils and fats, water, fibre 3.5% (inulin), emulsifiers (mono-and diglycerides of fatty acids esterified) (citric acid), 0.2% salt, flavour (derived from milk), acidity regulator (citric acid), colour (annatto), vitamins (vitamin A, vitamin D3, vitamin B1, vitamin B2, vitamin B6, vitamin B9, vitamin B12).

Product Description: Benevita Margaryna z Witaminami i Blonnikiem (Margarine with Vitamins and Fibre) is free from preservatives. This product retails in a 225 g pack that features three free bags of tea.

***Source for all:** Mintel, 2012*

MARKET SHARE BY COMPANY AND BRAND

- Poland's oils and fats market is experiencing consolidation, such as the merging of four companies in 2006 that created market leader Zaklady Tluszczowe Kruszwica SA. However, it was Unilever Polska SA, that experienced the highest value share increase in oils and fats during 2010*. Both companies provide a wide product portfolio, and products that are reasonably priced, high quality, and easily available. Unilever Polska's products have also drawn consumer interest through new product development.

- Together, the top three companies accounted for nearly half (45.4%) of Poland's oils and fats retail market. Of the top 20 companies, Zaklady grew the most (50.6%) from 2007 to 2010. Private label has also been growing in the market. While other private labels represented only a small market share of 1.4% in 2010, this represents a 55.6% growth from 2007.

- Although consolidation is occurring, the variety of brands and products in Poland has created a highly competitive oils and fats market. As a result, promotional activities are a necessity. Large players in the oils and fats market generally focus on advertising in mass media, such as television, print, and outdoor, which can raise brand awareness and increase sales. However, when launching new products, in-store promotions can also be a popular method for attracting consumers. Due to the market saturation of oils and fats in Poland, new product developments will likely be the key drivers of growth in this market (Euromonitor International, 2011).

Poland's Oils and Fats Market Share by Company Retail Value — % Breakdown

Company	2007	2008	2009	2010
Zaklady Tluszczowe Kruszwica SA	16.6	24.1	24.8	25.0
Unilever Polska SA	11.6	11.9	12.1	12.6
Raisio Polska Foods Sp zoo	7.6	7.9	7.9	7.8
Spoldzielnia Mleczarska Mlekpol	3.4	3.4	3.6	3.6
ZPT SA	-	3.8	3.7	3.0
SM Mlekovita	2.5	2.5	2.6	2.8
Jeronimo Martins Dystrybucja SA	2.3	2.3	2.4	2.5
ZT Bielmar Sp zoo	2.7	2.6	2.6	2.5
ICC Paslek Sp zoo	2.4	2.4	2.2	2.2
Tesco Polska Sp zoo	1.8	1.8	1.9	1.9
PHZ SM Lacpol Sp zoo	1.8	1.7	1.7	1.8
Mleczarnia Naramowice Sp zoo	1.6	1.6	1.6	1.6
RSM Rolmlecz	1.6	1.6	1.5	1.5
Lactalis Polska	1.3	1.4	1.5	1.5
SM Gostyn	1.4	1.4	1.4	1.4
OSM Lowicz	-	1.4	1.4	1.4
Real Sp zoo	1.2	1.2	1.3	1.4
SM Bieluch	1.3	1.3	1.3	1.3
OSM Radomsko	1.4	1.4	1.2	1.2
SM Spomlek	1.0	1.0	1.0	1.0
Other Private Label	0.9	0.9	1.5	1.4
Others	24.3	18.7	17.3	16.5

Source: *Euromonitor International, Oils and Fats in Poland, 2011*
Note: *At the time of writing this report, 2010 was the latest available company share data.*

MARKET SHARE BY COMPANY AND BRAND (continued)

- While Poland's top eight brands each held a retail value share of 2% or more in 2010, the vast majority of brands have a fairly small market share below this level. From 2007 to 2010, the brand Kujawski from Zaklady Tluszczowe Kruszwica SA, maintained its position as market leader, except for in 2008, when Rama, by Unilever Polska SA, became the leader with a 7.1% share. Following fairly closely in third position has been Masmix, by Raisio Polska Foods Sp zoo. Of the top 20 brands in the market, four of Zaklady's brands accounted for a combined 15.6% market share, while four of Unilever Polska SA's brands held a combined 11.3% share.

- The market share for top brand, Kujawski, has declined by 5.1% from 2007 to 2010, while Rama's share declined by 9.1%. However, Masmix experienced a share increase of 3.9%. Within the top 20 brands, those with the highest growth from 2007 to 2010 were: Flora (511.1% growth), Delma (36.3%), and Réal (13.3%).

