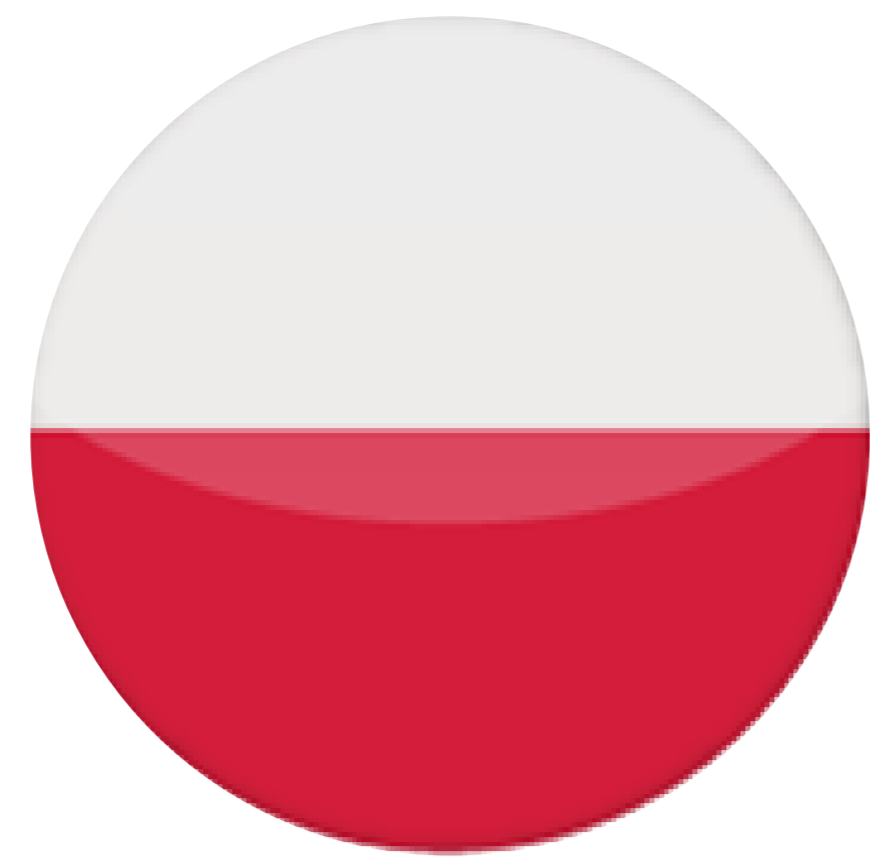


POLAND





POLAND

IDENTITY CARD



SURFACE

312 680 KM²



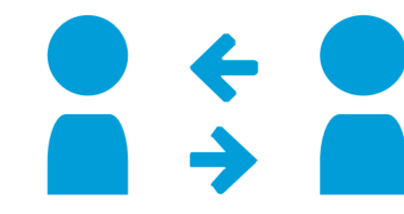
POPULATION

37,999,494



CAPITAL

VARSOVIE



LANGUAGE

POLISH



RELIGION

95%

Catholics

GDP PER CAPITA (USD) 12,494 €

TOP 3 EXPORT GERMANY, UNITED KINGDOM, RUSSIA

TOP 3 IMPORT GERMANY, NETHERLANDS, RUSSIA

CURRENCY ZLOTY

GROCERY SHOPPING

55%

ENJOY SHOPPING FOR GROCERIES

NOMBRE DE MAGASINS

344 HYPERMARKETS

5104 SUPERMARKETS

3745 DISCOUNTERS

FMCG VALUE SALES TREND



2.7%

CONFIDENCE INDEX

CONSUMER CONFIDENCE INDEX



87%

47%

THINK THE STATE OF THEIR OWN PERSONAL FINANCES IN THE NEXT 12 MONTHS WILL BE GOOD OR EXCELLENT

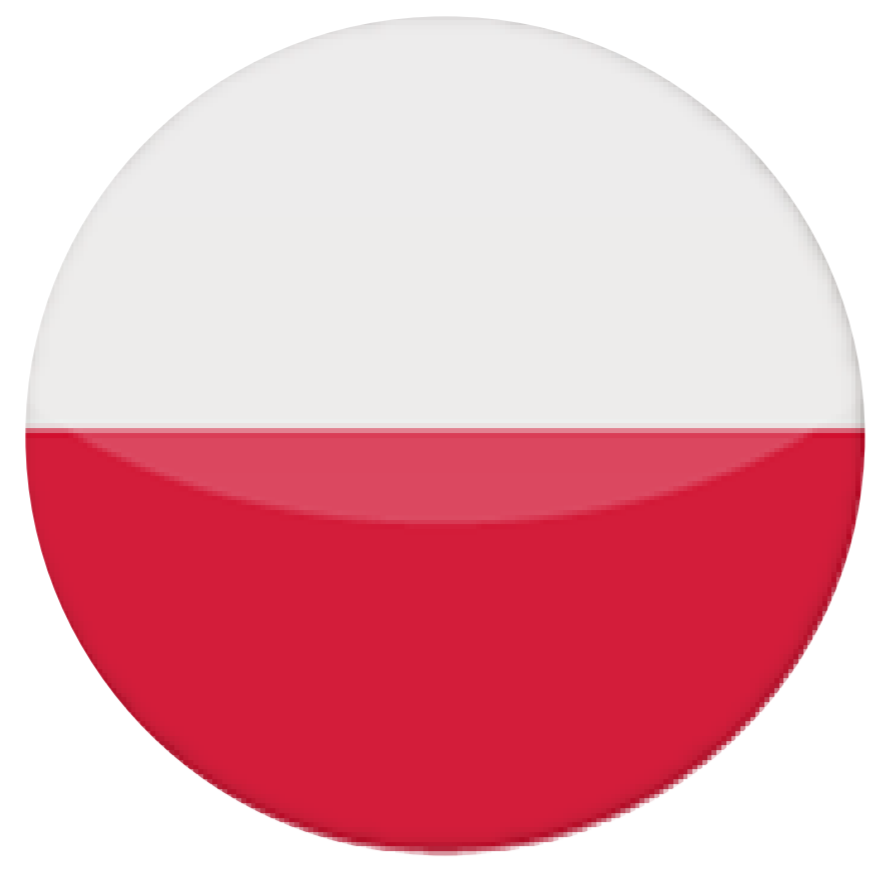
COMPARED TO THIS TIME LAST YEAR...

