

GREEKFOOD

the story



GREEKFOOD

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We at the Athens Exchange (ATHEX) are convinced about the great potential and the bright perspectives of the Greek food and beverage sector. Our conviction is based on the high availability of quality raw materials and produce and the large number of businesses that, with passion and love for what they do, are involved in the development, production and processing of agricultural products and their distribution around the world.

We have decided to play a role in the development of this sector of the economy and are committed to assisting the growth of businesses operating therein. ATHEX wishes to help local agricultural producers to enter foreign markets, to improve the promotion of quality products and to enable them to find partners and investors in order to develop their strategy, achieve business synergies and fund their expansion efficiently.

A good point to start is by providing you with a fair understanding of what

we are talking about. In this context, we have gathered and present in this concise guide, a summary of the key segments of Greek food and beverage production and the high-quality products processed, standardized and distributed by a number of Greek companies. The material that follows should make interesting reading for foreign investors and fund managers (more will follow as this will be regularly updated through the inclusion of new companies and products on www.athex.gr).

At the same time, we are in the process of further improving the legislative, regulatory and tax environment in Greece, for the benefit of listed funds at ATHEX. Through the operation of such funds, much needed capital will flow to listed and non-listed companies and talented and experienced people will get access to the right international partners to grow their businesses.

There are remarkable opportunities for long term investment in the food and

beverage processing sector in Greece and at ATHEX, both through our Main Market and our Alternative Market (E.NA), we provide a secure and transparent environment for foreign investors.

“In food processing, due to the availability of high quality raw materials and produce, specialized know – how and reasonable cost levels (in some categories), Greece has significant potential to increase output, boost exports and contain imports, especially in four major high-potential categories, namely oils & fats, fruits and vegetables, dairy and bakery products”.
Greece 10 Years Ahead,
McKinsey & Company 2011

The word “gastronomy” has its roots in ancient Greek. Gastronomy is one of the genuine cultural features of a region. The particular cooking tastes of a region are often associated with the qualitative characteristics of the region’s society, while it uncovers elements of its cultural and economic history. At the same time, taste seems to be a means of communication - a way to reach one another.

Greek gastronomy has a history of more or less 4000 years; its specific characteristics are based on pure products from the Greek soil with a unique quality. In fact, the earliest writing on cooking was done by the ancient Greek poet Archestratus, who in 330 B.C. published history’s first cook book.

Traditional Greek food harmonically combines taste with high nutritional value. Dozens of scientific studies have demonstrated the positive effects of the balanced Greek diet on health,

beauty and longevity. As in most of the countries around the Mediterranean Sea, the diet incorporates the basics of healthy eating — plus a splash of flavorful olive oil and perhaps a glass of red wine — among other components characterizing the traditional cooking style of those countries. On November 17, 2010, UNESCO recognized this diet pattern as an Intangible Cultural Heritage of Italy, Greece, Spain and Morocco, thus reinforcing it not only as a fundamental part of their history and background, but also as a great contribution to the world.

Moreover though in Greece, the culture of food and eating is also about a tradition of mealtime socialization, combining taste satisfaction with entertainment and communication, thus preserving until today some vestiges of the ancient symposiums.

Contrary to popular belief, Greek cuisine is not just about “Moussakas”, “Souvlaki” and “Greek Salad”. It offers

a great variety of unparalleled food products and dishes, which will satisfy even the most demanding palates on their gastronomic quests.

The wide range of traditional Greek food include: Greek olive oil, Greek olives - prepared more or less in the same way through the centuries, Greek honey, herbs, sprouts, a myriad of wild herbs, grain legumes such as yellow split peas, field peas, chick peas and lentils, fish and seafood, snails, dried seeds, sesame seeds, wholegrain cereals, various cheeses made from goat and sheep milk.

Grown under the ideal climate conditions of the Mediterranean, Greek food products have been distinguished by their excellence in quality and have thus reinforced international esteem for traditional Greek food and cooking.

INTRODUCTION



OLIVE OIL

The voyage through flavor of the magic world of olive oil leads to where the rustling silvery leaves of the olive tree reveal the beauty of this favored product of the Greek soil which so profoundly emanates Greek traditions.

The olive tree is interwoven in the Greek culture and in mythology the olive tree is the symbol of peace. It is the gift presented to the Athenians by Pallas Athena, when she defeated Poseidon in the dispute over the name of their city, known ever after as Athens. In antiquity during competitions athletes rubbed their bodies with olive oil to relax the muscles whereas in the Panathenaic Games the winners were rewarded with olive oil from the holy olive trees of the Athenians and the olive branch from the sacred grove of Olympia crowned the heads of the Olympic winners. Olive oil was also a valuable medicine in the hands of ancient Greek doctors, used as an antiseptic and remedy for a great number of ailments. For centuries, the blessed fruit of the olive tree is basic to

every Greek cooking - a precious fruit symbol of abundance as well as wisdom.

Today, the olive fruit and its oil claim gastronomy trophies and appear on the tables of the finest restaurants worldwide. The juice from the olive fruit is susceptible to oxidation and fermentation and requires knowledge and care to preserve its taste and quality. The taste, the aroma and the color of olive oil is determined by the soil character, climate conditions and varietal, as well as the ecosystem, standardization and the conditions found in the oil mill. Further, the organoleptic characteristics of the final product are affected by the altitude of the olive grove, the sunshine duration, the growing and harvesting manner and the maturity stages of the olive. Greek olive oil is considered to be the best olive oil worldwide as far as taste and organoleptic characteristics are concerned.

Much as wine, the flavor of olive oil is determined by the types of olive such

as Koroneiki, Tsounaity, Throubolia, Megaritikiki and other varietals. Every olive oil has its own characteristics. Before you taste it, it is worth inhaling its freshness. The bouquet of the olive fruit is reminiscent of apple, chamomile, lime, green leaves, even marjoram. These are nature's fragrances of the fields, encapsulated in the juice of the olive. The somehow bitter taste of virgin olive oil indicates the freshness and the aggressive intensity of not yet ripened fresh olive. This indicates a high anti-oxidant content, which is beneficial to health.

Cooking and Serving Suggestions

Mild tasting olive oil with flavors of chamomile or marjoram goes well with fresh, green salad, vegetable pies, dips and desserts such as oil cake with fruits. The green olive oil with its strong fruity and bitter taste is best used with Greek dishes such as Greek salad, beans, oven-baked stuffed aubergines and oven roasts.

The Industry in Numbers

The olive oil industry plays an extremely important role in the Greek economy, as it represents 11 percent of the total agriculture production in terms of value. After Spain and Italy, Greece is the third largest olive oil producer in the world.

Olive oil can be found in the following four categories: virgin olive oil, refined olive oil, olive oil, olive-pomace oil and table olives.

From a representative sample of 80 companies of the above industry that employ a workforce of about 1.430 employees, the following data have been retrieved:

(in €)	2013	2012	% 2013-2012	2011	% 2012-2011
Total Assets	752,440,174	772,164,977	-2.55%	793,694,779	-2.71%
Total Equity	368,260,764	346,178,271	6.38%	335,435,609	3.20%
Total Borrowings	239,083,571	251,264,116	-4.85%	263,104,724	-4.50%
Total Debt	375,537,308	416,089,650	-9.75%	448,069,191	-7.14%
Total Revenue	917,580,558	861,046,290	6.57%	826,483,684	4.18%
Gross Profit	118,866,420	101,441,468	17.18%	103,385,144	-1.88%
EBITDA	68,574,701	55,652,030	23.22%	59,931,130	-7.14%
Gross Profit margin	12.95%	11.78%		12.51%	
EBITDA margin	7.47%	6.46%		7.25%	
Debt / Equity ratio	1.02	1.20		1.34	
EBITDA to interest coverage ratio	3.73	2.80		4.06	

The above figures indicate that the domestic economic crisis did not affect the industry. During the 2012-2013 period Total Revenue increased by 6.57%. At the same time a significant increase in profitability of sector companies, in terms of Gross Results (+17.18%) and Earnings before Interest, Tax, Depreciation, and Amortization (+23.22%) was recorded. Gross Profit and EBITDA margins increased as compared to 2012 and they marginally exceeded the corresponding figures of 2011. The Debt-to-equity ratio improved to 1.02 while the reduction of interest payments in 2013 improved the EBITDA to interest coverage ratio to 3.73 (from 2.80).

Sector Highlights

In Greece, 18 varieties of olive oil received by the European Union the “Protected Designation of Origin (P.D.O.)” status and 11 olive oils received the “Protected Geographical Indication (PGI)” status
Standardized olive oil is constantly gaining market share

Favorable conditions for the production of organic olive oil

The quality of Greek olive oil is superior to the competing products from Italy and Spain in terms of taste and organoleptic characteristics

The fragmentation of the olive oil industry disfavors any attempts to increase production, whereas a small number of powerful oil standardizing and packaging companies dominate the market

20% of total olive oil production is standardized, whereas 80% of the production is bulk olive oil

Highly dependent on exports of bulk olive oil to Italy

AiQ International Trade Co. Ltd

REGION

Anoixis, Attica

PRODUCTS

Organic extra virgin olive oil

Extra virgin olive oil

Kalamon olives, Olive paste

CONTACT DETAILS

Leoforos Marathonos 33

Anoixis 14569, Trade Center

Tel.: +30 210 8004070

Fax: +30 210-8145480

www.aiq.gr - axenofos@aiq.gr

akitanidi@aiq.gr - info@aiq.gr



ARISTEON OLIVE PRESS-SOULIS CHAIKALIS LTD

REGION

Zakynthos

PRODUCTS

Extra virgin olive oil protected
designation of origin (PDO)



CONTACT DETAILS

Lithakia, Zakynthos, 29092

Tel.: +30 26950 52888

Fax: +30 26950 53080

www.aristeon.gr - sxoil@otenet.gr

ASTRAEA - STAVRIANAKIS

REGION

Samothraki

PRODUCTS

Early Harvest Extra Virgin Olive Oil

Greek Extra Virgin Olive Oil

Single Estate Extra Virgin Olive Oil

Green Olives, Black Marinated Olives

Wrinkled Olives

CONTACT DETAILS

Chora, Samothraki, 68002

Tel.: +30 25510 42043

Fax: +30 25510 42043

www.astraea.eu - sales@astraea.gr



BIO-SITIA S.A.

REGION

Crete

PRODUCT

Extra virgin olive oil of Sitia

Biological extra virgin olive oil (BIO)



CONTACT DETAILS

Iera Moni Toplou, Sitia, Crete

Tel.: +30 28430 29630-8

Fax: +30 28430 29635

biositia@otenet.gr

BOULOULIS ADAM LTD

REGION

Messinia

PRODUCTS

Virgin olive oil

CONTACT DETAILS

Gargalianoi, Messinia 34400

Tel.: +30 27630 22525

Fax: +30 27630 22942

www.boulouli.gr

boulouli@otenet.gr



CRETAN MOUNTAINS SKOULA

REGION

Crete

PRODUCTS

Standardization and packaging
of «XILOURIS»

extra virgin olive oil

CONTACT DETAILS

Profitis Ilias, Heraklion, Crete

Tel.: +30 28181 08000

Fax: +30 213 116696

www.xilouris-oliveoil.com

info@xilouris-oliveoil.com



DRITSAS OLIVE OIL

REGION

Aegina

PRODUCTS

Extra virgin olive oil from
Peloponnese, traditional method
of first cold extraction



CONTACT DETAILS

7 Antoniou Leousi Av.,

Aegina, 18010

www.dritsasoliveoil.gr

info@dritsasoliveoil.gr

GAEA PRODUCTS S.A.

REGION

Agrinion

PRODUCTS

Extra virgin olive oils & olives
Greek specialties, Cooking sauces

CONTACT DETAILS

1st km Agrinio-Karpenisi Nt Rd

Agrinio 30100

HQ: 171 Sygrou Ave, Athens 17121

Tel.: +30 210 9330595

Fax: +30 2109330576

www.gaea.gr - info@gaea.gr



OLIVE OIL

KANAKIS OLIVE MILL FACTORY

REGION

Messinia

PRODUCTS

Extra virgin olive oil

Biological extra virgin olive oil

Kalamata Olives, Balsamic vinegar



CONTACT DETAILS

Papoulia, Pylos, Messinia 24001

Tel.: +30 28430 29630-8

Fax: +30 28430 29635

www.oliveoil-kanakis.gr

office@oliveoil-kanakis.gr



KARAVAS ESTATE

REGION

Korinthos

PRODUCTS

Organic extra virgin olive oil

Tapenade of Kalamata olives

Kalamata Olives, Gift packages

CONTACT DETAILS

Evrostini Korinthias

Tel: +30 27430 32001

Fax: +30 27430 32001

www.karavasestate.com

akaravas@yahoo.gr



LADI BIOSAS

REGION

Kalamata

PRODUCTS

Ladi Biosas high premium extra virgin olive oil, Ladi Biosas ORANGE

Ladi Biosas LEMON

CONTACT DETAILS

Archimidous 45, Kalamata 24100

HQ Lakonikis 14, Kalamata 24100

Tel.: +30 69389 83283 (GR)

+31 6141 31858 (NL)

Fax: +32 15555 02591

www.ladibiosas.com info@ladibiosas.com



LAKONIKO LIOTRIVI CO

REGION

Gytheio

PRODUCTS

Organic extra virgin olive oil

(PGI) Laconia



CONTACT DETAILS

17th km Sparta-Gytheion Nt Rd

Tel.: +30 27310 35130

Fax: +30 27310 35131

www.olivestate.gr

info@olivestate.gr

NILEAS PRODUCERS GROUP

REGION

Messinia

PRODUCTS

Biological virgin olive oil

Extra virgin olive oil



CONTACT DETAILS

Antronaropoulou 9

Chora Messinias, 24600

Tel.: +30 27630 31752

Fax: +30 27630 31023

www.nileasoliveoil.gr

opnileas@yahoo.gr



OIL PRESS KYKLOPAS S.A.

