

Dairy Products and Alternatives in Poland

September 2023

Table of Contents

Dairy Products and Alternatives in Poland

EXECUTIVE SUMMARY

Dairy products and alternatives in 2023: The big picture

Key trends in 2023

Competitive Landscape

Channel developments

What next for dairy products and alternatives?

MARKET DATA

- Table 1 Sales of Dairy Products and Alternatives by Category: Value 2018-2023
- Table 2 Sales of Dairy Products and Alternatives by Category: % Value Growth 2018-2023
- Table 3 NBO Company Shares of Dairy Products and Alternatives: % Value 2019-2023
- Table 4 LBN Brand Shares of Dairy Products and Alternatives: % Value 2020-2023
- Table 5 Penetration of Private Label by Category: % Value 2018-2023
- Table 6 Distribution of Dairy Products and Alternatives by Format: % Value 2018-2023
- Table 7 Forecast Sales of Dairy Products and Alternatives by Category: Value 2023-2028
- Table 8 Forecast Sales of Dairy Products and Alternatives by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baby Food in Poland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Declining birth rates negatively impact sales of baby food Innovations in baby food look to stimulate growth on a struggling landscape Slowing immigration negatively impacts growth of packaged baby food

PROSPECTS AND OPPORTUNITIES

Discounters rise, appreciated for competitive price points

The ongoing decline in birth rates poses challenges for packaged baby food Multinational companies to maintain dominance across the coming years

CATEGORY DATA

- Table 9 Sales of Baby Food by Category: Volume 2018-2023
- Table 10 Sales of Baby Food by Category: Value 2018-2023
- Table 11 Sales of Baby Food by Category: % Volume Growth 2018-2023
- Table 12 Sales of Baby Food by Category: % Value Growth 2018-2023
- Table 13 Sales of Growing-Up Milk Formula by Age: % Value 2018-2023
- Table 14 NBO Company Shares of Baby Food: % Value 2019-2023
- Table 15 LBN Brand Shares of Baby Food: % Value 2020-2023
- Table 16 Distribution of Baby Food by Format: % Value 2018-2023
- Table 17 Forecast Sales of Baby Food by Category: Volume 2023-2028
- Table 18 Forecast Sales of Baby Food by Category: Value 2023-2028
- Table 19 Forecast Sales of Baby Food by Category: % Volume Growth 2023-2028
- Table 20 Forecast Sales of Baby Food by Category: % Value Growth 2023-2028

Butter and Spreads in Poland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Creative strategies to combat high prices on the butter landscape Butter marketing campaigns look to boost consumption The declining popularity of cooking fats impacts sales

PROSPECTS AND OPPORTUNITIES

Dim prospects for cooking fats and minor growth for margarine Sustained market fragmentation across the forecast period The premiumisation trend to bolster Polish butter and spreads

CATEGORY DATA

- Table 21 Sales of Butter and Spreads by Category: Volume 2018-2023
- Table 22 Sales of Butter and Spreads by Category: Value 2018-2023
- Table 23 Sales of Butter and Spreads by Category: % Volume Growth 2018-2023
- Table 24 Sales of Butter and Spreads by Category: % Value Growth 2018-2023
- Table 25 NBO Company Shares of Butter and Spreads: % Value 2019-2023
- Table 26 LBN Brand Shares of Butter and Spreads: % Value 2020-2023
- Table 27 Distribution of Butter and Spreads by Format: % Value 2018-2023
- Table 28 Forecast Sales of Butter and Spreads by Category: Volume 2023-2028
- Table 29 Forecast Sales of Butter and Spreads by Category: Value 2023-2028
- Table 30 Forecast Sales of Butter and Spreads by Category: % Volume Growth 2023-2028
- Table 31 Forecast Sales of Butter and Spreads by Category: % Value Growth 2023-2028

Cheese in Poland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Innovations and marketing strategies abound in the Polish cheese sector Sustainability trends are rising, responding to consumer demands Marketing campaigns as a means to promote cheese consumption

PROSPECTS AND OPPORTUNITIES

Anticipated growth in goat cheese, which aligns to rising health trends Lactose-free cheese products and convenient packaging rise Increasing concentration amid fragmentation on the landscape

CATEGORY DATA

- Table 32 Sales of Cheese by Category: Volume 2018-2023
- Table 33 Sales of Cheese by Category: Value 2018-2023
- Table 34 Sales of Cheese by Category: % Volume Growth 2018-2023
- Table 35 Sales of Cheese by Category: % Value Growth 2018-2023
- Table 36 Sales of Spreadable Processed Cheese by Type: % Value 2018-2023
- Table 37 Sales of Soft Cheese by Type: % Value 2018-2023
- Table 38 Sales of Hard Cheese by Type: % Value 2018-2023
- Table 39 NBO Company Shares of Cheese: % Value 2019-2023
- Table 40 LBN Brand Shares of Cheese: % Value 2020-2023
- Table 41 Distribution of Cheese by Format: % Value 2018-2023
- Table 42 Forecast Sales of Cheese by Category: Volume 2023-2028
- Table 43 Forecast Sales of Cheese by Category: Value 2023-2028
- Table 44 Forecast Sales of Cheese by Category: % Volume Growth 2023-2028
- Table 45 Forecast Sales of Cheese by Category: % Value Growth 2023-2028