- Kujawski is a well-established brand within the vegetable and seed oil category, in a market where olive oil brands that provide added health benefits have become increasingly present. Demand for premium brands of oils and fats is also increasing in Poland, particularly for olive oils. However, difficult economic conditions have also led to purchases of cheaper brands and private label products by less wealthy consumers. In the future, a growing number of brands are expected in the market (Euromonitor International, 2011).

Poland's Oils and Fats Market Share by Brand Retail Value — % Breakdown

Brand	Company	2007	2008	2009	2010
Kujawski	Zaklady Tluszczowe Kruszwica SA	7.1	6.9	6.9	6.7
Rama	Unilever Polska SA	6.8	7.1	6.6	6.2
Masmix	Raisio Polska Foods Sp zoo	5.6	5.8	5.7	5.9
Bartek	Zaklady Tluszczowe Kruszwica SA	-	3.9	3.7	3.6
Laciate	Spoldzielnia Mleczarska Mlekpol	3.4	3.4	3.6	3.6
Olek	Zaklady Tluszczowe Kruszwica SA	3.7	3.6	3.5	3.4
Biedronka	Jeronimo Martins Dystrybucja SA	2.3	2.3	2.4	2.5
Delma	Unilever Polska SA	1.5	1.5	1.7	2.0
Tesco	Tesco Polska Sp zoo	1.8	1.8	1.9	1.9
Smakowita	Zaklady Tluszczowe Kruszwica SA	2.1	2.1	2.2	1.9
Staropolskie	PHZ SM Lacpol Sp zoo	1.8	1.7	1.7	1.8
Flora	Unilever Polska SA	0.3	0.4	1.0	1.7
Ekstra	Mleczarnia Naramowice Sp zoo	1.6	1.6	1.6	1.6
Maslo	RSM Rolmlecz	1.6	1.6	1.5	1.5
Président	Lactalis Polska	1.3	1.4	1.5	1.5
Kasia	Unilever Polska SA	1.6	1.6	1.5	1.4
Extra	SM Gostyn	1.4	1.4	1.4	1.4
Maslo	OSM Lowicz	-	1.4	1.4	1.4
Réal	Real Sp zoo	1.2	1.2	1.3	1.4
Maslo	SM Bieluch	1.3	1.3	1.3	1.3
Other Private Label	Other Private Label	0.9	0.9	1.5	1.4
Others	Others	37.3	36.9	36.1	35.2

Source: *Euromonitor International, Oils and Fats in Poland, 2011*
Note: *At the time of writing this report, 2010 was the latest available brand share data.*

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Oils at a discount store (Jerónimo Martins) in Poland
Source: *Planet Retail, 2012*

Extra virgin olive oil displayed at a supermarket (Tesco) in Poland
Source: *Planet Retail, 2012*

Oils displayed at a supermarket (Carrefour) in Poland
Source: *Planet Retail, 2012*

ANNEX: NEW FOOD PRODUCTS CONTAINING CANOLA OIL

- According to Mintel, there were 24 new food product launches containing canola/rapeseed oil* in Poland between January 2007 and August 2012. Up until 2012, there was little use of canola/rapeseed oil in food product launches in Poland. However food launches containing canola/rapeseed oil increased ten times over from 2011 to 2012.

Launch Type

- Of the 24 launches, 16 were new products, while eight were new variety/range extensions (Mintel, 2012).

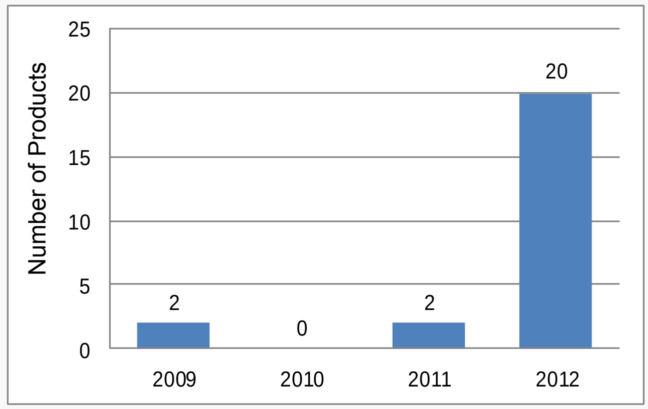
Product Categories

- Bakery was the most common food category, with six product launches. This included several sub-categories such as bread products, cakes, pastries and sweets, and sweet biscuits/cookies.

- Snacks was the second-most popular category for launches, containing products such as hors d'oeuvres/canapés, potato snacks, and grain-based snacks.

