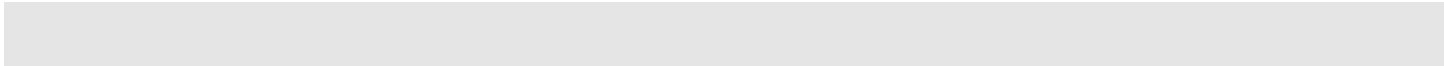
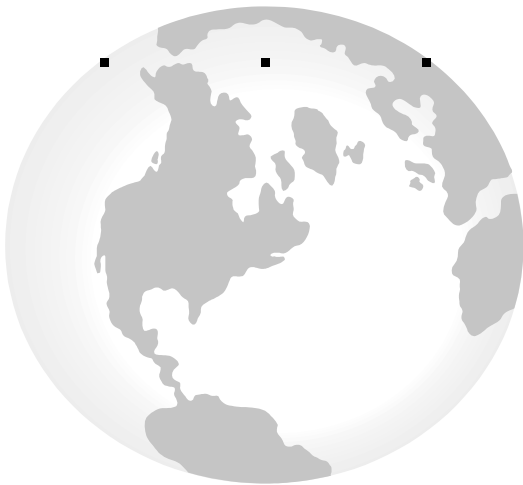




# Market Research – Eastern Europe

## Coffee in Poland



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**Estimado Empresario:**

La búsqueda de acuerdos comerciales que nos permitan como país ampliar los escenarios y mercados de exportación, nos reta como PROEXPORT a apoyar en forma directa a los empresarios en sus iniciativas exportadoras, ofreciendo servicios dentro de un modelo de gestión comercial y compartiendo un conocimiento más detallado sobre los mercados y sus oportunidades.

Para lograr lo anterior, PROEXPORT, con inversión de recursos propios y de cooperación técnica no-reembolsables del BID-FOMIN, emprendió una labor de recolección y análisis de información de primera mano en los principales mercados de interés a través de la contratación de consultorías internacionales especializadas en investigaciones de mercados. Los resultados de estos trabajos permitieron analizar y conocer la dinámica comercial de los sectores en los cuales existe un potencial para nuestras exportaciones, así como detallar aspectos de competitividad, información valiosa para la orientación de las iniciativas exportadoras de nuestros empresarios.

La información que contiene este estudio, sobre la dinámica del sector, la demanda y consumo, la situación competitiva de los productos, estructura y características de la comercialización y logística de acceso al mercado, es una contribución e invitación a profundizar y conocer aspectos que nos permitan avanzar en la realización de negocios en escenarios internacionales.

Cordialmente,

A handwritten signature in black ink, appearing to read 'L.G.P.' with a stylized flourish.

Luis Guillermo Plata P.  
Presidente PROEXPORT



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# **1. Introduction**

## **1.1 Introduction**

This report aims at providing Colombian exporters with a comprehensive guide of the Polish coffee market. The main goal of the report presented below is to identify export opportunities for Colombian entrepreneurs in Poland. Civilization proximity, similar structures of democratic institutions, comparable level of reforms conveyed in the regions, close relations between EU and South America, cultural, tradition and religion similarity, should additionally encourage both sides to cooperate successfully. The report focuses on the analysis of the coffee sector, a market of specific trademarks performing in Poland, describing the local competition and giving a profile of tendencies in the coffee market. While at the same time not disregarding the data referring to coffee essences, concentrates and extracts as well as special coffees.

## **1.2 Methodology**

Information for the research was gathered from official sources of information, such as the Ministry of Economy and Labor, the Central Statistical Office, the Agricultural Market Agency, the Ministry of Infrastructure and the Ministry of Finance, to name a few of the most important. Much use has also been made of secondary sources, such as studies, publications, databases, branch magazines and internet resources. As well as various field resources provided by some companies and organizations active in this field.

However, it is worth to emphasize that there is no coffee branch organization in Poland (or other), which has a specialized division dedicated to the product. Therefore the report is elaborated mainly on the basis of interpretation of data, acquired from secondary sources or entities not fully involved in the market. Reports dedicated to the matter are only within the range of companies active in the sector, usually prepared by agencies of market research, specialized in coffee products.

The information presented was gathered and processed to give the best possible inside view of the coffee market in Poland. It should be stressed that the hot drinks sector may still be changing, as its potential is gradually discovered by both foreign and domestic entrepreneurs and slowly filling its possibilities. The conclusions of this report will show that high quality products are especially popular within the Polish coffee market.

The appropriate data are given in percentage, values in Euro or rating numbers. The exchange rate of 27<sup>th</sup> September 2005 was 1 PLN = 0,256261 EUR, 1 EUR = 3,90227 PLN.

All the graphs and tables presented are based on several, comparable sources and prepared for the purpose of this report. It is worth to state that certain data requested from particular companies, such as pricing strategies and companies' development plans, are very hard to acquire, as entrepreneurs perceive this information as official company secrets. All the latest available data, that could be accessed freely and did not interfere with Polish companies' policies, are however used and presented in this report.



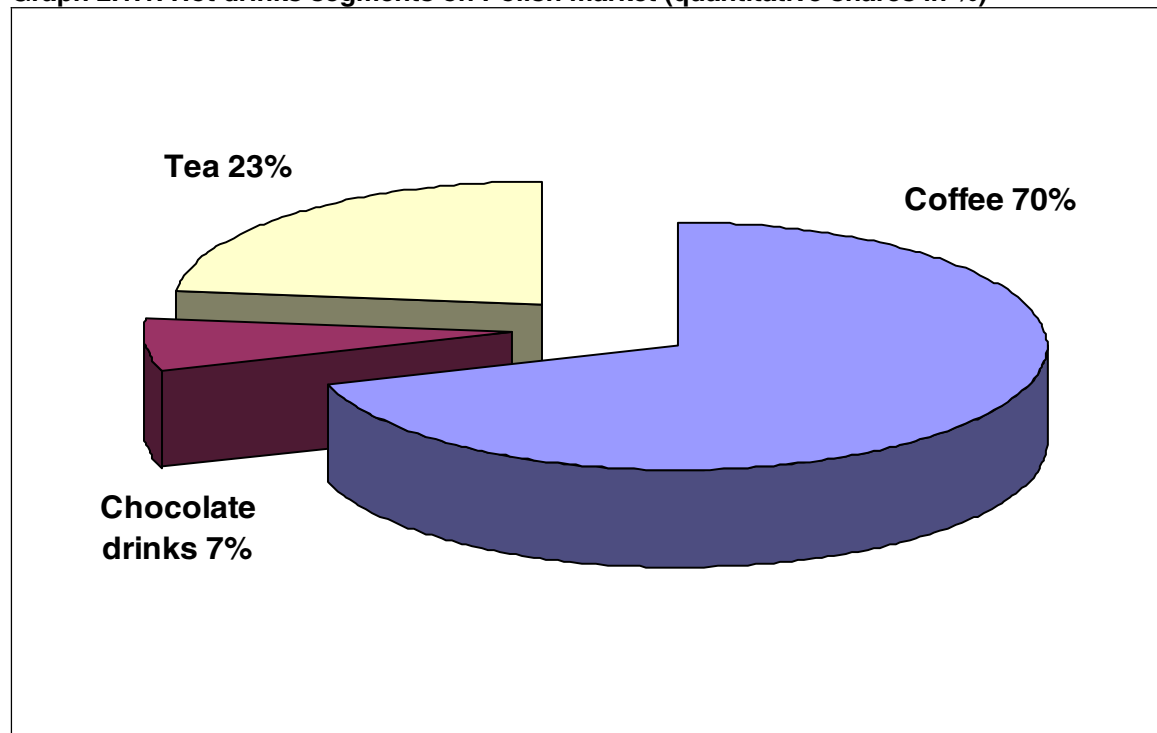
## 2. General sector data

### 2.1 Current market developments within the specified sector

The coffee market in Poland is still growing. The annual sale of coffee for 2005 is estimated for € 500 million (about 80-90 thousands tons).

In general Polish consumers can be divided in two groups; those who drink coffee (majority) and those who drink tea (minority). Currently Polish consumers are strongly coffee orientated. Segments of hot drinks in Poland are presented in the picture below<sup>1</sup>:

Graph 2.1.1. Hot drinks segments on Polish market (quantitative shares in %)

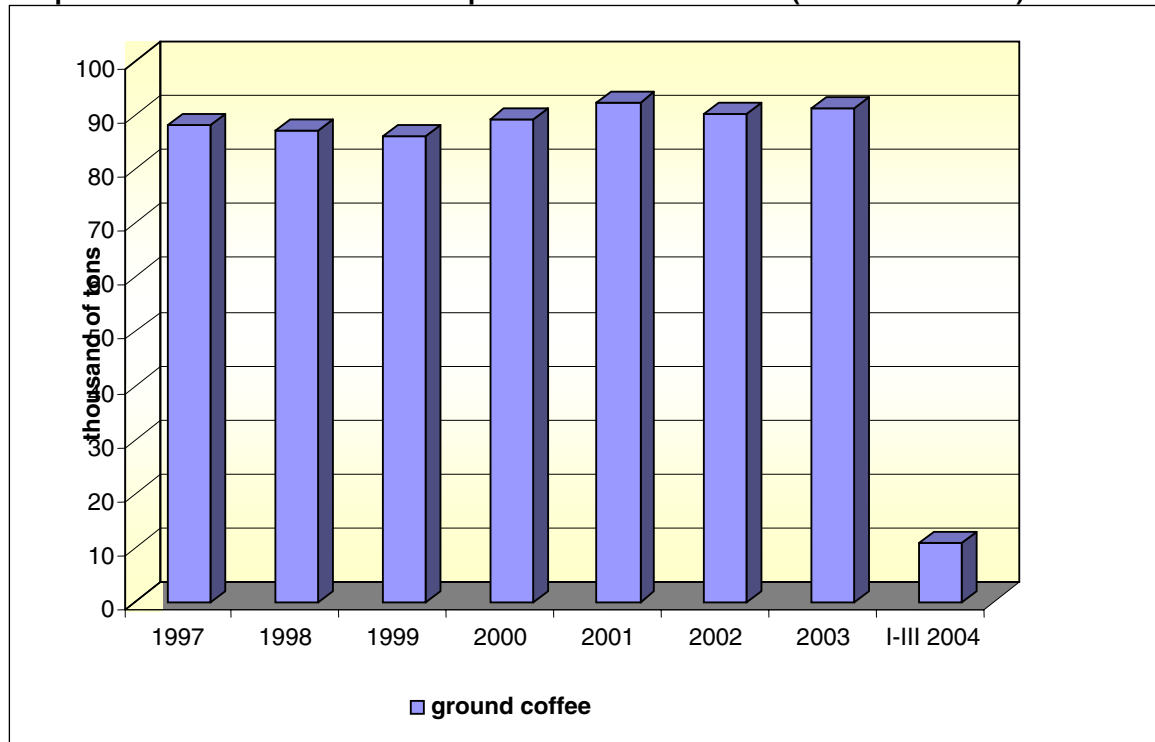


Source: ACNielsen for "Boss Gospodarka", August 2004 nr 8 (477), page 28

In the period of 1997-2003 coffee consumption has increased by 6%, while the consumption of tea decreased by 8,8%. Along with the growth of the Polish economy, the demand for coffee increased significantly. However coffee deliveries to restaurants and bars have been rather stable or even are falling. Deliveries of coffee in the period of 1997 to first quarter of 2004 are presented in the graph below.

<sup>1</sup> Research for the period of May 2002 – June 2003

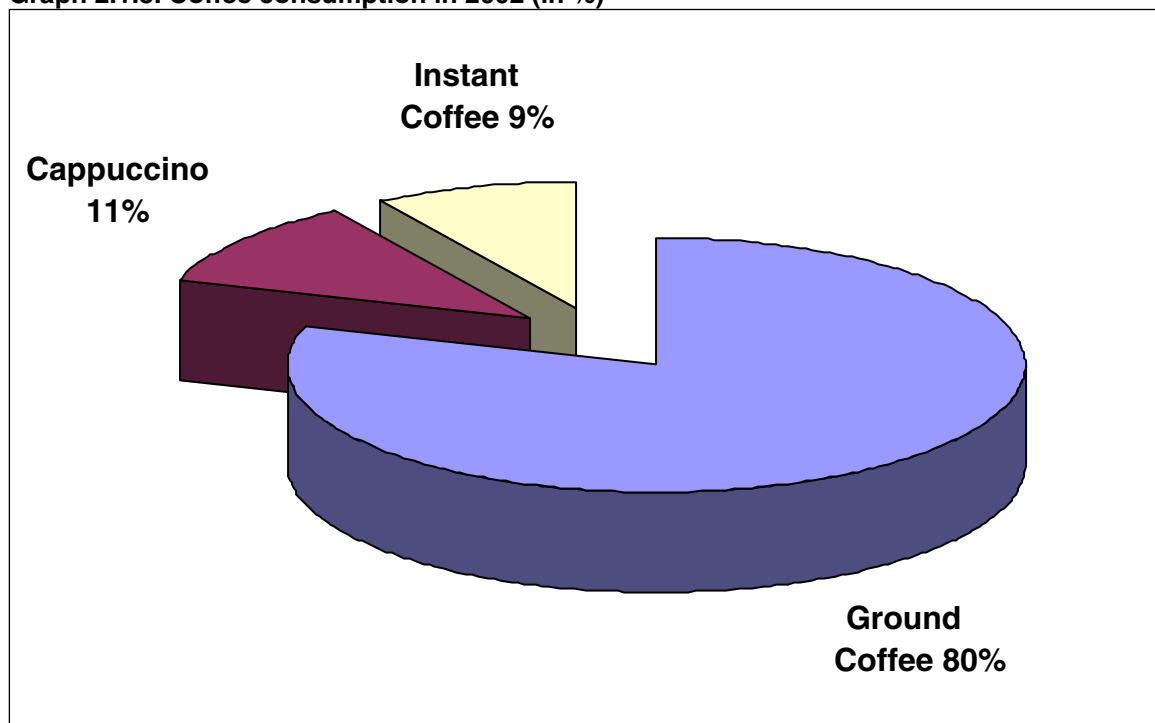
Graph 2.1.2. Coffee deliveries in the period of 1997 – I-III 2004 (thousand of tons)



Source: Central Statistical Office

In the coffee sector the consumer preferences are as follows:

Graph 2.1.3. Coffee consumption in 2002 (in %)



Source: Home&Market, February 2003, page 80

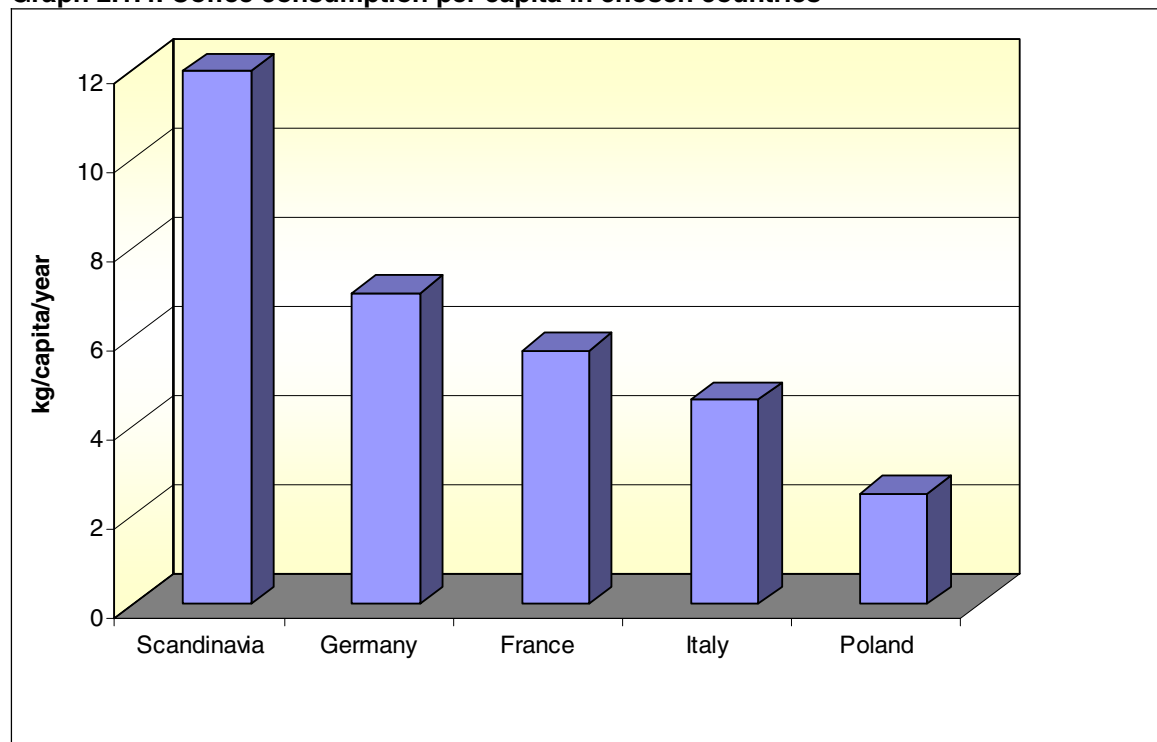
The Polish coffee sector can generally be divided into three segments:

- Ground Coffee
- Instant Coffee
- Cappuccino

During the past years the segment of soluble coffee and cappuccino has been increasing slightly, whereas the grounded coffee segment has been decreasing. This trend, however, doesn't change the strong position of grounded coffee on the Polish market.

Despite a growing consumption of coffee (from 0,9 kg/capita in 1998 to 2,5 kg/capita in 2001), Poland is low on the list of average consumption per capita. Coffee is still perceived as a luxury product, which is the result of having lived in a centrally governed economy for many years. Consumption of coffee per capita in various countries is shown in the graph below:

**Graph 2.1.4. Coffee consumption per capita in chosen countries**



Source: Home&Market, February 2003, page 80

## 2.2 Sector's participation in total GDP

The sector of coffee as such is not detailed in national accounts. The only information on general participation in GDP of agriculture, industry and services is given in national statistics, such as in the graph below.

**Table 2.2.1. GDP in Poland 2002-2004 (current prices in billions of EUROS)**

	<b>2002</b>	<b>2003</b>	<b>2004</b>
<b>GDP (billions of EUR)</b>	195,3	203,7	220,9
<b>Dynamic of GDP growth</b>	25,4	26,0	26,3
<b>GDP share (%)</b>	100%		
<b>Agriculture/GDP</b>	0,79	0,76	0,75
<b>Industry/GDP</b>	7,6	7,8	7,7
<b>Services/GDP</b>	16,6	16,5	16,6

*Source: Central Statistical Office (GUS)*

### **2.3 Sector's participation in employment**

Similarly, the sector of coffee as such is not detailed in employment accounts. Statistics present employment in the food sector in general:

**Table 2.3.1. Employment in the Polish food industry (thousand persons)**

	<b>2000</b>	<b>2001</b>	<b>2002</b>	<b>2003</b>
<b>Employment (in thous.)</b>	314,1	290,8	283,8	286,9
<b>Growth rate</b>	94,1	92,6	97,6	101,1

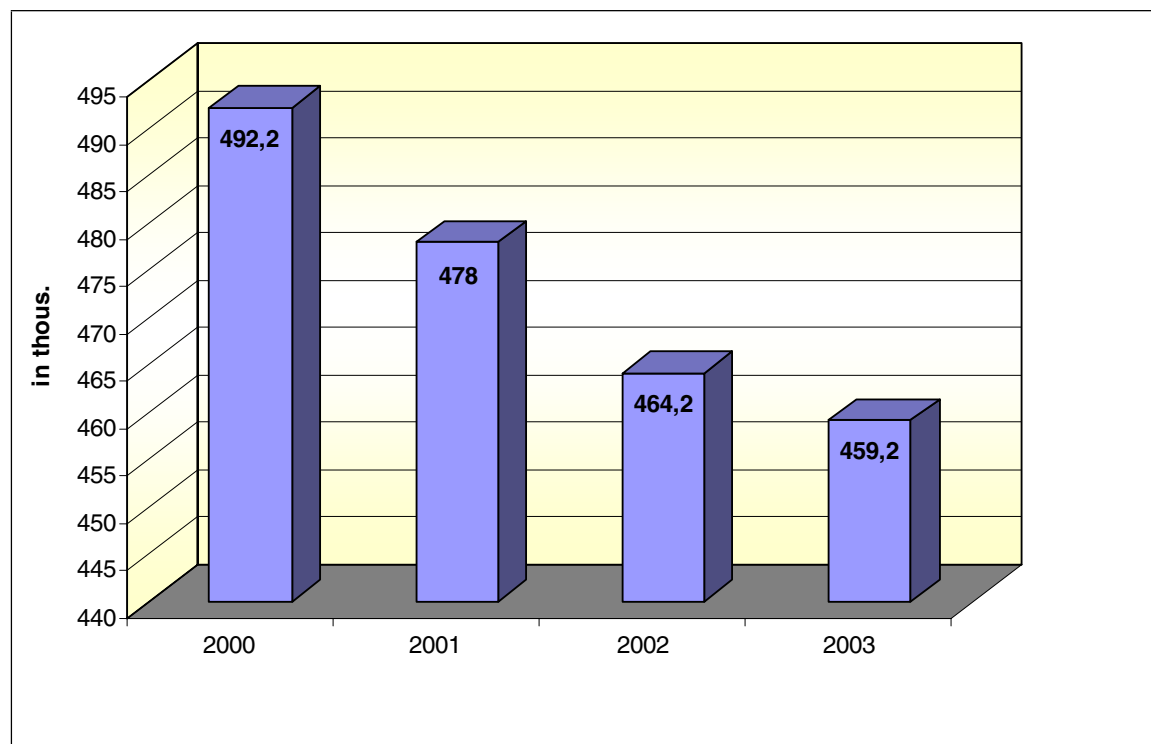
*Source: Central Statistical Office (GUS) for PAIZ*

In the year 2000, according to data of the Polish Federation of Food Manufacturers, 3.917 persons were employed in coffee sector, of which 3.200 in big and medium sized companies, whereas the total number of employed persons in Poland amounted to about 13 million people.

Other statistics provided by Central Statistical Office (GUS) show the number of persons employed in the manufacturing of food products and beverages. Employment in the manufacture of food and beverages industry is decreasing rapidly during the period between 2000 and 2003. This situation can be caused by general growth of unemployment in Poland. During the period of 1999 and 2003 the unemployment rate increased by almost 6% from 13,4% to 19,2%. Therefore the situation in the coffee sector should be analyzed with consideration of the background of the whole situation within the Polish economy.

The percentage share in total employment in industry in 2003 amounted to 15,8%, this means that more people are employed in the manufacturing of food and beverages, than in any other branch of industry. These data are presented in the graph below.

**Graph 2.3.1. Employed persons in the manufacture of food products and beverages (in thous.)**



Source: Central Statistical Office (GUS)

## **2.4 Developments in production**

Till the end of the 80's, the coffeesector was monopolized by a company called Agros. Besides Agros, all activities, like import and roasting of coffee, were dominated by few coffee roasting plants. After the Polish economy dramatically changed in 1989, the coffee sector was transformed significantly, reflected by many modernizations and extensions. As a result of this transformation, many new importers and manufacturers entered the market.

During the 90's the coffee production sector was very profitable. The capital accumulation ratio in 2000 amounted to 5%, whereas the level of ratio of current liquidity is 1,5%.

In the year 2000 the production of coffee in Poland was concentrated in 38 entities, 23 of those were big and medium sized companies (with over 50 employees).

The dynamic development of the coffee sector in Poland, which can be observed during the last 15 years, was caused mainly by global companies, which invested on the Polish market. Companies like Tchibo, Kraft Jacobs Suchard AG, Union

Caffe Confectionary Group BV, Enduscho, Nestle and Unilever have invested over 100 mln USD (EUR 83,11<sup>2</sup>) in Poland.

Nowadays, the production of coffee in Poland is concentrated mainly in companies with foreign capital. However there are also firms with Polish capital, which play an important role on the market. In chapter 4, the most important coffee companies will be mentioned.

Due to the high competitiveness in the sector, companies are constantly investing in production facilities and new technologies to stay on the market. In this respect, the quality standard of production is very important and should always be observed by producing companies. Special systems and certificates (like HACCP system, The Certificate of Quality Management System consistent with PN-EN ISO 9001) are required to continue one's activities.

Worth mentioning is a company called Astra (Poznańska Palarnia Kawy Astra Sp. z.o.o.), which introduced a new line of products on the market aimed at consumers, who are interested in a healthier way of life. The company invested in innovative processes of production and researches and was quite successful in doing so.

## ***2.5 Sales-, import- and export activities***

### *Sales activities*

Sales in the coffee sector have dynamically increased, both in quantitative terms and terms of value. In the period August 2003 - July 2004, sales of coffee has generated a turnover of nearly € 425 million in retail establishments. The majority of those sales (in terms of value) concerned the roasted coffee segment: the total roasted coffee sales amounted to 55% of total coffee sales. The second biggest share was formed by the instant coffee segment with a 32 % share in total sale. The smallest share is owned by the special coffees (cappuccino, mixes etc.) with 13 %, however the most dynamic changes were observed in this category during the indicated period. They were caused by expansion on the market of new products, so called mixes (3 in 1).

The growth of sale in valuable terms for the period of August 2003 - July 2004 amounted to 16% and the quantitative to 9% (compared to the preceding period).

Data from researches done by AC Nielsen<sup>3</sup> for years 2002 – 2004, are shown in the tables below:

---

<sup>2</sup> Exchange rate of 27 September 2005

<sup>3</sup> AC Nielsen is a market survey company, very well-known all around the world, with a very well-developed market measurement tools operating in more than 100 countries all around the world.

Table 2.5.1. Quantitative sale of coffee for years 2002 -2004

Quantity (in thousand of kg)			
	VI 2002 – V 2003	VI 2003 - V 2004	Change (in %)
<b>Coffee</b>	<b>58 968</b>	<b>64 789</b>	<b>10</b>
<b>Roasted Coffee</b>	46 776	50 191	7
<b>Instant Coffee</b>	5 980	6 893	15
<b>Special Coffee</b>	6 212	7 705	24

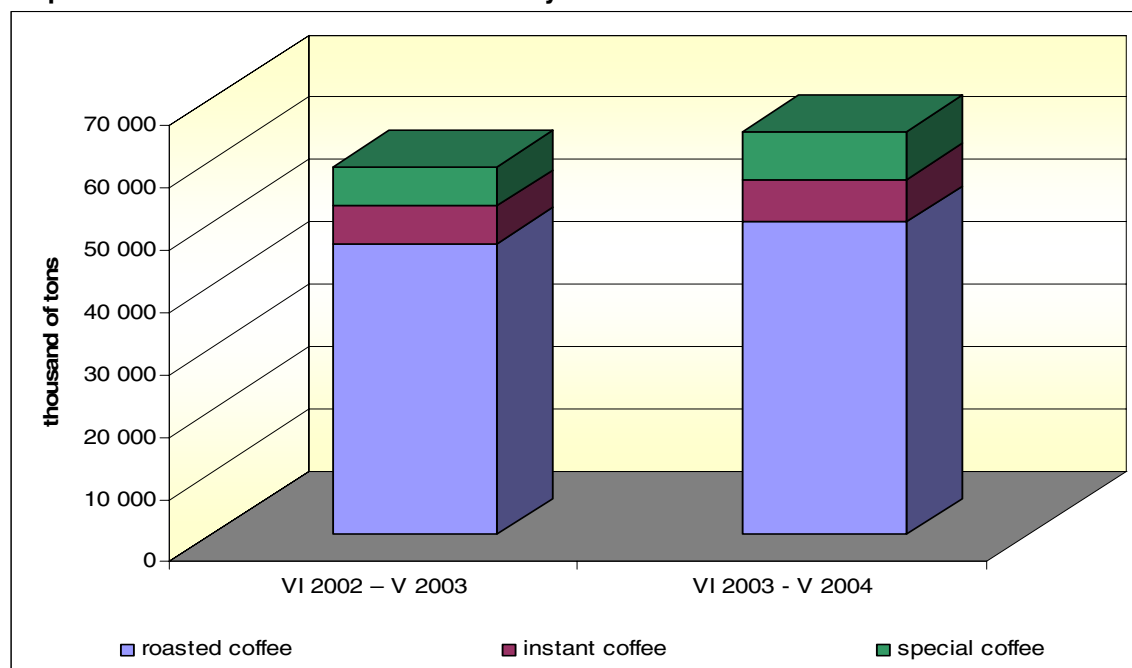
Source: AC Nielsen

Table 2.5.2. Valuable sale of coffee for years 2002 -2004

Value (in 10,000 EURO's)			
	VI 2002 – V 2003	VI 2003 - V 2004	Change (in %)
<b>Coffee</b>	<b>35 935</b>	<b>41 475</b>	<b>15</b>
<b>Roasted Coffee</b>	20 425	22 741	11
<b>Instant Coffee</b>	12 169	14 274	17
<b>Special Coffee</b>	3 340	4 460	34

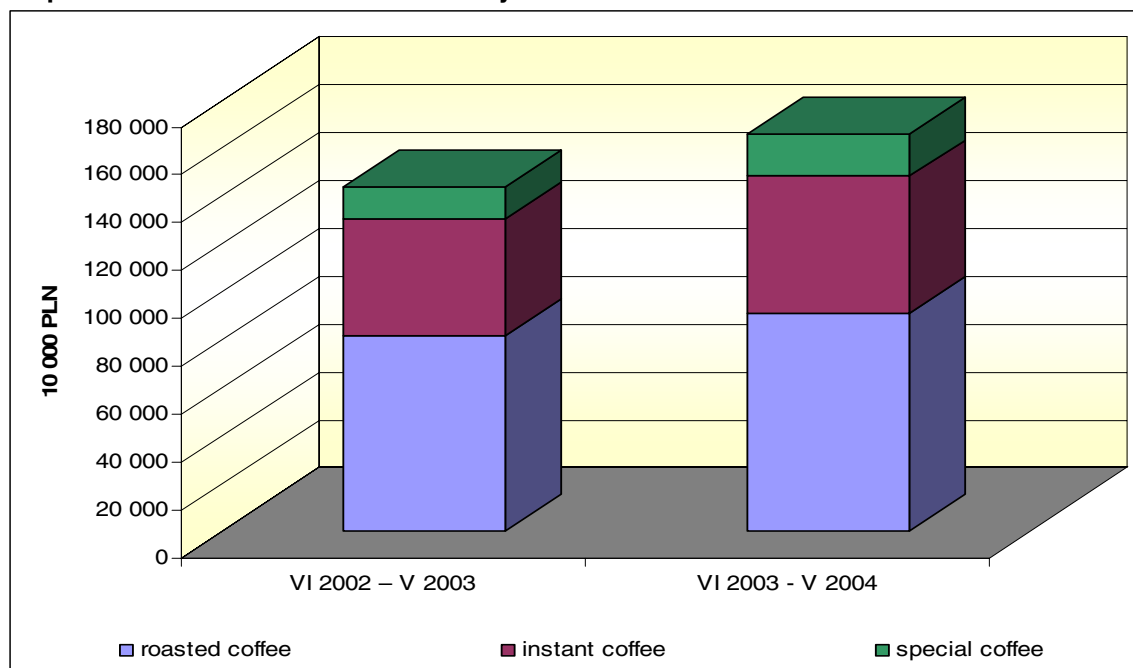
Source: AC Nielsen

Graph 2.5.1. Quantitative sale of coffee for years 2002 - 2004



Source: AC Nielsen

Graph 2.5.2. Valuable sale of coffee for years 2002 - 2004



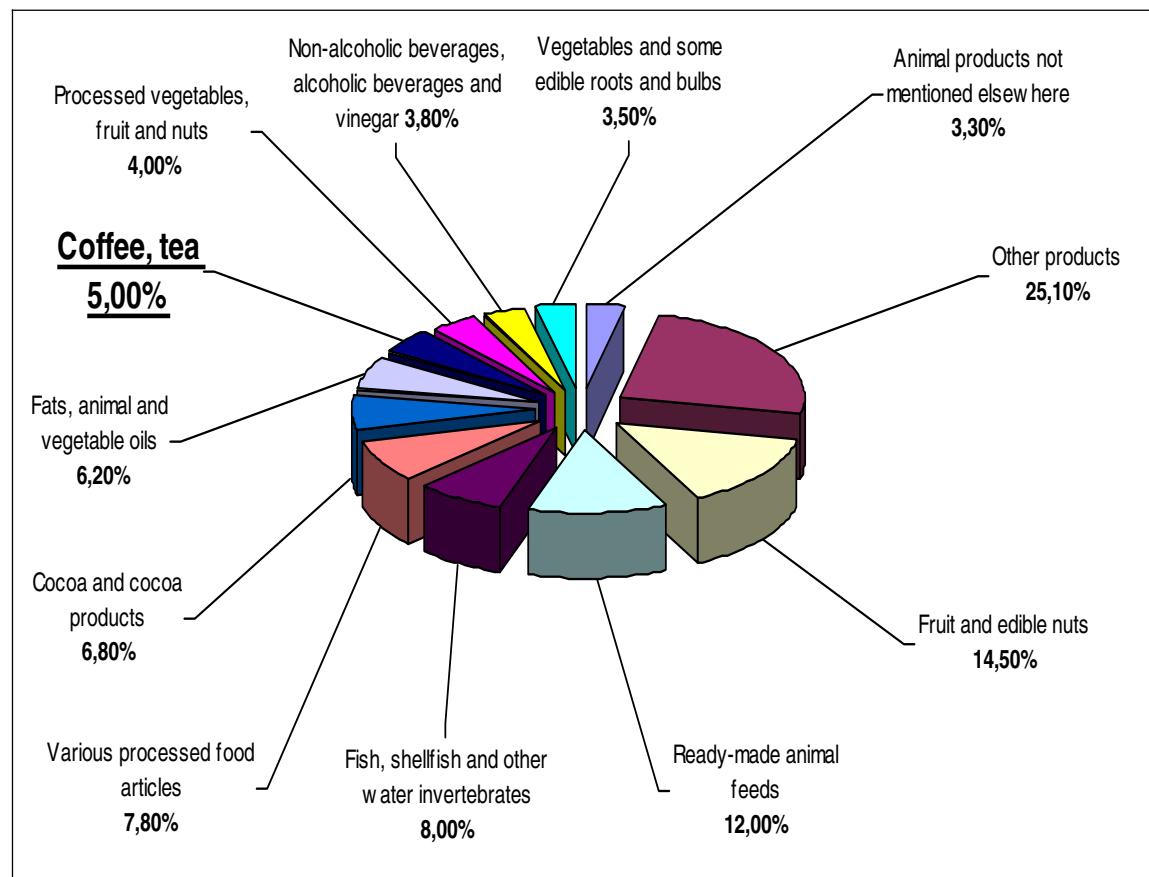
Source: AC Nielsen

### Import activities

The structure of Polish food and agricultural imports in 2003 (€ 3 262, 5 million = 100%) is presented in the picture below:



Graph 2.5.3. Structure of Polish food and agricultural imports in 2003



Source: Central Statistical Office (GUS)

The value of imports of coffee and tea in 2003 amounted to € 164,4 million. The Polish food and agricultural imports are dominated by products coming from other climatic zones. These are mainly fruit and nuts (which are not grown in Poland), animal feeds, fish and condiments (coffee, tea, cocoa).