REGION

Evros

PRODUCTS

Extra virgin olive oil (Kyklopas)

CONTACT DETAILS

Makri Alexandroupolis

Evros 68100 P.O. Box 317

Tel.: +30 25510 71271

Fax: +30 25510 21331

www.kyklopas.com

info@kyklopas.com



"OLIVE VISION" BALAFAS K.-DIMARAKIS A.

REGION

Ermioni, Argolida

PRODUCTS

MORIA ELEA: Premium Extra Virgin Olive oil

DOP Kranidiou in limited edition.

BAND OF CHEFS: Culinary Extra Virgin Olive Oil



CONTACT DETAILS

Marathonodromou 41-45, Marousi 15124

Tel: +30 211 7002719

Fax: +30 27540 21018

www.olivevision.gr

info@olivevision.gr



PanProd PANDELOPOULOS S.A.

REGION

Messinia

PRODUCTS

KALLISTO extra virgin olive oil,
olives and olive paste, KALLISTO vinegars,

PHAETHON extra virgin olive oil

CONTACT DETAILS

Nea Eisodos Akovitika Kalamata

24100 Messinia

Tel: +30 27210 69094

Fax: +30 27210 69694

www.panprod.com info@panprod.com



OLIVE OIL

POLIANA EXTRA VIRGIN OLIVE OIL

REGION

Athens

PRODUCTS

Singe variety olive oils

Gourmet olive oils

(with taste of orange & lemon)

CONTACT DETAILS

34 Asklipiou str, Athens 10680

Tel: +30 6936 081431

www.poliana.gr

dskliris@poliana.gr

nskcliris@poliana.gr



SAKELLAROPOULOS ORGANIC FARMING "ARMONIA"

REGION

Lakonia

PRODUCTS

Specialized superior gourmet organic
olive oils & olives, traditional olive oils & olives

Wort Oil wax creams

Dried olive leaves & flowerbuds

CONTACT DETAILS

Menelaou 67, Sparta

Tel.: +30 27310 81118

Fax: +30 27310 81118

www.bioarmonia.gr geosakel@gmail.com



SEFERLIS ESTATES

REGION

Lakonia

PRODUCTS

Extra virgin olive oil

Kalamata olives

(without preservatives)

CONTACT DETAILS

Goritsa, Sparta, Lakonia

Tel.: +30 27310 74441

Fax: +30 27310 74445

www.seferli.gr

seferlis@seferli.gr



SPEIRON ULTRA PREMIUM FOOD and BEVERAGE Co.

REGION

Athens

PRODUCTS

Ultra Premium Extra Virgin Olive Oil

Bespoke (the first personalized
olive oil in the world)

CONTACT DETAILS

4 Eleonon str., 153 51 Pallini-Athens

Tel.: +30 210 6658708

Fax: +30 210 6658725

www.speironcompany.com

info@speironcompany.com



UNION of AGRICULTURAL COOPERATIVES LAKONIA

REGION

Lakonia

PRODUCTS

Extra virgin olive oil

Biological extra virgin olive oil

Crude Olive-Pomace oil

Olive Pellet

CONTACT DETAILS

Leonidiou 113, Sparta 23100

Tel.: +30 27310 24940

Fax: +30 27310 21911

www.easlakonia.gr

easlsale@otenet.gr





DAIRY

Greece is rich in cheese production with a cheese loving population. Greece, together with France, is the nation with the highest cheese consumption in the world. Never mind the delicious food, if there is no exuberantly flavored Graviera cheese on the dinner table, or if the Greek salad is not “crowned” with its own snow-white feta cheese, the dinner table is incomplete. For the Greeks cheese is not just an accompanying platter – it is food per se.

The history of cheese has its beginnings in Greek mythology, when the gods of Mount Olympus sent Aristaeus, son of Apollo, to man to teach them the art of cheese making. As for yogurt, both the historian Herodotus (5th century B.C.) and the famous physician Galen (1st-2nd century B.C.) extensively referred to it in their writings.

Yogurt was very popular in the medieval Arab world and there are many stories about how milk was first made into yogurt. Regardless of the circumstances of its discovery, it was quickly found

out that yogurt, except for its pleasant taste, was also a wonderful way of preserving milk. Yogurt was attributed with a great number of health benefits, and its reputation of prolonging life and calming nerves along with its other health benefits has spread over the centuries. Today, Greek yogurt, with its high quality and nutritional value, has become a staple in the kitchen of celebrity chefs and nutrition specialists worldwide.

Following in the footsteps of tradition, the Greeks managed not only to make yogurt but also to produce an enviable selection of cheeses, some of which are unique in the world. The art of cheese making in Greece has evolved over the years, with every cheese maker having his own jealously guarded secret recipe. The cheeses produced from these secret cheese making methods are culinary gems and can be discovered in many regions of Greece. Feta cheese is made in Greece for over two centuries and is the undisputed number one item on Greek dinner tables. The primary cheese

varieties in Greece are: Feta, Kefalotyri (a hard, salty, yellow cheese) and Mizithra (whey cheese), which are the base for the production of all the other cheeses. It is noteworthy, that in Greece approximately 300 different types of cheese are produced, either in small or large quantities and 21 Greek cheese varieties carry on their “Protected Designation of Origin (PDO)” label.

Cooking or Serving Suggestions

Yogurt can be made into a frozen dessert – the frozen yogurt - and flavored with toppings of mastic, fresh fruits, nuts and sweet preserves. Of course, the calorie and nutritional value of frozen yogurt depends on the combination of the toppings selected.

Macedonian Batsos cheese is a spicy cheese ideal for frying in a pan and known to be the best fried cheese (saganaki).

This is as close as one can get to truly authentic Greek cuisine: a slice of feta dressed with olive oil and aromatic oregano from the Greek mountains.

The Industry in Numbers

The dairy industry remains one of the most durable industries of the Greek economy, as dairy is part of the basic food stuff of Greek consumers.

The basic product categories are milk (fresh pasteurized, high-temperature pasteurized, and condensed), cheese (white, yellow), butter and yogurt.

The following summary data was collected from 90 companies operating as Dairy and Cheese factories in Greece and employing a workforce of about 5.970 people:

(in €)	2013	2012	% 2013-2012	2011	% 2012-2011
Total Assets	1,866,921,994	1,974,987,675	-5.47%	2,030,727,526	-2.74%
Total Equity	817,413,903	859,292,391	-4.87%	733,668,502	17.12%
Total Borrowings	542,589,163	567,319,133	-4.36%	735,120,913	-22.83%
Total Debt	1,045,895,853	1,113,709,850	-6.09%	1,294,881,301	-13.99%
Total Revenue	1,651,601,877	1,671,823,908	-1.21%	1,701,071,086	-1.72%
Gross Profit	304,906,838	326,087,273	-6.50%	337,375,693	-3.35%
EBITDA	87,561,960	94,758,589	-7.59%	89,363,422	6.04%
Gross Profit margin	18.46%	19.50%		19.83%	
EBITDA margin	5.30%	5.67%		5.25%	
Debt / Equity ratio	1.28	1.30		1.76	
EBITDA to interest coverage ratio	2.04	1.58		1.42	

The ongoing recession has affected the financial results of the dairy industry. A slight decrease in total revenue (-1,21%) was recorded in the last two years. In terms of profitability, Total Gross Profit fell by 6,50% and Earnings before Interest, Tax, Depreciation and Amortization dwindled by 7,59%. Gross Profit and EBITDA margins showed a decrease compared to 2012. The Debt-to-Equity ratio recorded a marginal improvement (1.28 from 1.30), while the EBITDA to interest coverage ratio increased to 2.04 (from 1.58) due to the reduction of interest payments.

Sector Highlights

Dairy products show a low elasticity of demand to price and income

In recent years there has been an increase in dairy product exports

Continuous development of innovative products, addressing specific population groups (women, children, etc.)

The acceptance in the market of organic products represents an opportunity to expand into new product lines and increase sales

The fragmentation of primary milk production results in high collection and transportation costs for the above primary milk product

The short shelf life of milk creates additional production costs

The European Union imposes quotas and restrictions on milk production

An increase of concentration in the retail sector is noted

EVROFARMA S.A. (Athex Listed: June 2000/Bloomberg Symbol EVROF:GA)



REGION

Alexandroupolis, Evros

PRODUCTS

Fresh milk

Highly pasteurized milk, Chocolate milk

Yogurt, Slurry (Ariani)

Feta cheese, Organic feta, Telemes

Anthotiro, Myzithra

CONTACT DETAILS

3rd km Alexandroupolis-Airport, 68100

Tel.: +30 25510 88120

Fax: +30 25510 88153

www.evrofarma.gr - info@evrofarma.gr



KRI KRI S.A. (Athex Listed: Aug 2003/Bloomberg Symbol KRI:GA)



REGION

Serres

PRODUCTS

Ice creams

Strained yogurt, Sheep yogurt

Cow's yogurt, Yogurt with fruits

Ayran, Fresh milk, Chocolate milk

CONTACT DETAILS

3rd km Serres-Drama Nat.Rd, 62125

Tel.: +30 23210 68300

Fax: +30 23210 68311

www.krikri.gr - info@krikri.gr



ARVANITIS S.A. Model Cheese-Making Unit

REGION

Thessaloniki

PRODUCTS DETAILS

Feta Cheese P.D.O. Barel Matured,

Goat Cheese, Tsantila Goat Cheese,

Manouri P.D.O., Kefalotyri, Anthotiro

CONTACT

Neochorouda P.O.Box 300, 54500 Thessaloniki

Tel.: +30 2310 709559

Fax: +30 2310 709676

www.cheese.gr

info@arvanitis.gr



KAROUSOS STAVROS-TRADITIONAL DAIRY PRODUCTS

REGION

Amfilochia, Aitolokarnania

PRODUCTS

Graviera, Kefalograviera

Pecorino, Mizithra

CONTACT DETAILS

Stanos, Amfilochia 30500

Tel.: +30 26420 41146

Fax: +30 26420 41139

www.karousoss.gr

stavroskarousos@yahoo.gr



KOUKAKIS FARM S.A.

REGION

Kilkis

PRODUCTS

Fresh milk, Chocolate milk
Ariani, Kefir, Yogurt, Feta cheese
Butter, yellow cheese, Orange juice

CONTACT DETAILS

Kato Apostoloi, Kilkis 61100
Tel.: +30 23410 94455
Fax: +30 23410 77252
www.koukfarm.gr
koukakis@koukfarm.gr



KOURELLAS S.A.

REGION

Grevena

PRODUCTS

Feta cheese, Kasseri, Kefalograviera,
Batzios, Anevato, Manouri, Anthotiro
Kefalotyri, Yogurts, Ariani

CONTACT DETAILS

1st km Grevena-Megaro, Grevena 51100
Tel.: +30 24620 87150
Fax: +30 24620 26351
www.kourellas.gr
kourellas@kourellas.gr



LABIOGAL S.A. KYRIAZAKOS

REGION

Lakonia

PRODUCTS DETAILS

Feta cheese
Goat feta cheese

CONTACT

Sykea, Lakonia
Tel.: +30 27320 71515
Fax: +30 27320 71805
www.cheesefeta.gr
laviogal@gmail.com



OLYMPUS DAIRY S.A.