53% HAVE CHANGED THEIR SPENDING TO SAVE ON HOUSEHOLD EXPENSES

35% HAVE SWITCHED TO CHEAPER GROCERY BRANDS

33% HAVE CUT DOWN ON TAKE-AWAY MEALS

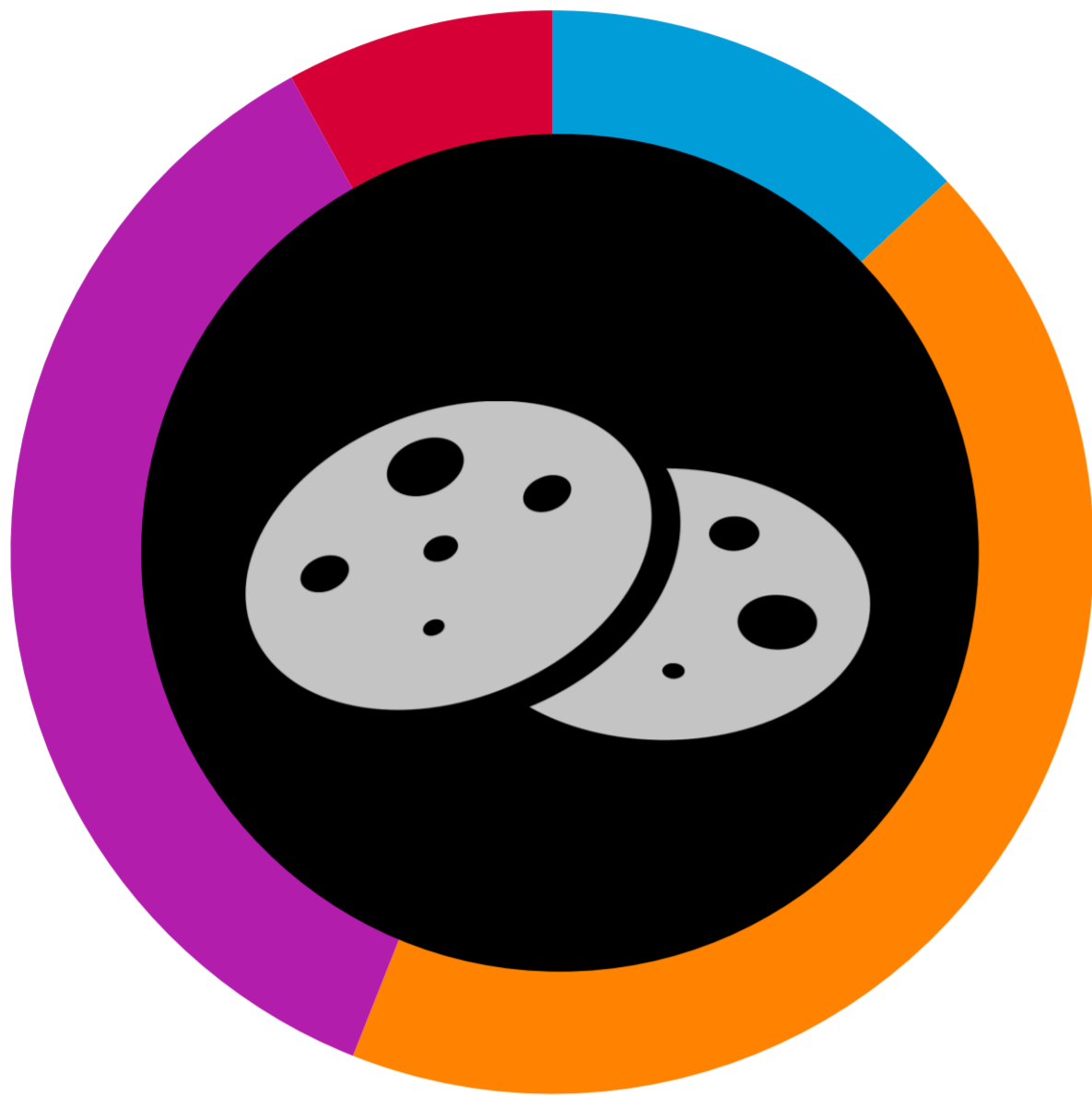
20% HAVE CUT DOWN ON OR BUY CHEAPER BRANDS OF ALCOHOL