KEY DATA FINDINGS

2023 DEVELOPMENTS

Stimulating drinking milk product sales through innovative marketing campaigns

Mlekpol introduces new bottle caps to align to sustainability trends

Unfair contracts challenged by the Office of Competition and Consumer Protection

PROSPECTS AND OPPORTUNITIES

Consolidation and dominance of major brands on the Polish drinking milk landscape Shift in preferences towards diversified, value-added milk products Sustainability to grow in importance across the forecast period

CATEGORY DATA

- Table 46 Sales of Drinking Milk Products by Category: Volume 2018-2023
- Table 47 Sales of Drinking Milk Products by Category: Value 2018-2023
- Table 48 Sales of Drinking Milk Products by Category: % Volume Growth 2018-2023
- Table 49 Sales of Drinking Milk Products by Category: % Value Growth 2018-2023
- Table 50 NBO Company Shares of Drinking Milk Products: % Value 2019-2023
- Table 51 LBN Brand Shares of Drinking Milk Products: % Value 2020-2023
- Table 52 Distribution of Drinking Milk Products by Format: % Value 2018-2023
- Table 53 Forecast Sales of Drinking Milk Products Products by Category: Volume 2023-2028
- Table 54 Forecast Sales of Drinking Milk Products Products by Category: Value 2023-2028
- Table 55 Forecast Sales of Drinking Milk Products Products by Category: % Volume Growth 2023-2028
- Table 56 Forecast Sales of Drinking Milk Products Products by Category: % Value Growth 2023-2028

Yoghurt and Sour Milk Products in Poland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Significant players with diverse offerings lead Polish yoghurt Numerous innovations and product launches shape the Polish dairy market Sour milk products have sustained popularity in Poland

PROSPECTS AND OPPORTUNITIES

Sales of yoghurt in Poland to increase over the forecast period Innovations and marketing campaigns as main methods of stimulating sales Bright future for sour milk as product innovations will be present

CATEGORY DATA

- Table 57 Sales of Yoghurt and Sour Milk Products by Category: Volume 2018-2023
- Table 58 Sales of Yoghurt and Sour Milk Products by Category: Value 2018-2023
- Table 59 Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2018-2023
- Table 60 Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2018-2023
- Table 61 Sales of Flavoured Yoghurt by Flavour: Rankings 2018-2023
- Table 62 NBO Company Shares of Yoghurt and Sour Milk Products: % Value 2019-2023
- Table 63 LBN Brand Shares of Yoghurt and Sour Milk Products: % Value 2020-2023
- Table 64 Distribution of Yoghurt and Sour Milk Products by Format: % Value 2018-2023
- Table 65 Forecast Sales of Yoghurt and Sour Milk Products by Category: Volume 2023-2028
- Table 66 Forecast Sales of Yoghurt and Sour Milk Products by Category: Value 2023-2028
- Table 67 Forecast Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2023-2028
- Table 68 Forecast Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2023-2028

Other Dairy in Poland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Home cooking is promoting the ongoing sales of cream in Poland Rise of private labels in cream and coffee whiteners

Innovations focus on stimulating sales within cream

PROSPECTS AND OPPORTUNITIES

Added value efforts to sustain sales, particularly in fromage frais

A promising future for chilled dairy snacks due to rising indulgence and health trends

Continued fragmentation on the other dairy competitive landscape

CATEGORY DATA

Table 69 - Sales of Other Dairy by Category: Volume 2018-2023

Table 70 - Sales of Other Dairy by Category: Value 2018-2023

Table 71 - Sales of Other Dairy by Category: % Volume Growth 2018-2023

Table 72 - Sales of Other Dairy by Category: % Value Growth 2018-2023

Table 73 - Sales of Cream by Type: % Value 2018-2023

Table 74 - NBO Company Shares of Other Dairy: % Value 2019-2023

Table 75 - LBN Brand Shares of Other Dairy: % Value 2020-2023

Table 76 - Distribution of Other Dairy by Format: % Value 2018-2023

Table 77 - Forecast Sales of Other Dairy by Category: Volume 2023-2028

Table 78 - Forecast Sales of Other Dairy by Category: Value 2023-2028

Table 79 - Forecast Sales of Other Dairy by Category: % Volume Growth 2023-2028

Table 80 - Forecast Sales of Other Dairy by Category: % Value Growth 2023-2028

Plant-Based Dairy in Poland

KEY DATA FINDINGS

2023 DEVELOPMENTS

The continuous rise of plant-based dairy as consumer appreciate health benefits Numerous innovations within plant-based dairy fuelling performance

Private label is supporting the popularity of plant-based dairy

PROSPECTS AND OPPORTUNITIES

A focus on health and wellness boosts growth of plant-based foods

Projected innovations in Poland's plant-based dairy sector

R&D costs and competitive pressure leads to a potential slowdown

CATEGORY DATA

Table 81 - Sales of Plant-Based Dairy by Category: Value 2018-2023

Table 82 - Sales of Plant-Based Dairy by Category: % Value Growth 2018-2023

Table 83 - Sales of Other Plant-Based Milk by Type: % Value 2020-2023

Table 84 - NBO Company Shares of Plant-Based Dairy: % Value 2019-2023

Table 85 - LBN Brand Shares of Plant-Based Dairy: % Value 2020-2023

Table 86 - Distribution of Plant-Based Dairy by Format: % Value 2018-2023

Table 87 - Forecast Sales of Plant-Based Dairy by Category: Value 2023-2028

Table 88 - Forecast Sales of Plant-Based Dairy by Category: % Value Growth 2023-2028

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer
 trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with
 country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/dairy-products-and-alternatives-in-poland/report.