Foreign Agricultural Service
GAIN Report
Global Agriculture Information Network

Required Report - public distribution

Date: 11/15/2000

GAIN Report #PL0038

Poland

Retail Food Sector

2000

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Report Highlights:
As per capita income continues to increase in Poland its retail sector is developing rapidly. The number of foreign hypermarkets operating in Poland in 1999 reached 95 compared with 57 outlets in 1998. It is estimated that 83 additional hypermarkets will open in Poland by the end of 2003.

Includes PSD changes: No
Includes Trade Matrix: No
Annual Report
Warsaw [PL1], PL

Contents

I. MARKET SUMMARY

General Information

Compared to western Europe, the Polish retail chain is still very much dispersed, and according to the opinion of international analysts, the development of its structure is at the stage of west European retail trade in the sixties.

Dynamic changes in the domestic market, resulting in increasing competition in both production and trade sectors, have taken place during recent years. Companies trading in food products are undergoing particularly strong pressure, as this segment of the market has become an area of intensive penetration by foreign competitors.

Due to the lack of capital, weak financial situation and low profitability, Polish companies have lost the battle for the access to the food retail market. This may prevent them from using their own capital in order to modernize their future operations, which may lead to the mass liquidation of their businesses. This is why foreign companies are expected to play a particular strong role in trade development during the coming years.

Continuous economic growth, which started in 1991, has resulted in considerable improvement in the labor market, the domestic area financial situation, and in increased income of the population. Every year the real consumption value, covered by personal income in the domestic sector, increases.

According to the Ministry of Finance in the oncoming period of five years, the Polish economy will continue to develop at a similar rate as in recent years. This will create macro-economic conditions for a further increase in the income of the population. According to the State budget for 1999, the real increase in households income reached 3.4%, while the increase in trade turnover reached 11.8%.

Description of the retail trade

Ninety-one per cent of Polish shops are small outlets with an operating area of less than 50 sq.m. The fact that 98% of traders have no more than two shops also shows the dispersed structure of the trade. Organizations owning more than 20 shops form only 0.1% of the total number of companies operating in this sector.

The number of shops in 1995-1998 is shown in Table 1.

Table 1. Points of retail trade[1)] and gas stations in Poland in 1995-1998

Item	1995	1996	1997	1998
Shops Including:	**425,600**	**405,563**	**424,362**	**451,785**
Shops with an area over 400 sq.m	2,231	2,560	2,858	3,098
Food stores	126,752	137,338	140,811	147,207
Fruit and vegetable shops	6,950	6,315	6,470	6,935
Meat shops	15,600	14,041	14,315	15,056
Fish shops	1,408	1,400	1,508	1,619
Confectionery shops	4,34	3,198	3,520	3,773
Alcoholic beverage shops	5,311	2,991	2,830	2,731
Gas stations	5,344	6,018	6,548	7,253
Number of people per one shop	91	95	91	86

[1)] The statistical data covers: shops, open market stores, stores, market stalls, and movable points of sale.
Source: Statistical Yearbook, 1999

Polish trade was privatized a few years ago. In 1997 shops belonging to the public sector formed only 1% of the total number of local outlets.

The total turnover of this sector is shown in the Table 2.

Table 2. Retail sales (current prices) in m. US$ calculated at average annual exchange rate.

Years	Food products	Alcohol
1994	18.827	5.970
1995	23.083	7.205
1996	25.227	7.908
1997	24.629	7.318
1998	26.719	7.646

Source: Statistical Yearbook, 1999

The structure of the retail trade is shown in the Table 3.

Table 3. Structure of retail sales in Poland in 1995-1998 in % (current prices)

Description	1995	1996	1997	1998
TOTAL	100	100	100	100
Fruits and vegetables	2.2	1.9	1.8	1.7
Meat and processed meats	6.9	6.0	5.9	5.1
Fish and fish products	1.3	1.2	0.9	0.9
Alcoholic beverages	8.1	8.0	9.3	9.1
Non-alcoholic beverages	2.2	2.0	1.4	1.5
Milk, cheese, eggs	2.6	2.6	2.6	2.8
Bread and processed cereals	3.7	3.5	2.6	2.1
Sugar and confectionery	6.5	5.9	6.0	5.8
Coffee, tea, cocoa	1.9	1.7	1.9	1.6
Other food products	8.0	9.1	9.6	11.1
Non-food products	56.6	58.1	59.4	65.7

Source: Statistical Yearbook, 1999

The number of all shops remains at the same level, but numbers of different types of shop have been changed during the recent past.