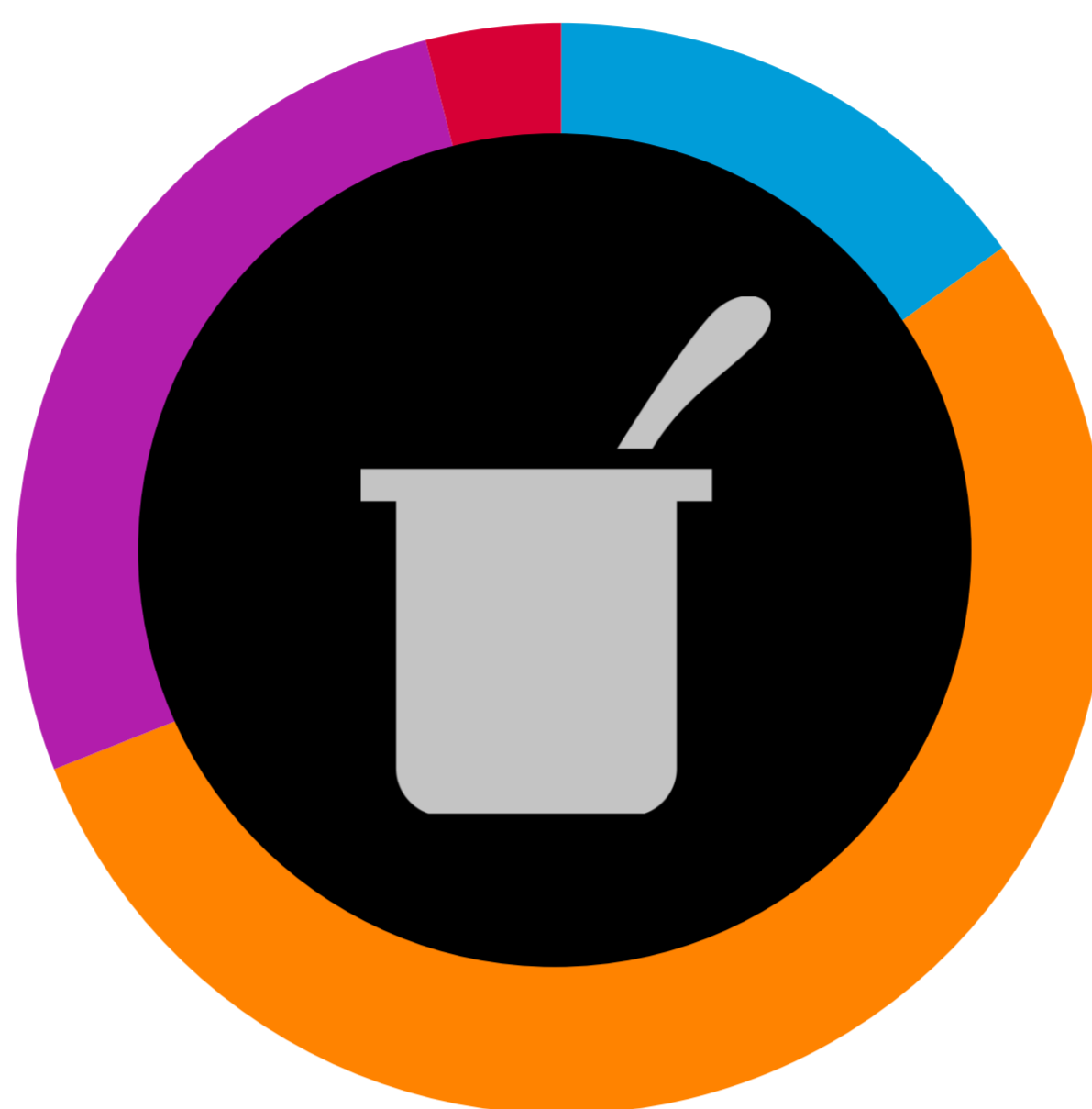
POLAND

BRAND ORIGIN PREFERENCES

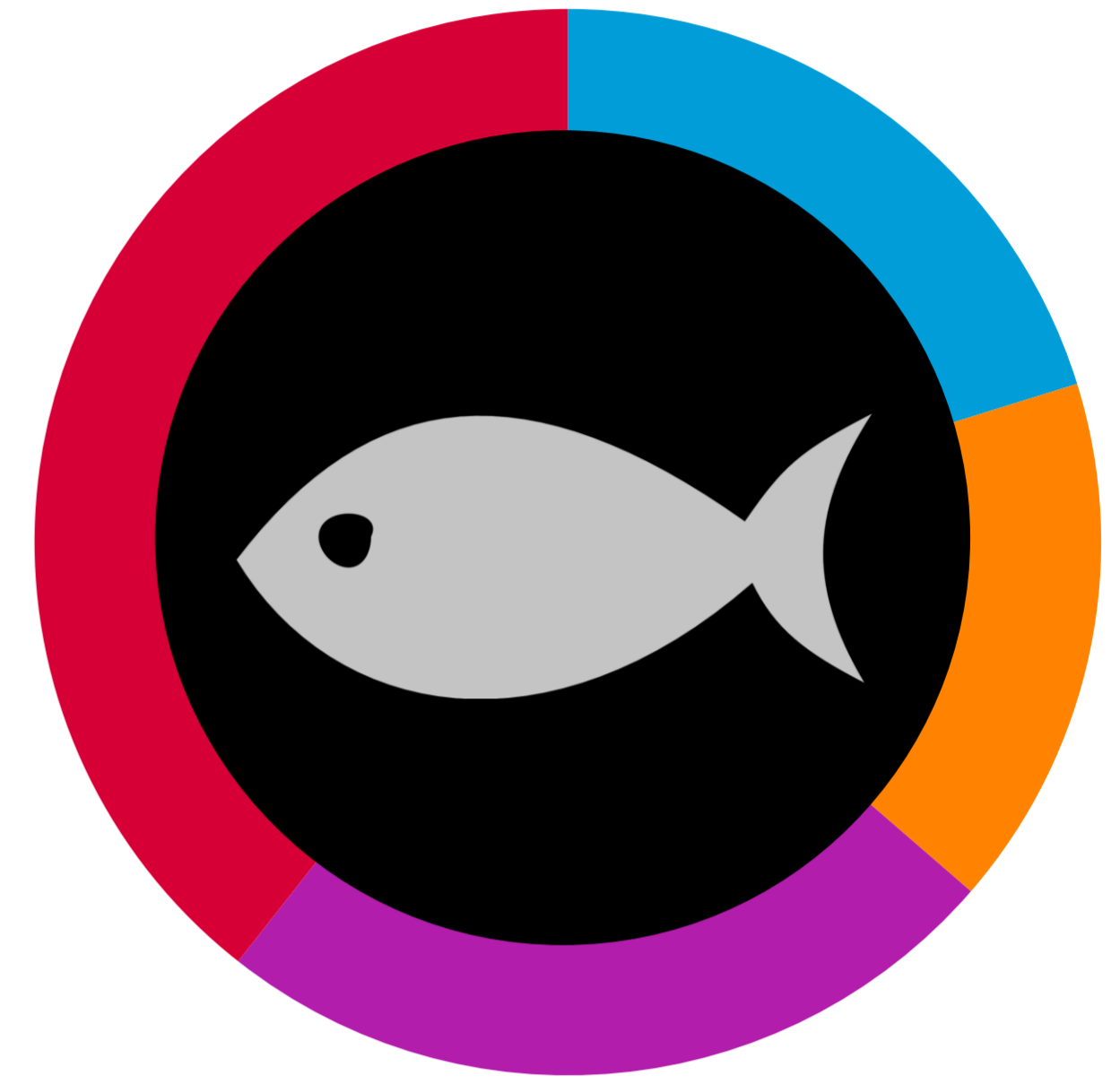
COOKIES/BI
SCUITS



YOGHURTS



SEAFOOD



■ Prefer Global Brands
■ Not important

■ Prefer Local Brands
■ I don't buy this category