- All together, new launches spanned a variety of categories, highlighting the diversity with which canola/rapeseed oil is being used as an ingredient in the Polish market (Mintel, 2012).

New Food Products with Canola/Rapeseed Oil Launched in Poland from January 2007 to August 2012 by Year



Source: *Mintel, 2012*

New Food Products with Canola/Rapeseed Oil Launched in Poland from January 2007 to August 2012 by Category

Category	Number of Products
Bakery	6
Snacks	5
Meals & meal centers	4
Baby food	3
Sauces and seasonings	2
Processed fish, meat and egg products	2
Chocolate confectionery	1
Dairy	1
Total	24

Source: *Mintel, 2012*

*** Note:** *This search was for food products with low erucic acid rapeseed oil as an ingredient, and excludes oil products.*

ANNEX: NEW FOOD PRODUCTS CONTAINING CANOLA OIL (continued)

Major Companies and Brands

- New food products containing canola/rapeseed oil were also widely distributed across companies. Fleury Michon Polska, Biedronka and Dan Cake had the most launches, with two products each.

- Both of Fleury Michon Polska's launches were under its Fleury Michon brand, and were microwaveable pasta dishes. While Biedronka's launches included chocolates, under its Magnetic brand, and meat croquettes under the Biedronka Swojska Chata brand. Dan Cake's launches included sponge cakes and toasted wheat bread under the Dan Cake Biszkotki and Dan Cake brands (Mintel, 2012).

Claims

- Of the 24 new product launches, there were 34 claims made, the most popular being microwaveable, which was used five times. No additives/preservatives was also a popular claim which was also used five times, while the claim, babies and toddlers (0-4), was used on three products.

New Food Products with Canola/Rapeseed Oil Launched in Poland from January 2007 to August 2012 by Top 10 Companies

Company	Number of Products
Fleury Michon Polska	2
Biedronka	2
Dan Cake	2
Provitus Dabrowscy, Malesa Sp. J.	1
Krakowski Kredens	1
Jeronimo Martins	1
SB Global Foods	1
HJH Pudliszki	1
Alima-Gerber	1
P.W. Spomet	1

Source: *Mintel, 2012*

- Other claims that were used centered largely on health-related claims, such as gluten-free and GMO-free, low/no/reduced allergen, fat, cholesterol free, etc., organic, and all natural product. Several products used convenience-related claims but, apart from microwaveable, health-related claims were more frequently used (Mintel, 2012).

Below are several examples of new food product launches containing canola/rapeseed oil, which also had claims.

Red Pepper Baked Organic Potato Snacks by McLloyd's
(contains canola oil)
Claims: *GMO-Free, Gluten-Free, Low/No/Reduced Allergen, Low/No/Reduced Cholesterol, Low/No/Reduced Fat, Low/No/Reduced Sodium, Low/No/Reduced Transfat, No Animal Ingredients, Organic, Vegan*
Source: *Mintel, 2012*

Sour Cream & Habanero Gourmet Pretzel Nuggets by SB Global Foods
(contains canola oil)
Claims: *All Natural Product, Kosher*
Source: *Mintel, 2012*

Potato Dumplings with Vegetables & Chicken by Hipp
(contains canola oil)
Claims: *Babies & Toddlers (0-4), GMO-Free, Gluten-Free, Low/No/Reduced Allergen, No Additives/Preservatives, Organic*
Source: *Mintel, 2012*

Penne Bolognese by Fleury Michon Polska
(contains canola oil)
Claims: *Microwaveable*
Source: *Mintel, 2012*

ANNEX: NEW FOOD PRODUCTS CONTAINING CANOLA OIL (continued)

The following are some examples of new product launches containing canola/rapeseed oil as an ingredient, launched in Poland between January 2007 and August 2012, from the Mintel Global New Products Database (2012).

Meat Croquettes

Company: Biedronka
Brand: Biedronka Swojska Chata
Category: Snacks
Sub-Category: Hors d'oeuvres/canapes
Price (US$): 1.20
Date Published: January 2012

Ingredients: Meat (pork, beef), wheat flour, water, breading (wheat flour, salt, yeast), canola oil, soy protein, fried onion (onion, canola oil), crumbs (wheat flour, yeast, salt), salt, rice flour, powdered eggs, soy flour, sugar, pepper, spices (salt, maltodextrin, aroma), thickener (potassium sorbate), garlic, spirit vinegar, raising agent (sodium bicarbonate) .

Product Description: This product retails in a 400 g pack.