Data of the Central Statistical Office (GUS) concerning imports of coffee and coffee substitutes containing coffee are presented in the table below. Unfortunately, both GUS as EU Trade Statistics database do provide statistics focused on Poland only and distinguishing in different kinds of coffee. The statistical data regarding imports and exports for Poland are available for 4 HS digit only. 8 HS digit statistics are only available for the EU 25 as a whole, not for one particular country like Poland. Therefore, trade statistics are presented for nomenclature 0901 only (Coffee, whether or not roasted or decaffeinated; coffee husks and skins; coffee substitutes containing coffee in any proportion).

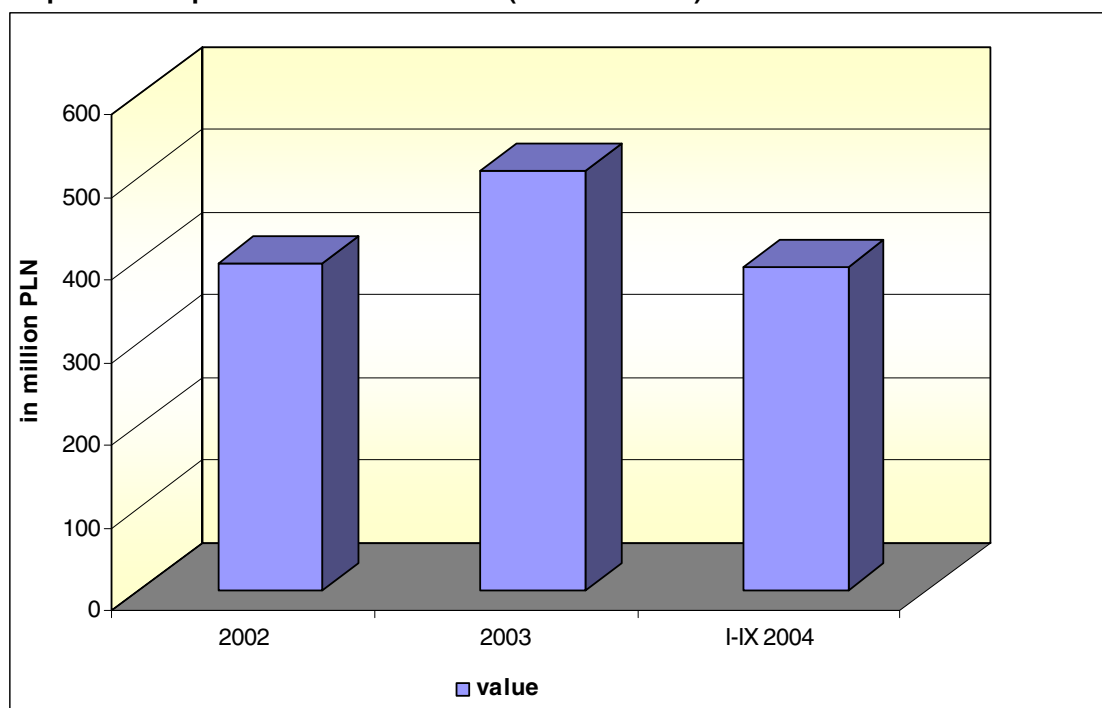
**Table 2.5.3. Imports of coffee and coffee substitutes containing coffee (current prices)**

<b>Imports of coffee and coffee substitutes containing coffee</b>			
	<b>2002</b>	<b>2003</b>	<b>I-IX 2004</b>
<b>Quantity (in thous. t)</b>	118,1	119,4	88
<b>Value (in mln Euros)</b>	95,4	126,7	97,8

Source: Central Statistical Office (GUS)

Quantitative sales of coffee have grown slightly during the presented period. However, the value of sales has increased dynamically. This trend might be caused by the growth of prices or by the change of structure of imported products and increase of their quality segment. Data from table 2.5.3. are shown in graph 2.5.4.

**Graph 2.5.4. Imports value in 2002-2004 (in million PLN)<sup>4</sup>**



Source: Central Statistical Office (GUS)

Imports of coffee and coffee substitutes containing coffee by major countries is presented in the table below.

<sup>4</sup> Conversion to EUR is based on the average exchange rate of 27 September 2005. No historical exchange rates are taken into account.

600 mln PLN = 153,85 mln EUR

500 mln PLN = 128,28 mln EUR

400 mln PLN = 102,62 mln EUR

300 mln PLN = 77,00 mln EUR

200 mln PLN = 51,27 mln EUR

Table 2.5.5. Imports of coffee and coffee substitutes containing coffee by selected countries

Imports (in thous. Euros)		
	2002	2003
<b>Total</b>	<b>79 047</b>	<b>10 575</b>
Viet Nam ↑	20 439	29 303
Germany ↑	13 054	21 487
Indonesia ↓	6 801	6 876
Peru ↓	4 514	2 190
Italy ↑	4 375	5 520
Uganda ↑	4 208	6 481
Austria ↓	3 645	3 012
Brazil ↑	3 145	5 318
<b>Colombia ↑</b>	<b>2 682</b>	<b>3 013</b>
Czech Republic ↑	2 093	2 961
Hungary ↓	1 929	751
Cote d'Ivoire ↓	1 602	805
Guatemala ↑	1 343	1 625
Laos ↑	1 307	3 442
Tanzania ↑	1 080	1 380
Ethiopia ↑	938	2 437
Papua New Guinea ↓	747	474
Switzerland ↓	611	605
China ↓	527	307
India ↑	418	729
Burundi ↑	386	605
Thailand ↑	341	2 202
Kenya ↓	322	306
USA ↓	320	305
Rwanda ↓	266	143
Sierra Leone	220	na
Togo	214	na
Congo	197	na
Costa Rica ↑	193	695
Cameroon ↓	184	88
Guinea ↑	144	872
Liberia	92	na
Denmark ↑	69	90
Netherlands	54	na
France ↑	46	124

Source: Central Statistical Office (GUS)

Imports of coffee have grown strongly in both categories. The biggest importers are Germany, Viet Nam, Indonesia and Italy. Colombia is also present in the top group of coffee exporters to Poland.

*Exports activities*

Poland is also an exporter of coffee, but in a limited way. Part of this export is based on re-export and is targeted mainly to Central-Eastern European countries.

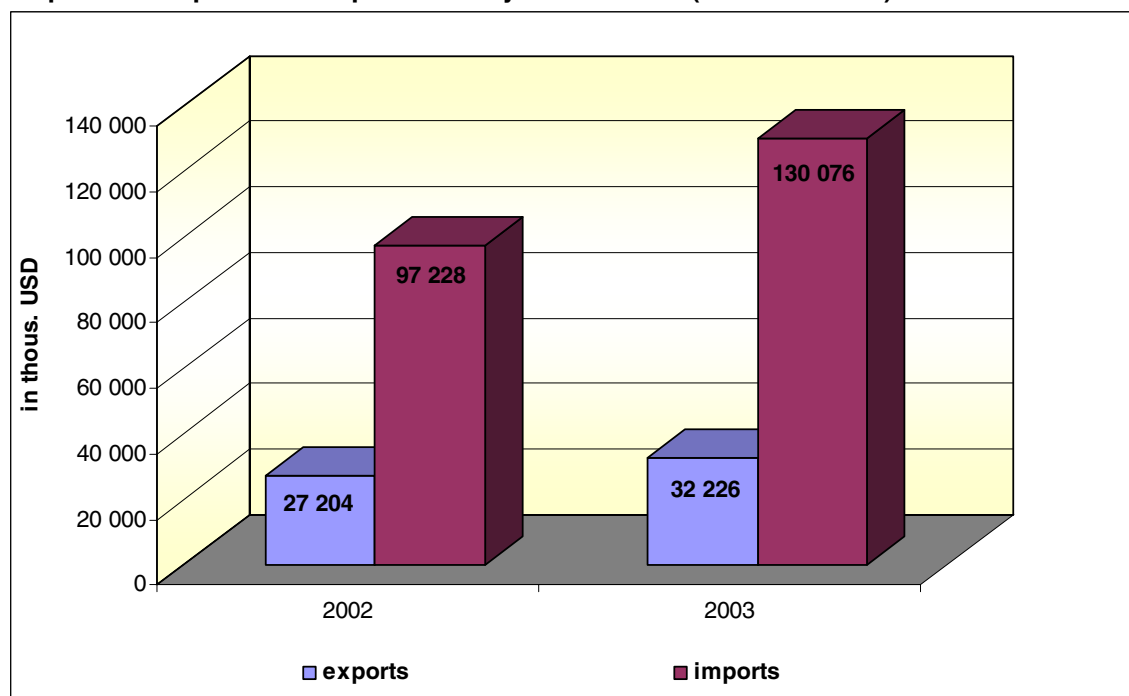
Data provided by GUS, concerning the value of imports of coffee and coffee substitutes containing coffee are presented in table below:

**Table 2.5.6. Exports of coffee and coffee substitutes containing coffee by countries**

<b>Exports (in thous. Euros)</b>		
	<b>2002</b>	<b>2003</b>
<b>Total</b>	<b>22 117</b>	<b>26 200</b>
Ukraine ↑	8 654	8 731
Lithuania ↑	4 808	6 288
Latvia ↑	2 259	2 270
Estonia ↓	1 905	1 724
Slovakia ↑	1 742	2 448
Czech Republic ↑	966	1 509
Germany ↑	784	1 411
Russia ↓	305	130
Belarus ↑	184	233
USA ↑	157	254
Saudi Arabia	54	na
Romania	47	na

*Source: Central Statistical Office (GUS)*

Comparison of imports and exports activities in 2002-2003 is shown on the graph below:

Graph 2.5.6. Imports and exports activity in 2002-2003 (in thous. USD<sup>5</sup>)

Source: Central Statistical Office (GUS)

The coffee import is more important than the coffee export in Poland. It means that Poland is a net importer of coffee, not exporter. Over the years 2002 and 2003 coffee import has increased by over € 40 million and amounted to a value of € 175 million, while at the same time coffee export increased by € 3.2 million and amounted to € 68 million.

## 2.6 Available data about the sub-sectors

Considering the segmentation of coffee market in Poland in respect to price level, 4 segments can be distinguished:

- Economy (lower segment)
- Mainstream (middle segment)
- Upper (higher segment)
- Premium (exclusive)

Quantitative structure of sale in coffee sectors is shown in the table below:

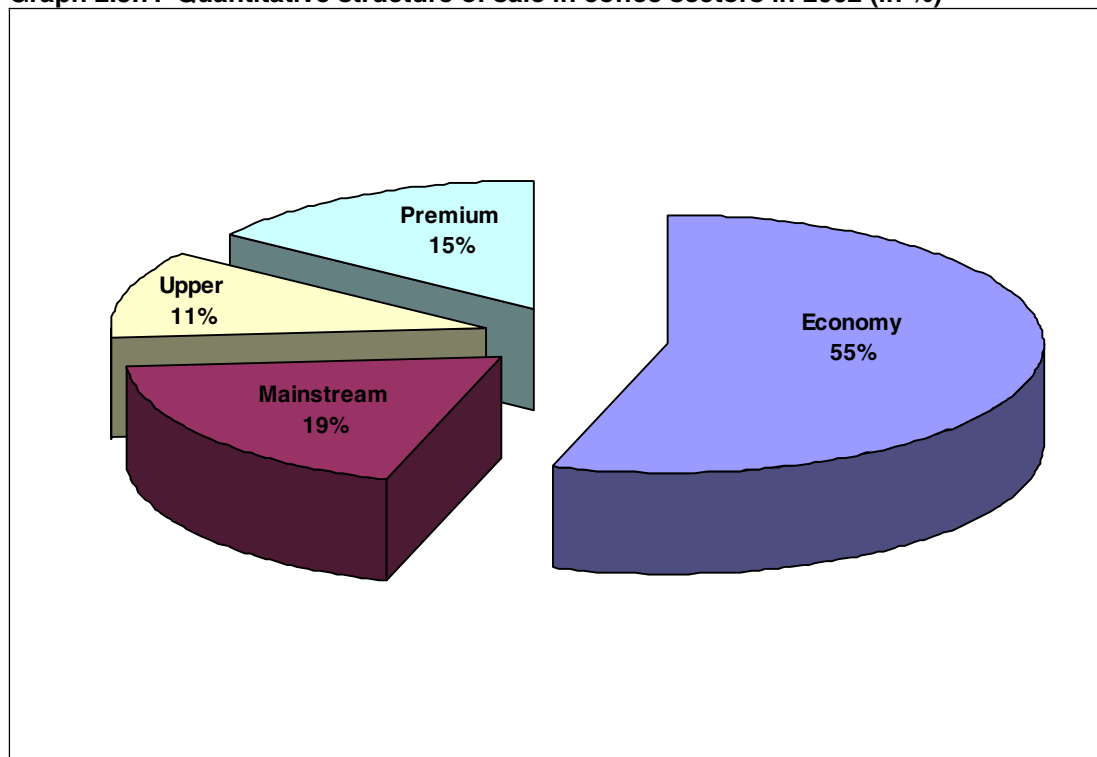
<sup>5</sup> Exchange rate of 27 September 2005: 1 USD = 0,832 EUR, 1 EUR = 1,201 USD  
 140.000 ths. USD = 116.567,4 ths. EUR  
 100.000 ths. USD = 83.266,5 ths. EUR  
 60.000 ths. USD = 49.959,9 ths. EUR  
 20.000 ths. USD = 16.653,3 ths. EUR

**Table 2.5.7. Quantitative structure of sale in coffee sectors (in %)**

	<b>2000</b>	<b>2001</b>	<b>2002</b>
<b>Economy</b>	53	54	55
<b>Mainstream</b>	21	20	19
<b>Upper</b>	13	12	11
<b>Premium</b>	13	14	15

*Source: Home&Market, February 2003, page 81*

**Graph 2.5.7. Quantitative structure of sale in coffee sectors in 2002 (in %)**



*Source: Home&Market, February 2003, page 81*

The Polish coffee sector is lately characterized by a strong polarization. Sales has been growing constantly for the past few years in two price segments. On the one hand Poles are purchasing more products from the lowest price level, which is caused by a worse economic situation, which effects households. On the other hand, more and more clients are interested in products from the highest segment. The premium sector<sup>6</sup> is starting to play a role of importance within the coffee sector.

Special coffees have become increasingly popular in Poland. Ten years ago cappuccino was little known, according to Mokate, a leading milk powder producer. But now, with promotion by milk powder producers, the Poles have

---

<sup>6</sup> The premium sector of coffee is the top sector, with the highest prices and quality of coffee products.

become the world's greatest per capita consumers of cappuccino, which represented 14% of all coffee consumed in the country in 2001.

## **2.7 Recommendations**

The coffee sector in Poland has been characterized in the last 15 years by visible changes in all levels of activity. The first period, after the changes of the national economy, was the beginning of new trends in coffee sector. Many new entities replaced the few big entities, governed by the state companies. The real developments on the market are being observed in the past 10 years, when companies with foreign capital entered the Polish market. It was the beginning of the real battle for the Polish clients.

The sector is still growing and new positive trends are expected in the future. The ground coffee segment is still leading among Polish consumers, but the sector of instant coffee and special coffees is starting to be more and important in Poland as well.

The low level of consumption (2,5 kg annually per capita) compared to other European countries (Scandinavia for example 12 kg/capita) means, that the Polish market is still in the process of developing and there is a place and opportunity for new importers and local producers .

Coffee has an important share in Polish imports (5% of the total import of food products). Among countries with the biggest share in total import, Germany, as one of Polish most important foreign trade partners, is still the leader. However Polish companies are getting more and more internationally orientated and are looking for direct contacts with importers from countries, where are the origins of coffee.

Coffee export plays a less important role in foreign trade. However, Polish companies from the sector are developing their cooperation with other countries, especially with Central and Eastern European (CEE) countries.

The developing coffee culture in Poland in combination with a market that is already accustomed to foreign suppliers and additionally, a new interest in special coffees, might offer great opportunities for Colombian coffee exporters.





### 3. Market composition and characteristics

Poland is one of the largest countries in Central Europe. The country ranks ninth in the Old Continent in terms of size and 69<sup>th</sup> in the world. Poland has a substantial amount of agricultural and mineral resources. It is a leading exporter of apple concentrate and the world's leading producers of berries, cabbages and carrots. In 2002 Poland was ranked second in rye production and world's sixth in potato production.

The population of Poland is estimated for 38.2 million people. Since 1999 it has been experiencing a very slow decline, reaching 0,08%. Approximately 62% of the Poles live in 884 urban area's and almost half of them lives in the cities, that outnumber 100 thousand inhabitants. With respect to the size of population, Poland ranks 8<sup>th</sup> in Europe and 30<sup>th</sup> in the world. Demographic trends in Poland indicate rapid growth in the working-age population. In 2003 there were 14.8 million people employed and the activity rate reached a value of over 50 %.

**Table 3. 1 Employment indices**

<b>Poland</b>	2002	2003
Rate of unemployment	19.8	19.2
Employment indicator	51.5	51.2

*Source: General Statistical Office*

If the average paid employment in industry is taken into consideration, divided by sectors and divisions, the amount for manufacture of food products and beverages was estimated in 2003 for 427 700 (in thousands), which equals 14% of 81.2% among the whole manufacturing sector. It is worth to notify that the sector of manufacturing food products and beverages employs 20.500 people in public sector and 441.100 in private one (ad 2003). According to the Polish General Statistics Office the employment in the sector constitutes 15.8% of the number of employed. According to PAlIZ data<sup>7</sup> in 2002, the Polish food sector has noted a growth rate of 97.6 and in 2003 101.1, which obviously is considered as a growing tendency of the employment in the sector.

#### 3.1 Market size

For a few years now, the Polish coffee market, despite being of relatively low volume, has been stable at a level of 80.000 – 90.000 tonnes annually.

<sup>7</sup> Polish Information and Foreign Investment Agency, Yearly report: Food industry in Poland 2004.

**Figure 3.1.1 Per capita consumption**

Per Capita Consumption of Coffee in Selected Importing Countries

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	1998	1999	2000	2001	2002	2003
Total	4.52	4.59	4.43	4.49	4.47	4.57
United States	4.14	4.24	3.96	4.09	3.95	4.25
European Community	5.12	5.15	5.01	5.00	5.06	5.09
Austria	8.20	8.44	6.57	7.74	7.10	5.64
Belgium-Luxembourg	7.54	5.29	7.32	5.52	9.13	9.60
Cyprus	3.82	4.21	5.23	4.18	3.98	4.00
Czech Republic	3.06	3.64	3.22	3.85	3.80	3.27
Denmark	9.57	9.66	8.84	9.66	8.97	8.10
Estonia	3.72	4.04	4.34	4.85	4.94	5.21
Finland	11.71	11.43	11.26	11.01	11.22	11.18
France	5.49	5.70	5.50	5.31	5.54	5.48
Germany	7.01	7.46	6.70	6.90	6.59	6.64
Greece	3.87	3.69	4.27	3.47	5.18	6.01
Hungary	3.88	4.35	4.38	4.35	4.19	3.64
Ireland	1.49	2.17	1.31	2.29	2.08	2.28
Italy	5.16	5.14	5.36	5.44	5.41	5.73
Latvia	3.31	3.04	2.84	3.97	3.87	4.38
Lithuania	2.47	2.68	2.95	3.50	3.60	3.05
Malta	2.15	2.92	2.92	2.31	3.90	3.00
Netherlands	7.56	5.71	7.21	6.47	6.10	6.76
Poland	2.79	2.74	2.74	3.04	3.03	3.29
Portugal	4.30	4.79	4.08	4.47	4.28	4.29

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Source: Food and Agricultural Association (FAO), 2005

### **3.2 Analysis of the apparent consumption dynamics**

To envisage the apparent consumption dynamics, it is worth to acknowledge the basic data regarding Polish economy, which might be useful for the general assumption.

Table 3.2.1 Goods and services account in Poland

<b>GOODS AND SERVICES ACCOUNT</b>	<b>GROSS DOMESTIC PRODUCT (MLN EUR)</b>	<b>NET FOREIGN INCOME (MLN EUR)</b>	<b>IMPORTS OF GOODS AND SERVICES (MLN EUR)</b>	<b>EXPORTS OF GOODS AND SERVICES (MLN EUR)<sup>8</sup></b>
2002	200497,5	- 1975,3	66074,7	59371,7
2003	209018,8	- 3618,5	77165,7	72047,1

Source: General Statistical Office

Table 3.2.2 Export and import dynamics

<b>QUARTERS</b>	<b>EXPORT</b>	<b>IMPORT</b>	<b>BALANCE</b>	<b>DYNAMICS IN %</b>	
				<b>export</b>	<b>import</b>
				<b>w mln EUR PRECEDING YEAR=100</b>	
I/2002	7.853	10.847	-2.994	97,4	94,7
II	8.668	11.109	-2441	100,9	94,3
III	8.816	11.259	-2.443	105,2	98,3
IV	9.409	12.497	-3.088	107,1	102,8
<b>2002</b>	<b>34.746</b>	<b>45.712</b>	<b>-10.966</b>	<b>102,7</b>	<b>97,6</b>
I/2003	8.352	10.577	-2.225	106,4	97,5
II	8.937	10.968	-2.031	103,1	98,7
III	9.432	11.516	-2.084	107,	102,3
IV	10.949	13.170	-2.221	116,4	105,4
<b>2003</b>	<b>37.670</b>	<b>46.231</b>	<b>-8.561</b>	<b>108,4</b>	<b>101,1</b>

Source: National Bank of Poland

<sup>8</sup> Exchange rate of 27<sup>th</sup> September 2005: 1PLN = 0,256261, 1 EUR = 3,90227. Please note that this is not the historical exchange rate.

As a member of European Union, Poland benefits from repeal on customs for import of coffee concentrates, extracts and concentrates, cappuccino coffee and tea. In 2004 the index of import of major commodities indicates that coffee and coffee substitutes containing coffee import equaled 88.034 tones, which gave the equivalent of U.S.\$ 103 million, € 84 million and 391 million PLN. Preceding years are characterized in terms of value with following numbers:

**Table 3.2.3 Import by sectors**

<b>IMPORT BY SECTORS AND DIVISIONS ACCORDING TO SITC NOMENCLATURE<sup>9</sup></b>	<b>2003 CURRENT PRICES</b>	<b>2002 CURRENT PRICES</b>
<b>COFFEE, TEA, COCOA, SPICES</b>	€ 546 million	€ 445 million

*Source: General Statistical Yearbook*

According to FAO Yearbook data, the numbers of import of Poland of (concerning) coffee, green coffee, coffee concentrates and extracts value as they are listed and presented on the next page:

**Table 3.2.4 Green coffee import to Poland**

<b>IMPORTS OF GREEN COFFEE TO POLAND</b>	<b>QUANTITY</b>	<b>VALUE</b>
2002	103,514 (Mt)	€ 52 million
2003	102,148 (Mt)	€ 70 million

*Source: FAOSTAT*

**Table 3.2.5 Coffee extracts import to Poland**

<b>IMPORTS OF COFFEE EXTRACTS TO POLAND</b>	<b>QUANTITY</b>	<b>VALUE</b>
2002	16,130 (Mt)	€ 54 million
2003	17,296 (Mt)	€ 70 million

*Source: FAOSTAT*

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<sup>9</sup> No data available in PCN nomenclature

**Table 3.2.6 Roasted coffee import to Poland**

<b>IMPORTS OF ROASTED COFFEE TO POLAND</b>	<b>QUANTITY</b>	<b>VALUE</b>
2002	14,301 (Mt)	€ 26 million
2003	16,975 (Mt)	€ 35 million

Source: FAOSTAT

The export of coffee, tea and spices by combined nomenclature, according to Polish General Statistical Office, in 2003 was an equivalent of € 45 million, whereas import of such group of products, also in combined nomenclature, accounts for € 164 million. This is the clearest picture of the tendency in the coffee market, as for trade and barter in the sector. Should it be specified by country, Polish coffee imports' main sources where situated in 2002 in (as per General Statistical Yearbook data):

- Germany
- Vietnam
- Spain
- Indonesia
- France
- Brazil

In 2003 slight changes in the records may be notified, as shown as follows:

- Germany
- Vietnam
- Spain
- United Kingdom
- Brazil
- Indonesia.

The major destinations of Polish coffee and coffee substitutes export in 2002 and 2003 were:

- Ukraine
- Lithuania
- Czech Republic
- Germany
- Hungary

According to FAO data, the value of Polish coffee, tea, cocoa and spices export in 2003 was € 241 million.

Colombia is one of the most important coffee and coffee substitutes suppliers to the Polish market. The General Statistical Office estimated coffee import to Poland from Colombia at € 5.4 million in 2003 out of a general coffee import into Poland, which amounted to € 175 million. It gives Colombia the 12<sup>th</sup> place in the list of importers by importance.

It is worth to emphasize that Colombia's position on this list was higher in 2002, however then total import from Colombia amounted to € 5.2 million, which was in sync with an overall smaller import into the Polish market. In 2000 bananas, coffee, coffee extracts, carbon and tobacco were the main products imported into Poland from Colombia.

### ***3.3 Governmental plans and programs***

Poland, as a member of the European Union, has access to many community programs, which derives advantages for the Polish trade and production market. The best examples are the PHARE programs, realized mostly by the Polish Agency for Enterprise Development. Due to EU membership, Polish government formed in November 30<sup>th</sup> of 2004 a specific strategy for cooperation with non-European developing countries, for all the sectors. There are no available documents or information about specific plans or programs for the coffee market.

All the general projects are conveyed through the Ministry of Economy and Labor. Especially worth mentioning seems the program of Economical Development of Poland, which is inclined to promote Polish expansion to foreign markets and at the same time a bigger absorption of foreign investments, with emphasis on Direct Foreign Investment. Also the Program of Governmental Activities for Small and Medium Enterprises from October 2004 could affect the above described market, as most of the performing entities in coffee sector are small or medium enterprises.

In 2003, the Polish Government planned a Strategy for Changes in Consumption and Production Specimen for Permanent and Balanced Development. Extremely important information should be that in autumn 2005, the Parliament and Presidential Elections will take place. Therefore the upcoming government may introduce new ideas and solutions, due to reliable prognosis that the typesetting of Parliament will probably be differently composed. The difference may be quite noticeable, as the socialistic party, which ruled for the past 4 years, gives in and the conservative parties will stand in for on both – Presidential officio and in Parliament.

The Polish political scene is constructed in an explicit and clear division, based on contradictions (originated from the post communistic camp and the previous communistic opposition). The perfect example of it is that the attitude towards the

European Union and the accession itself, which received far more scepticism on the right side of the Polish political spectrum (conservatives).

The important thing is that conservatives are sometimes even more inclined to follow the protectionist line of its policy towards foreign exchange and also consolidate economical programs with their strong patriotic beliefs. This means a slight change in Polish politics in next few years.