FOOD INGREDIENTS



58%

WANT MORE ALL NATURAL PRODUCTS

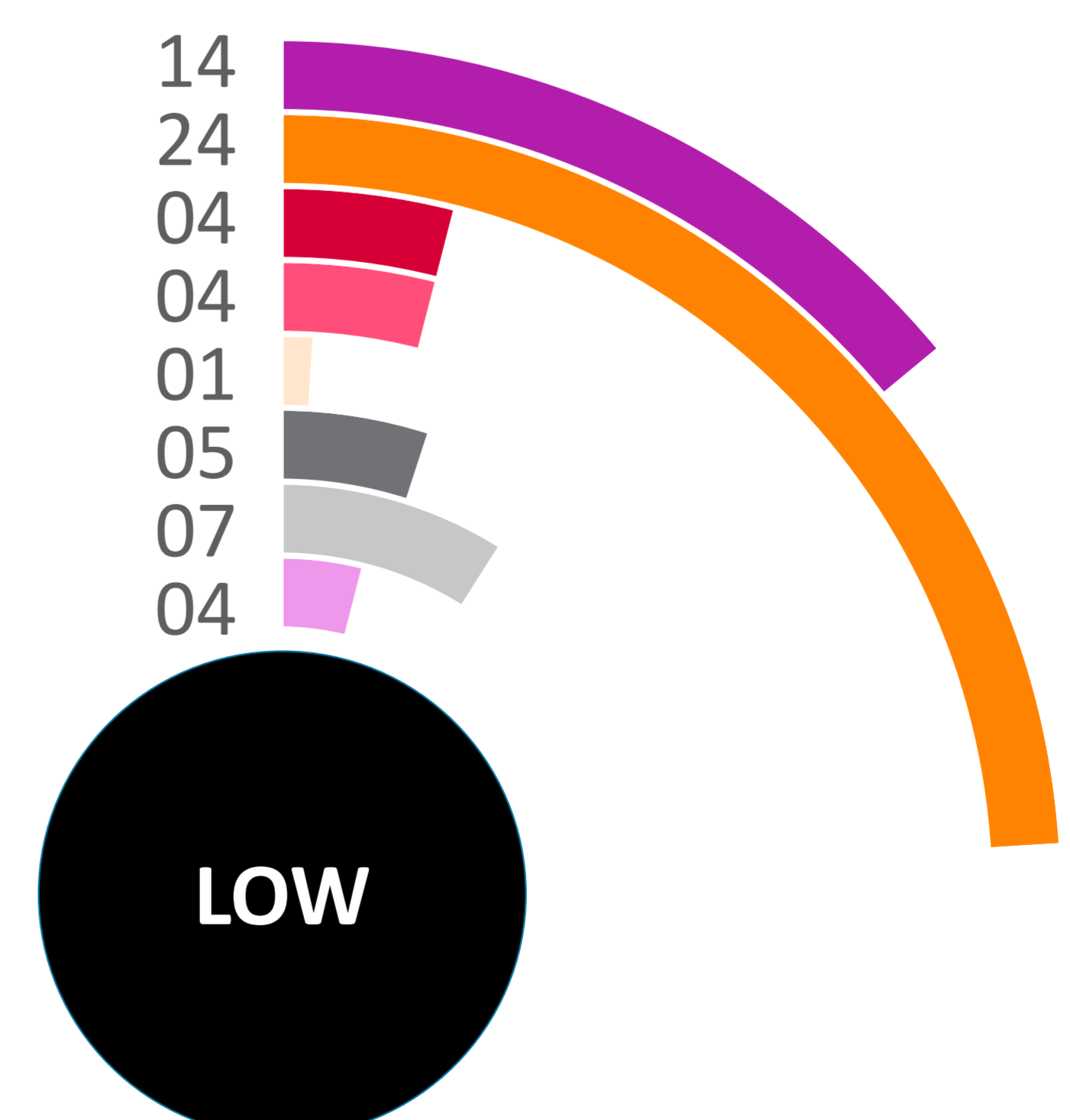
22%

LIVE IN AN HOUSEHOLD WHERE SOMEONE SUFFERS FROM A FOOD ALLERGY OR INTOLERANCE

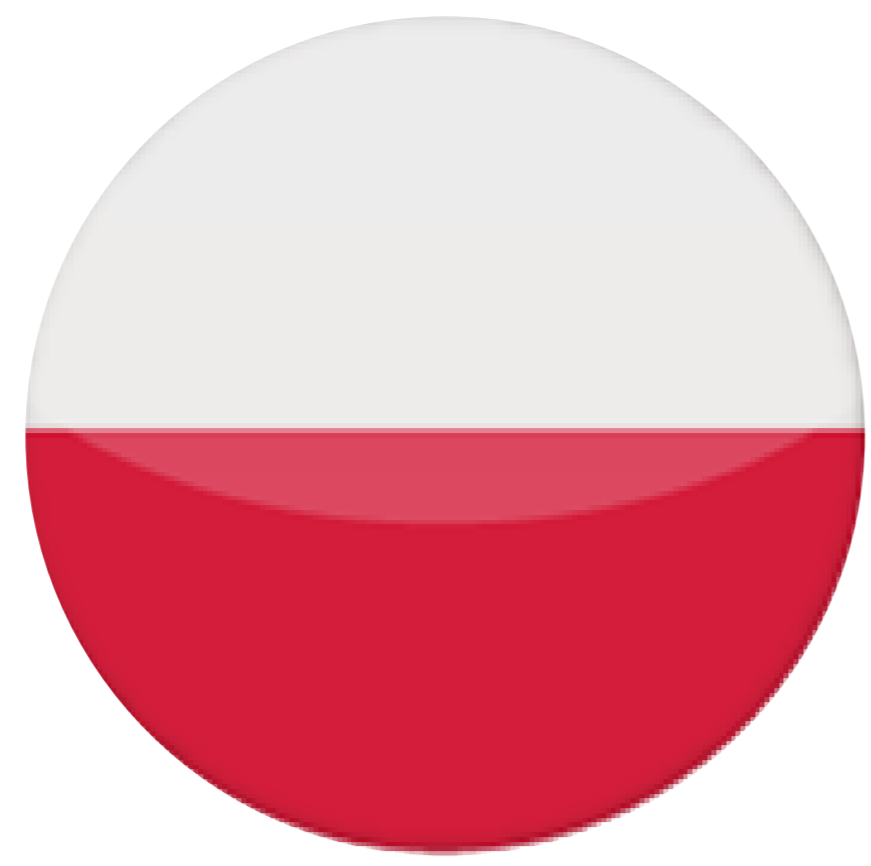