REGION

Larisa

PRODUCTS

Fresh milk, Chocolate milk, Ariani
Kefir, Yogurt, Feta cheese, Kasseri, Graviera,
Kefalotyri, Anthotiro, Butter, Fruit juices

CONTACT DETAILS

16th km Larisa-Thessaloniki Rd, 41002
Tel.: +30 2410 541160
Fax: +30 2410 541164
www.olympus.gr - www.olympusdairy.com
info@olympus.gr - info@olympusdairy.com





FISH

If you are looking for Greek traditional foods that remained unaltered, not touched by modern times nor taste preferences, it is definitely grilled fish, emanating the aroma and freshness of the sea, dressed with the rich taste of the Greek olive oil, that you are looking for. A typical example is the traditional “Kakavia”, the fish soup prepared by the Greek islands’ fishermen.

The Greek seas, especially the Aegean, harbor a remarkable richness in seafood and its waters have given the Greece’s inhabitants food for thousands of years. Given the geographic features of Greece, with its abundant coastlines - the Modern Greek mainland measures 4.000 km of coastline and the coastlines with their clusters of islands measure another 11.000 km - it was a natural evolution that Greeks engaged for centuries in fishery.

The Minoan Civilization had a high regard for fish, as evidenced in excavation findings. Writings dating from the 5th century B.C., mention the Greek’s

preference for fish that was the main ingredient for many delectable dishes on their menu. Fish continued to be a staple food during the Hellenistic Period and fishery products maintained a dominant position on the tables in Roman and Byzantine times.

Greek coastal fishing methods have not changed much over time, utilizing about 250 marine species found in Greek waters. Fish farming has made significant progress, and managed to dominate the world market.

Throughout the centuries the fishing tradition in Greece has greatly influenced local cooking and developing remarkable ways of preparing fish dishes. Yet, not only culinary creations were inspired by marine life, but the visual arts as well. Fish is a religious symbol in Christianity, symbolizing the presence of Christ and the Eucharist. Fish and seabed creatures, real or imaginary, have made appearances throughout the history and have inspired writers, poets, filmmakers and painters.

From the embayed Greek seas and the rich depths of the Aegean Sea come delicious fish varieties, a fact that has been repeatedly acknowledged by celebrity chefs and connoisseurs. Fish is a very delicate product and dries out easily when overcooked. The general rule that applies to all fish dishes: fish needs to be treated with tenderness and care when cooked.

Cooking or Serving Suggestions

Salted sardines offer many possibilities for a selection of small dishes (mezes), with a minimum preparation time. A typical meze that perfectly matches with an ouzo drink is to remove the salt from the sardines and to serve it on a thin slice of bread with olive oil sprinkled on top of it.

The Industry in Numbers

For the purposes of this publication, both aquaculture companies and fish processing companies are presented. Greek fish farming is export-oriented, with exports amounting to 80% of total domestic production and fish exports ranked as one of the top food export industries in Greece.

The main cultivated species are seabream and seabass, while the frozen catches are cod, sole, perch, redfish and mullet.

Summary financial data from 78 companies that employ approximately 4,260 employees are presented below:

(in €)	2013	2012	% 2013-2012	2011	% 2012-2011
Total Assets	1,228,102,469	1,376,235,786	-10.76%	1,337,859,701	2.87%
Total Equity	141,758,663	312,161,434	-54.59%	347,185,813	-10.09%
Total Borrowings	669,739,595	634,442,758	5.56%	602,894,964	5.23%
Total Debt	1,085,058,460	1,062,933,624	2.08%	989,757,135	7.39%
Total Revenue	740,027,408	743,890,136	-0.52%	800,838,916	-7.11%
Gross Profit	-1,780,626	134,910,797	<100%	128,523,573	4.97%
EBITDA	-92,975,256	48,986,650	<100%	43,877,167	11.64%
Gross Profit margin	N/A	18.14%		16.05%	
EBITDA margin	N/A	6.59%		5.48%	
Debt/Equity ratio	7.65	3.41		2.85	
EBITDA to interest coverage ratio	N/A	1.09		1.06	

During the 2012-2013 period the economic problems encountered by the industry were intensified. The above figures indicate that while the Total Revenue remained almost at the same level as in 2012, on the contrary both Gross Results and Earnings before Interest, Tax, Depreciation and Amortization recorded an impressive deterioration. Gross Results and EBITDA amounted to losses € 1.7 million and € 92.9 million respectively, compared to profits for the corresponding figures in 2012. Total Equity decreased by 54.59%. As a result the Debt-to-equity ratio more than doubled to 7.65 times.

Sector Highlights

Greece has favorable geological, climatic and hydrobiological conditions for the development of aquaculture

The country's proximity to the Italian and Spanish markets gives it a competitive advantage over other production countries (Turkey)

Leading companies dominate the market achieving scale economies

Large aquaculture companies are capable of market supply throughout the year, which enables them to penetrate large food retail chains

The length of the production cycle makes timely adjustments of inventories difficult with regards to changes in market demand

The fragmentation of the industry does not support joint action taking for product promotion

The effective branding of aquaculture products has been hampered

The frozen catches and especially the Lenten seafood (squid, octopus, cuttlefish, shrimps and mussels) are characterized by strong seasonality. 70-80% of annual sales of mollusks take place during Lenten season

GALAXIDI FISH FARMING S.A. (Athex Listed: Mar 2002/Bloomberg Symbol GMF:GA)



REGION

Galaxidi, Fokida

PRODUCTS

Sea bream (*Sparus aurata*),
Sea bass (*Dicentrarchus labrax*)



CONTACT DETAILS

Anemokampi, Galaxidi 33052
Tel: +30 22650 41840
Fax: +30 22650 41197
www.gmf-sa.gr
gmf-sa@gmf-sa.gr

HELLENIC FISHFARMING S.A. (Athex Listed: Aug 2000/Bloomberg Symbol ELFI:GA)



REGION

Vrilissia, Attica

PRODUCTS

Sea bream juveniles
Sea bass juveniles
Fresh sea bream & sea bass
Frozen sea bream & sea bass



CONTACT DETAILS

48 Pentelis Ave., Vrilissia 15235
Tel: +30 210 6131666
Fax: +30 210 6132367
www.helfish.gr
dchalkiadakis@helfish.gr

NIREUS S.A. (Athex Listed: Mar 1995/Bloomberg Symbol NIR:GA)



REGION

Koropi, Attica

PRODUCTS

Sea bream, Sea bass, Meagre
Juvenile, fish Feed
Aquaculture equipment

CONTACT DETAILS

1 Dimokritou str., Vari, 19400
Tel: +30 210 6624280
Fax: +30 210 626804
www.nireus.com
info@nireus.com



SELONDA AQUACULTURE S.A. (Athex Listed: June 1994/Bloomberg Symbol SELO:GA)



REGION

Athens

PRODUCTS

Sea bream, Sea bass



CONTACT DETAILS

30 Navarchou Nikodimou str.
Athens 10556
Tel: +30 210 3724900
Fax: +30 210 3724909
www.selonda.com
sud.b@gr.selonda.com



FRESKOT KONTOVEROS S.A.

REGION

Aspropyrgos, Attica

PRODUCTS

Frozen fish, Peeled fish

Shrimps & seafood

Ready-to-eat meals

CONTACT DETAILS

Lakkos Katsari, Aspropyrgos 19300

Tel.: +30 210 5595661

Fax: +30 210 5596357

www.kontoveros.gr

sales@kontoveros.gr



THINK GREEN

REGION

Thessaloniki

PRODUCTS

Anchovy 7 Sardine

in greek organic olive oil

Black organic olives, Appetizers

CONTACT DETAILS

Xifilinos, 13-15 str.

55131 Kalamaria -Thessaloniki

Tel.: +30 2310 403511

Fax: +30 2310 403618

www.thinkgreen.gr info@thinkgreen.gr



CH. KIRIAZIS SA

REGION

Aspropyrgos, Attica

PRODUCTS

Processing, packaging
and commerce of frozen fish
and seafood

CONTACT DETAILS

Aspropyrgos 19300

Tel.: +30 210 5596590-2

Fax: +30 210 5595394

www.portoheliseafood.gr

phelifzn@otenet.gr



VASSILIOU - TROFINKO SA

REGION

Magoula Attica

PRODUCTS

Processing, packaging
and commerce
of frozen fish and seafood

CONTACT DETAILS

Dervenochorion

VIPA Magoula Attica

Tel.: +30 210 5512117

Fax: +30 210 5551000

www.vtf.gr

lourantos@vtf.gr, evassiliou@vtf.gr





WINES

In ancient times, it was believed that the fermented fruit juice from grapes was a gods' gift to man – this divine bestowment paved the way for man to the magical world of wine. Wine indulges the taste buds with an endless game of colors, aromas and flavors. The world of wine is exciting; it poses many challenges in combining contrasting tastes in the search for balance and harmony.

The wine making tradition in Greece is as old as the history of wine itself. Odysseus escaped the Cyclops Polyphemus by getting him drunk on wine from Maronia, a wine that is still made today in the region, a connecting link of the past and present that evidences the history of vine and winemaking, which is as intoxicating as good aged wine.

For years, the Greek vintners worked hard, with passion and knowledge to improve Greek wines, and all indications indicate that their efforts have paid off. Of course, one glass of wine is not enough

to convince us of the greatly elevated reputation of the local wines, but the fact that Greek wines receive the highest awards in international competitions speaks for itself.

Wines can significantly differ among each other, even when they emanate from the same grape variety. These differences are due to location, the vintner and the wine making technique, as well as the year of production.

Each wine displays the characteristics of its terroir, which give the wines their distinguished features. The wine producing regions in Greece have been internationally recognized for their unique and outstanding cultivars, producing fine quality wines.

The journey through the Greek vineyards, with their unique products is exciting. It reveals the tannins of the robust wines of Naoussa, from the red Xynomavro cultivars, grown in the Macedonia region; the velvety taste of the red Agiorgitiko from Nemea, the refreshing

acidity of the Assyrtiko from Santorini, and the sweetness of Malvasia from Crete – a wine which dominated over three centuries the markets of the East and West; but also the richness of the Cretan Liatikou wine, that can stand up to the ancient local variety from Chania, the Romaiko. There are more to come! The taste experiences continue with: the Aegean red Mandilaria, the aromatic Moschofilero and Malagouzia, and the playful Athiri from the Dodecanese. The intense nose of honeyed aromas of the Muscat from Samos and Limnos needs no further introduction, nor does the rich, raisiny and rustic Mavrodaphne wine.

Greek wine has opened its gates and reveals its magical world, which is full of changing colors, aromas and tastes. It is a stimulation of blends and differences in search of balance and harmony.

The Industry in Numbers

Viticulture and Enology has a long tradition in Greece and in the last decades major investments have been made for the production of bottled wine. The quality and reputation of Greek wines is confirmed by its high export numbers and the continuous award of medals in international competitions.

The wines of Greece are categorized into wines with “Protected Designation of Origin (PDO)” status, wines with “Protected Geographical Indication (PGI) status, varietal wines and table wines.

From a representative sample of 62 companies of the above industry that employ a workforce of about 1,500 people, the following data have been retrieved:

(in €)	2013	% 2012	2013-2012	% 2011	2012-2011
Total Assets	568,814,767	582,691,768	-2.38%	581,120,911	0.27%
Total Equity	241,987,217	250,068,416	-3.23%	241,887,116	3.38%
Total Borrowings	212,794,894	213,774,368	-0.46%	204,419,474	4.58%
Total Debt	325,800,369	331,323,003	-1.67%	337,721,292	-1.89%
Total Revenue	223,631,510	210,684,742	6.15%	216,156,034	-2.53%
Gross Profit	65,900,725	62,828,703	4.89%	72,215,270	-13.00%
EBITDA	19,553,090	18,071,022	8.20%	22,736,458	-20.52%
Gross Profit margin	29.47%	29.82%		33.41%	
EBITDA margin	8.74%	8.58%		10.52%	
Debt / Equity ratio	1.35	1.32		1.40	
EBITDA to interest coverage ratio	1.39	1.19		1.59	

During the 2012-2013 period Total Revenue was increased by 6.15%, with a parallel increase in profitability of sector companies, in terms of Gross Results (+4.89%) and Earnings before Interest, Tax, Depreciation and Amortization (+8.20%). Gross Profit and EBITDA margins remained at the same level as in 2012, but they recorded a decline compared to the corresponding figures in 2011. The Debt-to-equity ratio remained at the same level as in 2012, whereas the EBITDA to interest coverage ratio improved to 1.39 (from 1.19).