### **3.4 Demand in the market**

To analyze a potential of the average Polish (average) consumer, some general, but basic data has to be given. Final consumption expenditures (in current prices) in 2002 were accounted for € 168 billion, in 2003 for € 170 billion, which amounts to € 4.460 per capita.

Figures for actual final consumption expenditure of household sectors for food and non-alcoholic beverages state (amounts to) 17%, which meant € 675 per capita in 2003. Individual consumption expenditures of the household sector indices shows that food and beverages consume 19.5% of the whole individual expenditure in 2003. Recent (for the first quarter of 2005) price indices of consumer goods and services quoted by the General Statistical Office show that prices of coffee have grown in proportion to 2004 with about 0.4%. The table below presents dynamics of forming coffee prices in Poland for previous years:

**Table 3.4.1 Price indices for coffee 2002-2003**

<b>PRICE INDICES FOR CONSUMER GOODS AND SERVICES</b>	2002 (PREVIOUS YEAR = 100)	2003 (PREVIOUS YEAR = 100)
COFFEE, TEA AND COCOA	97.3	100.3

*Source: General Statistical Office*

The consumption of coffee in Poland has grown from 0,9 kg per person in the late 80's up to 2,2 kg in 1998 and reached 2,5 kg in 2001. This indicates a growing tendency in the consumption of coffee.

The major reason for this is that Poles do not have a coffee drinking culture, therefore are not fond of 'real' coffee. The most popular way to drink it is simply to pour some water in a cup. That is why there is a lot of well-selling cheap coffees from the more economic market segment and so few from *super premium*. The majority of consumers in Poland focusses on the price, and do not really take the quality of a product into account. Therefore the price is the main, sometimes the only, element, which indicates the specific choice of an average coffee consumer.

However, it is worth to emphasize that the situation has been changing in the recent years. More and more Poles try to drink coffee, also in bigger quantities,

and have gained a bigger interest into how coffee is prepared. Special kinds of coffee have definitely become more popular recently, especially cappuccino, which covers around 14% of the total sales of coffee in Poland.

The other tendency in Polish market, which has to be underlined, is that Poles are very used to the consumption of domestic products, particularly in the food sector. Colombian coffee is known worldwide for its quality, but it might be difficult to persuade consumers away from Polish and other Eastern European brands.

According to AC Nielsen the best-selling type of coffee in Poland is roasted coffee, which noted a sales in the period of June 2003 – May 2004 accounted for 50.191 thousand kg, whereas cappuccino was sold in amount of 7.705 thousand kg and instant coffee only amounted to 6.893 thousand kg.

A research by SMG/KRC<sup>10</sup> has shown some interesting information about coffee consumers' habits in Poland:

a) Frequency of drinking roasted coffee amongst Polish consumers:

- More often than once a day – 43,7%
- Once a day – 36%
- 5/ 6 times a week – 3,4%
- Twice a week – 4,6%
- Once a week or less often – 7,4%

b) Frequency of drinking instant coffee amongst Polish consumers:

- 4 times a day or more often – 2,7%
- 2/3 times a day – 16,6%
- Once a day – 27,6%
- 5/ 6 times per week – 5,9%
- 3/ 4 times per week – 11%
- Twice a week – 13,7%
- Once a week or less often – 22,5%

c) Frequency of drinking Cappuccino coffee amongst Polish consumers:

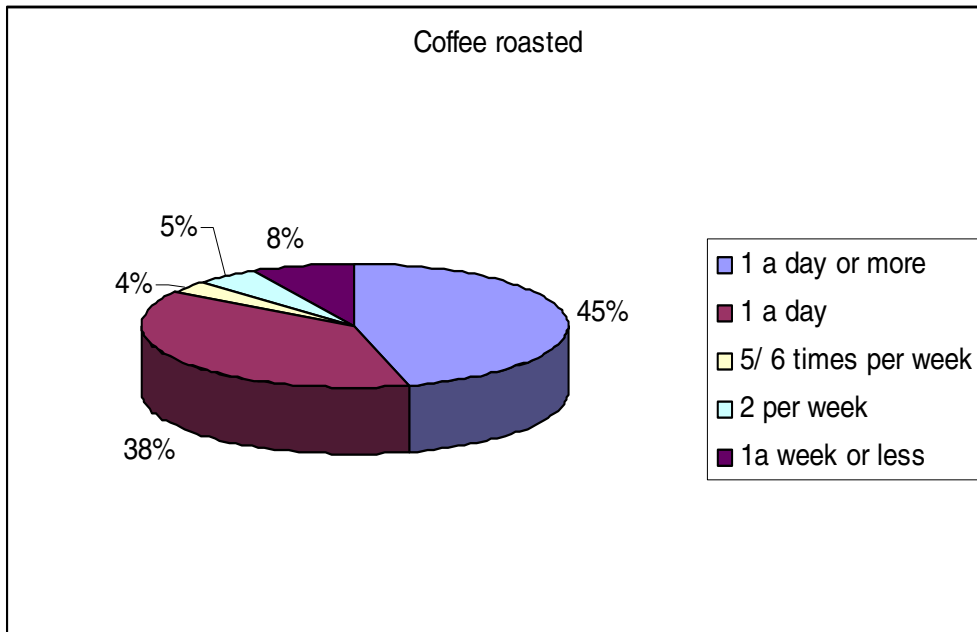
- More often than once a day – 3,1%
- Once a day – 7,8%
- 5/ 6 times per week – 3,3%
- 3/ 4 times per week – 10,6%
- Twice a week – 21,3%
- Once a week or less often – 3,7%.

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<sup>10</sup> Institute of Market Research and Public Opinion Poll/ A Millward Brown Company.

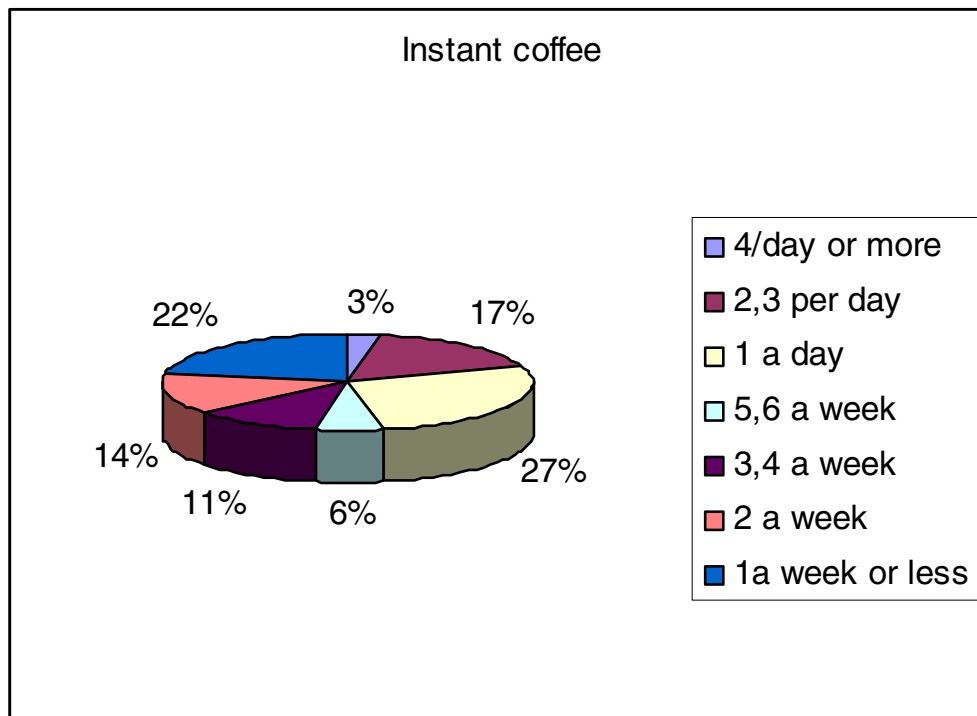


Graph 3.1.1 Frequency of roasted coffee drinking by Poles



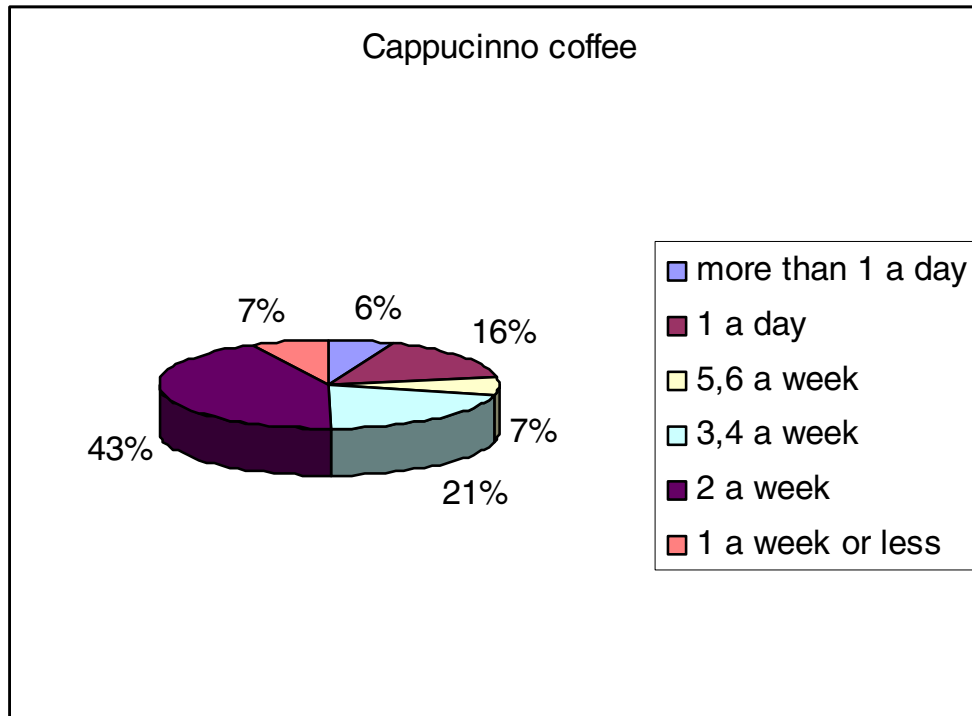
Source: AC Nielsen

Graph 3.1.2 Frequency of instant coffee drinking by Poles



Source: AC Nielsen

**Graph 3.1. 3 Frequency of cappuccino coffee drinking by Poles**



Source: AC Nielsen

### **3.5 Recommendations**

It is highly recommendable for foreign enterprises to enter the Polish market, as the food market in Poland is still in progress of forming its balance and stable condition. The coming years will be the best period to invest in Poland, as now, as a member of European Union, Poland is a reliable partner and firmly developing country, but still with its own currency and having reached a sustainable level of welfare. The consumers' demands are still being formed and the upper segment of the market as well as part of the medium segment, still needs to be defined. This could present possibilities for potential exporters, who could broaden the existing offer of coffee and coffee products with new items from foreign countries.

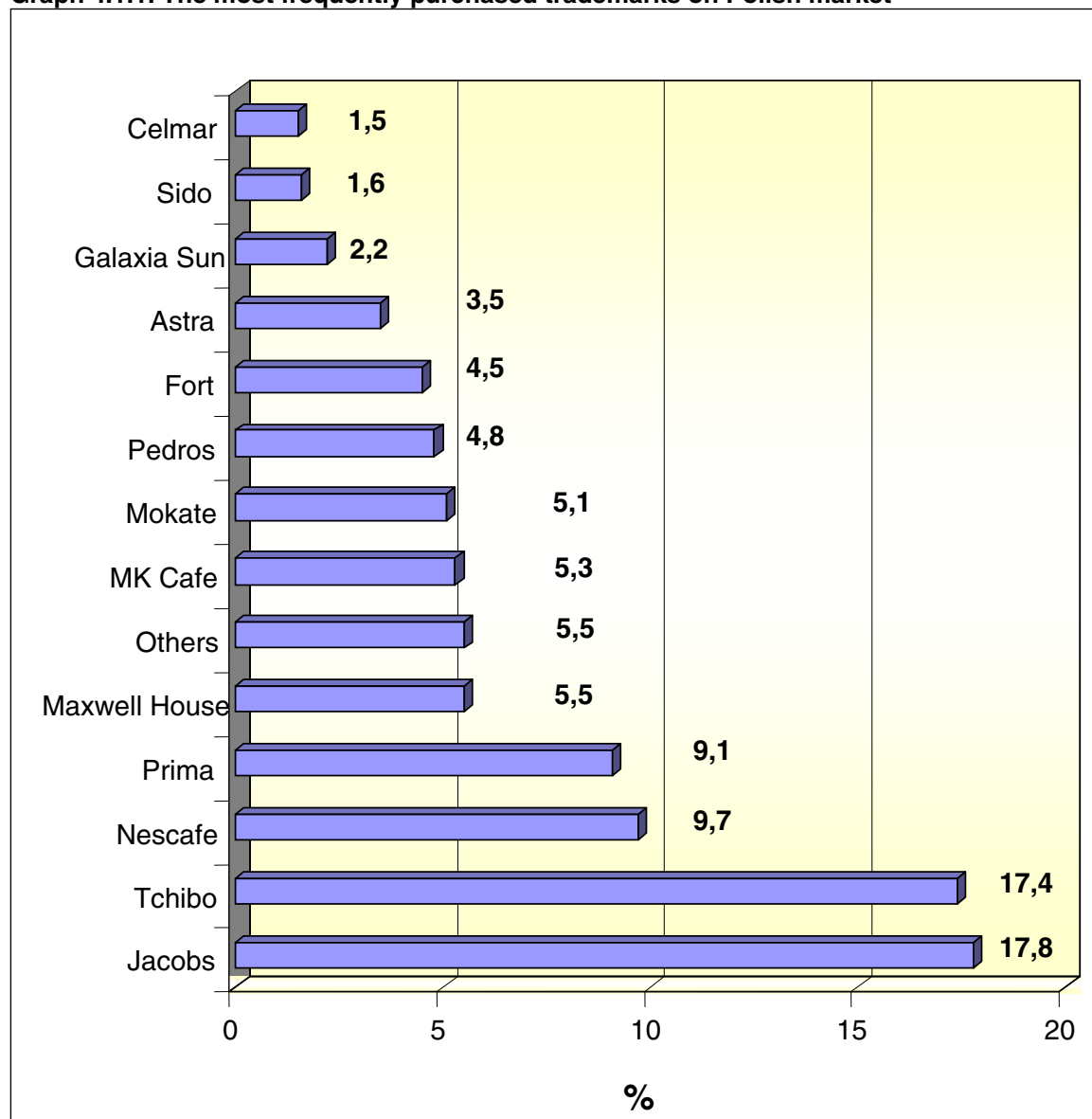
It will however be important to create a bigger understanding of the culture of coffee drinking amongst Polish consumers and to extend their knowledge and awareness of coffee.

## 4. Competition analysis

### 4.1 Main trademarks available in the market

The most popular trademarks on Polish market (most frequently purchased by consumers) are shown in the graph below.

Graph 4.1.1. The most frequently purchased trademarks on Polish market



Source: Claritas Polska for Home&Market, February 2003, page 80

Despite the fact, that Jacobs and Tchibo products are not the cheapest coffees available in the market, they're the most popular coffees currently being purchased in Poland. Polish consumers are very sensitive to the level of prices, but these brands are well perceived by consumers, while they are still being sold at a moderate price level. They were the first trademarks to enter the Polish market after the fall of socialism and this introduction was supported by strong publicity actions.

According to data provided by SMG/KRC for the period of April 2003-March 2004, the most popular trademarks in the ground coffee segment are

**Table 4.1.1. The most popular ground coffee trademarks on Polish market (in %)**

<b>Ground coffee (in %)</b>	
Niebieska - Prima	16,2
Family - Tchibo	13,6
Krönung - Jacobs	12,5
Maxwell House	8,0
Gala	7,0
Premium - MK Cafe	5,4
Woseba	5,2
Pedro's - Elite	4,6
Astra	4,2
Taka Czarna	4,1
Fort - Elite	4,1
Exclusive - Tchibo	3,6
Prima (other trademarks)	3,5
Other	3,4
Merido - Jacobs	3,4
Gala Eduscho	2,3
Arabica - Prima	2,3
Aroma - Jacobs	1,9
Sido	1,9
Galaxia Sun	1,6
Celmar	1,2
Maxima - Jacobs	1,2
Exclusive Mild - Tchibo	1,1
Lavazza	1,0
Natural - MK Cafe	1,0
Sati	1,0
Rumba - Prima	0,9
Decaf - Prima	0,9
Milea - Jacobs	0,9
Sahara - Elite	0,8
Wiener Gold - Eduscho	0,7

Ground coffee (in %)	
Pedro's Active - Elite	0,7
Optima - Elite	0,7

Source: SMG/KRC Research

The most frequently consumed coffee in the instant coffee segment is Nescafe Classic, the second is Maxwell House and the third position belongs to Tchibo Family. The most popular instant coffees are those, with the average, most popular taste and which are being sold at a low price level.

Table 4.1.2. The most popular instant coffee trademarks on Polish market (in %)

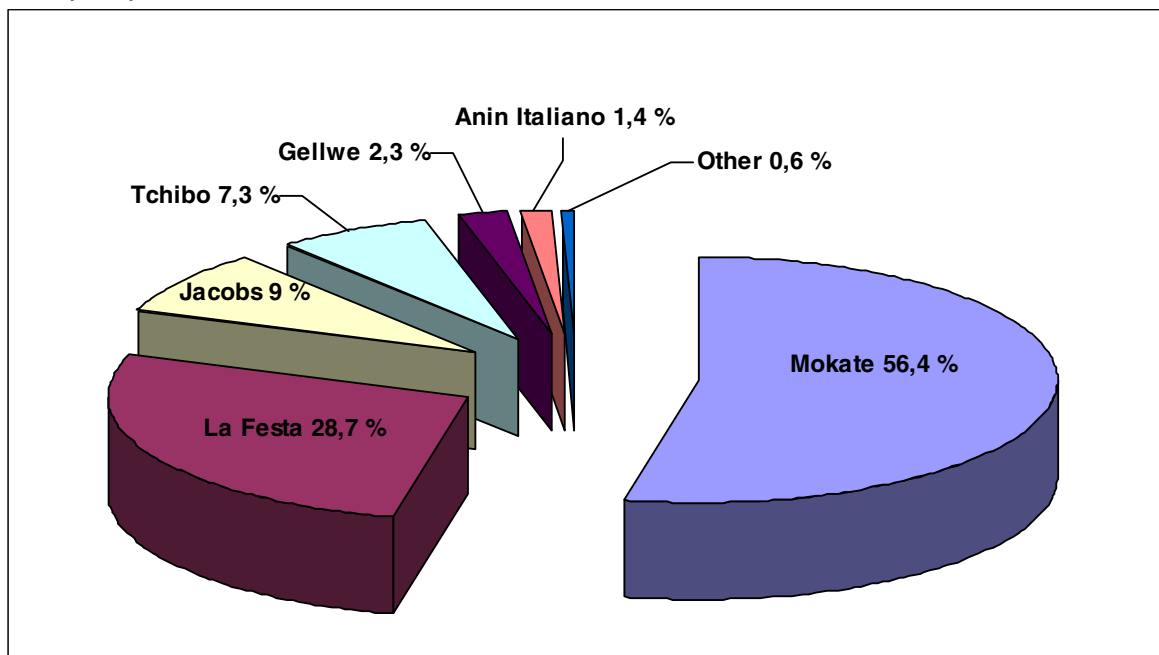
Instant coffee (in %)	
Classic - Nescafe	26,3
Maxwell House	16,5
Family - Tchibo	8,6
Kronung - Jacobs	8,4
Gold - Nescafe	7,2
Cronat Gold - Jacobs	4,9
Classic 3 in 1 - Nescafe	4,9
Mokate	4,0
Niebieska - Prima	3,7
Merido - Jacobs	3,2
Śniadaniowa - Prima	2,7
Other	2,6
Exclusive - Tchibo	2,4
Premium - MK Cafe	2,0
Pedro's - Elite	1,9
Astra	1,9
Prima (other trademarks)	1,7
Classic decaf - Nescafé	1,7
Espresso - Nescafé	1,7
Aroma - Jacobs	1,7
Exclusive Mild - Tchibo	1,3
Maxima - Jacobs	1,3
Taka Czarna	1,1
Natural - MK Cafe	1,0
Fort - Elite	0,9
NYCaffee - Mokate	0,9
Woseba	0,8
Milea - Jacobs	0,8
Arabica - Prima	0,7
Grand Mocca - Tchibo	0,6
Sati	0,6
Rumba - Prima	0,4

<b>Instant coffee (in %)</b>	
Optima - Elite	0,4
Night & Day - Jacobs	0,4
Idee Kaffee	0,4
Nova - MK Cafe	0,3

Source: SMG/KRC Research

The domination of a particular trademark is especially visible in the sector of cappuccino coffee. The most frequently consumed trademark of cappuccino coffee among Polish consumers is presented in the graph below:

**Graph 4.1.2. The most frequently consumed cappuccino among Polish consumers in 2003 2004 (in %)**



Source: SMG/KRC Research

## **4.2 Features of the commercialized products**

The most popular packaging of coffee products on Polish market are:

- Glass jar (50 g, 100 g, 200 g)
- ALU laminated bag (100 g, 200 g, 250 g, 500 g)
- Metal tin / tube (250 g, 500 g)
- One-serving paper bag

Coffee is still perceived in Poland as a luxury product. This determines the quality and material of the packaging. Producers are choosing mainly glass jars and metal tins for products from the middle (mainstream and upper) and higher

(premium) segments. ALU laminated bags and one-serving paper bags are used especially for products from the lower price level (cappuccino and mixes).

The colors of packaging are playing also an important role. For coffee with a high content of caffeine, producers are using dark colors, which are perceived as “heavier”. The most frequently used colors of packaging on Polish market are:

- Navy blue (Prima, Jacobs)
- Brown (Nestle, Prima)
- Green (Jacobs, Tchibo)
- Dark red (Prima, Tchibo)
- Yellow (Tchibo, Prima, Nestle, Elite)
- Sky-blue (Tchibo, Prima, Jacobs)

The packaging of coffee with a low content of caffeine or decaffeinated is mainly pastel or green. Very often producers are using the gold color for small details of the package like cap or on the label. For examples of packaging and prices, we kindly refer to the annexes.

### **4.3 Marketing and advertising strategies**

Competition amongst coffee producers is very strong. Researches on the coffee market in Poland show that women are decision makers in the process of purchasing coffee products. That is why marketing actions and advertising strategies are aimed on women and in the opinion of producers this approach has an important impact on sales.

According to Pentor<sup>11</sup>, that conducted a research amongst consumers purchasing coffee, the most effective advertising strategy is price promotion (when producers decrease the price of their product for some particular period of time). The most sensitive group for this strategy is the group of consumers of the products from the lower segment. However clients of luxury products are also reacting positively to these marketing actions.

Companies from within the coffee sector are also involved in marketing actions connected with sponsorship of culture and sport events (Tchibo, MK Café).

The latest means of promoting coffee consumption of a specific brand, is the establishment of chains of coffee bars in Poland. These actions were initiated by Tchibo (Tchibo Coffee Bars) in 1999. Before 1999 coffee bars did not exist in Poland, not even in the capital, Warsaw.

The culture of drinking coffee in Poland is changing, especially in big cities, where people are drinking coffee more and more often out of their homes, on

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<sup>11</sup> Polish survey and research centre.

their way to work or during travel. At this moment, there are a few chains of coffee bars in Poland:

- Tchibo Coffee Bars
- Café Nescafe
- Mercer's Gourmet Coffee (with 100% of Polish capital)
- Pożegnanie z Afryką (with 100% of Polish capital)
- Coffee-Heaven

Coffee producers have also developed special loyalty programs. An example of marketing approach is Astra, a coffee producing company, that initiated a loyalty program many years ago. Consumers can collect special points with every purchase and they can exchange them for gifts from the company's catalogue.

The most popular and effective advertising strategy is still advertisement in the media. Research shows that during the Christmas period four coffee products were amongst the top fifteen products that received most exposure on television during commercials. The results from this research are presented in the table below.

**Table 4.3.1. Advertising in television during the Christmas period - 08.12.2003 - 21.12.2003**

<b>Advertisement in television<sup>12</sup></b>			
	<b>GRP</b>	<b>Ins</b>	<b>Ad. Exp</b>
<b>Nescafe Classic</b>	<b>593,10</b>	<b>111</b>	<b>3 388 200</b>
E. Wedel - chocolate	585,69	165	3 076 300
Warka Jasne Piłne (beer)	510,24	446	3 110 300
Hortex – orange juice	480,03	244	2 492 600
Fortuna - juice	439,63	161	1 590 120
<b>Tchibo Exclusive</b>	<b>428,49</b>	<b>110</b>	<b>1 697 000</b>
L'Oreal Elseve Color-Vive	411,86	208	1 761 700
Winiary - mayonnaise	395,88	65	1 826 900
E. Wedel	354,23	135	1 668 525
Pepsi	353,46	142	1 655 970
Pampers Total Care	350,18	148	1 009 000
<b>Jacobs Kronung</b>	<b>347,13</b>	<b>85</b>	<b>1 770 400</b>
Clairol Herbal Essence	346,09	125	1 546 540
<b>Woseba</b>	<b>338,97</b>	<b>170</b>	<b>1 054 240</b>
Kamis	337,96	116	1 810 500

Source: TNS OBOP

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<sup>12</sup> **GRP** – Number of people who watch the commercial for at least 60 seconds

**Ins** – Number of spots on tv during the surveyed period

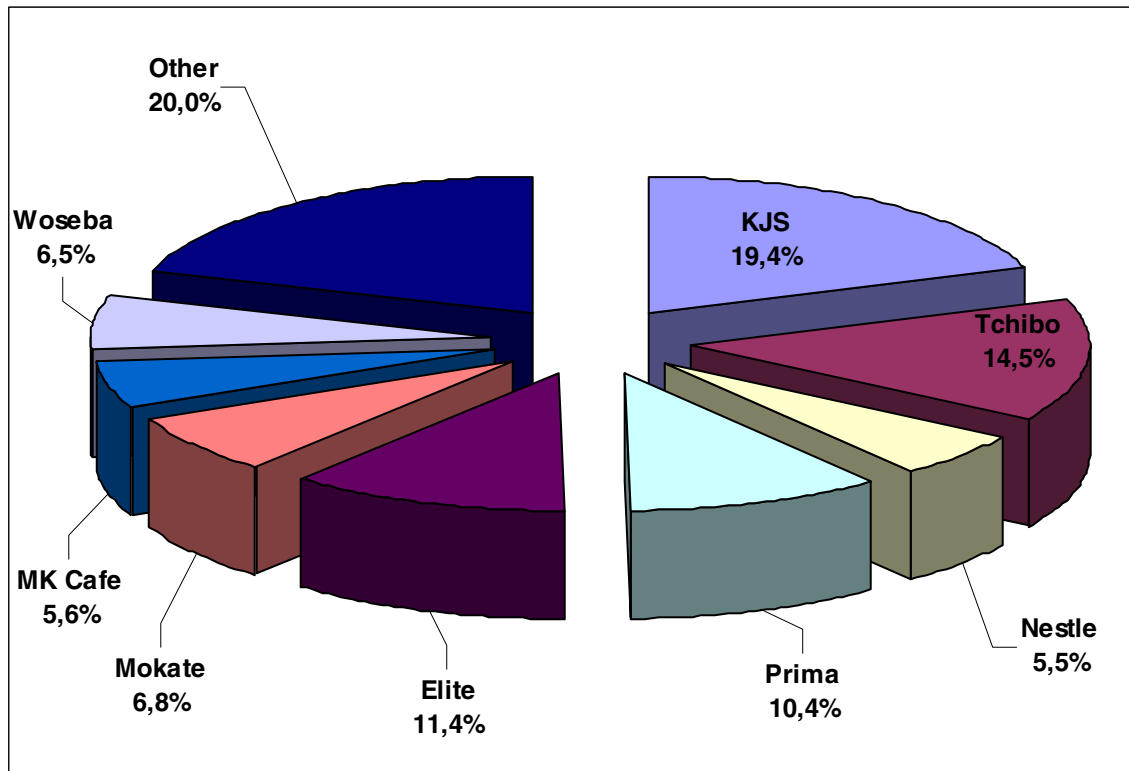
**Ad. Exp** – Expenses for advertisement in surveyed period



#### 4.4 Participation in the market and segments that are served

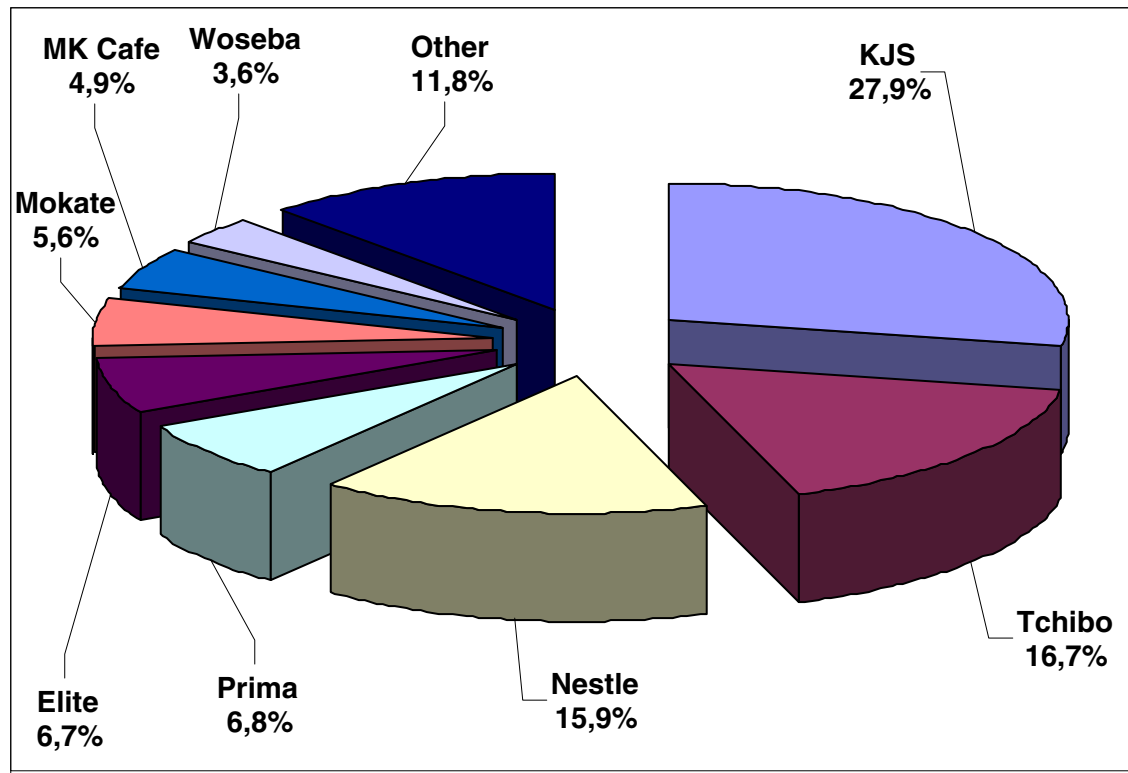
The Polish coffee sector is dominated by internationally operating companies with foreign capital, but in the market Polish companies with Polish capital also play an important role. In general the market is stable, with few big players and big number of smaller, locally operating companies. The participations in the market are presented in the graphs presented below.