FOLLOW A SPECIAL DIET THAT LIMITS OR RESTRICTS SPECIFIED FOODS OR INGREDIENTS

- LOW FAT
- SUGAR CONSCIOUS
- LOW SODIUM
- VEGETARIAN
- HALAL
- GLUTEN FREE
- LOW CARBOHYDRATE
- LACTOSE FREE



LOW

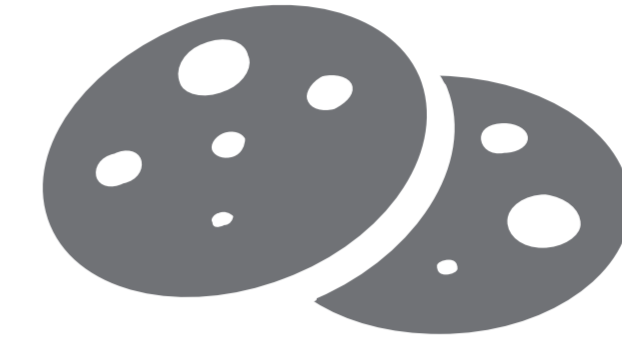
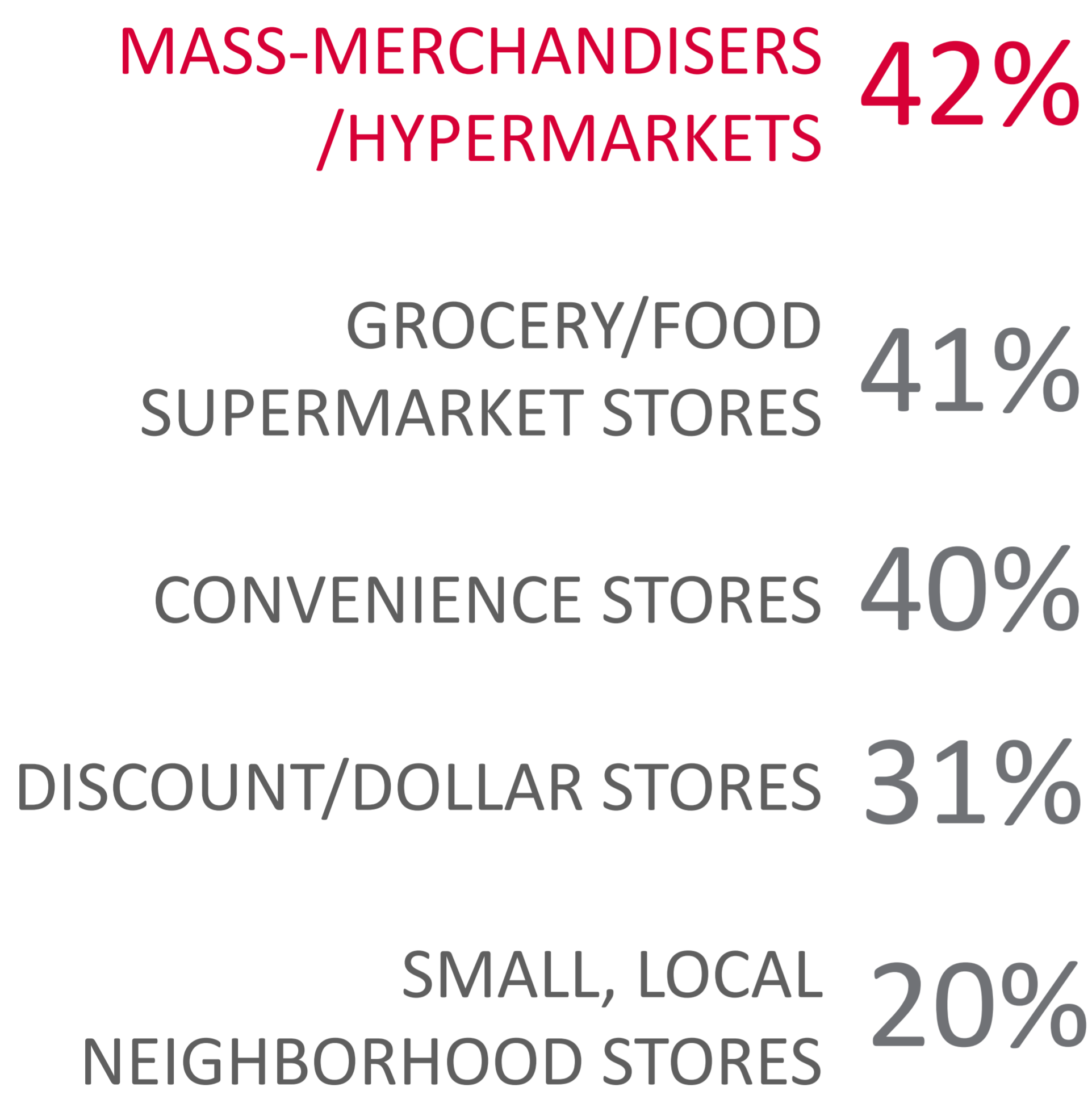