Sector Highlights

Upgraded quality of Greek wines and recognition abroad

New, improved winemaking methods and investments in modern wineries

Wine is not subject to excise duty like its substitute products (beer, spirits)

Penetration in new markets such as China, Russia and India

Fragmentation of the domestic viticulture and winemaking and high production costs due to lack of economies of scale

Increase in number of wine imports from third countries

Distortion of competition due to illegal trade and uncontrolled movement of bulk wines

Tense competition overseas from New World wines

J. BOUTARIS & SON HOLDING S.A. (Athex Listed: Nov 1987/Bloomberg Symbol MPK:GA)



REGION

Athens

PRODUCTS

Food & Beverage

Distillation & Wine Making



CONTACT DETAILS

20th km Marathonos Avenue

19009 Pikermi

Tel: +30 210 6605200

Fax: +30 210 6039852

www.boutarigroup.gr

cleopatra.christou@boutarigroup.gr



DOMAINE COSTA LAZARIDI (Athex Listed: Jan 2000/Bloomberg Symbol KTILA:GA)



REGION

Drama

PRODUCTS

Domaine Costa Lazaridi, Amethystos

Cava Chateau Julia, Oinotria Land

Collector's Magnum, Aceto Botanico

CONTACT DETAILS

Adriani, P.O. Box 157, Drama 66100

Tel.: +30 25210 82231 +30 25210 82348

Fax: +30 25210 82320

www.domaine-lazaridi.gr

amethystos@otenet.gr



BOSINAKIS WINERY

REGION

Steno, Mantinea

PRODUCTS

White dry wine P.D.O. Mantinia

CONTACT DETAILS

Steno, Mantinea, Tripoli 22100

Tel.: +30 2710 572767

Fax: +30 2710 572765

www.bosinakis.gr

wines@bosinakis.gr



DOMAINE CHATZIGEORGIOU

REGION

Limnos

PRODUCTS

White dry P.D.O wine

Red & Rose dry P.D.O wine

Natural sweet wine aged

CONTACT DETAILS

Karpasi, Limnos 81401

Tel.: +30 22540 31082

Fax: +30 22540 31155

www.chatzigeorgioulimnos.gr

chatzigeorgiou_domaine@hotmail.com.gr



DOMAINE EVHARIS

REGION

Megara, Attica

PRODUCTS

Eva Secco, Eva roze, Ilaros White & Red,
Domaine Evharis White & Red,
Assyrtiko, Assyrtiko Sur Lie,
Merlot, Syrah, Chardonnay, Epilogos

CONTACT DETAILS

1st km Alepochori - Megara Ave 19100
Tel.: +30 22960 90346
Fax: +30 22960 90151
www.evharis.gr
evharis@evharis.gr



GREEK WINE CELLARS D. KOURTAKIS S.A.

REGION

Markopoulo, Attica

PRODUCTS

Retsina, Mavrodaphne, Apelia
Kouros Patras & Kouros Nemea
Imiglikos, Calliga, Muscat of Samos
GWC, Vin de Crete

CONTACT DETAILS

20 Anapafseos str., Markopoulo 19003
Tel.: +30 22990 22231-6
Fax: +30 22990 23301
www.greek-wine-cellar.com
kourt@otenet.gr



EYRYTUS TSOPELAKOS WINERY

REGION

Messinia

PRODUCTS

Eyrytus Roditis
Eyrytus Syrah Merlot

CONTACT DETAILS

4th km Tsakona Kalo Nero Nt Rd
Zevgolatia, Messinia
Tel.: +30 27240 22435 - 6974921235
Fax: +30 27240 22435
www.evritos.com
info@evritos.com



INO S.A.

REGION

Thiva

PRODUCTS

WINEpoems, INO Varietals
INO wines, Melodikos

Retsina Yortassi

CONTACT DETAILS

P.O. Box 2, Thiva 32200
Tel.: +30 22620 28781-4
Fax: +30 22620 28144
www.inowines.gr
inong@inowines.gr



PAPANTONIS WINERY

REGION

Argos

PRODUCTS

Meden Agan

Metron Ariston



CONTACT DETAILS

47 Kanari str., Argos 21200

Tel.: +30 27510 23620

Fax: +30 27510 24719

www.papantonis.gr

info@papantonis.gr





FLOUR-BAKERY

Flour and water - two humble ingredients, transformed by man with dedication and mastery into silky-smooth dough that magically turns into the most familiar and best loved aliment - bread. Flavors differ, depending on weather conditions, humidity, flour variety and water temperature.

A bite of warm aromatic bread brings back the comforting memories of childhood. Smooth and elastic, the airy dough comes alive with kneading and baking is transformed into nutritious bread. The unsurpassed velvety taste is reminiscent of maternal affection and the feel of a warm welcoming home, filled with the aroma of freshly baked bread.

A primordial and sacred ingredient, flour guarantees the survival of man. It is one of the raw materials that played an important part in human nutrition and of all flour-based products, bread is the most prominent. The beginning of flower milling is lost in the mists of time. In his writings, Homer refers to flour mills and milling, and it becomes

evident that production of flour in ancient times did not differ much from the newer methods.

In ancient Greece, ritual bread offerings were made to the gods and during the Thesmophoria festival, offerings of big bread loafs were made to Demeter, the goddess of harvest, at her temple at Eleusis. In daily life, the Greeks enjoyed different kinds of bread: the leavened bread from flour, water and yeast, the unleavened bread made only with flour and water and the semolina bread, ground flour from good quality wheat. To enhance the flavor of their bread, the ancient Greeks added sea salt to the dough.

Flour is made by grinding cereal grains into powder. From all the grain varieties, more wheat flour is produced than any other flour and it is one of the most important aliments in the world. In many areas of Greece "Celebration Breads" are made, served at holiday times such as Christmas and Easter and during harvest festivals. Greece is

also home to fine pies, cookies, rusks, trahanas (cracked wheat and fermented milk) and pasta (such as hilopites).

Bread is a basic food staple. Bread keeps the human body going and it is not by chance that the Greeks have a profound awe and respect for bread. They avoid throwing away bread, for it also considered a blessing from Christ, the poor man's food but also the physical manifestation of friendship, with the sharing of "bread-and-salt".

Cooking or Serving Suggestions

The absolute experience for the taste buds is a thick slice of leavened bread, toasted and sprinkled with olive oil, coarse sea salt and some fresh oregano leaves.

The Industry in Numbers

Both the Greek flour milling industry and the sector of bread and bakery products are classified as self-sufficient, as their demand for supply is covered almost entirely by domestic production and only a small percentage of supply is imported.

The basic products of the flour milling industry are flour and semolina, whereas the main standardized bread and bakery products are toast bread, loaf, burger rolls, rusks, and breadsticks.

From a representative sample of over 139 companies of the above industries and a workforce of about 9.310 employees, the following data have been retrieved:

(in €)	2013	2012	% 2013-2012	2011	% 2012-2011
Total Assets	2,035,892,831	2,057,144,847	-1.03%	2,065,748,306	-0.42%
Total Equity	858,906,408	863,026,260	-0.48%	931,047,368	-7.31%
Total Borrowings	694,231,553	714,100,471	-2.78%	696,700,605	2.50%
Total Debt	1,171,646,521	1,189,060,996	-1.46%	1,130,277,112	5.20%
Total Revenue	1,355,936,740	1,356,950,816	-0.07%	1,276,993,501	6.26%
Gross Profit	422,775,669	431,777,642	-2.08%	411,228,571	5.00%
EBITDA	129,334,144	137,079,277	-5.65%	135,615,894	1.08%
Gross Profit margin	31.18%	31.82%		32.20%	
EBITDA margin	9.54%	10.10%		10.62%	
Debt/Equity ratio	1.36	1.38		1.21	
EBITDA to interest coverage ratio	1.17	1.21		1.47	

The above figures indicate that the domestic economic crisis had a little affect in the two industries. During the 2012-2013 period Total Revenue showed a marginal decline. In terms of profitability, Total Gross Profit fell by 2.08% and Earnings before Interest, Tax, Depreciation and Amortization dwindled by 5.65%. Gross Profit and EBITDA margins recorded a marginal reduction. The Debt-to-equity ratio remained at the same level as in 2012 while the EBITDA to interest coverage ratio arrived at 1.17 (from 1.21).

Sector Highlights

Significant investments in Research &

Development, resulting in new, more competitive products and technologies and a reduction in production cost

Modernization of company machinery and equipment

Creation of vertical units with higher capacity and productivity

Low income elasticity of demand, given that it is a source material for production of basic foodstuffs

The bread and bakery industry shows a high degree of concentration, with the existence of a few large industries and a small number of small and medium-sized enterprises

Lack of incentives for investments for relocation from the Attica region.

Deficiencies in transport infrastructure (road networks, ports) which limit the effectiveness of sales channels

The domestic flour and semolina market appears saturated and is characterized by oversupply

SONS E.CHATZIKRANIOIS FLOUR INDUSTRY OF TIRNAVOS S.A.

(Athex Listed: Dec 1999/Bloomberg Symbol HKRAN:GA)

REGION

Tirnavos, Larisa

PRODUCTS

Several types of flours (Bakery
Patisserie, Bran flour-total milling
Stone Mill, Super, Corn & Semolina)

CONTACT DETAILS

1st km Tirnavos-Larisa Rd, Tirnavos
Tel.: +30 24920 22227 +30 210 5242344
Fax: +30 24920 23755 +30 210 5232338
www.xatzikranioti.gr - xkran@otenet.gr



KARAMOLENGOS BAKERY INDUSTRY S.A.

(Athex Listed: Jan 1999/Bloomberg Symbol KMOL:GA)

REGION

Koropi, Attica

PRODUCTS

Bakery and confectionery products

CONTACT DETAILS

Koropi Industrial Area
Thesi Tzima
Tel.: +30 210 6694200
Fax: +30 210 6694299
www.karamolegos-bkr.gr
karamolegos@ath.forthnet.gr



KEPENOS FLOUR MILLS S.A.

(Athex Listed: Jan 2002/Bloomberg Symbol KEPEN:GA)

REGION

Patra

PRODUCTS

Several types of flours

CONTACT DETAILS

Patra Industrial Area, 25018
Tel.: +30 2610 241940
Fax: +30 2610 647173
www.kepenos.gr
mkepenos@kepenos.gr



LOULIS MILLS S.A.

(Athex Listed: Oct 1951/Bloomberg Symbol KYLO:GA)

REGION

Keratsini, Piraeus

PRODUCTS

Milling products & Sub-products
Long & Short Life Consumer Goods

CONTACT DETAILS

1 Spetsion str., Keratsini 18755
Tel.: +30 210 4090100
Fax: +30 210 4090185
www.loulisgroup.com
loulisathens@loulisgroup.com



LOULIS MILLS S.A.



K. SARANTOPOULOS FLOUR MILLS S.A.

(Athex Listed: Nov 1949/Bloomberg Symbol KYSA:GA)

REGION

Keratsini, Piraeus

PRODUCTS

Flour products, By-products

Products for industrials

CONTACT DETAILS

3 Dimokratias Ave.,

Keratsini 18756

Tel.: +30 210 4124731

Fax: +30 210 4124734

www.ksarantopoulos.gr

sarantopoulos@internet.gr



ADAMANTINA HOUSE

REGION

Lakonia

PRODUCTS

Bio-pasta total milling with tomato

& spinach Traditional cookies

with olive oil without sugar

CONTACT DETAILS

Glykovrysi, Lakonia

Tel.: +30 27350 91001

Fax: +30 27350 91300

www.adamantina.gr

christos@adamantina.gr



Kriton ARTos S.A.

(Athex EN.A. Listed: Feb 2009/Bloomberg Symbol KRITON:GA)

REGION

Heraklion, Crete

PRODUCTS

Traditional Cretan rusks, Cretan Crisps

Olive oil biscuits, bread sticks

CONTACT DETAILS

Ammos Kalithea, Alikarnassos

Heraklion 71500

Tel.: +30 2810 380850

Fax: +30 2810 381916

www.kritonartos.gr - kr-artos@otenet.gr



«ALFA» ATH.KOUKOUTARIS S.A.

REGION

Kozani

PRODUCTS

Traditional family pie «KIXI» &

Mini pies, Country pies, Pizza, Brioche

Pie pastry bases, Croissants, Bougatsa

CONTACT DETAILS

1st km Kozani-Argilos Rd, Kozani 50100

Tel.: +30 24610 42103-4

Fax: +30 24610 33305

www.alfapastry.com info@alfapastry.com



FLOUR-BAKERY

ELBISCO HOLDING S.A.

REGION

Pikermi, Attica

PRODUCTS

Cereal products (flours, rusks)
Biscuits, Bread & Pastries products
as well as plastic packing products

CONTACT DETAILS

21st km Marathonos Ave.

Pikermi 19009

Tel.: +30 210 6039712

Fax: +30 210 6039083

www.elbisco.gr

elbisco@elbisco.gr



ATHENIAN FAMILY BAKERY FERRO SA

REGION

Lamia

PRODUCTS

Production and trade in Breadsticks,
Wafer Rolls, Mini Cookies,
Digestives, Palmiers

CONTACT DETAILS

196 Mesogeion Ave., Cholargos 15561

Tel.: +30 210 6039121

Fax: +30 210 6039002

www.ferro.gr

production@ferro.gr



FLOUR MILLS THRAKIS - I.OUZOUNOPOULOS S.A.