From 1996 to 1998 the number of all food outlets decreased by 14%, of detergent-cosmetic shops by 6%, and of catering points, kiosks, and convenience shops by 5%. At the same time the number of non-food shops increased.

Food shops still form the most numerous group (31% of all shops). Food service outlets form 12%, kiosks 8%, and convenience shops 2%. Remaining shops (garments, stationary, book-shops, etc) form 47% of all retail selling points. The number of food shops systematically decreases every year. In 1998 the number dropped by 24% compared to 1994 (from 159,000 to 121,000). This process mainly affected small food shops (below 40 sq.m.) and specialized shops (meat, vegetable, confectionery, etc.). In both these categories the number of outlets decreased by 15% compared to 1996. During the last two years, a noticeable decrease in outlets (11%) also affected medium and large food shops (with selling space between 40 and 300 sq.m.)

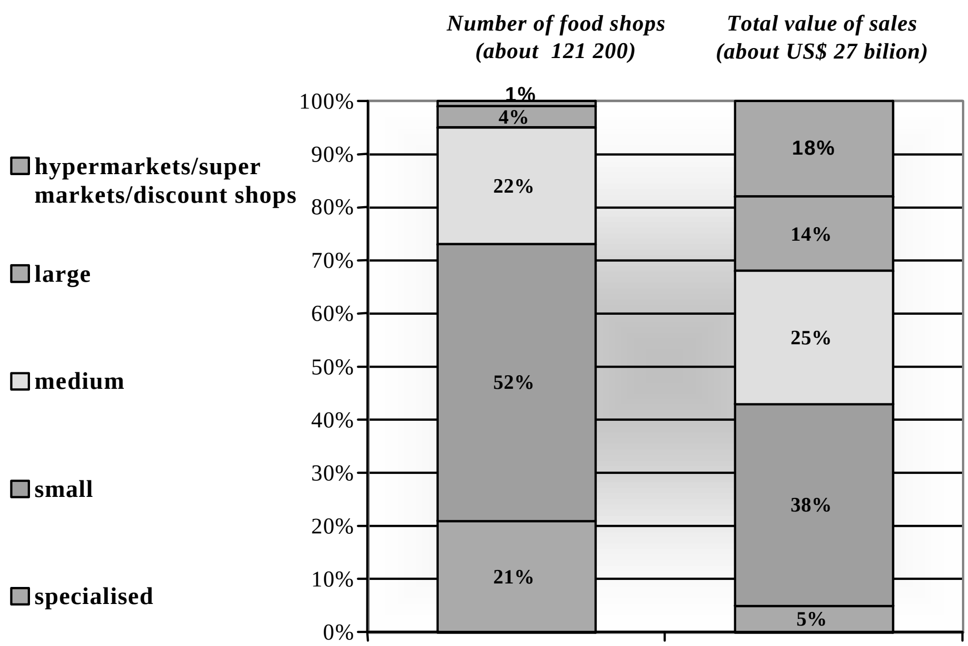
At the same time a dynamic development of large self-service shops (supermarkets and discount shops with an area of between 300 and 2,500 sq.m, and hypermarkets with an area of over 2,500 sq.m.) is taking place. In 1998 about 100 supermarkets and discount shops were opened, which means a 7% growth compared to 1995, and a 12% growth compared to 1996.

The structure of food shops has not changed much compared to previous years. Despite the decrease in the number of outlets, small and specialized shops still dominate Polish trade. Small food shops form 53% of all food outlets (50% a year earlier), medium and large shops form 25% (24% a year before), and specialized shops 21% (25%). For two years, shops with a large selling space (over 300 sq.m.) have constituted only 1% of the total number of food shops.

Structure of shops in 1998 and changes occurred in 1996-1997.