Grated Horseradish

Company: Krakowski Kredens
Brand: Krakowski Kredens
Category: Sauces & seasonings
Sub-Category: Table sauces
Price (US$): 1.62
Date Published: January 2012

Ingredients: Horseradish, water, sugar, spirit vinegar, canola oil, powdered milk, salt, thickener (acetylated distarch adipate), acidity regulator (citric acid), antioxidants (sodium metabisulphite [sulphur dioxide], ascorbic acid)

Product Description: Krakowski Kredens Chrzan Tarty (Grated Horseradish) is great as an addition to ham and meats. The product retails in a 140 g pack.

Sponge Cakes

Company: Dan Cake
Brand: Dan Cake Biszkotki
Category: Bakery
Sub-Category: Cakes, pastries and sweet goods
Price (US$): 0.89
Date Published: June 2012

Ingredients: Wheat flour, sugar, eggs, wheat starch, glucose-fructose syrup, canola oil, emulsifiers (mono and diglycerides of fatty acids, polyglycerol esters of fatty acids), colour (beta-carotene), natural vanilla flavour, raising agents (ammonium bicarbonate, sodium bicarbonate), salt, natural orange flavour.

Product Description: Dan Cake Biszkotki Biszkopty (Sponge Cakes) are baked without the use of artificial colours and preservatives. These cakes are made with natural ingredients, ensuring a delicate flavour and aroma. This product retails in a 150 g pack.

***Source for all: Mintel**, 2012*

ANNEX: NEW FOOD PRODUCTS CONTAINING CANOLA OIL (continued)

Spaghetti Bolognese

Company: Nutricia
Brand: Bobovita
Category: Baby food
Sub-Category: Baby savoury meals and dishes
Price (US$): 2.26
Date Published: March 2012

Ingredients: Tomato from concentrated puree 36.4%, pasta 21% (wheat semolina, egg white), onions, beef 9.9%, carrots 8.3%, 5.4% red pepper, peas, corn starch, tomato paste, garlic, vegetable oils (canola oil, sunflower oil), olive oil, basil, water, thyme, oregano 0.017%, vitamin E, vitamin B1, vitamin B2, vitamin PP, vitamin B6, vitamin B8, vitamin B5.

Product Description: Bobovita Obiadek dla Dzieci (Spaghetti Bolognese) is a source of B vitamins and iron, and does not contain preservatives, colourings or flavour enhancers. The microwaveable product is suitable for babies aged one year and over, and retails in a 230 g pack. Also available are: Cod with Vegetables in a Creamy Sauce; Potatoes with Carrots & Beef; and Vegetables with Pasta & Turkey.

Cookies with Chocolate Chip and Hazelnuts

Company: Jeronimo Martins
Brand: Kruszynki (Private Label)
Category: Bakery
Sub-Category: Sweet biscuits/cookies
Price (US$): 0.72
Date Published: June 2012

Ingredients: Wheat flour, vegetable fat (vegetable oil obtained from refined vegetable fats, palm oil, canola oil), sugar, 16.8% drops of chocolate (sugar, cocoa mass, cocoa butter, glucose syrup, emulsifier [soy lecithin], vanilla flavor), 6.7% drops of milk chocolate (sugar, whole milk powder, cocoa mass, cocoa butter, whey powder [from milk], skim milk powder, emulsifier [soya lecithin], vanilla flavour), water, 5.6 % hazelnut, oatmeal, skim milk powder, raising agent (ammonium bicarbonate), glucose-fructose syrup, flavours, salt, cocoa (reduced-fat).

Product Description: Kruszynki Ciastka z Kawalkami Czekolady i Orzechami Laskowymi (Cookies with Chocolate Chips and Hazelnuts) are now available. This product retails in a 135 g pack. Also available are: Kruszynki Ciastka z Kawalkami Czekolady i Rodzynkami (Cookies with Chocolate Chips and Raisins).

Vegetable Salad with Egg

Company: HJH Pudliszki
Brand: Pudliszki Salatkowy Przysmak
Category: Meals and meal centers
Sub-Category: Salads
Price (US$): 0.90
Date Published: April 2012

Ingredients: Vegetables (52%) (potatoes, carrots, peas, cucumber, onion, celery), mayonnaise (33%) (canola oil, water, sugar, egg yolks, cooking salt, vinegar, mustard [mustard], acidity regulator [lactic acid], thickener [guar gum, xanthan gum], preservative [potassium sorbate]), eggs (7%), apple, mustard (water, mustard, vinegar, sugar, cooking salt, vinegar, spices), dried onion, spices

Product Description: Pudliszki Salatkowy Przysmak Salatka Warzywna Z Jajkiem (Vegetable Salad With Egg) is made with traditional mayonnaise. The product is retailed in a 150 g pack.

Source for all: *Mintel, 2012*

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