REGION

Alexandroupoli

PRODUCTS

Wheat flour



CONTACT DETAILS

P.O. Box 1104, Alexandroupoli

Tel.: +30 25510 26474

+30 210 2850553

Fax: +30 25510 31644

+30 210 2850351

www.thracemills.gr



"GAIA" WOMEN'S AGROTOURISM COOPERATIVE OF TRIGONON EVROU

REGION

Orestiada, Evros

PRODUCTS

Ifkadia, Triftaria (traditional pasta)

Traditional pies,
sweets and marmelades

CONTACT DETAILS

Spilaio, Orestiada, Evros

Tel.: +30 25560 51100

Fax: +30 25560 51100

www.gaia-evros.gr

gaia.evros@gmail.com



HELLENIC QUALITY FOODS AET - HQF

REGION

Magoula, Attica

PRODUCTS

Pastries frozen & fresh, Pizza
Pies with cheese and vegetables

CONTACT DETAILS

Gennimata Ave., Magoula

Attica 19018

Tel.: +30 210 6161500

Fax: +30 210 6161599

www.kanaki.gr info@hqf.gr



IONIKI FROZEN DOUGH & PASTRY PRODUCTS S.A.

REGION

Oraiokastro, Thessaloniki

PRODUCTS

Pies and doughs, Bugatsa, Brioche
Vegetarian delicacies, Croissants

CONTACT DETAILS

1st km Neochorouda-Oraiokastro Rd
Thessaloniki

Tel.: +30 2310 788120

Fax: +30 2310 778225

www.ioniki.com

nikos.export@ioniki.com



KARAVAS BAKERY – KORONAIΟΥ GEORGIA

REGION

Kythira

PRODUCTS

Traditional rusks with virgin
olive oil, Total milling
without additives preservatives

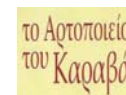
CONTACT DETAILS

Karavas, Kythira

Tel.: +30 27360 33092

Fax: +30 27360 33092

karavas.bakery@gmail.gr



RODOULA FROZEN DOUGH PRODUCTS

REGION

Acharnai

PRODUCTS

Frozen dough products

CONTACT DETAILS

Amaliados 2 & Trakomakedonon 74

Acharnai 13671

Tel.: +30 210 2447550

Fax: +30 210 2447117

www.rodoula.gr

info@rodoula.gr



FLOUR-BAKERY

"THE MANNA" N. TSATSARONAKIS S.A.

REGION

Chania, Crete

PRODUCTS

Traditional Cretan rusks

Biological rusks, Cookies

Bread sticks

CONTACT DETAILS

Platanos Kissamou, Chania

Tel.: +30 28220 41228

Fax: +30 28220 41193

www.tomanna.gr

to_manna@otenet.gr



"TA MYLELIA" WATER MILL LTD

REGION

Ippios (Watermill), Lesvos

PRODUCTS

Pasta with various flavors

and traditional Greek sweets



CONTACT DETAILS

Main Office: 29 Marathonos Ave.

Agios Stefanos, Athens

Tel.: +30 210 6219976,

Fax: +30 210 6216919

www.mylelia.gr

christina@mylelia.gr





COLD CUTS

Cold cuts consumption in Greece has a history of over 2.500 years ago. It is a history of a myriad of flavors which bring us to Mani with its sausage specialty called the “Sigklino”, to Evros with its “Kavourmas” sausage, to the island of Crete with the “Apaki” sausage, to the Cycladic islands where they offer “Loutza” sausage, and, last but not least, to Karditsa, famous for its small sausages. The imagination and resourcefulness of many generations and their relentless search for new tastes, led to an amazing culinary variety in the Greek market.

The history of cold cuts making evolved as an effort by man to preserve and economize meat from his hunts and to keep it in storage for the difficult months of the year. In time, mankind discovered methods to ensure better preservation, and, at the same time, experimented on the positive effects of some ingredients such as salt and animal fat. The need to preserve meat created the art of making cold cuts and other cured, smoked and preserved meats, a practice which is now called “charcuterie”.

The ancient Greek ancestors were fond of their meat and in their quest to preserve their beloved food, they discovered the value and taste of cold cuts. Reports about sausages as part of the dietary menu of the ancient Greeks can be found in Homer’s Odyssey, in the “Deipnosophists” a work by Atheaneus and in the writings of Hippocrates and Archestratus.

The ancient Greeks were lovers of cold cuts and offal and Charinos, the father of Aeschines who was a student of Socrates, is mentioned in 500 B.C. as the first Garde manger, famous for his smoked meats.

The methods of meat preservation evolved with the passage of time and in the Middle Ages meat preservation developed into the culinary art of charcuterie. During this period of time sausage consumption grew in popularity and many places evolved into “cold cuts paradises”. The cold cuts were named after the town where they were made as well as after their country of origin.

In various regions of Greece, sausage making started before Christmas. Every household was celebrating and the festivities lasted until dawn the next day. The meat was cut into pieces with some of the pieces kept for preservation either salted or preserved in fat and stored in clay pots. Other pieces were smoked over the aromatic brushwood from the mountains and other parts were grinded and seasoned with orange, leeks and peppers and made into sausages.

There are ample varieties of cold cuts and the manifold methods of their preparation reflect the gastronomic culture of each region as well as the cultural traditions of its habitants.

Cooking or Serving Suggestions

Thin slices of the wonderfully textured and peppery tasting Loutza, will bring the taste of lentil salad to new heights. The Sigklino sausage from Mani will enhance any omelet with its taste and pasta will get special mentions when accompanied by the smoked Cretan Apaki sausage.

The Industry in Numbers

The Cold Cuts product sector is marked by a high level of concentration, since the top five companies collectively hold 70% of sales in the industry.

The key products of the industry are divided into Pariza-Mortadella, Ham (ham and shoulders), Turkey/Chicken cold cuts', Sausages, Salami and Bacon. Over the last years new products that have been launched, low in fat, reduced in salt content, and preservatives, gain a good market share.

Data were collected from a sample of 24 companies that employ about 2.140 employees and present the following summary sizes:

(in €)	2013	2012	2013-2012	%	2011	2012-2011
Total Assets	505.798.136	550.907.684	-8,19%		548.997.071	0,35%
Total Equity	90.692.170	127.328.232	-28,77%		139.259.623	-8,57%
Total Borrowings	264.789.396	252.631.723	4,81%		238.214.129	6,05%
Total Debt	412.707.584	421.293.358	-2,04%		407.679.082	3,34%
Total Revenue	401.616.516	414.303.375	-3,06%		420.280.250	-1,42%
Gross Profit	121.404.871	129.776.392	-6,45%		133.134.473	-2,52%
EBITDA	-3.551.581	28.603.621	<100%		25.365.520	12,77%
Gross Profit margin	30,23%	31,32%			31,68%	
EBITDA margin	N/A	6,90%			6,04%	
Debt/Equity ratio	4,55	3,31			2,93	
EBITDA to interest coverage ratio	N/A	1,50			1,47	

The fiscal results of the industry were adversely affected by the current economic conditions, the limited consumers income and the negative figures recorded by two of the major companies of the industry. Total Revenue noted a decline of 3.06% compared to the previous year. At the same time, Gross Profit showed a reduction by 6.45%, while Earnings before Interest, Tax, Depreciation and Amortization amounted to losses of € 3.5 million, compared to profits of €28.6 million for the corresponding period in 2012. Gross Profit and EBITDA margins adjusted to a lower level and the debt-to-equity ratio declined from 3.31 to 4.55.

Sector Highlights

Implementation of major investments for equipment renewal and vertical integration of businesses

Conclusion of exclusive partnerships for the provision of fast food chains

Modern ways of life favor the consumption of frozen ready meals, hence also cured meat products

Market penetration in foreign markets.

Production and distribution to consumers of organic cured meat

In Greece, the per capita consumption of cold cuts is still low compared to the rest of Europe

Small size of the domestic market

Production costs are heavily dependent on the conditions prevailing in the global meat market

CRETA FARMS S.A. (Athex Listed: Apr 2000/Bloomberg Symbol Creta:GA)



REGION

Rethymno, Crete

PRODUCTS

Deli meats

Frozen products



CONTACT DETAILS

15th km Rethymno-Heraklion Nt Rd
Latzimas, 74100

Tel: +30 28310 58026 +30 210 6260233

Fax: +30 28310 58035 +30 210 6221229

www.cretafarm.gr

elouraki@cretafarm.gr

NIKAS S.A. (Athex Listed: Apr 1991/Bloomberg Symbol NIKAS:GA)



REGION

Agios Stefanos, Attica

PRODUCTS

Cold cuts, Sausages, Salami

Frozen pizza, Cheese products

CONTACT DETAILS

22nd km Athens-Lamia Nt.Rd

Agios Stefanos 14565

Tel: +30 210 8187300

Fax: +30 210 6216439

www.nikas.gr

info@nikas.gr



IFANTIS S.A.

REGION

Kifissia, Attica

PRODUCTS

Cold cuts, Frozen products

Pizza, Salads, Feta cheese

Chicken products



CONTACT DETAILS

Seneka 4, Kifissia 14564

Tel.: +30 210 8196507

Fax: +30 210 8075692

www.ifantis.com

info@ifantis.gr

PRITSAS CHRISTOS

REGION

Karditsa

PRODUCTS

Various types of sausages

traditional seftalia

CONTACT DETAILS

3rd km Karditsa-Athens Nt Rd

Karditsa 43100

Tel.: +30 24410 22074

Fax: +30 24410 75334

www.pritsas.com.gr

info@pritsas.com.gr





NON-ALCOHOLIC BEVERAGES

The history of water and springs has its beginnings in mythology. Old Greek folk stories told myths of the waters and the magical creatures that lived there - nymphs, dragons, monsters and specters, all dwellers of the aquatic realm.

Greek natural mineral water is of exceptional quality. Research has shown that not only its quality is high but it is also “light”- meaning that it contains very few inorganic elements such as metals.

In Greece, the consumption of bottled water increases annually by 10%, remaining below the average consumption of the rest of Europe, with Italy holding the first place in bottled water consumption of.

It is noted that tap water in the Attica region is the best in Europe, while tap water in some European countries is not considered safe for drinking.

Bottled spring water may have minor differences depending on the mineral's concentration of each spring.

Modern way of life demands many hours away from home and alongside bottled water consumption, it has also led to the consumption of packaged fruit and vegetable juices. Soft drinks are easy to drink and are accessible at all times by everyone (outdoors, at school, at the office). They help keep the body hydrated and provide the valuable nutrients it requires.

At the same time, modern technology has made it possible to enrich the packaged juices with vitamins and minerals, such as calcium, Vitamin and also other fat-soluble vitamins, such as Vitamin E and A, providing nutrients essential to human health.

In Greece, the production of long-life fruit juices started in 1982, which was an important innovation. Until that time, there were juice concentrates which had to be diluted with water. Naturally, the soft drinks remain the undisputed leader in the market.

The Industry in Numbers

Competition in Greece is concentrated largely between five companies, which account for 80% of the market.

The main products of the Water, Soft-drinks and Juices industry are: mineral water, table water, sparkling water, colas, sodas, lemonades, orangeades, isotonic soft drinks, ice teas, coffees, natural juices and concentrated juices.

From a representative sample of 48 companies of the above industry and a workforce of over 2,100 employees, the following data have been retrieved:

(in €)	2013	2012	% 2013-2012	2011	% 2012-2011
Total Assets	565,410,524	572,058,446	-1.16%	577,429,570	-0.93%
Total Equity	309,595,943	281,565,801	9.96%	245,120,005	14.87%
Total Borrowings	109,567,562	138,854,097	-21.09%	174,087,462	-20.24%
Total Debt	250,137,907	284,402,162	-12.05%	323,731,231	-12.15%
Total Revenue	394,104,216	418,366,714	-5.80%	398,490,571	4.99%
Gross Profit	144,264,089	145,778,092	-1.04%	136,953,470	6.44%
EBITDA	35,435,819	38,119,894	-7.04%	31,316,446	21.72%
Gross Profit margin	36.61%	34.84%		34.37%	
EBITDA margin	8.99%	9.11%		7.86%	
Debt/Equity ratio	0.81	1.01		1.32	
EBITDA to interest coverage ratio	4.67	4.05		3.32	

The ongoing recession affected the financial results of the Water – Soft drinks and Juices sector. Total Revenue in 2013 decreased by 5.80% compared to 2012, while there was a regression in Gross Profit (-1.4%) and Earnings before Interest, Tax, Depreciation and Amortization (-7.04%). The Debt-to-equity ratio improved to 0.81 (from 1.01) while the EBITDA to interest coverage ratio increased to 4.67 (from 4.05).