The continuous concentration in the Polish food trade results in a decreasing number of shops and in an increased share by large organizations in the total turnover. The share of the largest shops in the total turnover of food products increased from 13% in 1997 to 18% in 1998. Other types of shops decreased their market share. Large food shops' share dropped from 15% to 14%, medium food shops reduced their share from 27% to 25%, small outlets from 39% to 38%, and specialized shops from 6% to 5%.

Figure 1. Structure of food shops by share in total value of sales



Twenty six per cent of shops, i.e. supermarkets, hypermarkets, and other large outlets accounted for 57% of the turnover of food products, while small shops, which form 52% of all outlets, achieve 38% of the turnover.

Open markets still play a significant role in Polish retail trade. In 1997 there were estimated 2,412 permanent markets and 129,000 points of sale (30% of all shops) registered and operating. This means that a considerable part of the domestic turnover is achieved by outlets selling in markets. The structure of markets in terms of the scope of activities has not changed for many years. Over 85% of the markets carry out retail activities, the remainder dealing with wholesale trade. The majority of goods sold in the markets is supplied by local producers. In central Poland 40% of shops belong to the producers. In the western part of the country this share is definitely lower.

An opportunity to shop in hypermarkets appeared in Poland five years ago. Today this is a normal way of shopping for most of the population living in big towns. During the recent years the hypermarkets have been undergoing very dynamic development. At first, 27 hypermarkets were opened in 1993-1996. These were individual outlets with an average area of 2,500 to 5,000 sq.m. During the period 1997-98, 30 new hypermarkets were opened. It became a rule that they were a part of a shopping center with small boutiques, restaurants, and other outlets. The average selling space of a hypermarket ranged between 6,000 and 14,000 sq.m, with the area of the neighboring outlets amounting to 2,000 – 8,000 sq.m.

Retail Market Situation during 1999

Number of permanent retail outlets in 1999

Total number of retail outlets: ±377,000

grocery	**chemical**	**alternative cosmetic**	**other channels**
117,400	**21,000**	**78,400**	**160,000**
* Hypermarkets * Supermarkets * Discount stores * Grocerylarge * Grocery medium * Grocery small * Specialist food	* Chemical stores * Cosmetic stores * Perfumeries * Pharmacies * Natural + herbal stores	* HoReCa* * Kiosks (with press) * Convenience outlets * Petrol stations (with stores)	* All other retail outlets (excl.“service" outlets)

HoReCa - Hotels, Restaurants, Catering outlets

Source:CAL Company Assistance

During 1999 hypermarkets showed the highest dynamics of growth. At the end of the year their total number amounted to 95 as compared with the figure of 57 outlets which operated in 1998. It is expected that 83 hypermarkets will be opened by the end of 2002. The average selling space of hypermarkets will increase to 8,000 – 18,000sq.m., and the area of the shopping centers, where supermarkets will be located, will reach 10,000 – 35,000 sq.m.

This change had the biggest effect on small, mostly Polish owned, private shops. It has been reported that as many as 20,000 such shops went bankrupt during 1999.

Expected changes in the retail trade

It is expected that the next five years will show very dynamic changes in retail trade, which will lead to essential structural changes.

The following changes are expected in the retail trade:

- increased importance of large-area trade outlets in the structure and in turnover of the retail trade,
- increased importance of companies owning chains of shops,
- decreased number of small retail outlets
- integration process among small and medium companies.

It is expected that the dynamics of development of hypermarkets and discount shops will be higher than that of other shops. In five years time Hyper and supermarket chains will become the leaders in the retail trade in food products. Given the limited investment possibilities for the local companies, a rapid growth in market share by foreign companies seems to be obvious.

Import conditions

In 1999, retail food products imported from the United States constituted 3.2% of all imported food products. Total imports of all agricultural products from the United States in 1999 was $107 million as compared with the figure of $164 million achieved during 1998.