POLAND

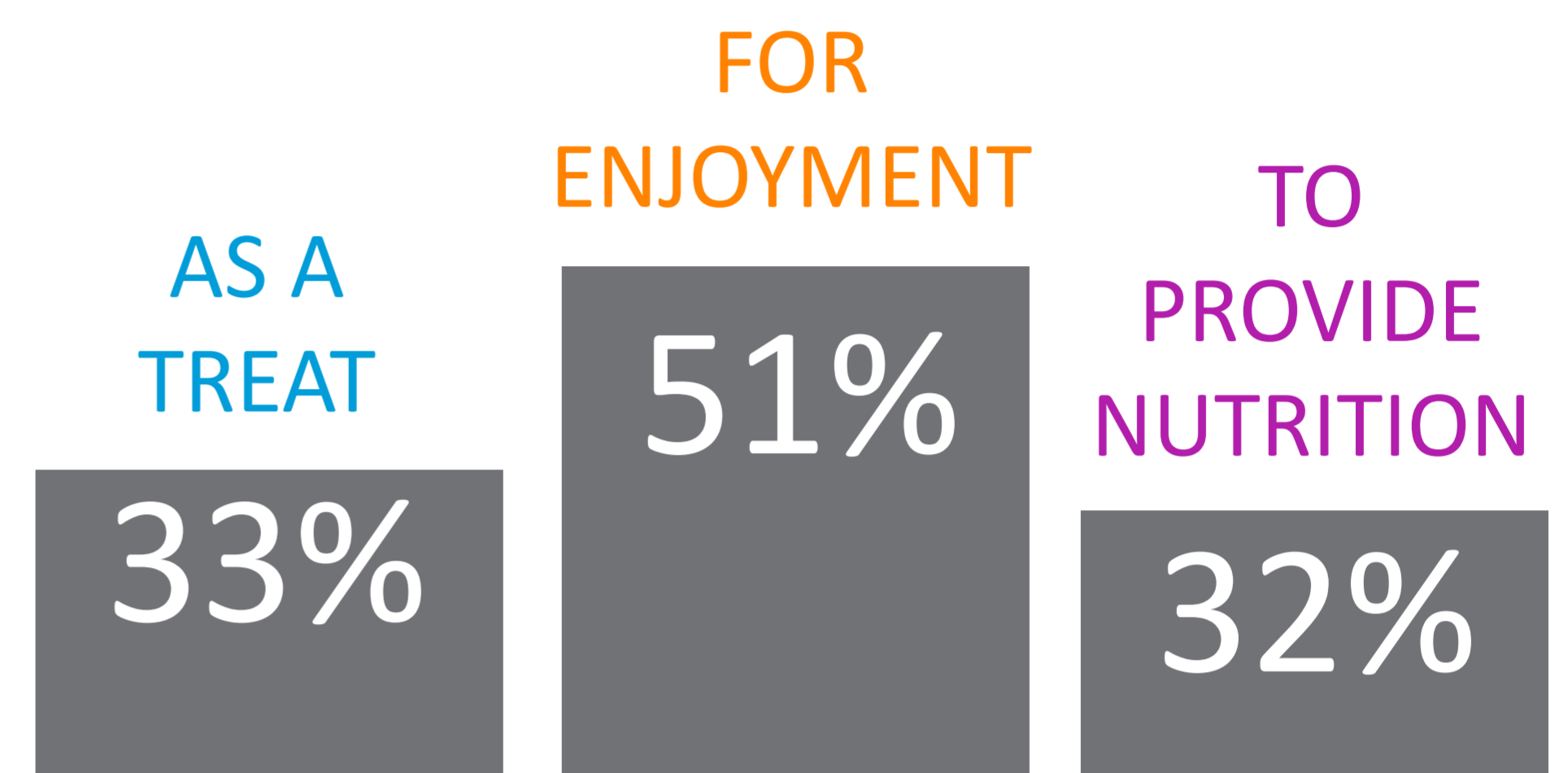
SNACKING



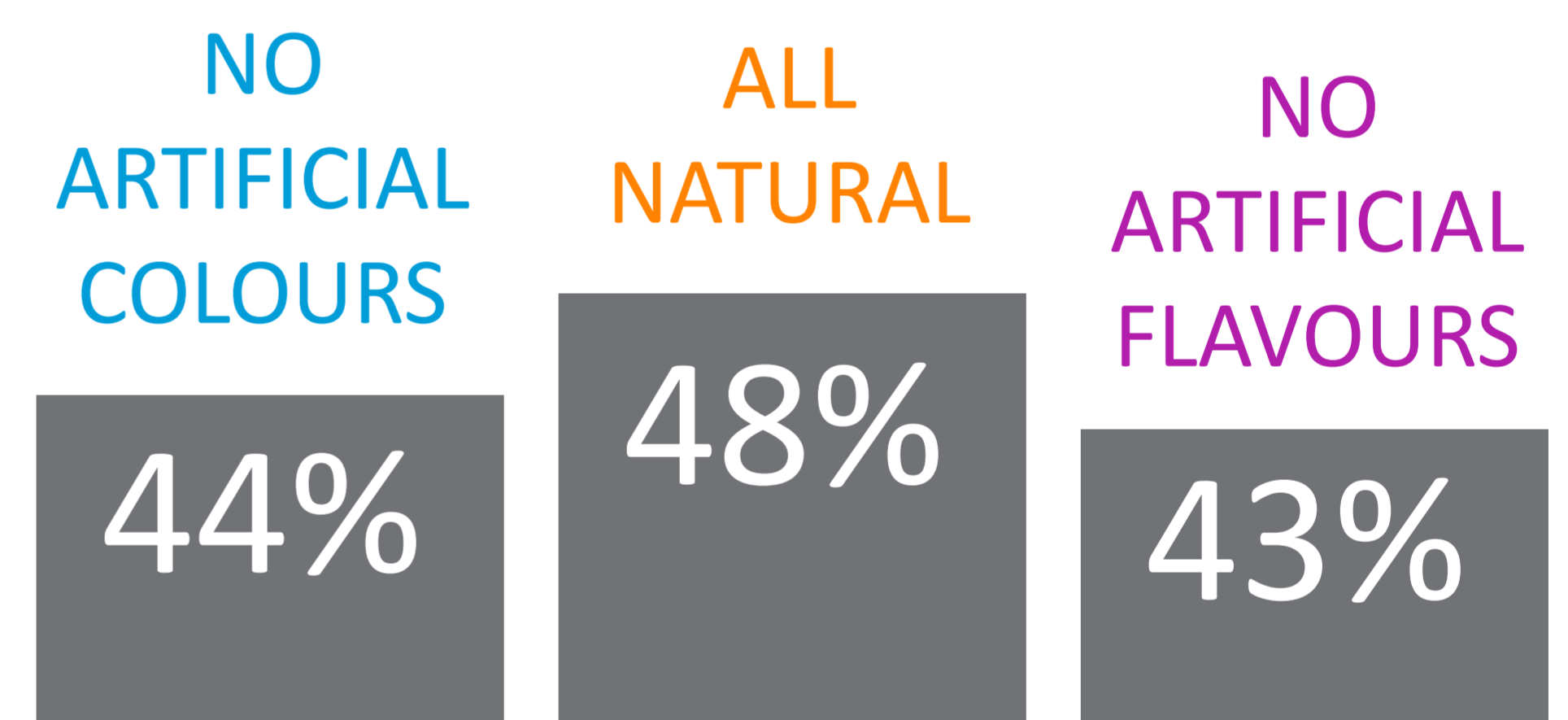
IN WHICH OUTLET DO YOU OFTEN BUY SNACKS?