Sector Highlights

The bottled water industry is the fastest growing sector of the wider food and beverage industry

The trend towards healthy eating has also influenced the water industry, with a preference for glass bottles and accredited bottling companies as well as innovative packaging

Unusually high temperatures in recent years in Europe have contributed significantly to an increase in water and soft-drink consumption

Difficulties for new businesses to penetrate the market due to economies of scale and difficult access to distribution channels

Low product differentiation gives great negotiation strength to the industry's clients (retail chains, super markets)

The market is characterized by a strong seasonality, where 70-75% of the total annual demand is covered during the months of April to September

Coca-Cola HBC Greece S.A.I.C (parent Coca-Cola HBC AG, ATHEX listed: April 2013/Bloomberg Symbol: EEE GA)



REGION

Athens

PRODUCTS

Sparkling beverages, Juices
Natural mineral water, Spring water
Ready-to-drink coffee & tea, Mixers
Energy drinks, Sports drinks

CONTACT DETAILS

60 Kifissias Ave., Marousi 15125

Tel: +30 210 6381700

Fax: +30 210 6381900

www.coca-colahellenic.com

oya.gur@cchellenic.com



BIOFRESH S.A.

REGION

Sparti - Lakonia

PRODUCTS

NFC juices, Natural blends
Citrus and fruits concentrates
Corrected concentrates

CONTACT DETAILS

Nakou 3, Athens 11743

Tel.: +30 210 9248456

Fax: +30 210 9248457

www.biofresh-sa.com

exports1@biofresh-sa.com



CHIOS FRUITS S.A.

REGION

Chios

PRODUCTS

100% Natural juices
Fruit juice soft drinks

CONTACT DETAILS

25 Martiou 34

Kambos Chios 82100

Tel: +30 22710 21117 +30 22710 20771

Fax: +30 22710 82230

www.chiosfruits.com

contact@chiosfruits.com



CHITOS S.A. – ZAGORI NATURAL MINERAL WATER

REGION

Ioannina

PRODUCTS

Natural mineral & sparkling water
in a variety of bottles & packages

CONTACT DETAILS

12th km Ioannina-Konitsa Nt Rd,

Ioannina 45500

Tel: +30 26510 61843

Fax: +30 26510 37074

www.zagoriwater.gr

info@zagoriwater.gr



CHRISTODOULOU FAMILY

REGION

Athens

PRODUCTS

Juices 100%

Pure not from concentrate



CONTACT DETAILS

29 Paradissou str.

Maroussi 15125 Athens

Tel: +30 210 6836860

Fax: +30 210 6836850

www.chfamily.gr

info@chfamily.gr



LOUX MARLAFEKAS S.A.

REGION

Patra

PRODUCTS

Soft drinks in 8 different flavours

Loux Mix, Gazoz, LouxCola

Club Soda and Tonic water

100% Natural juices

CONTACT DETAILS

Kefalovryso, Patra 26500

Tel: +30 2610 529890

Fax: +30 2610 529682

www.loux.gr export@loux.gr



VIKOS EPIROTICAL BOTTLING COMPANY S.A.

REGION

Ioannina

PRODUCTS

“Vikos” & “Zagorohoria Vikos”

natural mineral water

“Vikos Cool-T” tea, Soft Drinks



CONTACT DETAILS

Chatzi Peleren 2, Ioannina 45221

Tel: +30 26510 62111

Fax: +30 26510 61363

www.vikoswater.gr

info@vikoswater.gr



NON-ALCOHOLIC BEVERAGES



MEAT-POULTRY

In the Copper Age, man begins to tame and breed the first wild animals, creating a first form of livestock breeding. Murals in caves indicate that goats first appeared 10,000 years ago, while the first evidence for the domestication of sheep dates back to 9,000 BC in Iraq. Chicken breeding goes back approximately 10,000 years ago in Southeast Asia. Cattle domestication and use in livestock breeding date back to about 6,500 BC - 8,000 BC in the Middle East. Pigs' domestication dates back to about 5,000 BC - 7,000 BC mainly in the Near East or China.

Animals had a prominent place in Greek mythology and many even had supernatural qualities. Some of them like sheep, deer, and oxen were protected by the gods, and played an important role in historical events.

Meat dominates our diet and is essential for proper nutrition and growth in humans. Red meat contains a wide variety of important nutrients, including high-quality protein, vitamin D, complex B vitamins, as well as iron,

zinc and selenium. When consumed in moderation, meat is part of a healthy balanced diet.

The white meat of poultry, also contains a high amount of protein and B complex vitamins, and because of its low fat content it is considered healthier and more digestible than red meat. It costs less but has high nutritional value; it is a food that is consumed in large quantities worldwide and cooked in various ways.

Indeed, researchers argue that chicken soup helps treat the symptoms of the common cold, since it contains many amino acids, confirming our grandmothers, who advise on savoring a steaming hot chicken soup with lots of lemon to fight a cold.

Meat and Greek traditions

In older times meat was a «luxury item» and was always consumed on special occasions such as large celebrations, festivals, name-day celebrations and weddings. Shortly before Lent fasting for Easter, on Fat Thursday, the Thursday of

the second week of Carnival (Kreatini = week of meat), it is customary to consume large quantities of charcoal grilled meat; the grilling gives out the typical smell (tsikna in Greek), thus that Thursday is called Tsiknopemti (Pemti – Thursday) in Greek. The traditional spit-roasted lamb is one of the most popular traditions of Easter Sunday throughout Greece. The celebration of Christmas in most parts of our country is also linked to the consumption of meat. A prominent place on the Christmas table is occupied by pork and goat meat, especially on the islands.

The Industry in Numbers

The meat and poultry industry was significantly developed in recent decades in parallel with the evolution and organization of the livestock breeding. The development of the sector and thereby its structure change is primarily due to the European Directives which they aim to encourage the production of safe, nutritious and affordable meats.

Financial data were collected from a sample of 98 companies with livestock and poultry operations, as well as processing and packaging companies of meat, poultry and their products. These companies employ a workforce of about 2.620 employees and they present the following summary data:

(in €)	2013	2012	% 2013-2012	2011	% 2012-2011
Total Assets	651,469,732	692,743,443	-5.96%	669,922,274	3.41%
Total equity	227,531,615	234,563,852	-3.00%	236,141,142	-0.67%
Total Borrowings	225,434,156	224,555,257	0.39%	198,623,765	13.06%
Total Debt	421,671,461	456,212,579	-7.57%	433,321,889	5.28%
Total Revenue	721,096,265	689,102,329	4.64%	660,436,299	4.34%
Gross profit	82,398,534	73,350,290	12.34%	73,195,467	0.21%
EBITDA	38,260,134	32,574,417	17.45%	33,489,253	-2.73%
Gross Profit margin	11.43%	10.64%		11.08%	
EBITDA margin	5.31%	4.73%		5.07%	
Debt/ equity ratio	1.85	1.94		1.84	
EBITDA to interest coverage ratio	2.32	1.84		2.24	

Total Revenue in 2013 increased by 4.64%. The percent increase in the cost of sales was retained at lower levels compared to the respective percent increase in the Total Revenue. This resulted in a significant improvement of both Gross Profit (+ 12.34%) and Earnings before Interest, Tax, Depreciation and Amortization (+17.45 %). Gross Profit and EBITDA margins recorded a slight increase compared to the previous year. The Debt-to-equity ratio was improved marginally to 1.85, while a significant increase was recorded in the EBITDA to interest coverage ratio (from 1.84 to 2.32).

Sector Highlights

The demand for meat in the country is characterized by low flexibility in terms of price.

The sector involves a few large industries, which have vertically integrated units and engage in all stages from animal breeding and slaughtering to meat production, processing/ preparation and production of meat products.

Insufficient pasture land and low-cost fodder have resulted in significant dependence of livestock breeding on imported and expensive fodder.

The majority of livestock breeding farms have a small production capacity and low level of organization.

KRE.KA S.A. (Athex Listed: Dec 1994/Bloomberg Symbol KREKA:GA)



REGION

Kavala

PRODUCTS

Raising, slaughtering & selling beef as well as wholesale slaughtering & trading of pork, lamb and goat



CONTACT DETAILS

Amynta 13, Kavala 65302

Tel: +30 2510 222270

Fax: +30 2510 834531

www.kreka.gr

kreka@otenet.gr

MEGAS ELLINIKOS PARADOSIAKOS GYROS S.A.

REGION

Aspropyrgos, Attica

PRODUCTS

Gyros, souvlaki and fine meat products.

All made from high quality meat provided by accredited producers

CONTACT DETAILS

100 Nato Avenue, Aspropyrgos, 19300

Tel: +30 210 558 4098

Fax: +30 210 558 4099

www.megagyros.gr

info@megagyros.gr



BIOGRECO S.A.

REGION

Laconia

PRODUCTS

Production, processing and commerce of organic products

Ready-made organic frozen meals, based on traditional recipes

CONTACT DETAILS

Kaminia Laconia, 23054

Tel: +30 27310 35667

Fax: +30 27310 36667

www.biogreco.gr

info@biogreco.gr





FRUITS & VEGETABLES

Early humans spent most of their time in search of food – they were hunters of animals and gatherers of fruits and vegetables.

Today, the provision of a great variety of food – and, especially fruits and vegetables, is made easy through super markets, grocery stores and farmer markets.

A great number of published daily research and studies recommend an increase in the consumption of fruits and vegetables due to their low calorie count, the abundance of nutritional values they contain, and their multiple health benefits.

The consumption of fruits and vegetables is determined by a number of factors, such as age, gender, and socioeconomic status. Given the low consumption rate in Europe, concerted efforts are made to increase the intake of fruits and vegetables.

Because of its geographic features and fertile soil, Greece produces fruits and vegetables of unique taste and quality.

Apples from the area of Zagoria or Tripoli are very popular, so are oranges from the Lakonia and Arta region. The peaches, nectarines and apricots from Imathia, the grapes and currants from Corinth are of outstanding quality. The Tzakonian eggplant from the Arkadia area, which has been awarded with the Protected Designation of Origin status, the potatoes from Nevropkopi, the tomatoes from Crete, the Santorini cherry tomatoes and many other unique and locally grown products are all part of a healthy diet.

Indeed, many regions of Greece hold annual food festivals, celebrating their local products. There is the Potato Festival, the Egg Plant Festival, the Tomato Festival – to name but a view and many others.

An increase in consumption of fruits and vegetables is one of the targets indicated in the 2007 E.U. White Paper on “the Strategy for Europe on Nutrition, Overweight and Obesity related health issues”. In this paper it is concluded that: “A school fruit scheme co-financed

by the European Union would be a big step in the right direction”. This recommendation has been put into action and in 2009 the Commission allocated EU money to distribute free fruit and vegetables to schools.

Sector Highlights

Fragmentation of farmland into many scattered, small farms, with a low modernization level, production organization and supply

Products mainly intended for the international market are processed and packaged in plants, which are either at the production location or in central Macedonia where a great number of private export companies is located
The domestic market is characterized by non-standardized products and a lack of organized market networks

The organization of exports activities does not provide for any kind of export policy measures. Exports entities are numerous, the majority of which have a small export volume, with autonomous and uncoordinated activities

BALAKANAKIS BROS S.A. – OLYMPIC FRUIT

REGION

Nafplio

PRODUCTS

Packaging and export
of fresh fruits and vegetables



CONTACT DETAILS

Argoliko Mideas, Nafplio 21100

Tel.: +30 27520 36400

Fax: +30 27520 36348

www.balakanakis.gr

info@balakanakis.gr

CITRUS MEMORY SCENT S.A.

REGION

Chios

PRODUCTS

Fruits in syrup, Marmelades
Delights, Marzipans, Biscuits
Rusks, Pretzels, Savory

CONTACT DETAILS

Argenti 9-11, Kambos, Chios 82100

Tel.: +30 22710 31513

Fax: +30 22710 32042

www.citrus-chios.gr

kplakotarisi@citrus-chios.gr



Dartsi Dimitra - 'OI GOUMENISSES'

REGION

Kilkis

PRODUCTS

Traditional sweets from fruits, jams,
quince paste, Greek pastas, mustard,
tomato sauce, different dips made
of peppers, aubergines and tomatoes

CONTACT DETAILS

Stathi – Goumenissa, 614 00 Kilkis

Tel.: +30 23430 43455

Fax: +30 23430 43455

www.oigoumenisses.gr

info@oigoumenisses.gr



οι γουμένισσες



GARLIC OF VISSA EVROS

REGION

Nea Vissa, Evros

PRODUCTS

Garlic

CONTACT DETAILS

Nea Vissa, Evros 68001

Tel.: +30 25520 71161

Fax: +30 25520 71628

www.skordobyssas.blogspot.gr

skordovissas@otenet.gr



«IDISTON» ARONEY A. - LAZAROU ATH.

REGION

Attica

PRODUCTS

Traditional spoon sweets,
marmelades and jams, cordials,
sauces and soups.