Table 4. Import of some food products in 1999

Description	Total import to Poland		Import from the USA		Share of US import in total import		Main Competitors
	Weight, '000 tons	Value in million US$	Weight, '000 tons	Value in million US$	Weight %	Value %	
TOTAL		**3,374.0**		**107.8**		**3.2**	
Including:							
Red meat and poultry meat	63	143.2	41.3	29.5	65.1	20.6	EU
Fish and seafood	250	327.4	-	1.3	-	0.4	Sweden Denmark
Dairy products	70	77.7	-	0.09	-	0.1	Germany, Holland, France
Rice	104	34	3.6	1.5	2.9	4.6	Vietnam, India
Processed fruits	126	126	1.6	2.4	1.5	2	EU
Peanuts	21	16.4	0.6	0.5	3	3	China, Argentina, India
Bread, rolls, cakes, cookies, waffles etc,	16.4	32.4	0.3	0.9	2	3	Hungary, EU
Citrus Fruits grapefruit, oranges	346.7	146.2	6.8	2.3	2	1.7	Spain, Marocco Israel, Turkey
Beer	30	17.6	0.6	0.6	1.9	3.5	EU, CEFTA, Mexico
Wine of fresh grapes	66.0	48.3	0.5	1.1	0.8	2.2	France, Italy, Hungary, Slovenia, Bulgaria, Germany

US exports show a declining tendency due to the rapid development of local production resulting, among others, from huge foreign investments in food processing and the food production sector. Out of $ 43 billion invested in 1999, $ 4 billion was invested in the food and tobacco processing industry (for comparison investments in machinery and equipment industry amounted to $ 1 billion). A list of companies that have invested in the agri-food industry is attached as Enclosure 1.

The significant interest in this sector results from the following:

- Poland is a big market in the course of transformation, with a fast rate of growth and absorptive of new goods and organizations of trade,
- considerable opportunities for export to east European countries,
- cheap workforce,
- opportunities to take over privatized companies with a relatively low capital investment,
- customs fees and additional payments for food, higher for imports from the USA than from the European Union,
- permanent pressure on the government by farmers to limit the import of food,

The two latter factors have a crucial significance for American export opportunities.
Some examples of customs fees for food products are shown in Enclosure 2.

In addition, the necessity of obtaining different types of certificate is another factor making export activities difficult. The procedure for getting such certificates is very complicated, time-consuming, and expensive.

Advantages and Challenges facing US products in Poland

Advantages	Challenges
Population of 40 million people, Increasing number of those who can afford high quality food products	Rapid development of local production (supported by foreign, and in many cases American, investments) has significantly reduced demand for imported products
The growing retail industry and the growing demand for more sophisticated and diversified products	Importers, retailers, and consumers lack awareness of American brands,
Well-experienced and increasingly reliable importers	Polish consumers prefer to purchase products produced in Poland,
Opportunity for different kinds of market promotion with retailer participation,	Imported products are more expensive because of many certificates, high tariffs, long period of payment,

	Registration process is slow, expensive, and inefficient, Polish language labels are required, Alcohol tariffs and excise tax are very high, An import licence is necessary, Third country competition is significant, especially from west European countries, Poland is planning to join EU which will result in the same restrictions as those in other countries belonging to the Union, There are quotas for meat and poultry, and some other products, Farmers' position is very strong and they influence government policy concerning import regulations,

II. Road Map for Market Entry

A. Hypermarkets, Supermarkets, Discount Shops,

Entry Strategy

Success in introducing new products in this segment of the market depends to a large extent on local representation and personal contacts. The local representative may or may not also be the importer and /or distributor, but due to the very tough conditions dictated by this type of outlet, this is a key person if the product is going to be sold there.

Here are some typical conditions that have to be fulfilled by a supplier when entering foreign retail chains:

1 Entry fees (amounting to tens of thousands of Polish zlotys), which are not paid back if the agreement is canceled.

2 30-60 day period of payment.

3 Considerable price discount - about 10%.

4 Obligatory participation in promotion activities, which are held 3-5 times a year and last for 1-3 weeks. This requires another price decrease (for about 5%).

5 Obligatory participation in covering the cost of advertising promoted products.

6 Separate fees (US$ 250-3500) for placing each type of product on the shelf.

7 Fees for the „length of the shelf”.

8 No opportunity to influence the price level

9 Very strict delivery terms

Market structure

10 Products may be imported either by an importer or a representative office who may also be a wholesaler and/or distributor.

11 The representative office deals only with your product, and so pays much more attention to the promotion, advertising, and marketing activities than an importer who buys many, sometimes even competitive, products.