THINKING ABOUT THE SNACKS YOU ATE IN THE LAST MONTH, WHY DID YOU CONSUME THESE SNACKS?



THINKING ABOUT THE SNACKS YOU EAT, WHICH HEALTH ATTRIBUTES ARE VERY IMPORTANT TO YOU? (TOP 3)

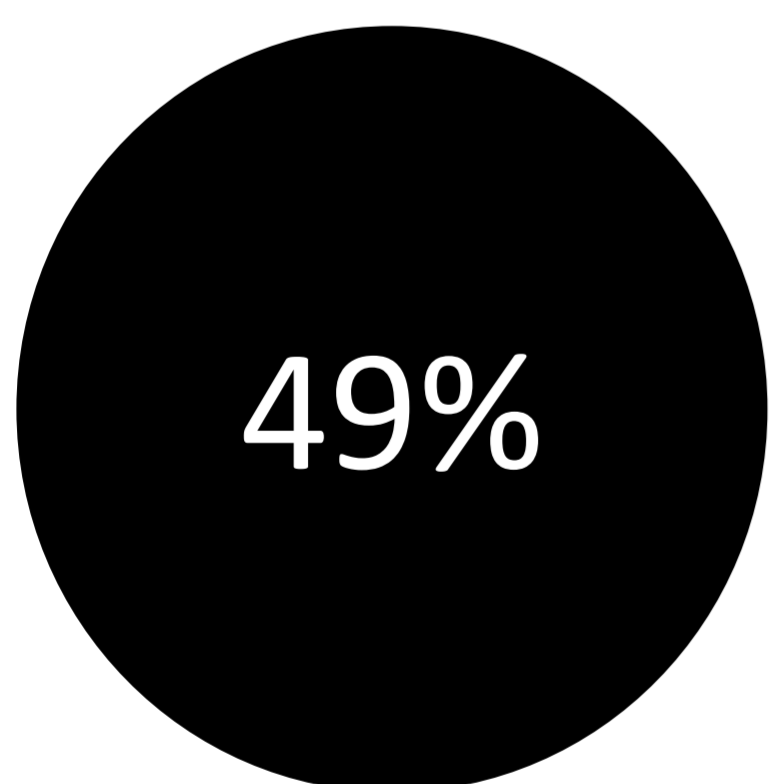


63%

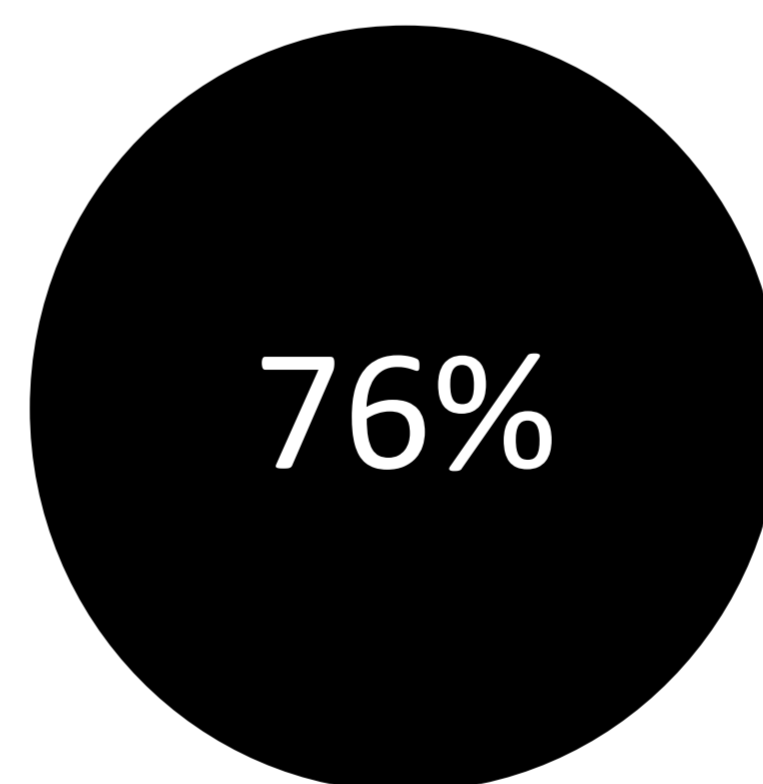
AGREE THAT MOST OF THEIR SNACK PURCHASES ARE