Graph 4.4.1. Quantitative share in the coffee market



Source: MEMBR

**Graph 4.4.2. Valuable share in the coffee market**



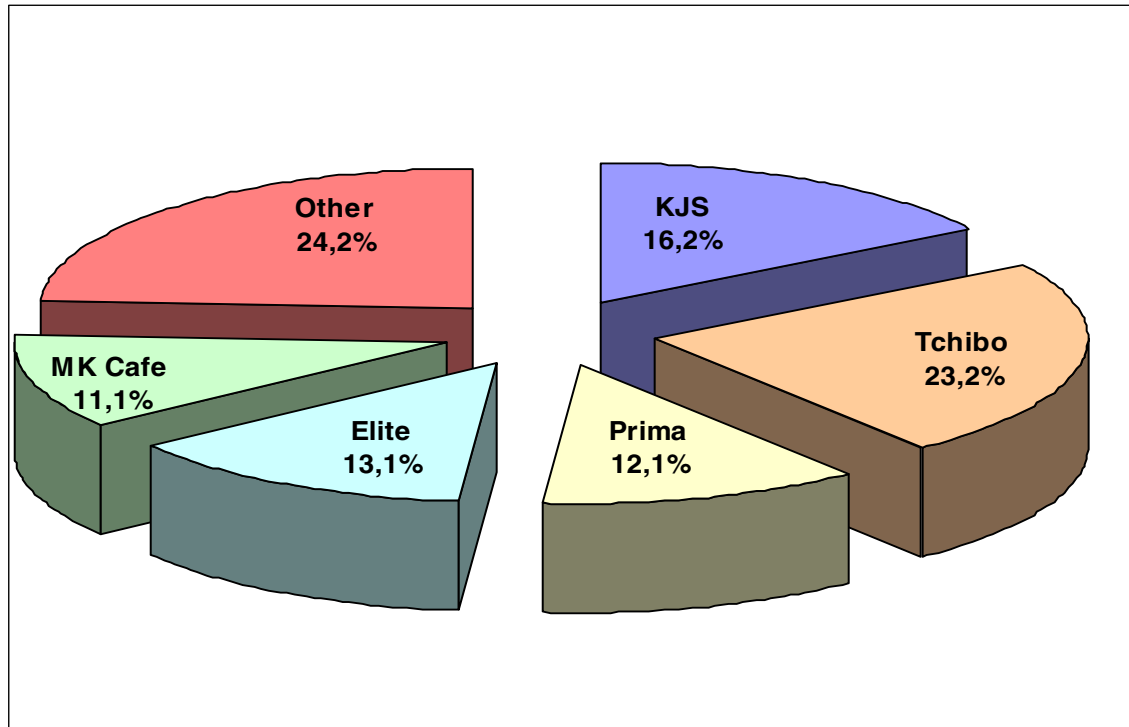
Source: MEMBR

According to data from the period of July 2003-June 2004, the biggest share in the coffee market belongs to Kraft Jacobs Suchard (Kraft Foods Polska S.A.), Tchibo has second position, and Elite takes third place. These companies have been operating on the Polish market for more than 10 years and have gained a very strong position. Companies with foreign capital control 70 % of the Polish coffee market.

Considering the valuable share in the market, the list of top companies did not change, but differences between companies have become more visible. Again KJS is the leader, but the position of the company is stronger and the gap between the rest of the companies is much bigger. The second largest producer, Tchibo, has over 10% less than KJS

The quantitative shares in the segment of ground coffee are presented in the graph below.

Graph 4.4.3. Quantitative share in the ground coffee sector

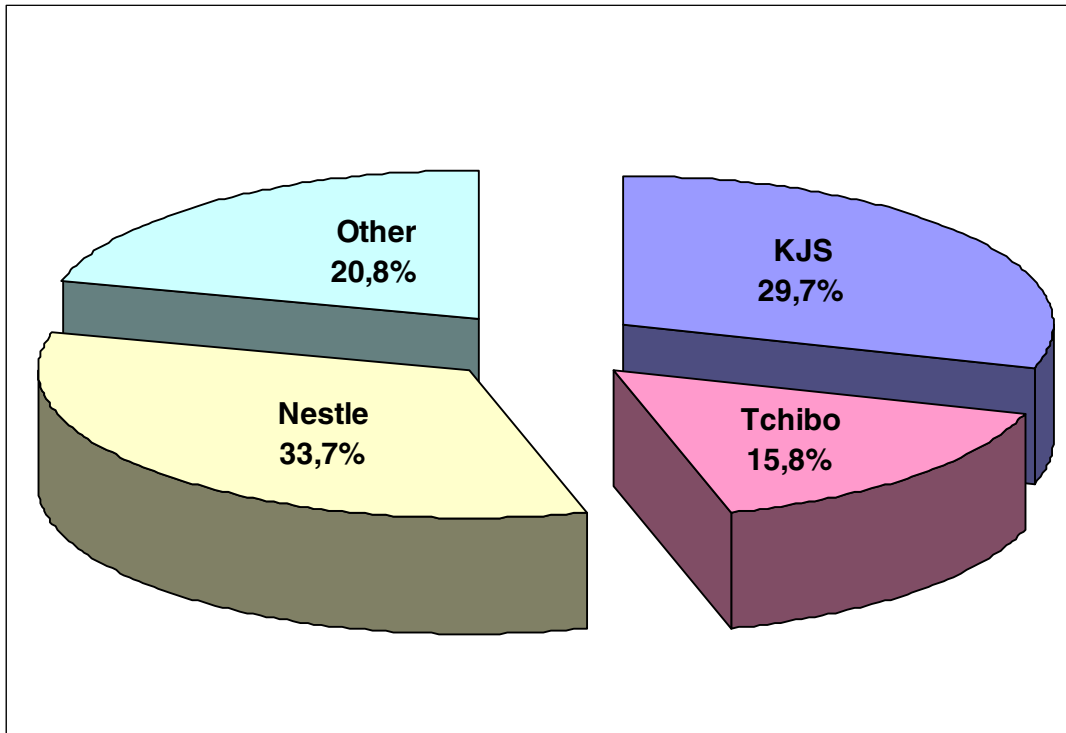


Source: AC Nielsen

According to researches led by AC Nielsen in August-September 2002, the leader of the ground coffee segment is Tchibo with a share 23,2 %. KJS gained a second position with 16,2 %. The gap between first and second place is visible. Differences between the rest of the companies are less important.

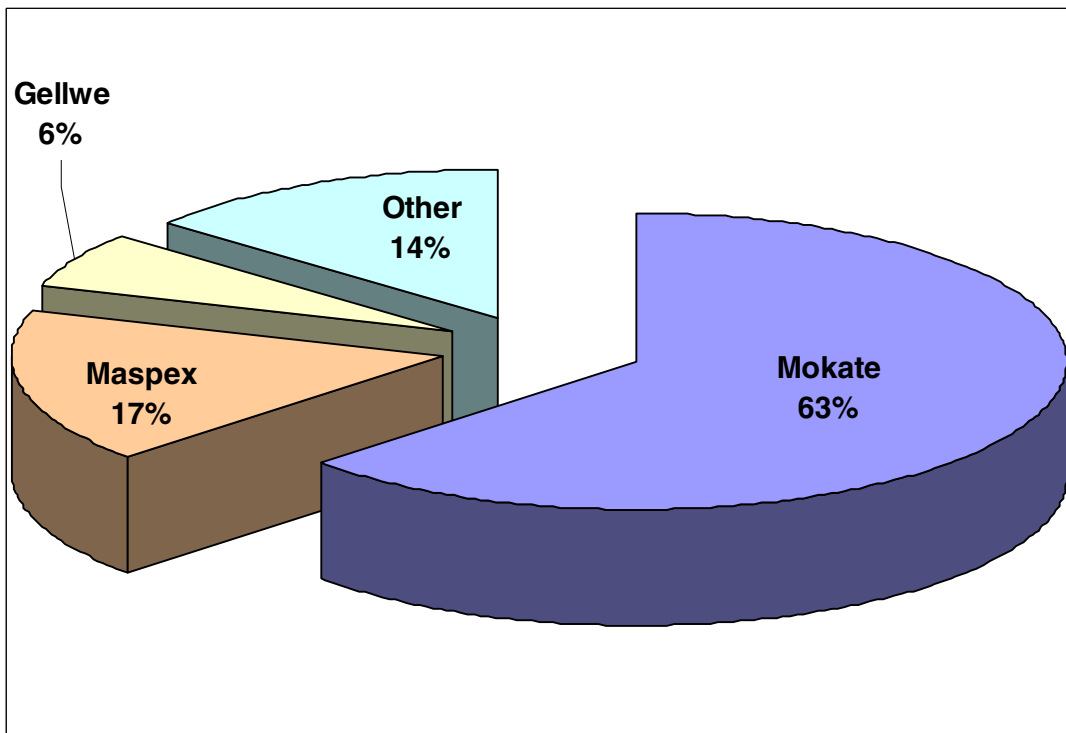
Quantitative shares in the instant coffee and cappuccino segments are presented in the graphs below.

Graph 4.4.4. Quantitative share in the instant coffee sector



Source: AC Nielsen

Graph 4.4.5. Quantitative share in the cappuccino sector



Source: AC Nielsen

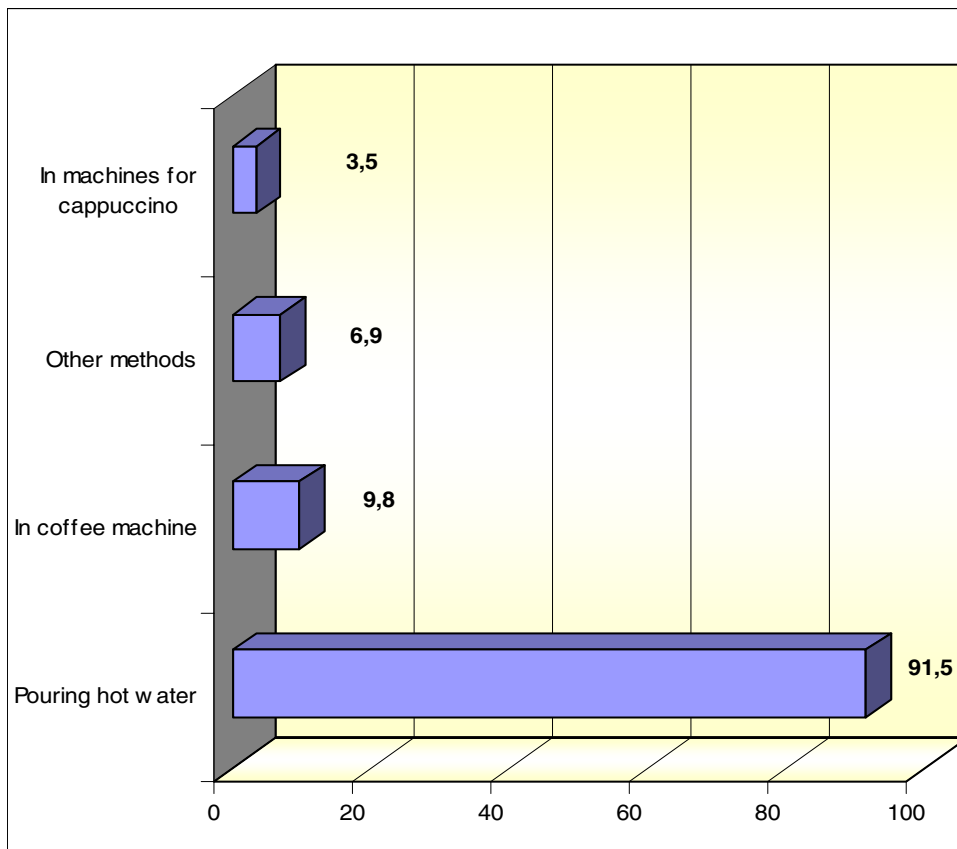
In the instant coffee and cappuccino sectors, the domination of particular companies is very strong. The leader of the instant coffee sector has always been Nestle, but KJS also has a strong position. The cappuccino segment is strongly controlled by Mokate, that maintains this position of leader within the cappuccino market for many years. The other companies present in this sector comprise, compared to Mokate, a very small share in the market.

#### 4.5 Quality of the product

Polish consumers are not coffee gourmets. The majority of Poles cannot mention one brand of coffee and is not able to distinguish between coffee products of a high and low quality. In most cases the price of the product tells consumers, how high the level of quality of the coffee they are drinking is. A high price is a sign that the product is of high quality.

Polish consumers are not aware of the possibilities and the range of coffee products. The most popular and common method of preparing coffee is simply pouring hot water on coffee. Methods of preparing the coffee in Poland are shown in the graph below.

Graph 4.5.1. Methods of preparing coffee in Poland (%)



Source: Home&Market, February 2003, page 80

However the situation is changing slowly and the group of consumers that is sensitive to the quality of coffee is getting bigger every year. That is why the highest segment of coffee (premium) is growing lately. Specialists researching the Polish coffee market are predicting further growth in this coffee segment and the increase of quality requirements of Polish consumers.

#### **4.6 Expansion plans**

The Polish coffee market is stable, market shares are already established, however the competition is strong and companies are constantly looking for possibilities of expansion.

- **Mokate** company, the leader of cappuccino sector with 100% of Polish capital, has implemented a very aggressive strategy, concerning takeovers of foreign companies. The company achieved everything it was able to achieve in the Polish market and is now looking for new possibilities abroad. In April 2005 the company bought Dukat from the Czech Republic. The president of Mokate, Mrs Teresa Mokrysz does not exclude more takeovers this year. The company has plans of consolidation in Polish food market.
- **Coffee bars** lately became the target of expansion of many companies from the coffee sector. Coffeeheaven, Tchibo and Nestle are the main competitors in this segment.
  - **Tchibo** has opened 20 bars till April 2005 and is planning to open 10 new bars every year.
  - **Nestle** has already 20 bars in their chain and their plan is to have 50-60 bars in a couple of years.
  - **Starbucks** announced an intension of entering to the Polish coffee market, but the details are not known yet.
  - **Coffee Heaven** has already created a chain of 28 bars and is planning to increase that number up to 50 bars in 3 years.
  - Polish company **Coffee Team** has about 10 bars in Poland and is planning to open 3,4 per year.
  - **Pozegnanie z Afryką** - the other Polish company created 25 coffee bars in Poland and is also planning to develop the chain.
  - Companies **Costa Coffee Boutique, Coffee Republic** and **Pret a Manger** are interested in Polish coffee bars market.
  - The whole number of coffee bars in Poland amounts to 300, of which 100 belongs to coffee bars chains.
- **Elite Café** has taken over the trademark MK Café in June 2005. The company is planning to become the leader of the ground coffee segment. Elite Café wants to acquire 21 % of share in the market and in that way wants to develop itself into being an important competitor for Tchibo. The company has also plans to increase the exports.

## 4.7 Pricing strategy

Over the last year, prices of coffee decreased. Changes in retail prices over the years 2000-2003 are presented in the table below:

Table 4.7.1. Changes in prices of coffee in retail

Prices of coffee (in € )			
	2000	2002	2003
<b>Natural coffee "Tchibo Family", ground, per 250 g</b>	1.55	1.10	1.16

Source: Central Statistical Office (GUS)

Data from 2004 show the differences in prices (maximum and minimum level) of coffee:

Table 4.7.2. Differences in level of prices in retail in 2005

Prices of coffee (in € )			
	MAX	MIN	AV.
<b>Nescafe Gold, jar, 100g</b>	4.50	2.86	3.85
<b>Jacobs Kronung, ground, 500 g</b>	4.35	2.97	3.63

Source: MEMBR

Data from the table above shows that the differences between price levels of the same product are very significant. They depend mainly on the channels of distribution. Hyper- and supermarkets implement the lowest level of prices.

Detailed tables with prices of coffee from June 2005 are shown in the table below:

Table 4.7.3. Retail prices of cappuccino from June 2005

Retail prices of cappuccino (in € )			
	price	package (in grams)	price/kg
Mokate Cappuccino Classic	0.82	130	6.33
Mokate Cappuccino Magnesium	0.85	110	7.71
Mokate Cappuccino Rum	0.82	110	7.48
Mokate Cappuccino Brandy	0.82	110	7.48
Mokate Cappuccino Marzipan	0.82	110	7.48
Tchibo Cappuccino Classic	3,39	100	33,90
Tchibo Cappuccino Cocos	3,39	100	33,90
Tchibo Cappuccino Chocolate	3,39	100	33,90
Jacobs Cappuccino Classic	4,99	125	39,92

Source: Research by EUNITE.

**Table 4.7.4. Retail prices of instant coffee from June 2005**

<b>Retail prices of instant coffee (in € )</b>			
	<b>price</b>	<b>package (in grams)</b>	<b>price/kg</b>
Gala Ulubiona	2.00	100	19.98
Astra Diuna	1.67	100	16.72
Astra Café de Colombia	6.25	200	31.24
Astra Marago	6.25	200	31.24
Astra Negrita Gold	5.99	100	14.98
Maxwell House	3.75	200	18.74
Elite Optima	3.42	200	17.11
Elite Fort	3.00	200	14.99
Elite Pedros	3.50	200	17.49
Café Prima Niebieska	3.00	200	14.99
Gala Ulubiona	3.50	200	17.49
Nescafe Classic	3.25	200	16.24
Jacobs Aroma	3.75	200	18.74
Jacobs Cronat Gold	5.00	200	25.00
Jacobs Kronung	6.50	200	32.49
Nescafe Gold	6.75	200	33.74
Tchibo Exclusive	6.25	200	31.24
Tchibo Gold	5.95	200	29.74
Tchibo Grand Mocca	4.67	200	23.36
Mokka Mocha	22.50	200	112.49
Nescafe Rood	23.50	200	117.49
Douwe Egberts Aroma Rood	22.50	200	112.49
Davidoff Espresso 57	8.00	100	79.98
Davidoff Rich Aroma	7.00	100	69.98

*Source: Research by EUNITE*

**Table 4.7.4. Retail prices of ground coffee from June 2005**

<b>Retail prices of ground coffee (in € )</b>			
	<b>price</b>	<b>package (in grams)</b>	<b>price/kg</b>
Tchibo Exclusive	1.75	250	6.99
Jacobs Aroma	1.10	250	4.39
Gala Ulubiona	1.05	250	4.19
Lavazza	4.00	250	15.99
MK Café Feelings	1.37	250	5.49
Davidoff Rich Aroma	4.75	250	18.99
Maxwell House	1.75	500	3.50

*Source: Research by EUNITE*



#### 4.8 Segmentation of enterprises by sectors and its categorization

Currently there are about 50 companies operating in the Polish coffee sector. The main companies are those with foreign capital, but the role of Polish companies is also very significant. The biggest companies with foreign capital are:

1. Tchibo Warszawa Sp. z o.o.
2. Nestle Polska SA
3. Prima S.A.
4. Elite Cafe Sp. z o.o.
5. Kraft Foods Polska S.A.

This group of top five companies controls 70% of the market. The group of companies with Polish capital with important roles in the market are:

1. Poznańska Palarnia Kawy Astra Sp. z o.o.
2. Mokate S.A.
3. Woseba Sp. z o.o.
4. Celmar Café

##### Tchibo Warszawa Sp z o.o.

Location: **Warsaw**  
 Beginning of activity: **1992**  
 Number of employees: **420**  
 Turnover: **€ 108.5 million**  
 Share in the market: **19,4 %**

##### Description:

The company started being active on the Polish market as a importer of roasted coffee trademarks Tchibo Exclusive, Mocca and Bistro from Germany. In 1994 the company opened coffee roasting plant near Warsaw and started the production of coffee. Currently the company is expanding its activity in the sector of coffee bars.



**Nestle Polska SA**

Location: **Warsaw**  
Beginning of activity: **1993**  
Number of employees: **2 000**  
Turnover: **€ 387.5 million**  
Share in the market: **5,5 %**

Description:  
The company operates in the Polish food sector in general. It began its activities in 1993 by implementing Nescafe coffee, which is nowadays the most popular trademark of instant coffee in Poland.



**Prima S.A.**

Location: **Poznań**  
Beginning of activity: **1988**  
Number of employees: **244 in Poznań**  
Turnover: **€ 75 million**  
Share in the market: **10,4 %**

Description:  
The company was founded by Polish entrepreneurs, but in 2001 the company merged with Drie Mollen Holding BV. In 2002 the company was taken over by Sara Lee / Douwe Egberts. Nowadays the company produces about 15 thousand tons of coffee per year.



**Elite Cafe Sp. z o.o.**

Location: **Tarnowo Podgórne near Poznań**

Beginning of activity: **1991**

Number of employees: **371**

Turnover: **€ 47.5 million**

Share in the market: **11,4 %**

Description:

Elite Café is part of an international company called Elite International BV. Elite is the biggest producers and one of the biggest distributors of coffee in the Polish market. The company has the biggest coffee roasting plant in Poland. The average production of the company amounts to 20 thousand tons per year. In June 2005 the company took over the MK Café trademark. Elite is executing a consistent strategy to gain the position of market leader in Poland.



**Kraft Foods Polska S.A.**

Location: **Warsaw**

Beginning of activity: **2004**

Number of employees: **700**

Turnover: **€ 180 million**

Share in the market: **19,4 %**

Description:

The company is offering coffees under the trademarks Jacobs and Maxwell House on the Polish market. Strong position on the market is especially important in the instant coffee sector, where company takes second place behind the market leader – Nescafe.



**Poznańska Palarnia Kawy**  
**Astra Sp. z o.o.**

Location: **Poznań**  
Beginning of activity: **1973**  
Number of employees: **160**  
Turnover: **€ 18 million**  
Share in the market: **4,2 %**

Description:

A company with 100% Polish capital, very well known and perceived by Polish consumers. Astra developed a strategy whereby it launched products fitted to a healthier way of life. This company gained the trust of Polish consumers and was awarded many times for the quality of its products.



**Mokate S.A.**

Location: **Ustrón**  
 Beginning of activity: **1990**  
 Number of employees: **1000**  
 Turnover: **€ 75.5 million**  
 Share in the market: **6,8 %**

Description:  
 Company with 100% Polish capital, very well known and popular in the cappuccino sector, with a market share close to 70%. The Company comprises 3 entities in Poland and in the Czech Republic, Slovakia and Hungary.

**Woseba Sp. z o.o.**

Location: **Odolanów**  
 Beginning of activity: **1991**  
 Number of employees: **n/a**  
 Turnover: **€ 26 million**  
 Share in the market: **6,5 %**

Description:  
 Company with 100% Polish capital. Since the beginning WOSEBA has been developing very dynamically and by now the distribution of the products covers the entire the area of Southern Wielkopolska and Upper Silesia. In 1994 the sales rose to such a level that it became necessary to increase economic capacity of the company by building a new factory. The new plant, located in Odolanów, was opened in 1995 and gave birth to a new stage of rapid development of the company.



## **Celmar Café**

Location: **Piła**

Beginning of activity: **1977**

Number of employees: **na**

Turnover: **€ 15 million**

Share in the market: **2,8 %**

Description:

Company has been active in the production of coffee since 1991. Celmar is a very innovative company, with a high level of investments in new technologies.



## **4.9 Recommendations**

The biggest concentration of companies from the coffee sector can be found in two regions: Wielkopolskie and Mazowieckie Voivodeship. The most important players of the market are mainly located in Warsaw or Poznań.

The most popular trademarks on the market belong to foreign companies, that have big budgets for promotions and advertisement. However the shares in the market are different in different segments. The biggest competition is in the ground coffee sector. The cappuccino segment is highly dominated by one company, that controls almost 70% of the market. This situation was caused by small interest and faith in the development of this sector in Poland. It created free space for Polish producers, who gained a good reputation and a strong position.

The gap between Polish consumers and the Europeans in the consumption of coffee per capita is an important opportunity for new firms willing to enter the Polish market. There are still possibilities for developments in the sector. If a Polish consumer drinks 2,5 kg of coffee per capita annually and the Scandinavian 12 kg of coffee per capita, it means that there is a potential of 9,5 kg of coffee per capita to sell. Since the Polish market has 38 million of consumers, the market is very promising.

However the Polish consumer is more sensitive to price, than to the quality of the product. But new trends in this approach have been predicted. The group of coffee gourmets is getting bigger and the segment of upper and premium products is increasing slowly. But still the most efficient way to attract new clients is manipulation with price. Advertisement please a key role in this.





## 5. Distribution channels

For a long time there have only been a few companies in Poland, that conveyed all activities concerned with the distribution of coffee – production, import and sales. Since the late eighties, this has however changed and now the distribution is mainly based on supermarkets or specialized small shops, which offer different kinds of coffee and tea (usually combined).

A very popular way to distribute coffee to final consumers are the so called Coffee Bars. A single trademark, like for example Tchibo, Jacobs or Astra, starts its own net of bars, that offers mainly coffee of its own brand (different types of it, including special coffees and those of better quality). In big cities this has become a new habit, connected with a change in spending free time and living patterns. Besides this, it also implemented a culture of coffee drinking. The coffee bars seem similar to regular, traditional cafés. However, the difference lies not only in the “one exclusively brand offer” in a particular bar, but also might be attractive for big towns’ inhabitants for the possibility to take it “to go”. To recap, the formula of Starbucks bars, popular not only in the USA, has been adapted to the Polish market, slightly changed by domestic brands, and introduced successfully in big cities.

In general, coffee is being sold more often than other categories from the food and beverage sector in so called modern trade (defined as shops of surface larger than 300 m<sup>2</sup>). Participation of distribution channels is divided between modern trade, which takes up 40% of coffee sales in Poland, whereas the other 60% is comprised of the traditional trade. The economy and mainstream segments are primarily distributed by supermarkets and coffee bars. Some supermarket chains are more inclined to also offer products of higher quality (for example domestic chain – “Piotr i Paweł”), but coffee from the higher segment is mainly being sold in specialized shops and bars, frequently situated in malls or in the cities’ centers. The premium segment may be found rarely, and if it can be bought, it can only be found in large urban areas.

The Polish coffee market is dominated by a war of prices, which effects all distributions channels. Therefore, the description of the market should be perceived as “cheap and of low quality”. The price competition on the level of distribution favors maintenance of these situation. According to AC Nielsen’s researches, sales in the past two years has been stimulated by the mixes segment (3 in 1 coffees) and also frappe coffees. That is why it can be stated that the market is rather innovative and still open for new solutions and products.

## **5.1 Distribution channels**

Among distribution channels it is necessary to distinguish super- and hypermarkets (including discounts and cash & carry shops), coffee roasting plants, wholesalers and shops specialized in selling coffee and tea. It is worth to emphasize that most channels usually perform locally, on a smaller scale, except for divisions of big brands. According to data of Institute GFK Polonia, the number of shops active in FMCG<sup>13</sup> sales amounts to 140 thousand. 66% of them are established by regular traditional shops. According to recently released surveys<sup>14</sup>, 45,9 % of consumers buy coffee in super- and hypermarkets. Traditional, smaller shops generate 21,7% of the market share. It means 3% less in proportion to precedent year.

The segment of supermarkets is close to being saturated. According to research, the most popular place to buy roasted coffee is, besides supermarkets, a traditional shop. For exporters, it is essential that the choice of the distribution channel depends on the kind of product offered. For example, to attract the consumer's attention in the supermarket, adequate pricing strategy is essential. Also looking for strategic contacts in Poland should be considered, for instance with an importer of coffee or a distributor. In this chapter, all distribution channels are examined.

It is worth to stress that each kind of distribution channel might be hard to distinguish unambiguously. The best example showing this ambiguity is "Pożegnanie z Afryką" shops and plants. This coffee roasting plant is as well a very popular coffee bar, where you can drink exquisite kinds of coffee and buy assesories related to coffee, like coffee mugs and pots. "Pożegnanie z Afryką" started as an importer, but now owns 25 shops and coffee bars all over Poland. It is an exclusive brand, not focusing on the average consumer. So, this company is not only a roasting plant, but both retail shop and importer as well.

"Pożegnanie z Afryką"  
Mr Krzysztof Drohomiecki  
Ul. Na Zaleczu 1  
31- 587 Krakow  
Tel/ fax + 48 (012) 644 4745  
E-mail: [pozegnanie@pozegnanie.com](mailto:pozegnanie@pozegnanie.com)

It might also happen that a brand that has a very well developed chain of coffee bars, uses supermarkets as its main distribution channel (for instance: Jacobs, Nescafe, Tchibo). So, the distribution channels in Poland are very nontransparent.

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<sup>13</sup> Fast moving consuming goods

<sup>14</sup> AC Nielsen, reserach for coffee consuming June 2004-May 2005.

*Super- and hypermarkets*

When entering the Polish market through supermarkets or big chains, it is highly recommendable to contact them directly. This formula is also adaptable when contacting smaller distributors throughout Poland. The direct approach is the best way to negotiate cooperation terms. However, the level of communication in a language different from Polish might be considered an obstacle to communicate. Super- and hypermarkets usually require quotation of an offer (price is usually a first indicator when potential Polish clients are considering further cooperation) in advance as a beginning of a business relationship. First contact should be made with a manager, responsible for a certain group of products. In case of coffee, the group is usually called “hot drinks”. Local distributors should be contacted directly to arrange an opening conversation meeting.

The most important supermarket/hypermarket chains in Poland are:

**Table 5.1. 1 Most important super- and hypermarkets in Polish market**

NAME	WEBSITE
Albert	www.albert.pl
Alma Market S.A.	www.almasupermarket.pl
Auchan Polska	www.auchan.com
Biedronka	www.biedronka.pl
Carrefour Polska	www.carrefour.pl
Eldorado S.A.	www.eldorado.pl
E. Leclerc	www.leclerc.com.pl
Geant	www.geant.pl
Hypernova	www.hypernova.pl
Intermarche	www.intermarche.pl
Kaufland	www.kaufland.pl
Leader Price	www.leaderprice.pl
Lewiatan	www.lewiatan.pl
Makro Cash&Carry	www.makro.pl
Netto	www.netto.pl
Piotr i Paweł	www.piotripawel.pl
Real	www.real.pl
Selgros Cash&Carry	www.selgros.com.pl
Tesco Polska	www.tesco.pl

Source: Internet resources

The international chains like Albert, Tesco and Carrefour Polska gain a bigger market share every year. For example in 2000, Carrefour owned 8 hypermarkets and 15 supermarkets, in 2003 Carrefour already had a quantity of 17 hypermarkets and 70 supermarkets, an increase of 378,2 %. However, Polish retail chains, like the delicatessen supermarkets Piotr i Paweł and Lewiatan, that opened its 175th shop in Gdansk in August 2005, have managed to gain a significant market share as well.