12 Some supermarkets carry out direct imports

13 Importers are distinctly separated into dry goods, refrigerated items, fruits and vegetables, alcohol, etc.

14 Importers or representative offices may use nation-wide logistic organizations for the storage and distribution of imported products.

15 Importers also have their own distribution networks.

Company Profiles

Retailer Name and Outlet Type	Sales ($Mil)	Ownership	No. of Outlets	Location	Purchasing Agent Type
1. METRO	2000	Germany			Direct, importers, wholesalers
Real, hyper	333		23	whole country	
TIP Discount, discount	150		61	whole country	
2. JERONIMO MARTINS	700	Portugal			Direct, importers, wholesalers
Biedronka, discount	360		612	whole country	
Jumbo, supermarket	66		4	Pozna½	
3. REWE	374	Germany			Direct, importers, wholesalers
Billa, supermarket	115		12	Warsaw and other big towns	
Minimal, hyper	73		18	whole country	
4. CASINO	342	France			Direct, importers, wholesalers
Geant, hyper			11	Warsaw and other big towns	
5. HIT, hyper	331	Germany	13	Warsaw and other big towns	Direct, importers, wholesalers
6. AUCHAN	285	France			Direct, importers, wholesalers
Auchant, hyper	265		4	Warsaw, Gdansk	
Robert, supermarket	20		12	Warsaw	
7.CARREFOUR, hyper Carrefour Stock/Mico Market	198 243 237 6	France	7	Krakow, Warsaw, Lodz	Direct, importers, wholesalers

8. TENGELMANN	224	Germany			Direct, importers, wholesalers
Plus Discount, discount	224		101	Southern Poland	
9.E. LECLERC, hypermarket	233	France	7	Warsaw, Lublin, Lodz	Direct, importers, wholesalers
10.AHOLD		Holland			Direct, importers, wholesalers
Szalony Max, supermarket	51		30	whole Poland	
Sezam, discoint	93		83	whole Poland	
Hypernova	42		2	Warsaw	
Delikatesy Centrum	31		11	whole Poland	
11 TESCO	139	Great Britain			Direct, importers, wholesalers
Tesco	84		8	Wroc»aw	
Savia	55		30	Southern Poland	
12. GLOBI, supermarket	88	Belgium	28	Warsaw	Direct, importers, wholesalers
16. REMA 1000, discount	66	Norway	64	Warsaw	Direct, importers, wholesalers
19. PSS Spolem Bialystok	62	local	58	Bialystok	Direct, importers, wholesalers

It is important to note that „cash and carry” outlets are becoming more and more popular. Some of these operate only as wholesale outlets and serve only the retailers, and some also sell to individuals, but under the condition that a certain quantity of goods is purchased.

The process of developing trade marks has just commenced, and it is expected that they will be widely used by foreign and local chains.

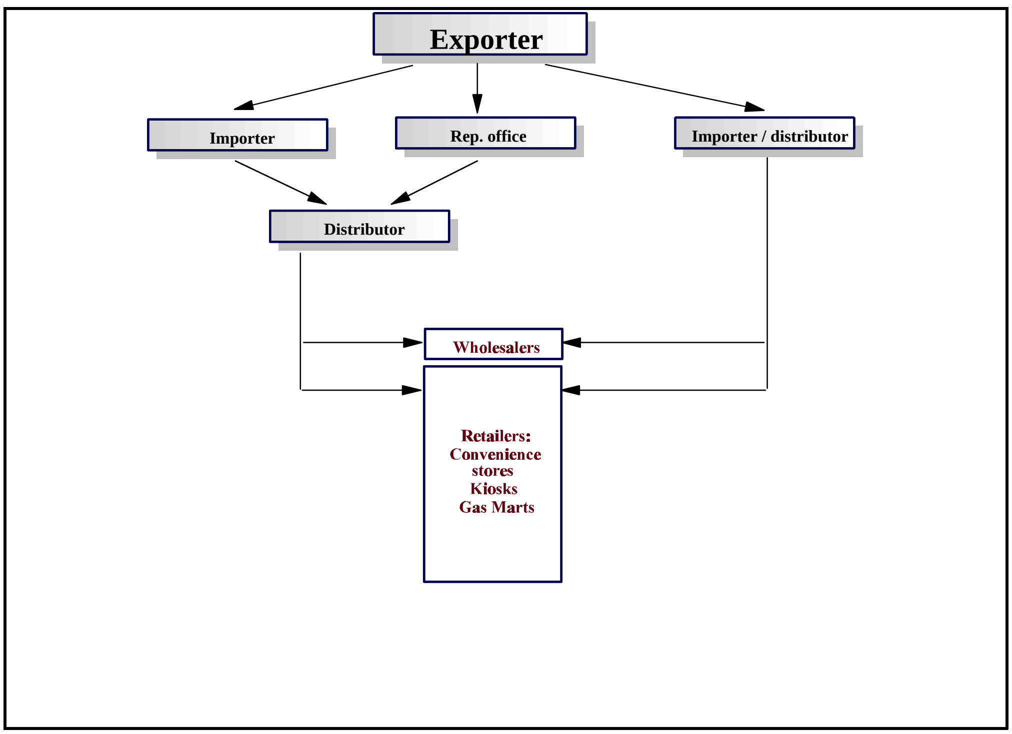
B. Convenience Stores, Gas Marts, Kiosks