CONTACT DETAILS

10 Al. Zaimi str,
14342 N.Philadelphia, Attica
Tel: +30 210 2533698
Fax: +30 210 2533698
www.idiston.com.gr
info@idiston.com.gr

ΙΔΙΣΤΟΝ
IDISTON HANOMADO TRADITION



IPPOTOUR S.A.

REGION

Athens

PRODUCTS

Production and marketing
of fresh mushrooms

CONTACT DETAILS

Kallirois 103, Athens 17671
Tel: +30 210 6634791
Fax: +30 210 6645015
www.ippotour.gr
arkolakisd@ippotour.gr



MAKEDONIKI S.A.

REGION

Skydra-Veria

PRODUCTS

Production of extra jams, 100% fruit spreads
Traditional spoon sweets, Fruitsalads,
Vegetables in brine

CONTACT DETAILS

53 Kalavriton str. 12462 Athens
Tel: +30 210 5325061-2
Fax: +30 210 5325063
www.makedoniki.gr
vhalvatzis@makedoniki.gr



PANTAZIS FRUIT S.A.

REGION

Lechena, Elia

PRODUCTS

Processing,
packaging and marketing
of citrus fruits and vegetables

CONTACT DETAILS

57th km Patra-Pyrgos Nt Rd
Lechena 27053
Tel.: +30 26230 24100
Fax: +30 26230 29300
info@pantazisfruit.gr

PANTAZIS FRUIT S.A.



PELOPAC S.A.

REGION

Sindos

PRODUCTS

Olives, Antipasti, Spreads, Glazes

Sauces, Sweet toppers

(fig, pomegranate, apricot)

PELOPAC
Mediterranean Food Specialties

CONTACT DETAILS

P.O. Box 1298, Industrial Zone

Sindos 57022

Tel.: +30 2310 754050

Fax: +30 2310 754051

www.pelopac.gr info@pelopac.gr



RADIKI

REGION

Messinia

PRODUCTS

Wild greens, Bulbs, Roots, Vegetables

Wild Asparagus, Samphire, Cardoon

Edible Flowers, Hirovotano, Ascolybi

Mountain tea, Trahana, Hilopites

CONTACT DETAILS

Rahes, 24500 Messinia

Tel.: +30 6945495262

www.radiki.com

info@radiki.com





RICE-PULSES

The systematic cultivation of pulses and cereals provided a boost in the increase of population. Food cultivation was a big leap for human civilization and its history is closely tied to the development of mankind.

Pulses play an important part in the nutrition of many civilizations from antiquity up until today. Pulses are mentioned in Homer's Iliad, in writings of Athenaeus and referred to in many other written sources. These writings confirm that pulses were a highly esteemed food with the ancient Greeks and have not lost their popularity to the present day.

In ancient Egypt, pulses were placed in the burial chambers of the Pharaohs as food for the afterlife and broad beans (Koukia) from Crete are mentioned in a recipe from an ancient Egyptian papyrus. Pulses made their first appearance in Asia and America and later in the Mediterranean. Chickpeas, broad beans and lentils sustained populations plagued by wars and beans were very popular

in the civilizations of the Aztecs and the Incas in the far-away Peru. Beans must have made also a big impression on Columbus, for he brought them to Europe, where they soon gained great popularity upon discovery of their nutritional value.

Beans were considered to be the “meat of the poor”, and it is no wonder why beans gained such great popularity and bean cultivation spread all over the world. In Greece, pulses are grown in many parts of the country. Fava Beans are grown on the island of Santorini, Large Beans in the Prespes region, and Eglouvi lentils on the island of Lefkas - to name but a few. There are many varieties of pulses and culinary preferences tend to vary regionally. They can be used in a wide selection of dishes, including soups, meat, fish or vegetables. In Crete, they make a mixed bean salad, called “Palikaria”, quite similar to the ancient “polyspermia”, which are dishes combining beans and grains. In ancient Greece the “polyspermia” were offerings to pagan gods, as a token of gratitude

for the new harvest, a custom that is still alive today in Crete.

Similar popularity has the tiny rice seed. It is the most important staple food for over three billion people on the planet. Rice is grown in different countries in countless varieties, and apart from being a relish; rice is contained in the base of the food pyramid of many nationalities. 50% of the world population consumes rice on a daily basis and it is not by coincidence that rice symbolizes life and fertility. In Greece rice is thrown in weddings as a gesture of blessing for the spiritual and physical fruitfulness of the marriage.

Cooking or Serving Suggestion

In Greece, it is customary to add rice to pulses that were left over from the previous day. These Rice and Bean or Rice and Lentil dishes are a tasty and healthy meal.

"3 ALFA" KARAGEORGIU K. BROS S.A.

REGION

Athens

PRODUCTS

White Rice, Yellow Rice

Aromatic Rice and Special Rice

Greek IM and PGI Rice and Pulses

White Beans, Colored Beans

Lentils, Chickpeas

CONTACT DETAILS

Parodos Orfeos 143, Athens 11855

Tel.: +30 210 3405600

Fax: +30 210 3451581

www.3alfa.gr - 3alfa@3alfa.gr



"OMEGA" KONSTANTAKOPOULOS BROS S.A.

REGION

Aspropyrgos, Attica

PRODUCTS

Rice

White Beans, Colored Beans

Lentils, Chickpeas

CONTACT DETAILS

Lofos Kyrillou – Thesi Foussa

Aspropyrgos

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Fax: +30 210 5596163

www.omega.com.gr

abarelier@omega.com.gr



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REGION

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Agrino Bistro semi-ready meals, Special Rice for pets

CONTACT DETAILS

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Tel.: +30 211 1816000

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SESAME-TAHINI-HALVAS

For thousands of years, the tiny sesame seed provides mankind with its nutritional ingredients. The exceptional benefits of sesame seeds were mentioned in many ancient cultures. Apparently, the Assyrian Gods drank sesame wine and sesame oil before storming into battle and in India the sesame seed is named the “king of seeds”. For the Babylonians, Greeks, Arabs, Persians, Japanese and Chinese, sesame seeds and its oil have been an important component of their cooking but was also used in elixirs, medicines and cosmetics.

In ancient Greece sesame was used for the making of sesame bread and for honey- and-sesame fritters. Also, a mixture of sesame and honey (a kind of halva) was offered in weddings. Hippocrates was enthralled by sesame and Athenaeus mentioned the seed in his work “Deipnosophists”, where it is referred as enriching the tastes of pies.

Sesame is a real treasure on our plates and we don't need the magical command

by Ali Baba “sesame open” to have the richness of this seed revealed to us.

Sesame seeds come in a variety of colors, which range from white to brown, and they are found on the market, in raw vegetable quality, or dried. When roasted, raw sesame seeds emanate a potent, fragrant aroma. Sesame is the seed with the highest oil content and is one of the most stable vegetable oils with long shelf life and health-benefitting ingredients. Sesame oil is ideal for frying; it has a high oxidative stability and is very popular for cooking in oriental cuisine.

Tahini is an aromatic paste made from hulled and roasted sesame seeds, with a pale beige color. Its taste and aroma is reminiscent of hazelnut and toasted bread. Tahini is the basis for halva production. Halva is a sweet of extraordinary qualities. It has a velvety texture and it comes in a variety of flavors, such as chocolate, cacao, nuts, orange or cinnamon.

In Greece, Tahini and Halva are the main Lenten sweets. Their high dietary fiber and protein content help replenish the lack of proteins from meat and dairy products during fasting. Apart from being a source of vitamins and trace elements, Sesame and sesame products contain also valuable amino acids and anti-oxidants which help strengthening the immune system and combat free radicals.

Cooking or Serving Suggestions

Tahini and honey are perfect as bread spread for breakfast, for a healthy start of the day. Honey-and-sesame fritters or plain crisp sesame fritters are one of the healthiest sweet treats, popular with both adults and children. Halvas goes very well with apple pie. Last but not least, roasted sesame seeds are a delicious taste enhancer for green salads.

HAITOGLOU BROS S.A.

REGION

Kalochori, Thessaloniki

PRODUCTS

Halva, Sesame, Sesame oil

Tahini, Sesame Snacks

Marmelades etc.

CONTACT DETAILS

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sesame-tahini-halvas companies



GREY MULLET BOTTARGA (AVGOTARAHO)

Grey Mullet Bottarga – or Greek caviar, is the gemstone of Greek cuisine, a relish that stands out with its elegant taste. Grey Mullet Bottarga or Avgotaraho, is also known as “the gold of the lagoons”, an appellation it owes to its color but also the high price tag attached to it. Avgotaraho is considered to be one of the most savory dishes, having a unique and delicate flavor and distinguished aroma. It is a high quality product with great nutritional value and a rich source of Omega-3-fatty acids, which reinforce body health by having a beneficial effect on the cardiovascular system and boosting the immune system.

The dried fish roe is a delicacy found in many countries, such as Italy (where it is called Bottarga), France (where it is called Poutargue), Spain (where it is called Bottarga), the Arab countries (where it is called Batarek) and Japan (where it is called Karasumi). Yet, the Greek Avgotaraho distinguishes itself from the other known products. It is produced from the eggs of the female flathead mullet indigenous to Greek lagoons. The best quality is found in the Messolonghi-

Etoliko Lagoons, and Avgotaraho from this area has been granted the “protected designation of origin” (PDO), one of only five seafood products with a PDO. Avgotaraho has been recognized by top chefs as a food product of outstanding quality.

The cured Grey Mullet roe has been considered a dainty since the age of the Pharaohs, and it was an essential part of the ancient Greek diet. Its value was also known in Byzantine times and while the technique of preserving fish is thought to be the legacy of the Byzantines, it actually goes farther back to the ancient Greek times. Some historical sources indicate that this technique was introduced by the Phoenicians in the Mediterranean region. Grey Mullet Bottarga was one of the main goods traded in the period of the Ottoman rule, during which time it also became known in Europe.

This Avgotaraho is harvested in its purest form from the roe sacks of the mullet fish. The roe sacks are removed carefully from the mullet, washed and salted.

The salted sacks are set into special casts, with a rectangular block shape, which allow the roe to air dry. It is very important to follow the correct drying procedures, since it helps the roe to obtain its smooth moisturized texture and honey color. Avgotaraho is available on the market in a wax coating. The wax coating is to prevent oxidation and preserve the nutritional value of the roe as well as its moisture.

Cooking or Serving Suggestion

Prior to serving the Grey Mullet Bottarga, its protecting wax coating has to be removed. It is a great appetizer, easy to prepare and one that will make quite a taste impression. Cut into thin slices, this dainty food can be enjoyed with a salad of a variety of fresh green vegetables; with pasta but also on its own, with a slice of toasted brown bread. Another snack variety would be to spread soft cheese on a slice of brown bread, top it with slices of cucumber and crown it with 2 – 3 very thin slices of Grey Mullet Bottarga and garnish with capers or slices of a boiled egg.

TRIKALINOS

REGION

Athens

PRODUCTS

Superior Quality Grey Mullet
Bottarga (Avgotaraho)
and Grey Mullet Bottarga Powder

Superior Quality

Fleur de Sel Premium Sea Salt

Superior Quality Sardine Fillets

Superior Quality Anchovy Fillets

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grey mullet bottarga (avgotaraho) companies



SNAILS

Snails have been part of people's cooking for a very long time. In Greece, snails are highly appreciated on the island of Crete, and considered to be one of the finest delicacies. The Cretans greatly favor this culinary treat– and the particular popularity of “Hohlio”, as the snails are called in the local dialect, becomes evident in the large number of recipes for snails.

It is quite impressive how the Cretan housewives make use of their culinary imagination in the preparation of this fine meze. Although, snails are consumed in many other places in Greece, popular Cretan cuisine holds the reigns of inventiveness when it comes to snail preparation.

From archaeological excavations it is evident that snails are one of the oldest human foods and have been used for consumption since prehistoric times. In the Neolithic age, humans collected snails as part of their diet and in ancient times snails were much favored for their supposedly aphrodisiac qualities. Galen,

the famous physician of the Roman era, was very much impressed by the Greeks' daily consumption of snails, and wrote about it in one of his treatises.

In the writings of the Roman author Pliny the Elder, snails are mentioned as an exceptional food that was highly appreciated in ancient Rome. It is assumed that the cooking methods of snails in the ancient times do not differ greatly from today's cooking practices.

In Crete, the way in which snails are prepared depends on the season. In spring, snails are cooked with “horta” (leafy greens), in summer they are prepared with vegetables and in winter with ground wheat. It is worth mentioning that snails were among the foods that helped the locals through challenging times, such as periods of servility, war and financial calamities. They were an affordable solution on the tables of the poor as well as during the Lenten season. In many European countries snail is an affordable traditional food, and prepared in many

different ways; in French cuisine, though, dishes with snails are not considered traditional meals but more of a delicacy.