Most supermarkets offer a broad range of coffee products, both from the cheap as from the middle segment. Delicatessen supermarket Piotr i Pavel offers coffee from the upper segment, which is of better quality, but slightly more expensive as well. Most premium coffee is bought in specialized shops

### *Specialized shops*

Specialized shops exclusively sell coffee products or, as it happens often in Poland, coffee and tea. The number of specialized shops in Poland is big. Chains are barely present in this segment of distribution channels, sometimes they are limited to a single city (for instance NOMA Świat Herbaty i Kawy in Wrocław or Arkom in Warsaw) but overall, specialized shops are regular, small and independent shops. They are found in every big city. Most coffees sold in these shops are not commonly known or popular brands. The coffee is chosen for its good taste and aroma. The high quality coffee without tag or known logo sold in these shops is mostly presented with a country of origin label, type (Arabica/Robusta) and sometimes a name like “Africa’s breeze” or “Hot wind”.

Popular specialized shops are

[www.noma.wroc.pl](http://www.noma.wroc.pl)

[www.maraska.pl](http://www.maraska.pl)

[www.busko.com.pl/herbaciarnia](http://www.busko.com.pl/herbaciarnia)

[www.fiveoclock.com.pl](http://www.fiveoclock.com.pl)

[www.arkom.waw.pl](http://www.arkom.waw.pl)

The prices in specialized shops range from 110 PLN/kg (28.35 €) to even 800 PLN/kg (206.18 €) The most expensive coffees are the coffees from Jamaica and Southern-America. These products are sold by weight/wage (any wage is soldable). It seems that there are no specific rules as for price setting, it depends on the importing source a shop buys its coffee from. Margins are, however, merchant secret and companies do not want to provide this information.

### *Coffee bars*

Coffee bars are getting more and more popular in big cities, as the life style in Poland is changing similarly to the one widely spread in Western Europe and the United States, mainly amongst younger people. Coffee bars are present mainly in big cities. Commonly, coffee bars are not associated in people’s awareness as coffee brands, as they clearly are stores selling coffee. As they are usually treated as coffee bars to meet friends or have a lunch break in, it is an excellent spot to sell coffee. As coffee bars symbolize a new way of spending time, the atmosphere of the bar and the exclusivity of the products sold are of significant importance. Besides this, the location of coffee bars is very important as the bars located on central or popular locations are most popular.

The three most important trade marks that opened a chain of coffee bars in Poland are the foreign brands Tchibo, Nescafé and Jacobs. Data about the market share of each coffee bar are not available, but as coffee bars are not seen as a brand, but as a place to drink coffee, market share depends more on the atmosphere and the number of bars. This is quite similar for all three below mentioned coffee bars.

#### *Tchibo*

Tchibo opened its first coffee bar in 1999 in Warsaw and now has coffee bars in Warszawa, Radom, Gdańsk, Łódź, Wrocław, Poznań, Kraków, Katowice and Czeladź. The coffee bars offer speciality coffees, as well as seasonal promotions. The company offers the possibility to choose your own quality of coffee, ranging from the 'standard' coffees to 'premium' and 'specials'. Prices are in the middle and upper segment.

#### *Jacobs*

Jacobs does not have coffee bars of its own, but the company cooperates with a chain of coffee houses, through which the company offers its brand, including coffee specialities as well as little (sweet) snacks.

#### *Nescafe*

Nescafé has established its cafeterias in Szczecin, Gdańsk, Gdynia, Poznań, Warsaw, Kraków, Katowice, Bydgoszcz, Toruń, Wrocław and Częstochowa. It offers coffees of all kinds, of one brand of course, including special coffees and also snacks (cookies, sandwiches, ice-cream, desserts), as well as other non-alcoholic beverages.

Also the Polish brands Astra has its own coffee houses in Poznan: Café Marago and CaféAstra.

Also worth noticing is the special coffee academy, created by the company J. J. Darboven Poland. It is dedicated to those, who make coffee – meaning restaurant employees, bartenders and cafeteria managers. It is connected with the brand Alfredo, that increased in popularity thanks to the academy. For more information, please visit [www.akademia-alfredo.pl](http://www.akademia-alfredo.pl)

Other coffee bars present on the Polish market are connected to Italian brands such as Vergnano, Alfredo or Segafredo. The above mentioned companies are the main entities though.

#### *Wholesalers*

There are hardly any independent wholesalers that exclusively sell coffee. Producers are supplying directly to retail chains or to customers in the gastronomical sector. Similarly, importers of particular coffee brands are taking

care of the distribution themselves, delivering directly to their customers, not using third parties by using a system of sales people.

Coffee is sometimes carried in the assortment of general food wholesales as one of the items. These wholesalers further deliver to (independent) retail units or are specialized in the gastronomy sector. In the table below, the most important wholesalers are mentioned.

<b>WHOLESALE</b>	<b>WEBSITE</b>
KAWAX Sp. z o.o.	<a href="http://www.kawax.pl">www.kawax.pl</a>
Apro Trade Sp. z o.o.	<a href="http://www.aprotrade.pl">www.aprotrade.pl</a>
Wanilia i Kawa Jacek Nieciecki	<a href="http://www.wanilia.com.pl">www.wanilia.com.pl</a>
Kawa i akcesoria	<a href="http://www.kawaiakcsoria.pl">www.kawaiakcsoria.pl</a>
Maroni	<a href="http://www.maroni.pl">www.maroni.pl</a>
Miko Kawa - Serwis	<a href="http://www.miko-kawa.pl">www.miko-kawa.pl</a>
Espresso service	<a href="http://www.espresso.pl">www.espresso.pl</a>
PB Distribution Service	<a href="http://www.pbds.pl">www.pbds.pl</a>
DAV	<a href="http://www.dav.pl">www.dav.pl</a>
KDWT S.A.	<a href="http://www.kdwt.com.pl">www.kdwt.com.pl</a>
SYDO	<a href="http://www.sydo.com.pl">www.sydo.com.pl</a>
Caffina	<a href="http://www.caffina.pl">www.caffina.pl</a>
Brandt	<a href="http://www.fiszebrandt.pl">www.fiszebrandt.pl</a>
INTER-HURT	<a href="http://www.inter-hurt.pl">www.inter-hurt.pl</a>
MARMAX Sp. J.	<a href="http://www.marmax.pl">www.marmax.pl</a>
CAFE RENE	<a href="http://www.caferene.pl">www.caferene.pl</a>
P.W. « ALCOR » Sp. z o.o.	<a href="http://www.alcor-coffe.com.pl">www.alcor-coffe.com.pl</a>

Kawax Sp. z o.o.  
ul. Katowicka 80  
43-300 Bielsko-Biała  
Tel + 48 33 812 41 60  
Fax + 48 33 815 18 14  
e-mail: [biuro@kawax.pl](mailto:biuro@kawax.pl)

Apro trade Sp. z.o.o.  
ul. Narutowicza 37  
05-091 Ząbki  
Tel + 48 22 781 7693  
Fax + 48 22 781 7893  
e-mail: [info@aprotrade.pl](mailto:info@aprotrade.pl)

Wanilia i Kawa  
07-300 Ostrów Mazowiecka  
Komorowo ul. Mazowiecka 54

Tel + 48 29 74 630 20

As prices for the distribution of coffee products are usually negotiated individually, depending on the size of the order and sustainability of cooperation, exact numbers are hard to achieve, as it is often treated as merchant secret.

### *Coffee roasting plants*

Listed below are most known coffee roasting plants in Poland, some of them are big players in the market, like Elite, Astra, Mokate, Woseba and Cafe prima. Those companies are already mentioned in chapter 3, 4 and 5. Smaller coffee roasting plants roast coffee mainly for use in their own specialized shop or coffee bar, that are mostly attached to the roasting plant. Most of the time they are not willing to and able to purchase large amounts of coffee, as they produce only a small amount for the (small) local market only.

<b>COFFEE ROASTING PLANT</b>	<b>WEBSITE</b>
CAFE ROMA	<a href="http://www.caferoma.pl">www.caferoma.pl</a>
Cafe Entos	<a href="http://www.kawa.entos.pl">www.kawa.entos.pl</a>
« Klejnot Afryki »	<a href="http://www.kawa.krakow.pl">www.kawa.krakow.pl</a>
Macedonia	<a href="http://www.macedonia.pl">www.macedonia.pl</a>
P.P.H.U. Macros s.c.	<a href="http://www.macrosc.com.pl">www.macrosc.com.pl</a>
Marti van den Haas	<a href="http://www.mvdh.pl">www.mvdh.pl</a>
Galaxia	<a href="http://www.galaxia.com.pl">www.galaxia.com.pl</a>
Biogran	<a href="http://www.biogran.com">www.biogran.com</a>
Celmar Café	<a href="http://www.celmar.pl">www.celmar.pl</a>
Elite	<a href="http://www.cafe.elite.pl">www.cafe.elite.pl</a>
Poznańska Palarnia Kawy ASTRA	<a href="http://www.astra.com.pl">www.astra.com.pl</a>
Mokate	<a href="http://www.mokate.com.pl">www.mokate.com.pl</a>
Café Prima	<a href="http://www.prima.com.pl">www.prima.com.pl</a>
« SIDO » Sidorek, Wróblewski Sp. J.	<a href="http://www.sido.com.pl">www.sido.com.pl</a>
Singidunum	<a href="http://www.kawa-singi.pl">www.kawa-singi.pl</a>
Woseba	<a href="http://www.woseba.com.pl">www.woseba.com.pl</a>
POLCAF Sp. z o.o.	<a href="http://www.polcaf.pl">www.polcaf.pl</a>

The company “Pożegnanie z Afryką”, that operates as a roasting plant as well, is already mentioned above.

## **5.2 Recommendations**

This chapter presents all possible channels of coffee distribution in Poland. It describes both wholesale markets as retail outlets, that are strongly represented by specialized shops and supermarkets/ hypermarkets. As specialized shops are situated in big cities only and prices are higher than in hypermarkets, hypermarkets are visited by a bigger amount of people and are more popular than specialized shops.

Sales through internet gains popularity. Internetsites, like for example the Heavenly Flavour shop,<sup>15</sup> are very popular.

It is recommendable for Colombian suppliers of coffee to establish a form of cooperation with Polish companies active on the coffee market and in that way enter the Polish market. For exporters it is essential that the choice of the distribution channel depends on the kind of product offered. For cheaper products, it is worth to approach hypermarkets or distributors. It seems that cheap, instant coffees are most often bought in hypermarkets. However, in shops such as "Piotr i Paweł", where products from supreme segment are also available, more expensive products are also being sold. As the standard of living of Poles is improving, more money can be spent on high quality products, such as coffees bought in specialized shops. Therefore with high quality products aiming at gourmets, specialized shops have to be approached.

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<sup>15</sup> [www.aromatyswiata.pl/sklep/](http://www.aromatyswiata.pl/sklep/)



## **6. Commercial Access Guide**

### **6.1 Preferential tariffs**

All goods entering the EU are subject to import duties. External trade conditions are mostly determined by EU regulations. Poland also uses the EU's Harmonized Tariff Schedule (Nomenclature) on the TARIC (Integrated Tariff of the European Community) which is issued by the Commission and the Member States for the purpose of applying Community measures relating to imports and exports. The level of the tariffs depends on the country of origin and the product. If there is not a special trade agreement in force, the general import tariff (conventional duty) applies.

In January 2005 Commission Regulation (EC) No 1810/2004 entered in force which is binding in all Member States. In its Part Two "Schedule of Customs Duties", Section II "Vegetable products" Chapter 9 deals with "Coffee, tea, maté and spices". The subcategories 0901 contains the coffee products relevant for this report.

Colombia is included in the general system of preferences – GSP. This agreement allows products originating in the countries concerned to be imported at preferential tariffs or, for the least developed countries, duty-free. A "Certificate of Origin Form A" has to be filled in by the exporter and issued by the competent authorities. Tariff contingents and tariff ceilings do not exist anymore.

According to international agreements Colombia is included in the SPGE group of preferences and therefore benefits from 0% tariff preference on the basis on Regulation (EC) No 2501/2001 and Commission Regulation (EC) No 2331/2003. Until July 1<sup>st</sup> 2005, this meant that Colombian exporters could introduce so-called "non-sensitive" products at a 0% tariff rate and "sensitive" products, such as all products under nomenclatures code 0901 at a 3.5% reduced rate.

However since July 1<sup>st</sup> 2005, Colombia is a member of the GSP Plus program, which assists the countries of the Andean Community, such as Colombia, in their battle against drugs. Exporters based in one of the GSP Plus programs are also exempt from duties on sensitive products. Therefore coffee, whether or not roasted or decaffeinated; coffee husks and skins; coffee substitutes containing coffee in any proportion (CN 0901) can be imported into the European Union from Colombia duty free.

## **6.2 Tariffs imposed by major competitors**

Many countries from South America region are included in SPGE. Therefore, partners such as Brazil, Peru, Ecuador, Guatemala, Honduras or Chile (additional preference SPGL 3,4%) benefit from the same custom conditions, as Colombia does. Furthermore, two of the biggest coffee importers to Poland are in the same group of countries, attributed with adequate preferences – Vietnam and Indonesia.

Other serious importers such as Germany, Spain, France, Italy and United Kingdom are exempt from all import duties, because they are European Union memberstates as well and therefore part of the common market.

The conventional rates for third countries that do not have a general system of preferences with the European Union are the following:

**Table 6.2.1 Conventional tariffs for coffee**

CN CODE 0901	SPECIFICATION	CONVENTIONAL TARRIF IN %
<ul style="list-style-type: none"><li>• 0901 11 00</li><li>• 0901 12 00</li></ul>	COFFEE NON-ROASTED <ul style="list-style-type: none"><li>• NON-DEPRIVED OF CAFFEINE</li><li>• DECAFFEINATED</li></ul>	<ul style="list-style-type: none"><li>• 0%</li><li>• 8,3%</li></ul>
<ul style="list-style-type: none"><li>• 0901 21 00</li><li>• 0901 22 00</li></ul>	COFFEE ROASTED <ul style="list-style-type: none"><li>• NON-DEPRIVED OF CAFFEINE</li><li>• DECAFFEINATED</li></ul>	<ul style="list-style-type: none"><li>• 7,5%</li><li>• 9%</li></ul>
<ul style="list-style-type: none"><li>• 0901 90</li><li>• 0901 90 10</li><li>• 0901 90 90</li></ul>	THE REST <ul style="list-style-type: none"><li>• COFFEE SHELLS AND HUSKS</li><li>• COFFEE SUBSTITUTES WITH A CONTENT OF NATURAL COFFEE</li></ul>	<ul style="list-style-type: none"><li>• 0%</li><li>• 11,5%</li></ul>

*Source: Source: Official Journal of the European Union, Commission Regulation (EC)No 1810/2004of September 7<sup>th</sup> 2004*

## **6.3 Norms of origin**

To be able to benefit from the GSP Plus 0% duties on sensitive and non-sensitive products it is necessary to prove that the product that is being imported is really from Colombia or another GSP (Plus) country. Some products clearly originate in a given country, e.g. because they are grown there from local seed. These are

called “wholly obtained” goods. But increasingly in today’s world, others are not produced in a single country.

In general terms, products are **wholly obtained** in a particular beneficiary country (or in the EC, in the case of cumulation) if only that country has been involved in their production. Even the smallest addition or input from any other country disqualifies a product from being "wholly obtained".

In practice, except for naturally-occurring and related products, situations where only a single country is involved in the manufacture of a product are relatively rare. Globalisation of manufacturing processes has resulted in many products being made from parts, materials etc. coming from all over the world. Such products are not of, course, wholly obtained, but they can nevertheless obtain originating status.

The condition is that the non-originating materials used (in practice: the materials imported into the beneficiary country) have undergone "**sufficient working or processing**". It must be stressed that only the non-originating materials need to be worked or processed sufficiently. If the other materials used are by themselves already originating (either by virtue of being wholly obtained, or by having been worked or processed sufficiently), they do not have to satisfy the conditions set out.

What can be considered as sufficient working or processing, depends on the product in question. For the products that belong under Chapter 9, the requirements are that the working or processing carried out on non-originating materials, which confers originating status is manufacture in which:  
 “Manufacture in which all the materials of Chapter 9 used are wholly obtained”

**Figure 6.3.1 Sufficient working or processing requirements**

<b>HS heading</b>	<b>Description of product</b>	<b>Working or processing, carried out on non-originating materials, which confers originating status</b>
ex Chapter 9	Coffee, tea, maté and spices; except for:	Manufacture in which all the materials of Chapter 9 used are wholly obtained
0901	Coffee, whether or not roasted or decaffeinated; coffee husks and skins; coffee substitutes containing coffee in any proportion	Manufacture from materials of any heading

Source: DG Trade

There are three principal forms of proof used in the context of the EC GSP:

- The certificate of origin Form A<sup>16</sup>, used as proof of origin at import into the EC and in regional cumulation.
  - Regional cumulation can be present between the countries of one of the regional groups recognised by the EC GSP<sup>17</sup>. Materials originating in one country of the group which are further worked or processed in another beneficiary country of the same group are considered to originate in the latter country.
- The Invoice Declaration, which can be used for goods whose total value does not exceed € 6000 (Article 89).
- The Movement Certificate EUR1, which may be used as may an invoice declaration, when goods are exported to beneficiary countries from the EC in the context of bilateral cumulation. (Article 90a).
  - Under bilateral cumulation, materials originating in the EC, within the meaning of the EC GSP RoO, and further worked or processed in a beneficiary country, are considered to originate in the beneficiary country.

The period of validity of a proof of origin is 10 months.

## **6.4 Barriers**

Levying of any customs duty or charge having an equivalent effect and the application of any quantitative import restriction or measure having an equivalent effect are prohibited in the trade with third countries.

For exporters in developing countries legislative standards enforced through EU legislation and possibly through EU member states, increasingly pose obstacles when exporting to the EU. Although standards are developed in order to protect consumers, environment or improve the harmonization of the internal EU market; they are often seen as technical, non-tariff barriers to trade or as a green wall protecting the fortress of Europe when looking at environmental standards.

When looking at the situation of exporters in developing countries who would like to access the EU market, there are many differences to overcome. Differences between the EU and third countries in their technical regulations and conformity

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<sup>16</sup> We kindly refer you to the annexes for an example of Form A

<sup>17</sup> The regional groups (listed in Article 72) are:

- Group I: Brunei-Darussalam, Cambodia, Indonesia, Laos, Malaysia, Philippines, Singapore, Thailand, Vietnam;

- Group II: Bolivia, Colombia, Costa Rica, Ecuador, El Salvador, Guatemala, Honduras, Nicaragua, Panama, Peru, Venezuela;

- Group III: Bangladesh, Bhutan, India, Maldives, Nepal, Pakistan, Sri Lanka.

assessment procedures are based on legitimate origins, such as differences in local preferences regarding health, safety and the environment, and differences in levels of income and labour conditions.

Moreover, exporters in developing countries often are critically constrained by the lack of important issues such as:

- Access to credit and insurance and investment climate
- Human and physical capital, management and marketing skills
- Sufficient facilities for transport and storage infrastructures
- Transparent legal and regulatory framework
- Awareness and knowledge
- Participation in the development of standards
- Certifying bodies, test laboratories, standardization institutes etc.

Therefore, the standards in the EU could be seen as obstacles when accessing the EU market, though official barriers do not longer exist.

## **6.5 Licenses**

The system of licenses is also submitted to EU regulations. There are no licenses required for import of coffee from third countries to EU membership countries.

## **6.6 Quotas**

Quotas have been assigned by the European Union to specific countries for specific products, which allow for the controlled importation of specific products.

There are however no quotas for any of the products under Chapter 9 originating from Colombia.

## **6.7 Approvals & 6.8 Technical standards**

### *Health control of food items of non-animal origin*

Imports of food items of non-animal origin into the European Union (EU) must comply with general conditions and specific provisions designed to prevent risk to public health and protect consumers' interests.

Hence, the general rules applicable to these products are as follows:<sup>18</sup>

- General rules of hygiene for food items
- General conditions concerning contaminants in food

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<sup>18</sup> More detailed information on the content of these rules is presented in the annexes.

- Special provisions on Genetically Modified (GM) food and Novel food
- General conditions of preparation of food items
- Official control of food items

Besides, in view of fulfilling food and feed safety conditions in the EU, specifically in relation with requirements for traceability, importers are required to keep documentation available in order to identify the exporter in the country of origin, as established by Regulation (CE) 178/2002.

### ***1. General rules of hygiene for foodstuffs***

The general rules of hygiene for foodstuffs and procedures for verification of compliance with these rules are laid down in Directive 93/43/EEC

All imported foodstuffs must comply with these rules so that they ensure their safety and wholesomeness. These measures cover preparation, processing, manufacture, packaging, storage, transport, distribution, handling, sale and supply of foodstuffs.

Member States may introduce more specific hygiene provisions if they are not less stringent and do not constitute a restriction to trade in foodstuffs.

If a hygiene problem likely to pose a serious risk to human health arises or spreads in the territory of a third country, the European Commission may suspend imports from all or part of the third country concerned or take interim protective measures regarding the foodstuffs concerned, depending on the seriousness of the situation.

### ***2. General conditions concerning contaminants in food***

Contaminant substances may be present in food as a result of the various stages of its production and marketing or due to environmental pollution. Since they represent a real risk for food safety, the EU has taken measures to minimise the risk by setting maximum levels for certain contaminants in foodstuffs.

#### ***a) Maximum levels of certain contaminants in foodstuffs***

Certain foodstuffs (i.e. fruit, vegetables, nuts, cereals, fruit juices, etc...) must not, when placed on the market, contain higher contaminant levels than those specified in Regulation (EC) 466/2001

This Regulation covers four different categories of contaminants: nitrates, aflatoxins, heavy metals (lead, cadmium, mercury) and 3-monochloropropane-1,2diol (3-MCPD).

The maximum contaminant levels relate to the edible part of the foodstuffs but apply also to the ingredients used for the production of compound foodstuffs.

**b) Maximum levels of pesticide residues in and on food**

Member States may restrict the putting on the market within their territories of certain products containing pesticide residues if the quantity of these residues exceeds the maximum levels permitted. These limits depend on the toxicity of the substance in question.

Pesticides residues in food are regulated by three Council Directives 76/895/EEC (OJ L-340 09/12/1976) 86/362/EEC (OJ L-221 07/08/1986) and 90/642/EC (OJ L-350 14/12/1990) which cover the following products: fruit and vegetables, cereals and other products of plant origin.

This legislation is also applied to the same products after being dried or processed or after their inclusion in a composite food in so far as they may contain pesticide residues.

**c) Maximum levels of radioactive contamination of foodstuffs**

Regulations (EC) 3954/1987 (OJ L-371 30/12/1987) and 944/1989 (OJ L-101 13/04/1989) lay down the maximum permitted levels of radioactive contamination of foodstuffs (either immediately or after processing) which may be placed on the market following a nuclear accident or any other case of radiological emergency.

There is a list of minor foodstuffs (i.e. those which are consumed least) for which the maximum permitted levels are considerably higher (ten times higher)

**d) Materials intended to come into contact with foodstuffs**

Materials and articles intended to come into contact with foodstuffs must be manufactured so that they do not transfer their constituents to food in quantities which could endanger human health, change the composition of the food in an unacceptable way or deteriorate the taste and odour of foodstuffs.

The Regulation (EC) 1935/2004 establishes a list of groups of materials and articles (such as plastics, ceramics, rubbers, paper, glass, etc.) which may be covered by specific measures that include a list of the authorised substances, special conditions of use, purity standards, etc. Specific measures exist for ceramics, regenerated cellulose and plastics.

### **3. Special provisions on Genetically Modified (GM) food and Novel food**

In order to ensure the highest level of protection of human health, EU legislation provides for a single authorisation procedure for the placing on the market of food containing, consisting of or derived from **Genetically Modified Organisms**.

An application must be sent to the competent authority of a Member State and then referred to the European Food Safety Authority (EFSA) which carries out a risk assessment.

On the basis of the opinion of EFSA, the Commission drafts a proposal for granting or refusing the authorisation, which must be approved by the Standing Committee on the Food Chain and Animal Health. The authorised food and feed are entered in the Community Register of GM food and feed.

GM food lawfully placed on the EU market prior to 18 April 2004 may continue to be placed on the market, used and processed provided that they are notified to the Commission before 18 October 2004.

**Novel foods** (i.e. foods and food ingredients that have not been used for human consumption to a significant degree within the EU before 15 May 1997) must also undergo a safety assessment before being placed on the EU market.

Companies that want to place a novel food on the EU market must submit their application to the competent body of a Member State for risk assessment purposes. As a result of this assessment, an authorisation decision may be taken. The authorisation decision defines the scope of the authorisation, the conditions of use, the designation of the food or food ingredient, its specification and the specific labelling requirements.

Novel foods or novel food ingredients considered by a national food assessment body as substantially equivalent to existing foods or food ingredients may follow a simplified procedure, only requiring notifications from the company.

### **4. General conditions of preparation of foodstuffs**

EU legislation lays down the rules relating to treatment of foodstuffs, food ingredients and their conditions of use in order to protect the health of consumers and guarantee the free circulation of foodstuffs in the European Union market.

Moreover, specific provisions for groups of foods are laid down in specific Directives. These include compositional requirements, hygiene requirements, list of additives, purity criteria, specific labelling requirements , etc



**a) Authorised food additives and flavourings**

The scope of the Directives covers food additives and flavourings used as ingredients during the manufacture or preparation of food and which are part of the finished product.

The only substances which may be used as food additives are those included in the approved common lists and then only under the conditions of use mentioned in those lists (e.g. colorants, sweeteners, preservatives, emulsifiers, stabilisers, raising agents, etc...).

**b) Preparation and treatments of certain foodstuffs**

Rules in relation with the manufacture, marketing and importation of foods and food ingredients that are subject to specific treatments (e.g. ionising radiation or quick-freezing) must be fulfilled.

**c) Specific provisions for certain groups of products and for foodstuffs for particular nutritional purposes**

Specific provisions are applied to certain groups of products (such as cocoa, sugar, etc.) and to foodstuffs intended for particular nutritional uses (baby foods, dietary foods, gluten-free foods...). These may include specific requirements on composition, hygiene, labelling (e.g. declaration of the energy value, carbohydrate, protein and fat content), list of additives, purity criteria, etc.

The Directives establish the procedures to be followed if a particular foodstuff, though complying with the relevant specific Directive, is believed to endanger human health.

**5. Official control of foodstuffs.**

Directive 89/397/EEC (OJ L-186 30/06/1989) provides for official inspections of foodstuffs, food additives, vitamins, mineral salts and other elements as well as materials or articles intended to come into contact with foodstuffs to ensure that they comply with the provisions designed to protect the health and interests of consumers.

The control may apply to import into the EU and/or to any other stage of the food chain (manufacture, processing, storage, transport, distribution and trade) and may include inspection, sampling and analysis, inspection of staff hygiene, examination of written and documentary material, examination of verification systems set up by the food operator and of the results obtained.

Inspection will be carried out by the Member State competent authorities regularly, and/or where non-compliance is suspected.

The general methods of sampling and analysis that must be carried out by official laboratories for the monitoring of foodstuffs are established in Directive 85/591/EEC (OJ L-372 31/12/1985) and their implementing measures.

### ***Additional information for Poland***

#### ***Control Procedure***

Health controls are carried out at control points (border checkpoints) for foodstuffs of non-animal origin

The importer, or his representative, must request a health inspection by submitting the first part of the application form<sup>19</sup> together with the documents related to the consignment.

Depending on the cases, the product may also go through a documentary check, an identity check and/or a physical inspection, which may lead to sample taking for analysis.

The result of the inspection is reflected in the second part of the application form. The product can only be released for consumption after favourable result.

#### ***Competent authority / competent bodies***

*Glówny Inspektor Sanitarny* (Chief Sanitary Inspectorate)

ul. Długa 38/40  
PL-00-238 Warsaw  
Tel: (+48) 22 635 45 81  
Fax: (+48) 22 635 61 94  
E-mail: inspektorat@gis.gov.pl  
Website: <http://www.gis.gov.pl>

## **6.9 Packaging**

### ***Packaging EU***

Care must be given to the packaging of products if one intends to export to the EU countries. It is obvious that the packaging must be travel-resistant. As required, products should also be protected against the elements, changes of

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<sup>19</sup> For an example of an application form, we refer to the annexes

temperature, rough handling and theft. Besides these basics issues, some importers may have specific demands concerning packaging, like information concerning the order printed on the boxes (order number, box number, name department or contact person etc.).

For environmental reasons packaging made from materials like PVC is less popular with consumers and in some cases is or will be forbidden by governments. Exporters in developing countries should be prepared to discuss this issue with potential clients and should anticipate the cost of special packaging in their selling price, if required.

The European Directive on Packaging and Packaging Waste (94/62/EC) establishes overall legislation for the treatment of packaging waste, consisting of quantitative objectives to be achieved by each of the EU member states. The member states have the responsibility to translate the Directive into national legislation.

It is becoming increasingly difficult and expensive to dispose of waste in Europe. In principle, the importer is held responsible for disposal of the packaging waste for all goods from outside the EU. It is therefore crucial, when planning exports to the EU, to take the packaging of your products (both sales packaging and transport packaging) into consideration. To fulfil the requirements of the target market, good communication with the importer about packaging is necessary.

Outer containers should bear the consignee's mark and port mark and be numbered, in accord with packing list, unless the contents can be otherwise readily identified. The following items must appear on the two vertical sides of each outer container:

- the sales contract number
- the consignee's instruction number
- the import licence number (if applicable)
- gross and net weights

A number of issues must be addressed when selecting packaging. Broadly, they can be grouped into questions of containment for the logistics of distribution; protection to ensure the produce arrives at the point of sale in the best possible condition; marketing to present the produce in a preferred style; and environmental impact relating to the handling of the used packaging.

There is now increasing pressure to create a more environmentally friendly means of handling packaging waste. Some EU governments, rather than wait for an EU wide directive, have already enacted legislation regarding packaging and packaging waste. Their common objectives include the minimisation of waste, re-use by re-cycling and safe disposal where no other use is possible.

## *Labeling*<sup>20</sup>

All foodstuffs marketed in the European Union (EU) must comply with EU labelling rules, which aim at ensuring that consumers get all the essential information to make an informed choice while purchasing their foodstuffs.

Hence, the applicable labelling provisions are as follows:

- General rules on food labelling
- Specific provisions for certain groups of products:
  - Labelling of Genetically Modified (GM) food and Novel Food
  - Labelling of foodstuffs for particular nutritional purposes
  - Labelling of materials intended to come into contact with food
  - Labelling of particular foodstuffs

Besides these mandatory rules, there is also additional information that may be included by the manufacturers on a voluntary basis provided that it is accurate and does not mislead the consumer. For example, nutritional labelling is not obligatory unless a nutritional claim (e.g. "low fat", "high fibre") is made on the label or in advertising material. In this case, nutritional claims must comply with a standardised format, pursuant to Council Directive 90/496/EEC (OJ L-276 06/10/1990). Similarly, Council Regulation (EEC) 2092/91 (OJ L-208 24/07/1992) sets out rules governing the use of the organic label.

### **General rules on food labelling**

#### *Labeling for food items*

All food items marketed in the European Union (EU) must comply with EU labeling rules, which aim at ensuring that consumers get all the essential information to make an informed choice while purchasing their foodstuffs.