Entry strategy

All these types of shop operate in a similar way. There are two ways of placing new products on their shelves, depending on the type of product. Either an exporter should use a representative for direct personal contact with the shops, or shop managers supply themselves from the wholesalers who may import the products as well.

In this case goods should be available in several regional wholesale units, where smaller wholesalers and retailers collect them. They should also be delivered to the cash and carry outlets.

Market structure



Company Profiles

Apart form the gas station outlets, there are no chains of shops and each of the shops has a different owner. The biggest share (about 70%) in gas station marts is held by the Polish company Orlen. The remaining part of the market belongs to Polish Refineries Plock and Gdansk and foreign Companies (e.g. Agip, Nestle, Aral, Elf).

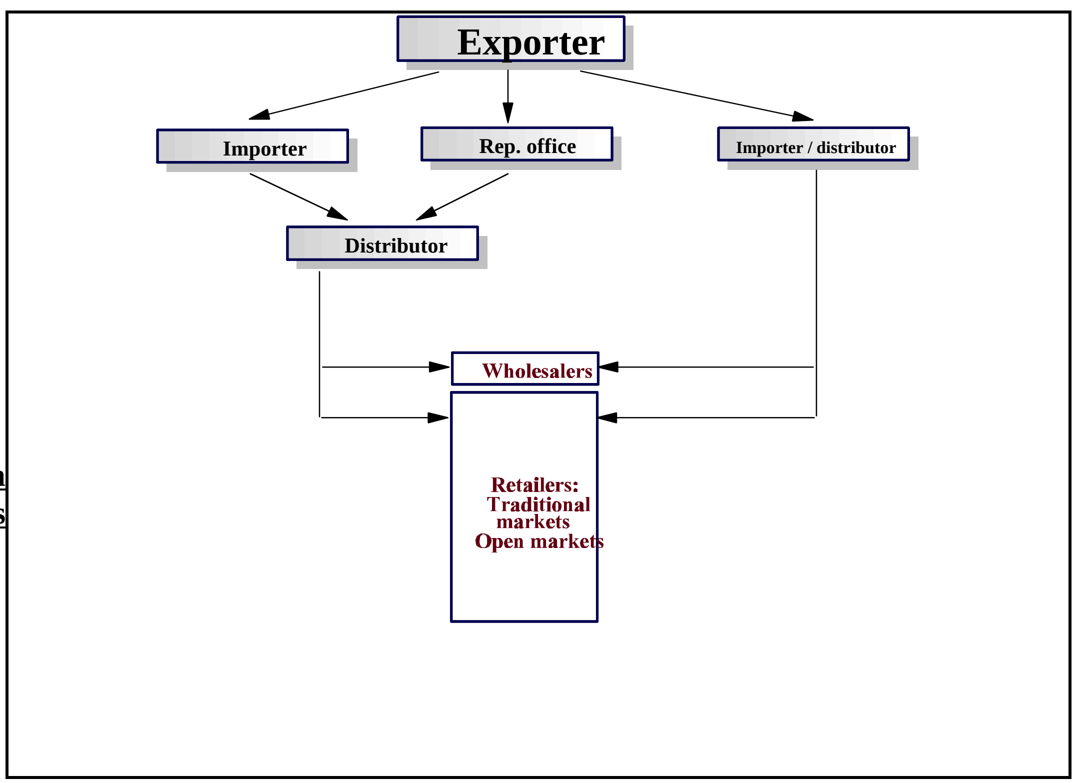
C. Traditional markets – "Mom and Pop" small independent grocery stores and farmer's markets