UNPLANNED

DIETS



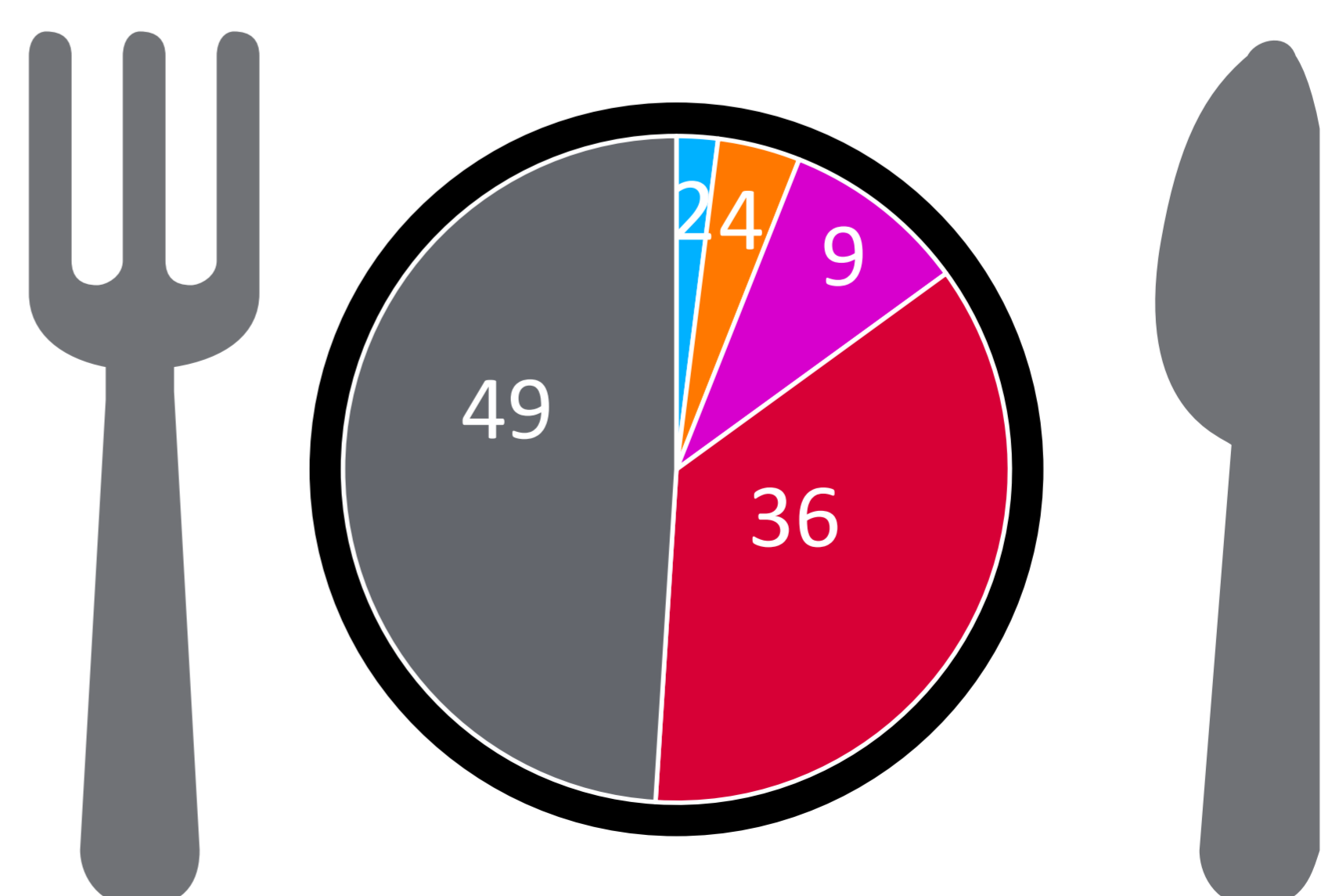
CURRENTLY TRYING TO LOSE WEIGHT



OF WHICH CHANGING THEIR DIET

OUT OF HOME

FREQUENCY OF DINING OUT



- ONCE A DAY OR MORE FREQUENTLY
- 3 TO 6 TIMES A WEEK
- ONCE OR TWICE A WEEK
- 1-3 TIMES PER MONTH
- LESS THAN ONCE A MONTH OR NEVER



GUIDE

DATA SOURCES

Nielsen Global Survey

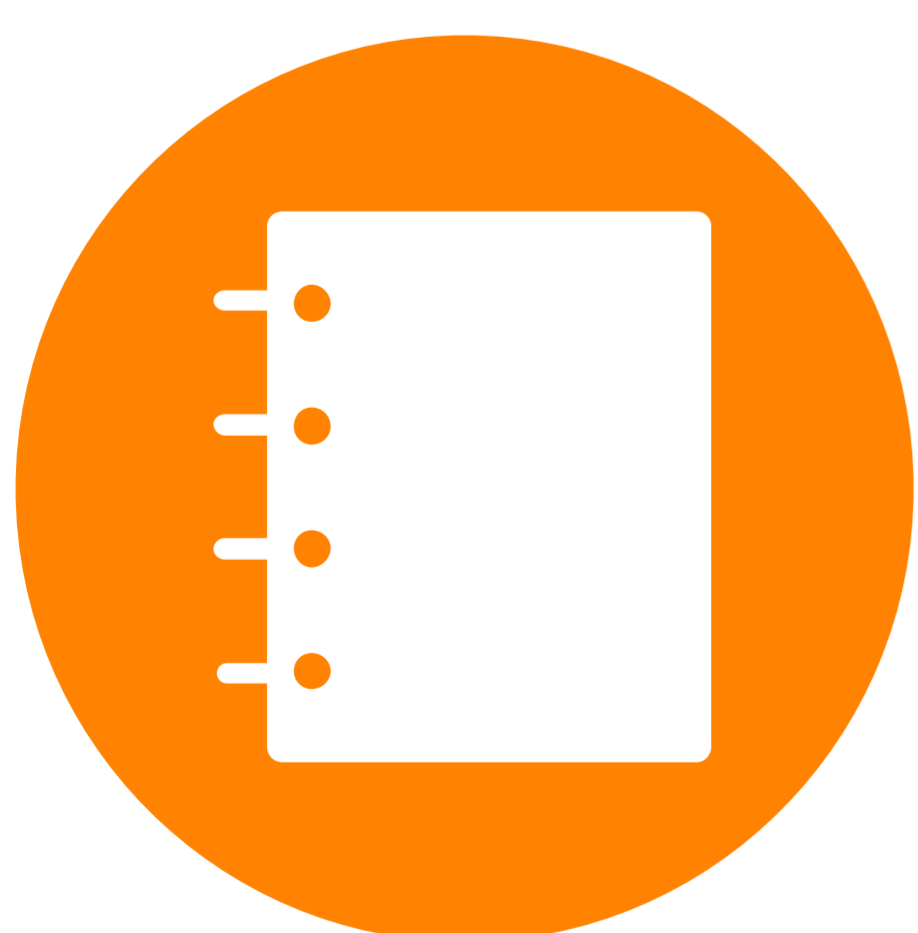
The survey, which includes the Global Consumer Confidence Index, was established in 2005 and measure Consumer Confidence and Spending Intentions. The survey poll every quarter more than 30,000 online consumers in 63 countries. The sample has quotas based on age and sex for each country based on their Internet users.

Consumer Confidence and Spending Intentions is a quarterly survey, with latest update conducted May 9–27, 2016. Consumer confidence levels above and below a baseline of 100 indicate degrees of optimism and pessimism, respectively.

- The Nielsen Global Health and Ingredient-Sentiment Survey was conducted March 1-23, 2016.
- The Nielsen Global Out-of-Home Dining, Brand-Origin and Retail-Growth Strategies Surveys were conducted Aug. 10–Sept. 4, 2015.
- The Nielsen Global Health & Wellness Survey was conducted between Aug. 13 and Sept. 5, 2014
- The Nielsen Snacking Survey was conducted between Feb. 17 & March 7, 2014.

Other Nielsen data

- Number of stores: source is Nielsen TradeDimensions, a continuous tracking of distribution landscape.
- Sales change% for FMCG (Fast Moving Consumer Goods, between 2014 and 2015): source is retail panel Nielsen ScanTrack.



Other sources

Surface, religions: Planète Expert
GDP: World Bank
Countries for import & export: Trade Map