Labels of foodstuffs according to the general rules laid down by Council Directive 2000/13/EC (OJ L-109 06/05/2000) must contain the following particulars:

- The name under which the product is being sold

No trademark, brand name or fancy name may substitute the generic name but rather may be used in addition. Particulars as to the physical condition of the foodstuff or the specific treatment it has undergone (powdered, freeze-dried, deep-frozen, concentrated, smoked, irradiated or treated with ionizing radiation) must be included where omission of such may confuse the purchaser.

- The list of ingredients

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<sup>20</sup> Source: DG Trade

Preceded by the word "Ingredients", must show all ingredients (including additives) in descending order of weight as recorded at the time of their use in the manufacture and designated by their specific name. In the case of those products that may contain ingredients liable to cause allergies or intolerances, such as alcoholic beverages, a clear indication should be given on the label by the word "contains" followed by the name of the ingredient. However, this indication will not be necessary provided the specific name is included in the list of ingredients.

- The net quantity of pre-packaged foodstuffs in metric units (liter, centiliter, milliliter) for liquids and (kilogram, gram) for non-liquids.
- The date of minimum durability consisting of day, month and year in that order and preceded by the words "best before" or "best before end" or the "use by" date for highly perishable goods.
- Any special conditions for keeping or use.
- The name or business name and address of the manufacturer, packager or importer established in the EU.
- Place of origin or provenance
- Instructions of use, where appropriate.
- Indication of the acquired alcoholic strength for beverages containing more than 1.2% by volume.
- Lot marking on pre-packaged food items with the marking preceded by the letter "L".

These particulars must appear on the packaging or on a label attached to pre-packaged foodstuffs. In the case of pre-packaged foodstuffs intended for mass caterers (foodstuffs sold in bulk), the compulsory labeling particulars must appear on commercial documents while the name under which it is sold, the date of durability or use-by-date and the name of manufacturer must appear on the external packaging.

The labeling must not mislead the purchaser as to the food item's characteristics or effects nor attribute the food item's special properties for the prevention, treatment or cure of a human disease. The information provided by labels must be easy to understand, easily visible, clearly legible and indelible and must appear in the official language(s) (i.c. Polish) of the Member State where the product is marketed. However, the use of foreign terms or expressions easily understood by the purchaser may be allowed.

*Labeling of Genetically Modified (GM) food and Novel food*

Products consisting of or containing Genetically Modified Organisms (GMOs) and food products obtained from GMOs which have been authorized for the placing on the EU market are subject to labeling requirements pursuant to Regulations (EC) 1829/2003 and 1830/2003 (OJ L-268 18/10/2003).

In the case of pre-packaged products, operators are required to state on a label that "This product contains genetically modified organisms". This labeling obligation also applies to highly refined products (e.g. oil obtained from genetically modified maize) as well as GM additives and flavorings.

In Poland, Surveillance and inspection of the conformity of foodstuffs to the information provided on their labels are to be carried out at different stages of the supply chain which, in case of imported products, ranges from customs clearance to retail outlets. Checks are also carried out at the premises of companies dealing in foodstuffs.

Information intended for the final consumer must be inscribed in Polish on the label and on the product package, if applicable. In addition, the product information may be provided on the label in other languages, too. At other marketing stages, the same data could as well be indicated in the commercial documents.

*Labelling of foodstuffs for particular nutritional purposes*

In addition to the rules applicable to foodstuffs in general, specific provisions (e.g. declaration of the energy value, carbohydrate, protein and fat content, etc.) for groups of foods for particular nutritional uses (baby foods, dietary foods for special medical purposes, foods for weight reduction, foods for sportspeople, etc.) are laid down in specific Directives.

These products must be suitable for their claimed nutritional purposes and marketed in such a way as to indicate their suitability.

*Labelling of materials intended to come into contact with food*

According to Regulation 1935/2004, articles intended to come into contact with foodstuffs, including packaging materials and containers shall be labelled "for food contact" or shall bear the symbol with a glass and fork.

**6.10 Required documentation for import**

When importing products from a third country, like Colombia, into the European Union six different documents are required;

### 1) Commercial invoice

The commercial invoice is a record or evidence of the transaction between the exporter and the importer. Once the goods are available, the exporter issues a commercial invoice to the importer in order to charge him for the goods.

The commercial invoice contains the basic information concerning the transaction and it is always required for customs clearance.

It is similar to an ordinary sales invoice, though some entries specific to the export-import trade are added. The minimum data generally included are the following:

- Information on the exporter and the importer (name and address)
- Date of issue
- Invoice number
- Description of the goods (name, quality, etc.)
- Unit of measure
- Quantity of goods
- Unit value
- Total item value
- Total invoice value and currency of payment. The equivalent amount must be indicated in a currency freely convertible to EUR or other legal tender in the importing Member State
- The terms of payment (method and date of payment, discounts, etc.)
- The terms of delivery according to the appropriate Incoterm
- Means of transport

No specific form is required. The commercial invoice is to be prepared by the exporter according to standard business practice and it must be submitted in the original along with at least one copy. It generally needs not be signed. In practice, the original and the copy of the commercial invoice are often signed. The commercial invoice may be prepared in any language. However, a translation into English is recommended.

### 2) Customs Value Declaration

The Customs Value Declaration is a document which must be presented to the customs authorities where the value of the imported goods exceeds EUR 10 000. The Customs Value Declaration must be drawn up conforming to form DV 1<sup>21</sup>, laying down provisions for the implementation of the Community Customs Code. This form must be presented with the Single Administrative Document (SAD).

The main purpose of this requirement is to assess the value of the transaction in order to fix the customs value (taxable value) to apply the tariff duties.

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<sup>21</sup> Please see the annexes for a sample of a DV1 form

The customs value corresponds to the value of the goods including all the costs incurred (e.g.: commercial price, transport, insurance) until the first point of entry in the EU. The usual method for establishing the Customs value is using the transaction value (the price paid or payable for the imported goods).

In certain cases the transaction value of the imported goods may be subject to adjustment which involve additions or deductions. For instance:

- commissions or royalties may need to be added to the price;
- the internal transport (from the entry point to the final destination in the Community Customs Territory) must be deducted.

The customs authorities shall waive the requirement of all or part of the customs value declaration where:

- the customs value of the imported goods in a consignment does not exceed EUR 10 000, provided that they do not constitute split or multiple consignments from the same consignor to the same consignee, or
- the importations involved are of a non-commercial nature; or
- the submission of the particulars in question is not necessary for the application of the Customs Tariff of the European Communities or where the customs duties provided for in the Tariff are not chargeable pursuant to specific customs provisions.

### 3) Freight insurance

The insurance is an agreement by which the insured is indemnified in the event of damages due to a risk covered in the policy. Insurance is all-important in the transport of goods because of its exposure to risks during handling, storing, loading or transporting cargo, and other rare risks, such as riots, strikes or terrorism.

There is a difference between the goods' transport insurance and the carrier's responsibility insurance. The transport insurance is a contract whose covered risks, fixed compensation and indemnity are let to the holder's choice. Nevertheless, the haulier's responsibility insurance is determined by different regulations depending on the means of transport, indemnity is limited by the weight and value of the goods and is only given if the transporter was unable to evade responsibility.

The insurance invoice is required for customs clearance only when the relevant data do not appear in the commercial invoice indicating the premium paid for insuring the merchandise.

The standard extent of the transporter's responsibility is laid down in the following international conventions:



### **1. Road freight**

International transport of goods by road is governed by the *Convention for the Contract of the International Carriage of Goods by Road* (CMR Convention) signed in Geneva in 1956.

Under this Convention, the road haulier is not responsible for losses of or damages to the goods if he proves that they arise from:

- the merchandise's own defect(s);
- force majeure;
- a fault by the loader or consignee.

There is no European Union's regulation regarding indemnifications for road freight.

### **2. The rail carrier**

International transport of goods by rail is regulated by the the *Convention concerning Intercarriage by Rail* (CIM Convention), signed in Bern in 1980.

The rail carrier is not responsible for losses of or damages to the goods if he proves that they arise from:

- the merchandise's own defect(s);
- force majeure;
- a fault by the loader or consignee.

With reference to compensation, there is currently no European regulation. Indemnification is normally limited to a maximum amount per gross kilo lost or damaged. This system means that, for the most part, the company is unlikely to receive anything approaching the value of its goods.

### **3. The shipping company**

The 1968 *International Convention on Bill of Lading*, better known as "The Hague Rules" or the "Brussels Convention" dictates the marine carrier's responsibilities when transporting international goods.

The shipping company is not responsible for losses of, or damage to, the goods if it proves that they arise from:

- the merchandise's own defects and loss in weight during transport;
- a nautical mistake by the crew;
- a fire;
- if the ship is not seaworthy;

- force majeure;
- strikes or a lock-out;
- a mistake by the loader;
- hidden defects on board ship, which went unnoticed during rigorous inspection;
- an attempt to save lives or goods at sea.

As far as compensation is concerned, there is currently no harmonisation at the European Union level. It is normally limited to a certain sum per kilogram of lost or damaged goods. This system causes the same problems as with rail accidents, the exporter is likely to lose much of the value of the goods.

#### **4. The air carrier**

The *1929 Warsaw Convention* as well as the *Montreal draft Treaty of 1975* determine that the air carrier is not responsible for damages or loss of goods if it is proved that:

- the carrier and associates took all the measures necessary to avoid the damage or that it was impossible for them to be taken (force majeure);
- the losses arise from a pilotage or navigation mistake;
- the injured party was the cause of the damage or contributed to it.

Concerning the injured party's indemnification, there is no European standard. Compensation is normally limited to a set amount per gross kilogram of damaged or lost goods.

The air carrier can state specific reservations at the time of receiving the cargo. These reservations will be written on the air consignment note (ACN) (air transport contract) and will be used as evidence. However, airlines will normally refuse dubious packages or those not corresponding to the ACN.

#### **4) Customs Import Declaration (SAD)**

All goods imported into the European Union (EU) must be declared to the customs authorities of the respective Member State using the Single Administrative Document (SAD)<sup>22</sup>, which is the common import declaration form for all the Member States, laid down in the Community Customs Code (Regulation (EEC) 2913/92).

The declaration must be drawn up in one of the official languages of the EU which is acceptable to the customs authorities of the Member State where the formalities are carried out.

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<sup>22</sup> See annexes

The SAD may be presented either by:

- Using an approved computerised system linked to Customs authorities; or
- Lodging it with the designated Customs Office premises.

The main information that shall be declared is:

- Identifying data of the parties involved in the operation (importer, exporter, representative,....)
- Custom approved treatment (release for free circulation, release for consumption, temporary importation, transit,....)
- Identifying data of the goods (Taric code, weight, units), location and packaging
- Information referred to the means of transport
- Data about country of origin, country of export and destination
- Commercial and financial information (Incoterms, invoice value, invoice currency, exchange rate, insurance...)
- List of documents associated to the SAD (Import licenses, inspection certificates, document of origin, transport document, commercial invoice...)
- Declaration and method of payment of import taxes (tariff duties, VAT, Excises, etc)

The SAD set consists of eight copies, the operator completes all or part of the sheets depending on the type of operation.

In the case of importation generally three copies shall be used: one is to be retained by the authorities of the Member State in which arrival formalities are completed, other is used for statistical purposes by the Member State of destination and the last one is returned to the consignee after being stamped by the customs authority.

### ***Documents associated to the SAD***

According to the operation and the nature of the imported goods, additional documents shall be declared with the SAD and shall be presented together with it. The most important documents are:

- Documentary proof of origin, normally used to apply a tariff preferential treatment
- Certificate confirming the special nature of the product
- Transport Document
- Commercial Invoice
- Customs Value Declaration
- Inspections Certificates (Health, Veterinary, Plant Health certificates)
- Import Licenses
- Community Surveillance Document

- Cites Certificate
- Documents to support a claim of a tariff quota
- Documents required for Excises purposes
- Evidence to support a claim to VAT relief

5) Freight documents

Depending on the means of transport used, the following documents are to be filled in and presented to the customs authorities of the importing European Union (EU) Member State (MS) upon importation in order for the goods to be cleared:

- Bill of Lading
- FIATA Bill of Lading
- Road Waybill (CMR)
- Air Waybill (AWB)
- Rail Waybill (CIM)
- ATA Carnet
- TIR Carnet

**Bill of Lading**

The Bill of Lading (B/L) is a document issued by the shipping company to the operating shipper which acknowledges that the goods have been received on board serving as **proof of receipt** of the goods by the carrier obliging him to deliver the goods to the consignee. It contains the details of the goods, vessel and port of destination. It **evidences the contract** of carriage and conveys **title to the goods**, meaning that the bearer of the Bill of Lading is the owner of the goods.

The Bill of Lading may be a negotiable document. A number of different types of bills of lading can be used. "Clean Bills of Lading" state that the goods have been received in an apparent good order and condition. "Unclean or Dirty Bills of Lading" indicate that the goods are damaged or in bad order, in this case, the financing bank may refuse to accept the consignor's documents.

**FIATA Bill of Lading**

The **FIATA Bill of Lading** is a document designed to be used as a multimodal or combined transport document with negotiable status which has been developed by the *International Federation of Forwarding Agents' Associations* (FIATA).

### **Road Waybill (CMR)**

The road waybill is a document containing the details of the international transportation of goods by road, set out by the *Convention for the Contract of the International Carriage of Goods by Road 1956* (the CMR Convention). It enables the consignor to have the goods at his disposal during the transportation. It must be issued in quadruplicate and signed by the consignor and the carrier. The first copy is intended for the consignor; the second remains in the possession of the carrier; and the third accompanies the goods and is delivered to the consignee. Usually, a CMR is issued for each vehicle.

The CMR note is not a document of title and is non-negotiable.

### **Air Waybill (AWB)**

The air waybill is a document proving the transport contract between the consignor and the carrier's company. It is issued by the carrier's agent and falls under the provisions of the *Warsaw Convention*. A single air waybill may be used for multiple shipment of goods, it contains three originals and several extra copies. One original is kept by each of the parties involved in the transport (the consignor, the consignee and the carrier). The copies may be required at the airport of departure/destination, for the delivery and in some cases, for further freight carriers. The air waybill is a freight bill which evidences a contract of carriage and proves receipt of goods..

The **IATA Standard Air Waybill** is used by all carriers belonging to the *International Air Transport Association* (IATA) and it embodies standard conditions associated to those set out in the Warsaw Convention.

### **Rail Waybill (CIM)**

The rail waybill (CIM) is a document required for the transportation of goods by rail. It is regulated by the *Convention concerning International Carriage by Rail 1980* (COTIF-CIM). The CIM is issued by the carrier in five copies, the original accompanies the goods and the duplicate of the original is kept by the consignor and the three remaining copies are intended for internal purposes of the carrier. It is considered the rail transport contract.

### **ATA Carnet**

ATA carnets are international customs documents issued by chambers of commerce in most major countries throughout the world for the purpose of allowing the temporary importation of goods, free of customs duties and taxes. ATA carnets can be issued for the following categories of goods:

commercial samples and advertising film, goods for international exhibition and professional equipment.<sup>23</sup>

### ***TIR Carnet***

TIR carnets are customs transit documents used for the international transport of goods a part of which has to be made by road. They allow the transport of goods under a procedure called the TIR procedure, laid down in the 1975 TIR Convention, signed under the auspices of the United Nations Economic Commission for Europe (UNECE)<sup>24</sup>

The TIR system requires that the goods travel in secure vehicles or containers, all duties and taxes at risk throughout the journey are covered by an internationally valid guarantee, the goods are accompanied by a TIR carnet, and customs control measures in the country of departure are accepted by the countries of transit and destination.

#### **6) Packing list**

The packing list (P/L) is a commercial document accompanying the commercial invoice and the transport documents, and providing information on the imported items and the packaging details of each shipment (weight, dimensions, handling issues, etc.)

It is required for customs clearance as an inventory of the incoming cargo.

The data generally included are:

- Information on the exporter, the importer and the transport company
- Date of issue
- Number of the freight invoice
- Type of packaging (drum, crate, carton, box, barrel, bag, etc.)
- Number of packages
- Content of each package (description of the goods and number of items per package)
- Marks and numbers
- Net weight, gross weight and measurement of the packages

No specific form is required. The packing list is to be prepared by the exporter according to standard business practice and it must be submitted in the original along with at least one copy. It generally needs not be signed. However, in practice, the original and the copy of the packing list are often signed. The

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<sup>23</sup> Further information may be obtained in the International Chamber of Commerce's website: [http://www.iccwbo.org/index\\_ata.asp](http://www.iccwbo.org/index_ata.asp)

<sup>24</sup> Website; <http://www.unece.org/trans/bcf/tir/welcome.html>.

packing list may be prepared in any language. However, a translation into English is recommended.

### **6.11 Import modalities or regimes involved in the process**

What might be interesting for exporters of goods to the EU to know, is the fact that there are so called free zones. These are special areas within the customs territory of the Community (EU). Goods placed within these area are free of import duties, VAT and other import charges. Free zone treatment applies to both Community and non-Community goods. Non-Community goods stored in the zone are perceived as not yet imported to the Customs territory.

With regards to the import of goods, free zones are mainly destined for storage of non-Community goods until they are released for free circulation. No import declaration has to be lodged as long as goods stay at free zone storage. In addition, there may be special relieves available in free zones from other taxes, excises or local duties. The free zones are mainly a service for traders to facilitate trading procedures by allowing fewer custom formalities.

List of free trade zones in Poland can be found on the website:

[http://europa.eu.int/comm/taxation\\_customs/customs/procedural\\_aspects/imports/free\\_zones/index\\_en.htm](http://europa.eu.int/comm/taxation_customs/customs/procedural_aspects/imports/free_zones/index_en.htm) and also in the table beneath:

**Table 6.11. 1 Free zones in Poland**

<b>FREE ZONE (CONTROL TYPE 1)</b>	<b>ADDRESS OF CUSTOMS AUTHORITY (ART.804 CCIP)</b>
WOLNY OBSZAR CELNY na terenie Międzynarodowego Portu Lotniczego Warszawa Okęcie ul. Zwirki i Wigury 1 PL-00-906 WARSZAWA	Izba Celna w Warszawie ul. Modlińska 4 PL-03-016 WARSZAWA
WOLNY OBSZAR CELNY w Gliwicach ul. Portowa 28 PL-44-100 Gliwice	Izba Celna w Katowicach Plac Grunwaldzki 8-10 PL-40-127 Katowice
WOLNY OBSZAR CELNY w Terespolu ul. Wojska Polskiego 47 PL-21-550 Terespol	Izba Celna w Białej Podlaskiej ul. Północna 19 PL-21-500 Biała Podlaska
WOLNY OBSZAR CELNY w Szczecinie ul. Bytomska 7 PL-70-603 Szczecin	Izba Celna w Szczecinie ul. Energetyków 55 PL-70-952 Szczecin
WOLNY OBSZAR CELNY w Świnoujściu ul. Jana Soltana 1 PL-72-602 Świnoujście	Izba Celna w Szczecinie ul. Energetyków 55 PL-70-952 Szczecin
WOLNY OBSZAR CELNY w Gdańsku ul. Zamknięta 18 PL-80-955 Gdańsk	Izba Celna w Gdyni ul. Polska 8 PL-81-339 Gdynia

<b>FREE ZONE (CONTROL TYPE 1)</b>	<b>ADDRESS OF CUSTOMS AUTHORITY (ART.804 CCIP)</b>
WOLNY OBSZAR CELNY w Mszczonowie ul. Fabryczna 6/10 PL- 96-320 Mszczonów	Izba Celna w Warszawie ul. Modlińska 4 PL-03-016 WARSZAWA

Source: *www.europa.eu.int*

### **6.12 Requirements for import of samples and accompanied luggage**

The requirements for the import of samples are the same as for the general import of coffee, because coffee is a consumable product.<sup>25</sup>

### **6.13 Website links to rules and regulations**

- [www.mg.gov.pl](http://www.mg.gov.pl)
  - Ministry of Economy and Labor
- <http://www.mf.gov.pl/sluzbacelna/index.php?wysw=4&sgl=2&dzial=501>
  - Polish Custom Service
- [www.clo.gov.pl](http://www.clo.gov.pl) / <http://clo.mg.gov.pl>
  - Customs in Poland
- [www.minrol.gov.pl](http://www.minrol.gov.pl)
  - Ministry of Agriculture and Rural Development
- [www.arr.gov.pl](http://www.arr.gov.pl)
  - Agricultural Market Agency
- [www.ijhar-s.gov.pl](http://www.ijhar-s.gov.pl)
  - Inspection of Trade Quality for Nutritive and Agricultural Goods

### **6.14 Recommendations**

Colombian exporters should be aware of the necessity to obtain a certification from the National Border Sanitary Inspectorate (on the basis of proper examinations and health certificate from Colombian authorities) and also a positively concluded protocol of Inspection of Trade Quality for Nutritive and Agricultural Goods control. The customs' habits and procedures are common for all membership EU countries, therefore, besides required sanitary probate, the invoice and the certificate of origin is (are) needed as basic documents are concerned. The VAT rate for coffee (roasted and on-roasted, with caffeine and decaffeinated) is accounted at 22%. Please note that it is very useful to consult [www.europa.eu.int](http://www.europa.eu.int) for all the information about import to EU membership countries.

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<sup>25</sup> Source: *Dutch Customs Office*

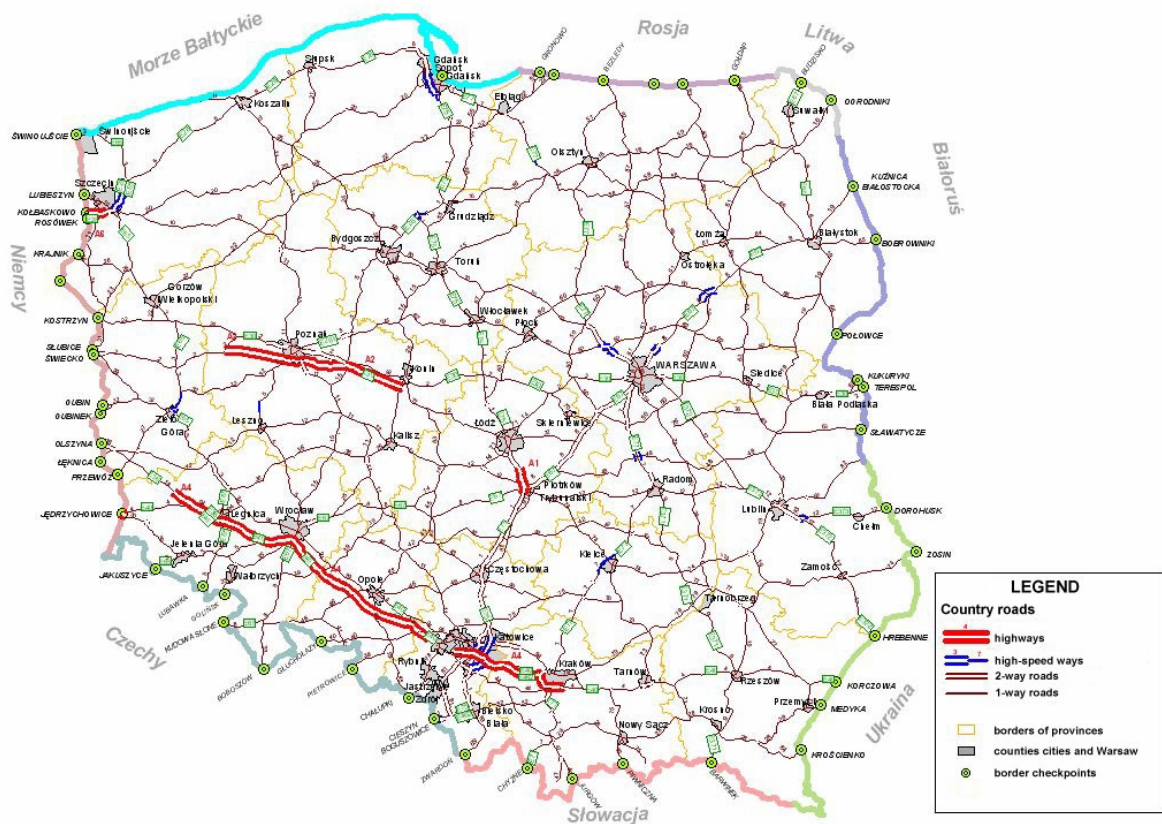


## 7. Physical Access

### 7.1 Available transportation infrastructure

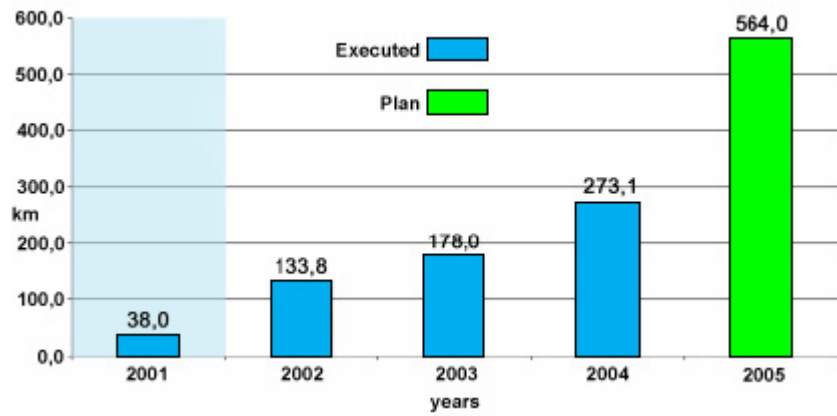
Poland has developed all transportation infrastructures: roads network, railways, airports connections as well as sea ports.

Picture 7.1. Polish roads network



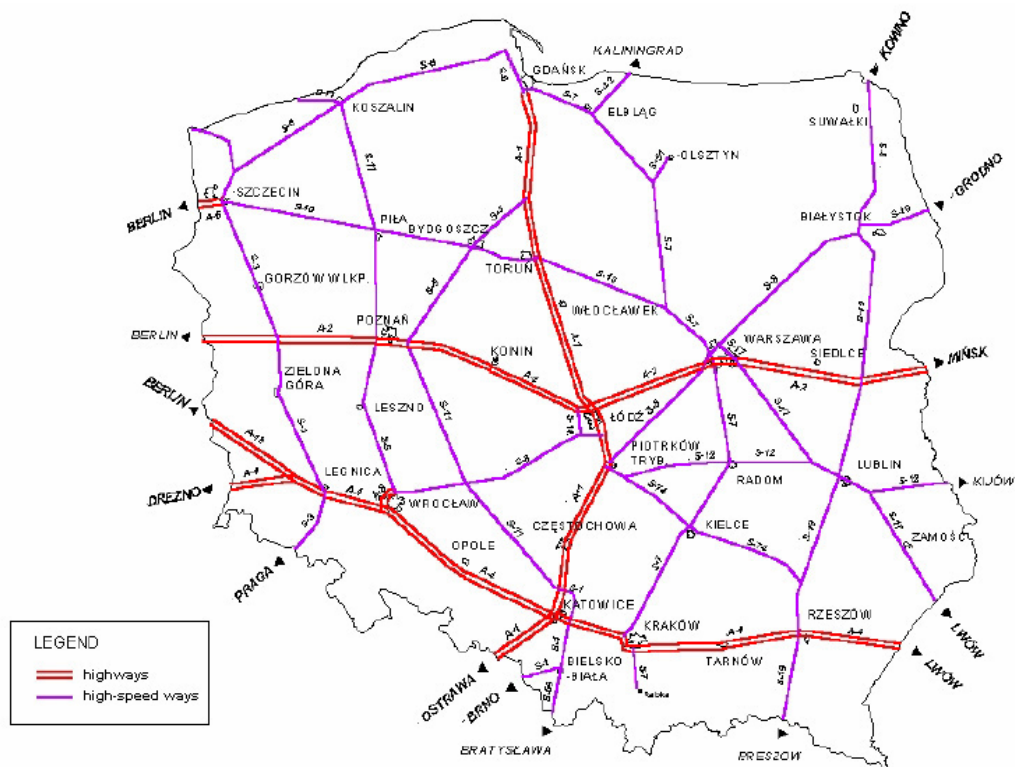
Source: [www.gddkia.gov.pl](http://www.gddkia.gov.pl)

**Picture 7.1.2. Polish roads - January 2005**



Source: [www.gddkia.gov.pl](http://www.gddkia.gov.pl)

**Picture 7.1.3. Polish roads – executed projects and plans**



Source: [www.gddkia.gov.pl](http://www.gddkia.gov.pl)

Picture 7.1.4. Polish railroads network



Source: PKP (Polish State Railroads)

Picture 7.1.5. Airports in Poland



Source: <http://www.lemon.travel.pl/samoloty/lotniska/polskie.jpg>

**International airport im. Fryderyka Chopina in Warsaw**  
**ul. Żwirki i Wigury**

**Warszawa**

tel.: +48 (22) 650 42 20

➤ [www.lotnisko-chopina.pl](http://www.lotnisko-chopina.pl)

**International airport im. Jana Pawła II Kraków - Balice Sp. z o.o.**

ul. Kpt. M. Medweckiego 1

32-083 Balice

tel.: +48 (12) 639 30 00

fax: +48 (12) 411 79 77

➤ [www.lotnisko-balice.pl](http://www.lotnisko-balice.pl)

**Górnośląskie Towarzystwo Lotnicze S.A. Internation Airport Katowice**

Al. Korfantego 38

40-161 Katowice

tel.: +48 (32) 201 06 33

fax: +48 (32) 201 06 34

➤ [www.gtl.com.pl](http://www.gtl.com.pl)

**Airport Poznań-Ławica Sp. z o.o.**

ul. Bukowska 285  
60-189 Poznań  
tel.: +48 (61) 849 20 00  
fax: +48 (61) 849 23 17  
✉ [www.airport-poznan.com.pl](http://www.airport-poznan.com.pl)

**Airport Gdańsk Sp. z o.o.**

ul. Słowackiego 200  
80-298 Gdańsk  
tel.: +48 (58) 348 11 54  
fax: +48 (58) 345 22 83  
✉ [www.airport.gdansk.pl](http://www.airport.gdansk.pl)

**Airport „Mazury-Szczytno” Sp. z o.o. w Szczytnie  
Port Lotniczy Szczytno-Szymany**

ul. Wielbarska 5  
12-100 Szczytno  
tel.: +48 (89) 624 32 81  
fax: +48 (89) 624 22 94  
✉ [www.airport.szczytno.pl](http://www.airport.szczytno.pl)

**Airport Wrocław S.A.**

ul. Skarżyńskiego 36  
54-530 Wrocław  
tel.: +48 (71) 358 11 00, 358 13 10  
fax: +48 (71) 357 39 73  
✉ [www.airport.wroclaw.pl](http://www.airport.wroclaw.pl)

**Lublinek Sp. z o.o.**

ul. Gen. S. Maczka 35  
94-328 Łódź  
tel.: +48 (42) 688 84 14  
fax: +48 (42) 688 83 84  
✉ [www.airport.lodz.pl](http://www.airport.lodz.pl)

**Airport Zielona Góra-Babimost**

skr. pocztowa 4  
6-110 Babimost  
tel.: +48 (68) 351 23 00  
fax: +48 (68) 351 27 29

**Airport Rzeszów-Jasionka**

36-002 Jasionka 942  
tel.: +48 (17) 852 00 81

fax: +48 (17) 852 07 09

**Airport Bydgoszcz S.A.**

ul. Grodzka 12  
85-109 Bydgoszcz  
tel.: +48 (52) 345 95 96  
fax: +48 (52) 322 52 32

**Airport Szczecin-Goleniów Sp. z o. o.**

72-100 Goleniów  
tel.: +48 (91) 418 28 64  
fax: +48 (91) 418 33 83  
✉ [www.airport.com.pl](http://www.airport.com.pl)

There are 4 big marine ports in Poland: Gdańsk, Gdynia, Świnoujście, Szczecin and 8 small ones: Darłowo, Elbląg, Hel, Kołobrzeg, Łeba, Police, Władysławowo, Ustka.