Entry strategy

There are two ways of placing new products in this type of shops, depending on the type of product. Either an exporter should use a representative for direct personal contact with the shops, or shop managers supply themselves from the wholesalers who may import the products as well.

In this case goods should be available in several regional wholesale units, where smaller wholesalers and retailers may collect them. They should also be delivered to the cash and carry outlets.

Market structure



Company Profiles

There are about 121,000 outlets

that may be regarded as traditional market.

Small retail outlets - The majority of the stores has a different owner and there are no chains or franchises. Many of the firms are family-run business. This shops are usually modest in size and their average area is 15-25 sqm..

Farmer's Markets - Such markets greatly vary in size and facilities which are being offered to traders and customers. In most cases they constitute of open air and/or kiosk facilities located over an area of 200/400 sqm.

III. COMPETITION

Local production and exporters from countries belonging to the European Union mainly Germany, France, Italy, Great Britain, Spain, Finland and Netherlands (50% of total Polish import of food) are the main competitors for the American exporters. Even such "American" products as chewing gum, Coca-Cola, Pepsi-Cola, or Dunkin Donuts are produced in Poland. It should also be taken into consideration that Polish consumers show a very strong tendency to prefer Polish products to imported goods. This of course influences the shops to purchase products made in Poland. Many chains use the fact that they offer Polish goods as an advertising slogan in order to create a better image to consumers.

The most important competitors are presented in Enclosure 1.

IV. BEST PRODUCTS PROSPECTS

A. Products Present in the Market Which have Good Sales Potential.

As mentioned before, the following markets have developed and will continue to grow:

- food consisting of many constituents, highly processed, convenient, and easy to cook, i.e. ready-to-cook products and semi-products, and a wide range of snacks (from crisps and sweets to salads, yoghourt, cheeses, etc.),
- food for the HRI food service sector,
- various non-alcoholic beverages, wine and beer,
- "healthy food" produced from natural agricultural products with a low level of pesticides, mineral fertilisers, and other chemicals applied for their cultivation,
- processed meat, fish, mild, and fruits and vegetables.

All these products are known to Polish consumers. The demand for them changes with different phases of development. These products will be, in most cases, produced in Poland, but imported constituents will often be used. Such a development of this sector will result in further growth of demand for the import of basic elements necessary for food production (hard wheat, processed soya, sunflower, palm oil, and juice concentrates) as well as for various additives.

B. *Products Not Present in Significant quantities but Which have Good Sales Potential*

This group mainly includes:

- processed vegetables, ready-to-cook dishes and snacks (excluding crisps), which, given a weak development of these sub-sectors, are rarely offered,
- "luxury" food and drinks, produced from exotic raw materials for people with the highest incomes, who consider consumption of such products as proof of their high social position,
- food constituents for special use, e.g. vegetable fat for different branches of secondary processing, sweeteners replacing sugar, protein or vitamin preparations necessary for the production of diet foods.

The market for these products is very shallow, but changes in eating habits and development of higher income classes create opportunities for rapid increase of demand.

C. Products Not Present Because They Face Significant Barriers

This group mainly consists of additives, which are not allowed in Poland, The list of such products, dyes and preservatives in particular, is very long, as Polish legislation in this respect is much stricter than in the developed countries. Information on such products is available from Panstwowy Zaklad Higieny (State Hygienic Office) and from the Ministry of Health. Integration with the European Union will allow some of those additives to be admitted for use in food production.

This group also includes constituents made from products and spices growing in other climatic zones (mainly vegetables, fruits, frutti di mare), which make the highly processed products more attractive.