**Chart 7.1.6. Cargo handling In Polish marine ports**

**Cargo handling 2003 [thous. tons]**

**Coal:**

Gdańsk	5926
Gdynia	1442
Szczecin i Świnoujście	5943
<b>Total:</b>	<b>13311</b>

**Ore:**

Gdańsk	99
Gdynia	0

Szczecin i		2008
Świnoujście		

**Total:2107**

**Other mass:**

Gdańsk		2582
--------	--	------

Gdynia		1776
--------	--	------

Szczecin i		1974
Świnoujście		

**Total: 6332**

**Corn:**

Gdańsk		397
--------	--	-----

Gdynia		872
--------	--	-----

Szczecin i		979
Świnoujście		

<b>Total:</b>		<b>2248</b>
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**Wood:**

Gdańsk		2
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Gdynia		162
--------	--	-----

Szczecin i	33
Świnoujście	

**Total:197**

**Package freight:**

Gdańsk	2295
--------	------

Gdynia	7107
--------	------

Szczecin i	4584
Świnoujście	

<b>Total:</b>	<b>13986</b>
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**Liquid fuels:**

Gdańsk	9991
--------	------

Gdynia	297
--------	-----

Szczecin i	125
Świnoujście	

<b>Total:</b>	<b>10413</b>
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*Source: Central Statistical Office (GUS), 2003*

**Chart 7.1.7.Nr. of Ships entering Polish marine ports in 2002**

<b>Gdańsk</b>	2506
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<b>Gdynia</b>	3483
---------------	------



Kołobrzeg	353
Police	269
Szczecin	3493
Świnoujście	9950
<b>Total:</b>	<b>30212</b>

Source: Central Statistical Office (GUS), 2003

Most coffee and coffee products that are shipped directly to Poland is being handled in the ports of Gdansk, Gdynia and Swinoujscie. However, the majority of coffee and coffee products that is shipped from Colombia to Poland arrives in the port of Rotterdam (the Netherlands) and is then further transported to Poland by air or truck. For more information about road and air transportation we refer to chapter 7.2 and 7.3.

## **7.2 Identification of ports, airports, roads – border passes – railways, waterways**

The goods may be transported from Colombia to Poland by air, by sea, combined air/sea or air/truck. In the case of coffee and coffee products the sea transportation is the most recommended way of transportation. The costs are relatively low (for more detailed information please see chapter 7.7.).

Transportation by sea is very popular. There are about 20 national and international shipping lines operating in the Caribbean harbors (Barranquilla, Cartagena, Santa Marta, Turbo, Puerto Bolivar) and the Pacific harbors (Buenaventura, Tumaco). These harbors are equipped with many ports and extensive storing capacity. Container harbors exist in Cartagena, Barranquilla and Buenaventura. The most important Colombian harbor is Buenaventura. Annually, about 650 000 tons of export goods are shipped there. The transportation to the Polish ports: Gdansk, Gdynia and Swinoujscie will take approximately 27 days.

The combined transportation to Poland would involve the goods to be shipped to Rotterdam or Amsterdam in the Netherlands and then transported by air, ship or truck to Poland. There are many possibilities to enter Poland from other European countries.

**Table 7.2.1. Methods of transportation from Colombia**

<b>Method of Transportation</b>	<b>Time of delivery</b>	<b>Security Factor</b>	<b>Cost</b>	<b>Freight Capacity</b>
<b>Air freight</b>	2 days	Excellent	Very expensive	Often difficult
<b>Sea freight</b>	28-30 days	Insufficient	Cheap	Sufficient
<b>By sea/air</b>	18-20 days	Excellent	Expensive	Not always

Source: [www.usergioarboleda.edu.co](http://www.usergioarboleda.edu.co)

Transportation by trucks within Europe is very popular due to its low costs. The transportation from The Netherlands to Poland takes approximately two days. Dutch and Polish truckers operate a vast network of (cooling) trucks with numerous daily departures.

### **7.3 Description of status, operation, security, costs, distances, transportation arrangements and intercommunity customs**

It is also possible to use air transportation for products from Colombia to Poland. However, the costs are very high and there is at least one trans-shipment necessary during the transit.

LOT, the Polish airlines, is able to arrange all the flights from Colombia to Poland. The air freight would approximately take 17 to 26 hours from Bogota, via New York to Warsaw or Cracow. The loading takes place in one of the two available airports in NY: JFK Airport or EWR Newark Airport. The shortest recommended operating time needed for the transit in NY is 4 hours. The trans-shipment is organized by handling agents, specialized companies that deal with loading and redirecting it. The transportation order should be delivered to the company that deals with the logistics. This is usually Cargo Agent or Airfreight Forwarder. The route of the transport should be included in the order, with the indication of each involved carrier. The sender as well as the receiver of the transported goods is obliged to possess permissions, export/import licenses that are subjects to customs law and sanitary rules in each country of transit.

Rates and charges published by the airline are based on the units of measurement. They cover only the carriage of consignment between airports. Such charges do not include the following services and charges: pick-up and delivery, storage, insurance, customs clearance, disbursements, airport taxes and charges, expenses for the repairing of faulty packing and other similar advanced charges.

These arrangements and costs are negotiated separately on the basis of an individual order. Prices depend on the amount of the transported goods, weight, frequency of orders, but also on the person negotiating the rates. Agents from the logistics centres are the most suitable persons to arrange these rates with.

The other airline, KLM Cargo is operating on the route Amsterdam – Warsaw. KLM as well as LOT offers flights from Amsterdam to Warsaw 3 times a day. The rates and general conditions from KLM Cargo are valid on the services within the current KLM Cargo network. All shipments are governed by the General Conditions of KLM Cargo. KLM states that the amount of goods transported from Amsterdam to Poland by air is very limited due to the high air cargo transport cost versus the low trucking costs. The transportation costs are less than 25% of the air cargo costs. Furthermore, there is no container air cargo capacity between Amsterdam and Warsaw, only loose belly capacity. The operating time by air is 2 hours.

#### **7.4 Identification of other handling and distribution infrastructure**

##### **The sea connections from Colombia to Poland:**

The sea service is provided by domestic companies only for the route Poland-Colombia. It are the international operators who deal with the transportation from Colombia to Europe.

**Table. 7.4.1. Sea connections from Gdańsk port to Colombia**

<b>Destination</b>	<b>Carrier</b>	<b>Frequency</b>	<b>Type of cargo</b>	<b>Agent</b>
<u>Barranquilla</u>	Venbulk Service GmbH	Every 6 <sup>th</sup> week	Containers/package freight	<b>MAG</b>

Source: [www.portgdansk.pl](http://www.portgdansk.pl)

**Table. 7.4.2. Sea connections from Gdynia port to Colombia**

<b>Destination</b>	<b>Carrier</b>	<b>Frequency</b>	<b>Type of cargo</b>	<b>Agent</b>
Cartagena	Conti Lines	Month	Conv.	<b>Okmarit</b>
Barranquilla	Spliethoff	Month	Conv.	<b>Pomorscy Maklerzy Okrętowi</b>
Turbo	Spliethoff	Month	Conv.	<b>Pomorscy Maklerzy Okrętowi</b>

Source: [www.port.gdynia.pl](http://www.port.gdynia.pl)

These Polish agents arrange transportation of goods such as steel and metal equipment. This is called conventional cargo and is packed as loose cargo and transported on pallets not in the containers. Transportation by sea from Colombia to Poland is offered by:

- **Maersk Sealand.** As a leading, world-class ocean carrier, they offer second to none door-to-door transportation service. With more than 300 container vessels, one million containers and own terminals, trucks and trains they ensure getting a reliable worldwide coverage. Their offices in

more than 125 countries ensure that the cargo will receive an excellent service in all corners of the world.

**Table 7.4.3. Transit time and possible schedule from Cartagena to Gdynia**

<b>LOCATIONS</b>		<b><u>SCHEDULE 1</u></b>	<b><u>SCHEDULE 2</u></b>
<b>Cartagena, CO</b>	<b>Dep.:</b> By: Lloyds no.: Voyage no.: Build year:	30.Jun.05(Thu) <u>AURETTE A</u> 9242285 0520 2002	08.Jul.05(Fri) <u>ROTHORN</u> 9126986 0520 1996
Manzanillo, PA	Arr.: Dep.: By:  Lloyds no.: Voyage no.: Build year:	02.Jul.05(Sat) 04.Jul.05(Mon) <u>JEPPESEN</u> <u>MAERSK</u> 9215165 0510 2001	09.Jul.05(Sat) 11.Jul.05(Mon) <u>OLIVIA MAERSK</u>  9251638 0510 2003
Bremerhaven, DE	Arr.: Dep.: By: Lloyds no.: Voyage no.: Build year:	20.Jul.05(Wed) 26.Jul.05(Tue) <u>FELICITAS</u>  0523 1996	27.Jul.05(Wed) 02.Aug.05(Tue) <u>FELICITAS</u>  0525 1996
<b>Gdynia, PL</b>	<b>Arr.:</b>	<b>28.Jul.05(Thu)</b>	<b>04.Aug.05(Thu)</b>
<b>Transit time:</b>		<b>28 days</b>	<b>27 days</b>
Container type:		<b><u>Dry, Reefer</u></b>	<b><u>Dry, Reefer</u></b>

Source: [www.maersksealand.com](http://www.maersksealand.com)

Picture 7.4.4. The route from Colombia to Poland



Port	Arrives	Departs	Transit
San Antonio, CHILE	Sat 0700	Sun 1200	--
Balboa, PANAMA	Sat 0700	Sat 2000	6
Panama Canal, PANAMA	Sun 0200	Sun 1800	7
Manzanillo, PANAMA	Sun 1900	Mon 0600	7
Algeciras, SPAIN	Wed 0800	Wed 2000	17
Rotterdam, NETHERLANDS	Sat 1900	Sun 0400	20
Dunkerque, FRANCE*	Sun 1800	Mon 0400	21
Felixstowe, ENGLAND	Mon 1900	Tue 0500	22
Bremerhaven, GERMANY	Wed 0600	Wed 2200	24
Rotterdam, NETHERLANDS	Fri 1100	Sat 0300	26

Notes: 1) Weekly service 2) \*Dunkerque called 5 out of every 7 vessels.

Source: [www.maersksealand.com](http://www.maersksealand.com)

- MSC** Mediterranean Shipping Company S.A., of Geneva, Switzerland is a privately owned shipping line, founded in 1970, which has rapidly grown from a small conventional ship operator to become one of the leading global shipping lines of the world. During recent years MSC's maritime fleet has expanded substantially to consolidate its position in 2003 as the 2nd largest carrier in respect of container slot capacity and of the number of container vessels operated. MSC operates in excess of 255 container vessels with an intake capacity of 670,000 TEUs. MSC provides an unparalleled service network via dedicated own offices throughout the world and remains a truly independent and private company able to respond quickly to market changes and implement long term plans, without unnecessary interference or delay. With a streamlined management structure in Geneva, MSC has become a leading customer focused and cost effective global transportation solution for many shippers.

MSC prices are slightly higher than Maersk Sealand rates.

## **7.5 Identification of carriers that transport goods imported from Colombia**

The providers of air connections from Colombia to Poland and from the Netherlands to Poland are:

- **LOT** – Polish Airlines
- **KLM** – Royal Dutch Airlines

The providers of road transportation throughout Europe are:

- **Fresh logistics (Raben-Group)** - developed, as one of the first logistic companies, a special dedicated system for fresh products. The quality of performed services was confirmed by obtaining a HACCP certificate. The modern solutions guarantee the highest quality of servicing the market, flexible reaction to its needs, faster and prompt deliveries, professional stock management and detailed administration. Fresh Logistics delivers goods of various volumes to indicated addresses - from one consignment to full truck loads. Domestic deliveries to retail-, wholesale- and network consignees are executed on the next working day. The company offers services of international forwarding of consignments:

- groupage loads from 50 to 3 000 kg (fresh products from +2 to +6°C)
- part loads over 3 000 kg (fresh products from +2 to +6°C)
- full truck loads (frozen products, fresh products from +2 to +6°C, food products with various temperature ranges: -18°C; +12°C; +18°C)

For more information please see: [www.freshlogistics.com](http://www.freshlogistics.com) or the carrier website [www.raben-group.com](http://www.raben-group.com)

- **Cargo Sped** - Cargo Sped specializes in forwarding of all types of freights. They offer road, railway and sea transportation services for export, import, transit and domestic traffic. The trans-shipment services at the borders, in the harbors and terminals are also offered. It also arranges agency services in customs and administrative matters, cargo insurance and customs securities.
- **AXA** – AXA company was established in the year 1991, and since then it developed and improved the quality of services that are offered to customers. The experienced personel and the variety of transportation which might be suitable to the individual needs of clientele are some of the features they provide. Known as reliable, dynamic company. Promptness in picking up the cargo from the loading up places and delivering it to their destinations is company goal. It specializes in the transportation all over Europe and CIS countries.

## 7.6 International Freight or Transportation Costs

### SEA TRANSPORTATION:

The costs of transportation are based on the container's size. Maersk Sealand offers containers as follows:

**Table 7.6.1 Description of containers**

#### Dry/steel

Type	Size	m <sup>3</sup>	ft <sup>3</sup>
» <u>20' standard</u>	20' x 8' x 8'6"	33	1,170
» <u>40' standard</u>	40' x 8' x 8'6"	67	2,390
» <u>40' high</u>	40' x 8' x 9'6"	76	2,714
» <u>45' high</u>	45' x 8' x 9'6"	85	3,040

#### Dry/aluminium

Type	Size	m <sup>3</sup>	ft <sup>3</sup>
» <u>45' high</u>	45' x 8' x 9'6"	86	3,071

Source: [www.maersksealand.com](http://www.maersksealand.com)

Maersk Sealand's dry containers come in several sizes and designs:

- 20' with a payload of up to 28.3 metric tonnes
- 40' - both 8'6" and 9'6" high cube - with a payload of up to 30.4 metric tonnes
- 45' - 9'6" high cube - with a total capacity of 86 cubic metres

Table 7.6.2 The base freight for the routes from Colombia to Poland for 20'container

Siz.	Base Freight	Orig	Dest	Comm	Exp. Date
20	€ 1373.98	<u>BARRANQUILLA</u> (port), COLOMBIA	<u>GDYNIA</u> (port), <u>POLAND</u>	<u>DRY CARGO :</u> <u>CLASS 1</u> <u>COMMODITIES</u>	31Jul2005
20	€ 1382.11	<u>CARTAGENA</u> (port), COLOMBIA	<u>GDYNIA</u> (port), <u>POLAND</u>	<u>DRY CARGO :</u> <u>CLASS 1</u> <u>COMMODITIES</u>	31Jul2005
20	€ 1463.41	<u>CARTAGENA</u> (port), COLOMBIA	<u>GDANSK</u> (port), <u>POLAND</u>	<u>DRY CARGO :</u> <u>CLASS 1</u> <u>COMMODITIES</u>	31Jul2005
20	€ 1463.41	<u>BUENAVENTURA</u> (port), COLOMBIA	<u>GDYNIA</u> (port), <u>POLAND</u>	<u>DRY CARGO :</u> <u>CLASS 1</u> <u>COMMODITIES</u>	31Jul2005
20	€ 1382.11	<u>BARRANQUILLA</u> (port), COLOMBIA	<u>SZCZECIN</u> (port), <u>POLAND</u>	<u>DRY CARGO :</u> <u>CLASS 1</u> <u>COMMODITIES</u>	31Jul2005
20	€ 1544.72	<u>BUENAVENTURA</u> (port), COLOMBIA	<u>GDANSK</u> (port), <u>POLAND</u>	<u>DRY CARGO :</u> <u>CLASS 1</u> <u>COMMODITIES</u>	31Jul2005
20	€ 1439.02	<u>BARRANQUILLA</u> (port), COLOMBIA	<u>GDANSK</u> (port), <u>POLAND</u>	<u>DRY CARGO :</u> <u>CLASS 1</u> <u>COMMODITIES</u>	31Jul2005
20	€ 1382.11	<u>CARTAGENA</u> (port), COLOMBIA	<u>SZCZECIN</u> (port), <u>POLAND</u>	<u>DRY CARGO :</u> <u>CLASS 1</u> <u>COMMODITIES</u>	31Jul2005
20	€ 1463.41	<u>BUENAVENTURA</u> (port), COLOMBIA	<u>SZCZECIN</u> (port), <u>POLAND</u>	<u>DRY CARGO :</u> <u>CLASS 1</u> <u>COMMODITIES</u>	31Jul2005

Source: [www.maersksealand.com](http://www.maersksealand.com)

Table 7.6.3 Additional charges

<b>Ocean Freight</b>	€ 1382.11 per Container
Redefining Basic Ocean Freight	TLI Rate
CARRIER SECURITY CHARGE	€ 4.88
BAF-NCSA To Europe (BAF)	€ 56.91
PORT SECURITY CHARGE	€ 2.44
DOCUMENTATION FEE - DESTINATION	€ 12.20
DOCUMENTATION FEE - ORIGIN	€ 40.65
	=====
<b>Total Charges</b>	€ 1501.75

Source: [www.maersksealand.com](http://www.maersksealand.com), charges as of 27 July 2005



The above rate quotation is valid for 30 days. All rates published in the tariff at the time of receipt of cargo will be applicable and supersede the above quoted rates. Rate quote may not include local destination charges such as but not limited to: Cleaning, Port fees, Primage, Overweight charges, Documentation fees, or Customs inspections. These fees may be assessed to and settled locally by the cargo receiver.

**Seagoing vessels in Gdańsk port:**

Tonnage Dues for Seagoing Vessels in Gdańsk port are described below: (for more information see <http://www.portgdansk.pl/index.php?id=charges&lg=en> )

Tonnage dues for entry of seagoing ship to port and departure of ship from port, transit through port area, and assurance of ship waste reception for recycling or treatment (excluding ships specified in § 5) per 1 GT:

No.	Ship size and type	Fee (EUR/1 GT)
1	Car carrier	0.14
2	General cargo vessel	0.45
3	Reefer carrier	0.52
4	Container vessel	0.22
5	"Ro-Ro" ship	0.20
6	Bulk carrier	0.51
7	Passenger ship	0.13
8	Ferry	0.09
9	Passenger - cargo ship	0.09
10	Tanker up to 38.000 GT	0.57
11	Tanker over 38.000 GT	0.64
12	Towing and pushing vessels	0.48
13	Other seagoing ships	0.45

Tonnage dues for line shipping and ferries entering port:

- at least 8 times a week amount to 40%
  - at least 6 times a week amount to 45%
  - at least 4 times a week amount to 50%
  - 3 times a week amount to 60%
  - 2 times a week amount to 65%
  - 1 once a week amount to 70%
  - less than once a week amount to 75%
- of the pertinent fee rate specified in clause 1.

For seagoing new buildings and newly constructed hulls leaving port or shipyard, arriving for repair, conversion, dismantling, scrapping, performance of towing power tests or bunkering fuel or provisions or equipment, and not involved in commercial activity, if their stay in port or shipyard is limited to the time necessary to perform these action, the charge amounts to 25% of the pertinent fee rate specified in clause 1.

For vessels staying in the roadstead for loading or discharging cargo or for passenger clearance the charge is 50% of the fee stipulated in clause 1.

For seagoing ship entering the port for other than commercial purposes the charges amount to 25% of the pertinent rate specified in clause 1.

For ships passing in transit through the port area and not conducting commercial activity, fees are charged for one way passage and amount to 50% of the pertinent fee rate specified in clause 1.

Seagoing ships involved in commercial activity and next proceeding to the shipyard, or involved in commercial activity on leaving the shipyard, are charged with full tonnage dues.

Tonnage Dues for Seagoing Vessels in Gdynia port are described below<sup>26</sup>:

1. The following are the tonnage due charged for:

No.	Type and size of vessel	Amount of due [EUR/1 GT]
1.	Car carriers	0,18
2.	General cargo vessels	0,49
3.	Reefer vessels	0,49
4.	Container vessels	0,31
5.	"Ro-ro" vessels	0,26
6.	Bulk carriers	0,52
7.	Passenger and cruise vessels	0,13
8.	Ferries	0,13
9.	Tankers	0,59
10.	Tugs, pusher-tugs, push trains and towing trains	0,40
11.	Fishing vessels and boats less than 35 m	0,00
12.	Other seagoing vessels	0,49

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<sup>26</sup> For more information see [www.port.gdynia.pl](http://www.port.gdynia.pl)

**2. Tonnage due for seagoing liners and ferries entering the port:**

- a)** at least 8 times a week amount to 40%,
- b)** at least 6 times a week amount to 45%,
- c)** at least 4 times a week amount to 50%,
- d)** 3 times a week amount to 60%,
- e)** twice a week amount to 65%,
- f)** once a week amount to 70%,
- g)** less than once a week (but not less than once a month) amount to 75% of the relevant rate of dues specified in § 3 Section 1.

**3.** The amount of the tonnage due charged for the seagoing vessels carrying homogeneous cargo to/from Gdynia and with the frequency not less than 8 calls a quarter - is 80 % of the relevant rate of the due specified in § 3 Section 1. The reduction of dues is granted, provided that the Port accepts the service declared by the ship operator.

**4.** For the seagoing vessels which are newly built and for the vessels calling at the port or at a shipyard with the purpose of repair, conversion, demolition, ship breaking, refuelling, replenishment of provisions or equipment materials or crew replacement and which do not perform any commercial operations - if they stay in port or in shipyard is only for the time necessary to perform the above mentioned operations - the amount of due charged is 25 % of the relevant rate specified in Section 1 above.

**5.** For the seagoing vessels calling for a stay in port without performing any commercial operations, the amount of due charged shall be 25 % of the rate specified in Section 1 above.

**6.** The seagoing vessels which perform commercial operations in the port and then go to a shipyard or the other way around, shall be charged the full tonnage due.

**AIR TRANSPORTATION:**

The arrangements and costs are negotiated separately on the basis of an individual order. General costs of air freight in LOT Cargo, from Amsterdam to Warsaw are calculated in the following way:

**Based cost B is EUR 34,03 which is a fixed cost  
Each kilogram of the parcel is counted EUR 1,56.**

In the case of a long-term partnership there is a possibility to negotiate the prices.

## **ROAD TRANSPORTATION:**

Following prices (per truck) and time of the delivery for the distance from the Netherlands to Poland:

**Amsterdam – Warsaw EUR 1000**

**Amsterdam – Poznań EUR 1200**

## **7.7 Physical distribution services address book**

### **SEA TRANSPORTATION:**

1. MSC Poland  
Plac Kaszubski 8  
81-350 Gdynia  
Phone: +48 58 666 1000  
Fax: +48 58 666 1001  
E-mail: [gdy@medship.pl](mailto:gdy@medship.pl)  
[www.mscgva.ch/index.html](http://www.mscgva.ch/index.html)

The worldwide agents may be found at:  
[www.mscgva.ch/contact/contact\\_page.html](http://www.mscgva.ch/contact/contact_page.html)

<b>COLOMBIA</b>			
<b>City</b>	<b>Company</b>	<b>Phone</b>	<b>Fax</b>
<b><u>Bogota</u></b>	MSC Colombia	+57 1 611 2787	+57 1 610 7347
<b><u>Buenaventura</u></b>	MSC Colombia	+57 2 241 8926	+57 2 241 7809
<b><u>Cartagena</u></b>	MSC Colombia	+57 5 667 1111	+57 5 667 0953

2. Maersk Sealand  
Ul. Kwiatkowskiego 60  
81-127 Gdynia  
Phone: +48 58 660 39 39  
Fax: +48 58 660 39 38  
E-mail: [gdysal@maersk.com](mailto:gdysal@maersk.com)  
[www.maersksealand.com](http://www.maersksealand.com)

<b>COLOMBIA</b>			
<b>City</b>	<b>Company</b>	<b>Phone</b>	<b>Fax</b>
<b><u>Bogota</u></b>	Maersk Colombia S.A	+57 1-6449600	+57 1-3760960
<b><u>Cali</u></b>	Maersk Colombia S.A.	+57 2-6618217	+57 2-6534871
<b><u>Medellin</u></b>	Maersk Colombia S.A.	+57 4-3134865	+57 4-3136884

<b><u>Buenaventura</u></b>	Maersk Colombia S.A.	+57 2-2411400	+57 2-2418683
<b><u>Cartagena</u></b>	Maersk Colombia S.A.	+57 5-6502405	+57 5-6502407
<b><u>Barranquilla</u></b>	Maersk Colombia S.A.	+57 5-3602936	+57 5-3607315
<b>POLAND</b>			
<b>City</b>	<b>Company</b>	<b>Phone</b>	<b>Fax</b>
<b><u>Gdynia</u></b>	Maersk Polska Sp. z o.o.	+48 58 6603939	+48 58 6603938
<b><u>Krakow</u></b>	Maersk Polska Sp. z o.o.	+48 12 4212006	+48 12 4228727
<b><u>Warsaw</u></b>	Maersk Polska Sp. z o.o.	+48 22 5414250	+48 22 5414251

Polish sea operators:

2. MAG (Morska Agencja Gdynia Sp. z o.o.)

ul. T. Wendy 15  
81-341 Gdynia  
Phone: (+48 58) 661 41 41  
Fax: (+48 58) 621 06 08  
E-mail: [mag@mag.gdynia.pl](mailto:mag@mag.gdynia.pl)  
[www.mag.gdynia.pl](http://www.mag.gdynia.pl)

3. Okmarit Sp. z o.o.

Armii Krajowej 30 street  
81-366 Gdynia  
Phone: (+48 58) 661 22 61  
Fax: (+48 58) 661 69 65  
E-mail: [okmarit@itnet.pl](mailto:okmarit@itnet.pl);  
[www.okmarit.com.pl](http://www.okmarit.com.pl)

4. Pomorscy Maklerzy Okrętowi Sp. z o.o.

ul. Chopina 6  
81-752, Sopot  
Phone: (+48 58) 550 20 62  
Fax: (+48 58) 550 20 18  
E-mail: [psb@transnet.info.pl](mailto:psb@transnet.info.pl)

**AIR TRANSPORTATION:**

5. LOT Cargo agent in the Netherlands:  
[www.lot.com](http://www.lot.com)  
Zygene European Freight Consult BV.  
Flamingoweg 31, room 316,  
1118 EE Schiphol-Zuid, The Netherlands.

Tel : 31-(0)-20-6530007  
Fax : 31-(0)-20-6530581  
E-Mail : [jos@zygene.nl](mailto:jos@zygene.nl)  
[www.zygene.nl](http://www.zygene.nl)

6. KLM Cargo in the Netherlands:  
[www.klmcargo.com](http://www.klmcargo.com)  
**Schiphol Airport**  
Building 551  
PO Box 7700  
1177 ZL  
Tel.: (31) 206498000  
Fax.: (31) 206494553  
E-mail: Customer-Service.SPL@KLMCARGO.COM

**Rotterdam**  
Arlandabaan platformzijde 52 3045 AB  
PO Box 12039  
3004 GA  
Tel.: (31) 104379455  
Fax.: (31) 104370731  
E-mail: Customer-Service.RTM@KLMCARGO.COM

**ROAD TRANSPORTATION:**

7. **Raben Transport Spółka z o.o.**  
ul. Poznańska 71  
62-023 Gądkki k/Poznania  
tel.: +48 (61) 650 65 00  
fax: +48 (61) 650 65 01  
e-mail: [transport@raben-group.com](mailto:transport@raben-group.com)  
[www.raben-group.com](http://www.raben-group.com)
8. **Cargo Sped**  
ul. Bokserska 66  
02-690 Warszawa  
tel.: +48 22 455 76 00  
e-mail: [warszawa@cargosped.pl](mailto:warszawa@cargosped.pl)  
[www.cargosped.com.pl](http://www.cargosped.com.pl)
9. **AXA**  
ul. Bukowiecka 92  
03-893 Warszawa  
tel.: +48 22 678 88 22  
e-mail: [info@axa.waw.pl](mailto:info@axa.waw.pl)  
[www.axa.waw.pl](http://www.axa.waw.pl)

## 8. Recommendations to the exporter

As a member of the EU, Poland has an opportunity to enhance and substantiate trading relations with Colombia and other South American countries. This is mainly due to the “Strategy of the Republic of Poland for cooperation with developing countries” which focuses on 4 priority countries (Brazil, Argentina, Mexico and Chile) and 2 countries of great importance (Venezuela and Colombia).

Over 82% of Polish import from Colombia is established by three groups of products: bananas, coffee and coffee extracts. This record shows that the Polish market is interested in Colombian coffee products. In the above mentioned strategy, the Polish government defines the indices for successful further cooperation, as well as threats that may disturb one. In the first group relative sustainable economic growth should be placed, along with very good scientific and cultural exchange and also a good relationship and level of cooperation between Colombia and the European Union. Among potential risks are listed: weak internal demand, lack of permanently in force tax law, political volatility and a high level of organized crime, attached to drugs issues in Colombia. However cooperation with the EU and the general situation of trade and exchange between Poland and Colombia in specific looks promising.

It is highly recommendable to encourage Colombian entrepreneurs to enter the Polish market. On one hand, the country has developed a status of a fully reliable partner, especially thanks to accession to the EU. All the regulations for import and customs, regarding the membership, are now unified with a majority of European countries, only a few matters are still treated separately. The formalities are sometimes facilitated, especially for non-Community countries, for example through possibility to benefit from the free zone in the country of imports destination. On the other hand Poland still has its own currency (weaker than the euro, therefore cheaper) and it is still a market with gaps that can easily be filled by new suppliers to the market. The market share of instant coffee is growing, which indicates that a gap in the market is the “convenience” sector, which included instant coffee and mixes.

The consumer demand is still being formed. There is one area that needs special attention in this matter: the fact that Poles do not have a culture of coffee drinking. The percentage of people in Poland willing to buy coffees from the *premium* segment (high quality coffees) is still small. Therefore it is essential to emphasize that the *upper* and *super premium* segment of coffee market in Poland should be explored.

The Polish coffee market is based on war of prices, meaning that consumers' first indicator of choice is a price. The cheapest products from the sector sell the biggest amount of product. Therefore supermarket and hypermarkets should be perceived as an important channel of distribution, including cash & carry and discount shops. For the most prospective coffee market segment – the upper segment of the coffee market - products shops of exclusive coffee sales and particular brands' coffee bars are recommended.

The negative aspect of potential coffee export to Poland is a 22% VAT rate for the product. Also, the already established trademarks, may be present some kind of obstacle for entering the Polish coffee market. However, adequate strategy of a particular company could easily overcome them.

The domination of companies with foreign capital in the Polish market is strong. However the role of national companies is very important, especially in not traditional coffee segments like special coffee sector (cappuccino). The competition from the side of local companies should also be seriously taken into account.

The low level of coffee consumption in Poland should be considered as a chance for new market possibilities. The gap between Polish and European consumers which amounts to 5-10 kg is an opportunity awaiting. Especially when focussing on mixed coffees of various specialities, such as cappacucino or wiener melange. These also blend in perfectly with the coffee drinking habit of the Poles to pour hot water over their coffee.

If the coffee drinking culture in Poland is cultivated and their interest in special coffees and flavours develops further, export potential for Colombian coffee producers could possibly lie ahead.



## Annexes

### Annex 1: Health inspection application form

ZAL4CZNIK Nr 1

- WZÓR/FORM -  
RZECZPOSPOLITA POLSKA/REPUBLIC OF POLAND  
SWIADECTWO/CERTIFICATE  
Nr/No /  
(rok/year)

JAKOSCI ZDROWOTNEJ SRODKA SPOZYWCZEGO/DOZWOLONEJ SUBSTANCJI  
DODATKOWEJ/SKLADNIKA ZYWNOSCI/MATERIALU LUB WYROBU PRZEZNACZONEGO DO  
KONTAKTU  
Z ZYWNOSCIA<sup>\*)</sup> PRZEKRACZAJACEGO GRANICE<sup>4</sup>  
/OF HEALTH QUALITY OF FOODSTUFF/AUTHORIZED ADDITIVE/OTHER FOOD  
INGREDIENT/MATERIAL OR ARTICLE INTENDED TO COME INTO CONTACT WITH  
FOODSTUFFS<sup>\*)</sup> WHICH CROSS THE BORDER

#### I. IDENTYFIKACJA PARTII/IDENTIFICATION OF BATCH<sup>1)</sup>:

Nazwa środka spożywczego/dozwolonej substancji dodatkowej  
/składnika żywności/materiału lub wyrobu przeznaczonego do  
kontaktu z żywnością\*/Name of foodstuff/authorized additive  
/other food ingredient/material or article intended to come  
into contact with foodstuffs :

.....

Kod CN, oznaczenia/Code, notation:

Kraj pochodzenia (w przypadku przywozu)/Country of origin (in  
case of import):

Kraj przywozu/Country of importation:

Wielkość partii, waga brutto /netto/Batch size, weight gross  
/net:

Wielkość i rodzaj/ilość opakowań/Packing size and type  
/quantity:

Data minimalnej trwałości/termin przydatności do spożycia<sup>\*)</sup>

/Minimum expiration date/the date of their appropriateness for  
consumption\*:

Irodek transportu/Mean of transport:

Osoba odpowiedzialna za towar/Person responsible for goods:...

Producent/Producer:

Numer zgłoszenia/spedytor/Declaration number/forwarder:

Przewidywany termin przekroczenia granicy/Date of border  
crossing:

Przejsie graniczne/Border check point:

Towar<sup>\*\*) /Goods<sup>\*\*) :</sup></sup>

przeznaczony do wolnego obszaru celnego/składu  
wolnocłowego/innego niż Rzeczpospolita Polska państwa  
członkowskiego Unii Europejskiej /intended to duty free  
zone/duty-free warehouse/Member States other than Republic  
of Poland

spełnia wymagania w zakresie jakości zdrowotnej określone w  
ustawie z dnia 11 maja 2001 r. o warunkach zdrowotnych  
żywności i żywienia/fulfills health quality requirements  
specified in Act of 11<sup>th</sup> May 2001 on health conditions of  
food and nutrition

Podmiot zgłaszający towary  
do granicznej kontroli sanitarnej  
/Subject declaring goods  
for border sanitary control

.....  
(pieczęć, imię i nazwisko,  
podpis /stamp, name and surname,  
signature)

**II. SWIADECTWO JAKOSCI GRANICZNEJ KONTROLI SANITARNEJ  
/CERTIFICATE OF HEALTH QUALITY<sup>2)</sup>**

W wyniku przeprowadzonej w dniu... granicznej kontroli sanitarnej obejmującej: kontrolę dokumentów/ogłódziny partii/badania laboratoryjne wykonanej w dniu.....Państwowym Graniczny/Powiatowy Inspektor Sanitarny w .....na podstawie art. 41 ust. 4 pkt 1 ustawy z dnia 11 maja 2001 r. o warunkach zdrowotnych żywności i żywienia (Dz. U. Nr 63, poz. 634, z późn. zm.), stwierdza, że zgłoszony do granicznej kontroli sanitarnej<sup>1)</sup>.  
/As a result of border sanitary control conducted in (date), which included: assessment of documentation/inspection of foodstuff's batch/laboratory tests done on ...(date) State Border/Poviat Sanitary Inspector in (city), pursuant to article 41 par. 4 point 1 of the Act of 11<sup>th</sup> May 2001 on health condition of food and nutrition (OJ 2001/63/634 with amend.), certifies that declared to border sanitary control<sup>1)</sup>:

Srodek spożywczy/dozwolona substancja dodatkowa/składnik żywności /Foodstuff/authorized additive/other food ingredient :

spełnia wymagania w zakresie jakości zdrowotnej/fulfils the requirements of health quality

nie spełnia wymagań w zakresie jakości zdrowotnej i nie może być przeznaczony do spożycia przez ludzi/does not fulfil the requirements of health quality and shall not be intended for human consumption

inne przeznaczenie (określić jakie)/other destination (define)

nie wyrażono zgody na przywóz/wywóz z powodu/have not been permitted for export/import in case of

może być przeznaczony do wolnego obrotu na terytorium Unii Europejskiej/shall be intended for free trade in the European Union

Materiał/wyrób przeznaczony do kontaktu z żywnościami<sup>3)</sup> /Material/article intended to come into contact with foodstuffs<sup>3)</sup>:

spełnia wymagania w zakresie jakości zdrowotnej/fulfils the requirements of health quality

nie spełnia wymagań w zakresie jakości zdrowotnej i nie może być przeznaczony do kontaktu z żywnościami/does not fulfil the requirements of health quality and shall not be intended to contact with foodstuffs

może być przeznaczony do wolnego obrotu na terytorium Unii Europejskiej/shall be intended for free trade in the European Union

**Przeznaczenie towaru (w przypadku niespełnienia wymagań)<sup>4)</sup>**  
/Destination of goods (in case of unfulfilment of requirements)<sup>4)</sup>:

do zwrotu przez/for withdrawal through

do zniszczenia przez/for destroy through

inne przeznaczenie (określić jakie)/other destination (specify)

.....  
(miejsce i data wydania (podpis i pieczęć państwowego  
/place and date of issuance) sanitarnego inspektora  
/signature and stamp of State  
Sanitary Inspector)

pieczęć okrągła organu  
Państwowej Inspekcji Sanitarnej  
/round stamp of the State Sanitary  
Inspection Body:

<sup>1)</sup> Wypełnia zgłaszający towar do granicznej kontroli sanitarnej/Fills one who declare goods to border sanitary control.

<sup>2)</sup> Wypełnia organ Państwowej Inspekcji Sanitarnej/Fills the State Sanitary Inspection Body.

<sup>3)</sup> Niepotrzebne skreślić/Delete if inapplicable.

<sup>4)</sup> Właściwie zaznaczyć/Mark appropriate.

ZAL4CZNIK Nr 2

- WZÓR/FORM -  
RZECZPOSPOLITA POLSKA/REPUBLIC OF POLAND  
SWIADECTWO/CERTIFICATE

Nr/No        /  
(rok/year)

O PRZYDATNOSCI DO PRODUKCJI SUBSTANCJI POMAGAJĄCEJ W PRZETWARZANIU /O/  
APPROPRIATENESS FOR MANUFACTURING OF PROCESSING AID

I. IDENTYFIKACJA PARTII/IDENTIFICATION OF **BATCH**<sup>1</sup>:

Nazwa substancji/Name of processing aid:  
.....

Kraj pochodzenia (w przypadku przywozu)/Country of origin (in  
case of import):

Kraj przywozu/Country of importation:

Wielkość partii/Batch size:

Wielkość i rodzaj opakowań/Packing size and type:        \*)

Data minimalnej trwałości/termin przydatności do spożycia  
/Minimum expiration date/the date of their appropriateness for  
consumption :

Kod, oznaczenia/Code, notation:

Irodek transportu/Mean of transport:

Osoba odpowiedzialna za towar/Person responsible for goods: ...  
.....

Producent/Producer:

Numer zgłoszenia/spedytor/Declaration number/forwarder:

Przewidywany termin przekroczenia granicy/Date of border  
crossing:

Przejście graniczne/Border check point:

Towar<sup>\*\*) /Goods<sup>\*\*) :</sup></sup>

- przeznaczony do wolnego obszaru celnego/składu wolnocłowego  
/innego niż Rzeczpospolita Polska państwa członkowskiego  
Unii Europejskiej/intended to duty free zone/duty free        \*)  
warehouse/Member States other than Republic of Poland
- spełnia wymagania w zakresie jakości zdrowotnej określone w  
ustawie z dnia 11 maja 2001 r. o warunkach zdrowotnych  
żywności i żywienia/fulfil health quality requirements  
specified in Act of 11<sup>th</sup> May 2001 on health conditions of  
food and nutrition

Podmiot zgłaszający towary  
do granicznej kontroli sanitarnej  
/Subject declaring goods  
for border sanitary control

.....  
(pieczęć, imię, i nazwisko, podpis  
/stamp, name and surname, signature)

**II. SWIADECTWO O PRZYDATNOSCI DO PRODUKCJI SUBSTANCJI  
POMAGAJACEJ W PRZETWARZANIU/CERTIFICATE OF APPROPRIATENESS  
FOR MANUFACTURING OF PROCESSING AID<sup>2)</sup>**

W wyniku przeprowadzonej w dniu \_\_\_\_\_ kontroli sanitarnej,  
Państwowy Graniczny/Powiatowy Inspektor Sanitarny w  
na podstawie art. 41 ust. 4 pkt 2 ustawy z dnia 11 maja 2001 r.  
o warunkach zdrowotnych żywności i żywienia (Dz. U. Nr 63, poz.  
634, ze zm.), stwierdza, że obj- ta świadectwem substancja

\_\_\_\_\_ <sup>\*\*) .</sup>  
pomaga- ca w przetwarzaniu

/As a result of border sanitary control conducted in  
(date), State Border/Powiat Sanitary Inspector in  
(city), pursuant to article 41 par. 4 point 2 of the Act of  
11<sup>th</sup> May 2001 on health condition of food and nutrition (OJ  
2001/63/634 with amend.), certifies that processing aid  
included in certificate <sup>\*\*) .</sup>

- spełnia wymagania i jest przydatna do produkcji/fulfils the requirements and is appropriate for manufacturing
- nie spełnia wymagań i nie mote być stosowana do produkcji żywnosci/does not fulfil the requirements and is not appropriate for manufacturing
- mote być przeznaczona do wolnego obrotu na terytorium Unii Europejskiej/shall be intended for free trade in the European Union

**Przeznaczenie towaru (w przypadku niespełnienia wymagań) /Destination of goods (in case of unfulfilment of requirements) <sup>\*\*) .</sup>**

- do zwrotu przez/for withdraw through
- do zniszczenia przez/for destroy through
- inne przeznaczenie/other destination

.....  
(miejsce i data wydania \_\_\_\_\_) (podpis i pieczęć państwowego  
/place and date of issuance) \_\_\_\_\_ sanitarnego inspektora  
/signature and stamp of State  
Sanitary Inspector)

pieczęć okręga i organu  
Państwowej Inspekcji Sanitarnej  
/round stamp of the State Sanitary  
Inspection Body:

---

<sup>1)</sup> Wypełnia zgłaszaj- cy towar do granicznej kontroli sanitarnej/Fills one who declare goods to border sanitary control.

<sup>2)</sup> Wypełnia organ Państwowej Inspekcji Sanitarnej/Fills the State Sanitary Inspection Body.

<sup>\*)</sup> Niepotrzebne skreślić/Delete if inapplicable.

<sup>\*\*)</sup> Właściwe zaznaczyć/Mark appropriate.

**Annex 2: Certificate of origin form A**

1 Consignor (Space reserved for translation)	No. 000000	<b>ORIGINAL</b>
	(Space reserved for issuing number)	(Space reserved for translation)
2 Consignee (Space reserved for translation)	<b>EUROPEAN COMMUNITY</b> (Space reserved for translation)	
	<b>CERTIFICATE OF ORIGIN</b> (Space reserved for translation)	
	3 Country of Origin (Space reserved for translation)	
4 Transport details (Optional) (Space reserved for translation)	5 Remarks (Space reserved for translation)	
6 Item number; marks, numbers, number and kind of packages; description of goods (Space reserved for translation)	7 Quantity (Space reserved for translation)	
8 THE UNDERSIGNED AUTHORITY CERTIFIES THAT THE GOODS DESCRIBED ABOVE ORIGINATE IN THE COUNTRY SHOWN IN BOX 3 (Space reserved for translation)		
Place and date of issue, name, signature and stamp of competent authority (Space reserved for translation)		

**Annex 3: DV1 Form**

EUROPEAN COMMUNITY **DECLARATION OF PARTICULARS RELATING TO CUSTOMS VALUE** **D.V.**

<b>1 NAME AND ADDRESS OF SELLER</b> (Block Letters)	FOR OFFICIAL USE			
<b>2 (a) NAME AND ADDRESS OF BUYER</b> (Block Letters)				
<b>2 (b) NAME AND ADDRESS OF DECLARANT</b> (Block Letters)				
<b>IMPORTANT NOTE</b> By signing and lodging the declaration the declarant accepts responsibility for the accuracy and completeness of the particulars given on this form and on any continuation sheet lodged with it and the authenticity of any document produced in support. The declarant also accepts responsibility to supply any additional information or document necessary to establish the customs value of the goods.	<b>3 Terms of delivery</b>			
	<b>4 Number and date of invoice</b>			
	<b>5 Number and date of contract</b>			
<b>6 Number and date of any previous Customs decision concerning boxes 7 to 9</b>		<b>Enter X where applicable</b>		
<b>7 (a)</b> Are the buyer and seller RELATED in the sense of Article 143 (*) of Regulation (EEC) No 2454/93? If 'NO', go to box 8. <b>(b)</b> Did the relationship INFLUENCE the price of the imported goods? <b>(c)</b> (reply optional) Does the transaction value of the imported goods CLOSELY APPROXIMATE to a value mentioned in Article 29 (2) (b) of Regulation (EEC) No 2913/92? If 'Yes', give details:		<input type="checkbox"/> YES <input type="checkbox"/> NO  <input type="checkbox"/> YES <input type="checkbox"/> NO  <input type="checkbox"/> YES <input type="checkbox"/> NO		
<b>8 (a)</b> Are there any RESTRICTIONS as to the disposition or use of the goods by the buyer, other than restrictions which: - are imposed or required by law or by the public authorities in the Community, - limit the geographical area in which the goods may be resold, or - do not substantially affect the value of the goods? <b>(b)</b> Is the sale or price subject to some CONDITION or CONSIDERATION for which a value cannot be determined with respect to the goods being valued? Specify the nature of the restrictions, conditions or considerations as appropriate:		<input type="checkbox"/> YES <input type="checkbox"/> NO  <input type="checkbox"/> YES <input type="checkbox"/> NO		
If the value of conditions or considerations can be determined, indicate the amount in box 11(b).				
<b>9 (a)</b> Are any ROYALTIES and LICENCE FEES related to the imported goods payable either directly or indirectly by the buyer as a condition of the sale?  <b>(b)</b> Is the sale subject to an arrangement under which part of the proceeds of any subsequent RESALE, DISPOSAL or USE accrues directly or indirectly to the seller?  If 'YES' to either of these questions, specify conditions and, if possible, indicate the amounts in boxes 15 and 16		<input type="checkbox"/> YES <input type="checkbox"/> NO  <input type="checkbox"/> YES <input type="checkbox"/> NO		
<b>(*) NOTES TO BOX 7</b> 1. PERSONS SHALL BE DEEMED TO BE RELATED ONLY IF: (a) they are officers or directors of one another's businesses; (b) they are legally recognized partners in business; (c) they are employer and employee; (d) any person directly or indirectly owns, controls or holds 5% or more of the outstanding voting stock or shares of both of them; (e) one of them directly or indirectly controls the other; (f) both of them are directly or indirectly controlled by a third person; (g) together they directly or indirectly control a third person; or (h) they are members of the same family. 2. The fact that the buyer and the seller are related need not preclude the use of a transaction value (see Article 29 (2) of Regulation (EEC) No 2913/92 and the Interpretative Notes on that provision in Annex 23).				
<b>10 (a)</b> Number of continuation sheets D.V. 1 BIS attached  <b>10 (b) Place:</b> Date: Signature:				

FOR OFFICIAL USE			
		Item	Item
<b>A. Basis of calculation</b>	<b>11 (a) Net price in CURRENCY OF INVOICE</b> (Price actually paid or price payable for settlement at the material time for valuation for customs purposes) . . . . .		
	(b) Indirect payments – see box 8 (b) . . . . . (rate of exchange: _____ )		
	<b>12 Total A in NATIONAL CURRENCY</b> . . . . .		
<b>B. ADDITIONS: Costs in NATIONAL CURRENCY NOT INCLUDED in A above (*)</b>  <b>QUOTE BELOW</b> previous relevant Customs decisions, if any:	<b>13 Costs incurred by the buyer:</b> (a) commissions, except buying commissions . . . . .		
	(b) brokerage . . . . .		
	(c) containers and packing . . . . .		
	<b>14 Goods and services supplied by the buyer free of charge or at reduced cost for use in connection with the production and sale for export of the imported goods:</b>  The values shown represent an apportionment where appropriate.		
	(a) materials, components, parts and similar items incorporated in the imported goods . . . . .		
	(b) tools, dies, moulds and similar items used in the production of the imported goods . . . . .		
	(c) materials consumed in the production of the imported goods . . . . .		
	(d) engineering, development, artwork, design work and plans and sketches undertaken elsewhere than in the Community and necessary for the production of the imported goods . . . . .		
	<b>15 Royalties and licence fees – see box 9 (a)</b> . . . . .		
	<b>16 Proceeds of any subsequent resale, disposal or use accruing to the seller – see box 9 (b)</b> . . . . .		
	<b>17 Costs of delivery to _____ (place of introduction)</b> (a) transport . . . . .		
	(b) loading and handling charges . . . . .		
	(c) insurance . . . . .		
		<b>18 Total B</b> . . . . .	
<b>C. DEDUCTIONS: Costs in NATIONAL CURRENCY INCLUDED in A above (*)</b>	<b>19 Costs of transport after arrival at place of introduction</b> . . . . .		
	<b>20 Charges for construction, erection, assembly, maintenance or technical assistance undertaken after importation</b> . . . . .		
	<b>21 Other charges (specify)</b> _____		
	<b>22 Customs duties and taxes payable in the Community by reason of the importation or sale of the goods</b> . . . . .		
		<b>23 Total C</b> . . . . .	
	<b>24 VALUE DECLARED (A + B – C)</b> . . . . .		
(*) Where amounts are payable in FOREIGN CURRENCY, indicate in this section the amount in foreign currency and the rate of exchange by reference to each relevant element and item.			
Reference	Amount	Rate of exchange	

Annex 4: Single Administrative Document (SAD)

EUROPEAN COMMUNITY					A OFFICE OF DESTINATION			
Copy for the consignee	8 2 Consignor/Exporter No <input type="checkbox"/>				1 DECLARATION			
					3 Forms	4 Loading lists		
					5 Items	6 Total packages	7 Reference number	
	8 Consignee No				9 Person responsible for financial settlement No			
					10 Country last consigned	11 Trad./Prod. country	12 Value details	13 CAP
	14 Declarant/Representative No				15 Country of dispatch/export		17 Country destn. Code	
					16 Country of origin		17 Country of destination	
	18 Identify and nationality of means of transport on arrival				19 Ctr	20 Delivery terms		
	21 Identify and nationality of active means of transport crossing the border				22 Currency and total amount invoiced		23 Exchange rate	24 Nature of transaction
	25 Mode of transport at the border				26 Inland mode of transport	27 Place of unloading		28 Financial and banking date
8 29 Office of entry				30 Location of goods				
31 Packages and description of goods	Marks and numbers — Container No(s) — Number and kind				32 Item No	33 Commodity Code		
					34 Country origin Code	35 Gross mass (kg)	36 Preference	
					37 PROCEDURE	38 Net mass (kg)	39 Quota	
					40 Summary declaration/Previous document			
					41 Supplementary units	42 Item price	43 VM Code	
44 Additional information: Documents produced/ Certificates and authorisations					A.I. Code		45 Adjustment	
					46 Statistical value			
47 Calculation of taxes	Type	Tax base	Rate	Amount	MP	48 Deferred payment		
						49 Identification of warehouse		
					B ACCOUNTING DETAILS			
50 Principal No					Signature			
					C OFFICE OF DEPARTURE			
51 Intended offices of transit (and country)	represented by							
	Place and date:							
52 Guarantee not valid for					Code 53 Office of destination (and country)			
J CONTROL BY OFFICE OF DESTINATION					54 Place and date			
					Signature and name of declarant/representative			



**Annex 5: Photo material**

**INSTANT COFFEES**

Jacobs Coffee



ALU laminated bag (100 g),  
PLN 11,25 (EUR 2,88)

Glass jar (100 g)  
PLN 9,99 (EUR 2,56)

**Proexport Colombia**

Nescafe



Glass jar (100 g)

PLN 10,69 (EUR 2,74)



3-in-1 One-serving paper bag (10 one-servings)

PLN 6,99 (EUR 1,79)

Maxwell House

Glass jar (200 g)  
PLN 14,49 (EUR 3,71)



Glass jar (100 g)  
PLN 7,99 (EUR 2,05)



Tchibo

Glass jar (100 g)  
PLN 8,79 (EUR 2,25)

Glass jar (200 g)  
PLN 22,99 (EUR 5,89)





Glass jar (200 g)  
PLN 22,99 (EUR 5,89)



3-in-1 One-serving paper bag (10 one-  
servings)  
PLN 5,99 (EUR 1,53)

Prima

Elite



Glass jar (100 g)  
PLN 4,29 (EUR 1,09)

Glass jar (100 g)  
PLN 6,49 (EUR 1,66)

**GROUND COFFEES AND BEANS**

Jacobs



Pack (500 g)  
PLN 15,35 (EUR 3,93)



ALU bag (100 g)  
PLN 3,69 (EUR 0,95)

**Maxwell House**



Pack (500 g)  
PLN 7,19 (EUR 7,19)



ALU bag (100 g)  
PLN 1,79 (EUR 0,46)



Tchibo



ALU bag (100g)  
PLN 3,29 (EUR 0,84)

Pack (250 g)  
PLN 4,99 (EUR 1,28)

Prima (Douwe Egberts)



ALU bag (250 g)  
PLN 4,59 (EUR 1,17)

ALU bag (100 g)  
PLN 1,49 (EUR 0,38)

Gala

Woseba



Pack (250 g)  
PLN 3,89 (EUR 0,99)

Metal can (500 g)  
PLN 14,99 (EUR 3,82)

Woseba



Pack (250 g)  
PLN 5,99 (EUR 1,53)

ALU bag (250 g)  
PLN 4,49 (EUR 1,15)

Astra



ALU bag (250 g)  
PLN 8,99 (EUR 2,30)

ALU bag (250 g)  
PLN 11,69 (EUR 2,99)

Lavazza



Pack (250 g)  
PLN 13,49 (EUR 3,49)

Metal can (250 g)  
PLN 19,49 (EUR 4,99)

**Special coffees**

Jacobs

Mokate



Cappuccino, different flavours  
Pack 10 bags  
PLN 5,49 (EUR 1,41)

Wiener melange  
Pack 10 bags  
PLN 4,69 (EUR 1,20)



Cappuccino, different flavours  
ALU bag (100 g)  
PLN 3,19 (EUR 0,82)

Cappuccino  
ALU bag 10 one-servings  
PLN 4,99 (EUR 1,28)



Presto

Tchibo



Cappuccino vanilla flavour  
ALU back (100 g)  
PLN 2,29 (EUR 0,59)

Cappuccino, different flavours  
ALU bag (100 g)  
PLN 3,99 (EUR 1,02)

**Annex 6: Companies Directories**

Companies Directory Country: Poland Sector: Coffee					
Página Web	Idioma	Idioma del Contenido	Información General de Empresas Disponible sin Costo	Requiere Registro	Información Adicional con Costo
<b>Directorios Europeos</b>					
<a href="http://www.kompass.com/">http://www.kompass.com/</a>	E	E; I; O	<b>Contenido:</b> Nombre de la empresa; País; Dirección; Teléfono; Fax; Sitio Web; Numero de empleados; Fecha de constitución; Capital; No de registro; Identificación del IVA. <b>Descripción:</b> Información de empresas para 70 Países. <b>Opciones de Búsqueda:</b> País; Productos/Servicios; Empresa; Sector; Subsector; Marcas; Dirigentes; Códigos.	SI	SI
<a href="http://worldyellowpages.com/">http://worldyellowpages.com/</a>	I	I	<b>Contenido:</b> Nombre de la empresa; País; Dirección; Teléfono; Fax; E-mail; Sitio Web; Descripción corta de la empresa y sus productos. <b>Descripción:</b> Paginas amarillas - Lista alfabética de productos y servicios; lista de empresas; Permite acceder a las páginas amarillas de cada País; Acceso a una pagina de Información de negocios con algunos Países entre los que se encuentran Polonia y Republica Checa. <b>Opciones de Búsqueda:</b> País; Productos/Servicios; Empresa; Listado de productos; Listado de países; Oportunidades de negocio con algunos países.	SI	NO
<a href="http://www.europages.com/">http://www.europages.com/</a>	E; I; O	E; I; O	<b>Contenido:</b> Nombre de la empresa; País; Dirección; Teléfono; Fax; Sitio Web; Productos/Servicios. <b>Descripción:</b> Directorio en línea (en 25 idiomas) de la empresas europeas mas dinámicas; Consulta gratuita de las licitaciones publicadas en el diario oficial de la Unión Europea; Directorio impreso (en 6 idiomas) de los compradores europeos mas dinámicos; Directorio en CD-Rom (en 14 idiomas) de la empresas europeas mas dinámicas. Permite contactar las empresa vía intra mail. <b>Opciones de Búsqueda:</b> Productos/Servicios; Empresa; Temática; País; Sector.	SI	SI
<b>Directorios Polacos</b>					

Companies Directory Country: Poland Sector: Coffee					
Página Web	Idioma	Idioma del Contenido	Información General de Empresas Disponible sin Costo	Requiere Registro	Información Adicional con Costo
<a href="http://www.teleadreson.pl/">http://www.teleadreson.pl/</a>	P; I	P; I	<b>Contenido:</b> Nombre de la empresa; Nombre corto; Dirección; Ciudad; Zip Code; Nombre del contacto; Teléfono; Fax; Tipo de entidad; Estatus legal; E-mail; Sitio Web; Empleados; Año de fundación; NACE (No de Actividad de la Comunidad Europea); SIC (Clasificación Industrial Estándar). <b>Descripción:</b> Permite elegir los capítulos arancelarios como criterio de búsqueda de las empresas. <b>Opciones de Búsqueda:</b> Texto; NACE (No de Actividad de la Comunidad Europea); SIC (Clasificación Industrial Estándar); Estado nuevo - antiguo; Tipo de entidad; Año de Fundación; Numero de empleados.	NO	NO
<a href="http://www.panoramafirm.pl/">http://www.panoramafirm.pl/</a> - <a href="http://www.pf.pl">http://www.pf.pl</a>	P	P	<b>Contenido:</b> Nombre de la empresa; Dirección; Teléfono; Fax; Sitio Web; E-mail; Productos/Servicios. <b>Descripción:</b> Información de empresas polacas. Permite contactar las empresa vía mail. <b>Opciones de Búsqueda:</b> Texto; Sector (Categorías temáticas).	NO	NO
<a href="http://www.polishproducts.gov.pl/">http://www.polishproducts.gov.pl/</a> - <a href="http://www.polishproducts.gov.pl/">http://www.polishproducts.gov.pl/</a>	P	P	<b>Contenido:</b> Nombre de la empresa; Categoría; País; Dirección; Teléfono; Descripción. <b>Descripción:</b> Portal de promoción de exportaciones del ministerio de comercio polaco. <b>Opciones de Búsqueda:</b> Texto; País; Categoría.	NO	NO
<a href="http://www.polandcompany.com/">http://www.polandcompany.com/</a>	P; I; A	I; W	<b>Contenido:</b> Descripción corta de la empresa y sus productos; Link al sitio Web de cada empresa. <b>Descripción:</b> Portal descriptivo de las empresas polacas, clasificadas por Categorías de productos. <b>Opciones de Búsqueda:</b> Sector.	NO	NO
<a href="http://www.pkt.pl">www.pkt.pl</a>	P	P; I	<b>Contenido:</b> Nombre de la Empresa; Dirección; Teléfono; E-mail; Sitio Web; Sector; Productos/Servicios; Códigos; Mapa. <b>Descripción:</b> Información de empresas polacas. Permite contactar las empresa vía intra mail <b>Opciones de Búsqueda:</b> Texto; Sector; Productos/Servicios; Empresa	NO	SI
<a href="http://www.infodata.pl/">http://www.infodata.pl/</a>	P; I	P; I	<b>Contenido:</b> Nombre; Ciudad; Actividad o sector; Códigos de Identificación; VAT; Código postal; Teléfono; Fax; E-mail; Contacto; Sitio Web. <b>Descripción:</b> Base de datos de empresas polacas - InfoData. <b>Opciones de Búsqueda:</b> Negocios - Base de datos; Nombre de la empresa; Ciudad; Actividad.	NO	NO
<b>Directorios por Sector</b>					

Companies Directory Country: Poland Sector: Coffee					
Página Web	Idioma	Idioma del Contenido	Información General de Empresas Disponible sin Costo	Requiere Registro	Información Adicional con Costo
<a href="http://www.foodtrader.com/">http://www.foodtrader.com/</a>	I	I	<b>Contenido:</b> Información sobre potenciales compradores. <b>Descripción:</b> Pagina especializada en las industrias de alimentos y agricultura. <b>Opciones de Búsqueda:</b> Productos/Servicios; Categorías	SI	SI
<a href="http://www.foodnavigator.com/">http://www.foodnavigator.com/</a>	I	I	<b>Contenido:</b> Descripción corta de la empresa y sus líneas de productos; Sitio Web. <b>Descripción:</b> Página de noticias de Alimentos y Bebidas en Europa. Hay una suscripción gratuita para recibir vía e-mail noticias sobre las 100 empresas top de la industria de bebidas y alimentos. <b>Opciones de Búsqueda:</b> Noticias de Productos y proveedores; Por patrocinador.	NO	NO

**Idioma:**

**E:** Español; **I:** Ingles; **A:** Alemán; **C:** Checo; **H:** Húngaro; **P:** Polaco; **O:** Otros; **W:** Idioma del Sitio Web