V. POST CONTACT INFORMATION

If you have any questions or comments regarding this report or need assistance exporting to Poland, please contact the Office of Agricultural Affairs in Warsaw at the following address:

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homepage: http://www.usaemb.pl/usfas.htm

Please contact our home page for more information on exporting U.S. food products to Poland, including “The Exporter Guide”, “The HRI Food Service Sector Report”, “The Retail Food Sector Report”, products briefs on the market potential for U.S. fruit, snack foods, ready-to-eat and health products and a complete listing of upcoming activities designed to promote your product in Poland. Importer lists are available from our office to exporters of U.S. food products.

For more information on exporting U.S. agricultural products to other countries please visit the Foreign Agricultural Service home page: http://www.fas.usda.gov.

Enclosure 1. Largest foreign investment projects in food-pror-essing industry ($ million. end-June 1999)

Investor	Branch	Capital Invested	Origin
1.Coca Cola	Beverages	360.0	United Kingdom
2.Harbin	Brewery	325.9	Netherlands
3.Nestle,	Sugar Confectionary food processing	309.0	Switzerland
4.PepsiCo	Beverages	203.0	United States
5.Heineken	Breweries	180.7	Netherlands
6.Mars Incorporated	Sugar confect. food processing, animal feeds	163 + 30 plans	United States
7.Unilever	Sugar confect. oils and fats, fish	105.0	International
8.Cadbury's Schweppes	Sugar confectionery	126.5	United Kingdom
9.Ferrero Holding	Sugar confectionery	80.0+10.0 plans	Italy
10.BSN Gervais Danone	Milk prod., sugar Confectionery	80.0	France
11.Carlsberg	Brewery	69.7	Denmark
12.Cargill	Animal feeds, manufacturing of glucose	60.0	United States
13. McCain Foods	Manufacturing of frozen fries	54.0	Canada
14. EBS Montendinson	Oils and fats	53.8+40.0 plans	Netherlands
15. Bestfoods	Edible oil, food concent. and food processing production	52.1 + 7.0 plans	United States
16.Wrigley	Chewing gum	49.0 + 30.0 plans	United States
17. Provimi Holding	Fodder production	48.0	Netherlands
18. Schoeller	Ice-cream prod.	43.0	Germany

19.Tchibo	Coffee prod.	42.0	Germany
20.Birtish Sugar	Manufacturing		
	of sugar	41.0+200.0 plans	United Kingdom

Source.- Polish Agenqi-forFor-eign lntvstment (PAIZ)

Enclosure 2. Some examples of customs tariffs

Description of goods	Tariffs for US Import s	Tariffs for UE Imports	Tariffs for CEFTA Imports	Excise tax
Processed meats	111.7%	111.7%	25.0%	
Frozen pork meat	83.3%	83.3%	0%	
Frozen beef meat	25%	25%	25%	
Frozen fish	5.0-25.0%	5.0-25.0%	0%	
Shellfish	30.0%	0%	0%	
Milk	102%	40%	20-30%	
Yogurt	175%	25%	20%	
Cheese	175%	25.0	5.0-8.0%	
Olives, maize	10	10.0	0.0-5.0%	
Frozen and dried vegetables	70%	20.0%	0%	
Nuts	10-20%	4-15%	0%	
Bananas	51%	10.0%	0%	
Dates, pineapples, avocado, mango, fresh or dried	10.0%	2.1%	0%	
Oranges, lemons, mandarins, fresh or dried	10.5	2.3-5%	0%	
Tea, coffee	15.8%	15.8%	0%	
Herbs and spices	5-25%	5-25%	0%	
Rice	10.5%	10.5%	0%	
Sweets, chewing gum	40.8%	8	12%	Depends on sugar contents
Soups	25.0%	25.0%	4.0%	
Champaign , wines	52.5%	20	20.0%	Depends on spirit contents
Brandy, cognac, gin, liqueurs	293.3%	75.0%	75.0%	Depends on spirit contents
Beer	41.7%	6.0%	6.0%	Depends on spirit content
Mineral water	20-30%	20-30%	10-19%	
Chocolate	60.0%	37%	10-30%	