Snail meat is low in calories and is renowned for its high nutritional value. It contains amino acids and essential fatty acids which offer a wealth of health benefits and it is a good source of calcium and potassium.

Cooking or Serving Suggestion

In Crete “boubouristi” snails, are among the most popular traditional dishes. For this dish, the snails are fried in hot oil, flushed with vinegar and flavored with rosemary. “Snails stew”, is one of the most favored dishes served across Greece. The snails are cooked with onions, tomato sauce and laurel leaves. “Snails stew” is an exquisite meze, best enjoyed with good company and wine.

FEREIKOS HELIX

REGION

Korinthos

PRODUCTS

Snails with shell & Snails Fillets
(fresh/frozen/canned)

CONTACT DETAILS

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Fax: +30 27410 80164

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MASTIHA

Mastic is the “gold” derived from the mastic trees that grow on the soil of Chios. Since antiquity, mastic has been praised for its culinary and therapeutic properties and its use in cosmetology. The Mastic trees that shed “tears” of mastic are found only in Chios - a mystery that remains unsolved until today.

Even in antiquity, the island was famous for its mastic cultivation and its “tears of Chios”. Although the mastic tree is native to the Mediterranean region, the island of Chios is the only place in the world where the tree exudes its resin and, again, only the trees in the south-western part of the island are the ones that produce this particular resin. This phenomenon can perhaps be best explained by the climate and soil conditions in Chios, with plenty of sunshine and limestone deposits that are naturally found in the soil of this particular area. In these growing conditions, the mastic trees can reach a height of up to three meters. To obtain the resin from the mastic trees, the tree bark is incised and the resin flows from the incisions and dries into drops, the so-called “tears”.

In the Mastichochoria, the fortified villages which have kept their traditional architecture since medieval times, the inhabitants begin at the end of summer the annual harvest of the mastic crystals. At the end of the harvest season, when the resin is stocked in the warehouses of the Mastichochoria, the narrow village streets with their traditional arches overflow with the scent of the mastic. During the dark winter days, the inhabitants tend to the process of sifting, sorting and washing of the resin “tears”.

Mastic was used in ancient times for therapeutic purposes, due to its excellent healing properties. The versatility of mastic made it extremely popular and it was not before long that it became part of the culture of different peoples and civilizations of the Eastern Mediterranean.

The women of antiquity adored the characteristic aroma of mastic and chewed mastic to keep their breath sweet - a habit that was continued until

the Ottoman era. During the time of Ottoman rule, the confectioners of Chios took much inspiration from the aromatic appeal of the mastic, creating sweet delights for the Queen Mothers of the reigning sultans.

Chios mastic has made a strong comeback, combining tradition with modern habits. During the last years, the trend towards mastic has become evident in its creative use in cooking by Greek chefs, as well as in the release of a wide range of food and beauty products with key ingredient mastic.

Cooking or Serving Suggestion

Mastic is traditionally used as a condiment in brioches, cookies and festive breads. In the northern regions of Greece mastic is used for flavoring cream desserts and is an essential ingredient in the famous “Kaimaki” ice cream. The slightly piney, exotic taste of mastic can be matched with a variety of dishes and drinks, from a tasty tomato sauce to a Martini Mastic Submarine cocktail.

MEDITERRA S.A. (Athex EN.A. Listed: Feb 2009/ Bloomberg Symbol MSHOP:GA)



REGION

Chios

PRODUCTS

Chios Mastiha, Parapharmaceuticals

Cosmetics, Grocery

Traditional Products

Snacks & Chocolates, Organic Products

Beverages, Mastiha Chewing Gums

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HONEY

Honey, the sweetest product of Greek nature, has a long history. Starting from ancient times, honey had a prominent place in the diet of ancient Greeks and was regarded the gift given to man by the Gods. Honey was consumed on a daily basis by the ancient Greeks – either plain or as part of sauces and sweets.

Since time began, honey and bees have been an important part of Greek mythology, customs and traditions. According to Greek legend, the infant Zeus was nursed by bees on honey in the “Ideon Cave” or “Ideon Andron” in Crete. Apollo, named by his father Zeus god of light, was fed on ambrosia and nectar, and according to the myth it was the consumption of those “foods of the gods” that gave him his dazzling beauty.

In Greek mythology, Aristaeus, son of Apollo and the nymph Cyrene, was given ambrosia and nectar to become immortal. Aristaeus was also the patron god of honey and the first ever recorded beekeeper, maintaining honey bee colonies and collecting the honey

from the hives. Hippocrates, Aristotle and Democritus refer to the beneficial properties of honey for health and longevity in their writings.

In Greek folk tradition, honey symbolizes fertility and welfare. In various parts of Greece, desserts with main ingredient the golden, fragrant honey are offered to newlyweds as a symbol of happiness and during celebrations as symbols of abundance. Also, bees have been a powerful inspiration to artists, which is evidenced by sculptures and jewelry resembling bees and by bee images on amphorae, vases, cups and coins.

Honey - aside from being a healthful snack and an energy booster for the human organism - is also used in the pharmaceutical, cosmetics and beverage industry. The Roman Empire was the first to have produced candles from bee wax and during its reign beekeeping peaked due to an increased need for bee wax, the main ingredient for early candle making. In recent history, honey as a natural sweetener was mostly replaced by sugar,

which resulted in a slowdown in honey production. However, in recent years consumers are looking for more healthy diet alternatives which led to an increase in consumption of quality honey.

The Greek honey bees love the heathers in spring and autumn, the mountain tea, fir, acacia and chestnut. The color and deep flavor of honey depends on the type of plant used by the bee to produce honey. For example, Thyme growing on the sea beaten Greek cliffs produces a honey of intensive flavor and taste. Greek honey is recognized for its superior quality all over the world, and comparative studies have shown that this is due to the rich variety of the Greek flora, its herbs, wild plants and flowers.

Cooking or Serving Suggestion

The simplest way to bring out the characteristic aroma and richness of the honey's taste is to pour thyme honey over a Cretan Graviera cheese and to accompany it with ice-cold raki (a strong grape brandy flavored with anise).

APIVITA SA

REGION

Metamorphosi, Attica

PRODUCTS

Greek Honey,
Fresh Greek Royal Jelly
Fresh Greek Bee Pollen
Organic Propolis Tincture

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ATTIKI BEE CULTURING Co - ALEXANDROS PITTAS S.A.

REGION

Attica

PRODUCTS

ATTIKI Honey, Nectar Honey,
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Tahini, Halva with Greek Honey

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Tel.: +30 210 5751896-98
Fax: +30 210 5717113
www.attiki-pittas.gr info@attiki-pittas.gr



"HONEY FASILIS"

REGION

Leonidio, Arcadia

PRODUCTS

Organic Flower & Forest Honey
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Chestnut honey, Arbutus honey
Pine Honey, Thyme Honey

CONTACT DETAILS

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Tel.: +30 6974897024
+30 27570 61367
Fax: +30 27570 29125
www.organic-honey.gr
melifasilis@gmail.com



MELISSOKOMIKI HELLAS

REGION

Karditsa

PRODUCTS

Processing and packaging honey
Natural wax & bee feed production

CONTACT DETAILS

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info@melissokomiki-hellas.com



MELISSOURGION NATURAL BEE PRODUCTS

REGION

Evvoia

PRODUCTS

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CONTACT DETAILS

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Melissourgion



MELITHEON

REGION

Leonidio, Arcadia

PRODUCTS

Supreme quality Greek honey

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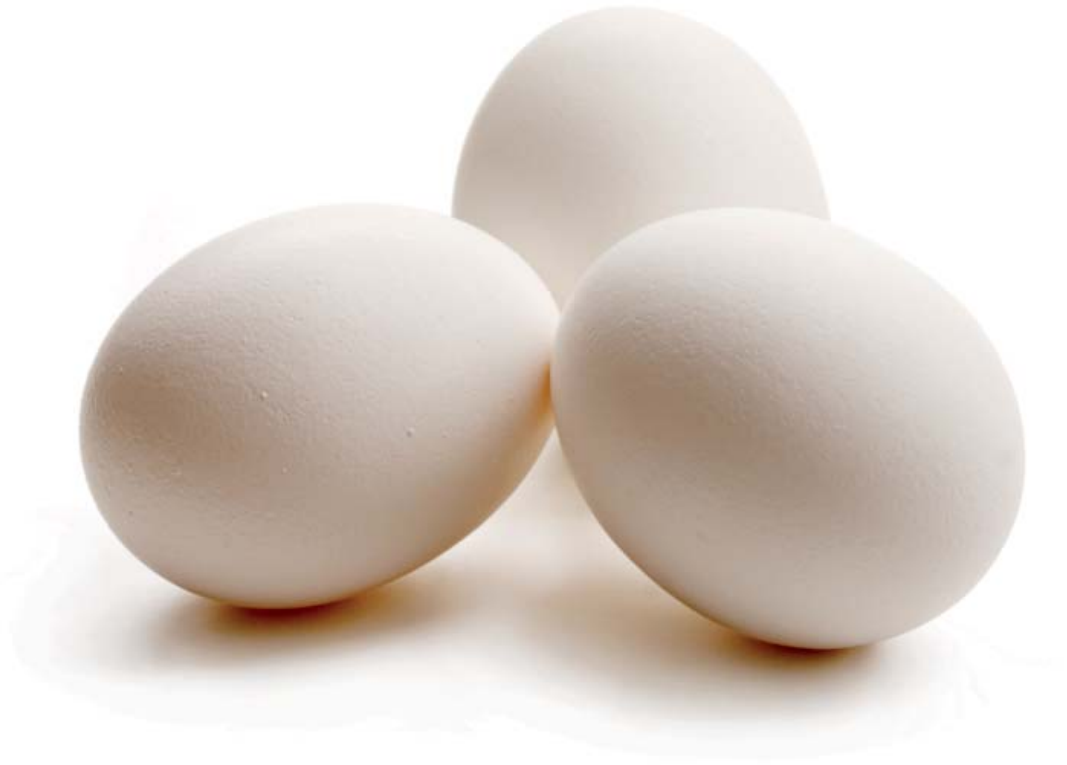
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EGGS

According to some Indian scriptures, the progenitor of chickens was already domesticated before 3200 B.C, while writings from Ancient Egypt and China dating back to 1400 B.C. depict hens sitting in a row and laying eggs for humans. The first chickens were brought to America on the ships of Christopher Columbus.

Nature has endowed eggs with an advantage concerning its richness in fats, thus making them one of nature's most nutritious foods. According to recent data from the International Egg Commission, Mexicans hold the number one position in egg consumption with an average of 345 eggs consumed per year, per person.

Greeks use many everyday sayings with the word egg. Yet eggs are not considered to be an integral part of the Greek diet. Compared to the rest of Europe, Greece's consumption rate of eggs (on average 139 eggs per person, per year) is low. This low egg consumption in Greece is due to dietary habits and the fear of cholesterol.

It is noteworthy that 15-20% of the total egg consumption happens in April, the month of Easter festivities, where it is estimated that approximately 250 million eggs are consumed.

In the early 1990's, eggs found their way into supermarket refrigerators. Until then, approximately 50% of eggs' distribution in urban centers was done through local farmer markets. However, consumer awareness of food safety issues reduces continuously the number of eggs sold on the local farmer markets.

The poultry producers continuously try to improve their market position, following closely new market trends. They have developed different kinds of product categories, the most important

being organic eggs which fetch double the regular market price. Despite the existence of two larger companies and three smaller production units, the egg market remains widely dispersed.

The global "Egg Day" was established in 1996 and since then it is celebrated every year on the second Friday of October with numerous celebrations and competitions. For 2012, the "Egg Day" has been set for October 12.

GOLDEN EGGS S.A.

REGION

Kifissia, Attica

PRODUCTS

GOLDEN EGGS S.A.

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promotion and sale of eggs

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Processed egg products,
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P. SKOURTIS S.A.

Production of Eggs.

Production, distribution and sale
of Organic Extra Virgin Olive Oil

Production and sale
of organic final feeds and fertilizers

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VLACHAKIS S.A.

REGION

Chalandri, Attica

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Omega 3 eggs



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VINEGAR

The history of vinegar dates back a long time ago, when vinegar was mainly used as a disinfectant given its natural antimicrobial properties. In addition, it was used as a preservative for meat, fish and fruit.

During the middle ages, the method of vinegar making was guarded as a secret by producers.

Modern research has found that acetic acid, the main component of vinegar, most likely helps to fight blood pressure, lower blood sugar amounts and inhibits fat accumulation.

Depending on the raw materials used, vinegar can be made from wine, fruits, raisins, alcohol, grains, honey and beer.

Balsamic vinegar has become very popular in modern cooking. Originally produced in

the Modena region of Italy, its production has spread to other geographical areas and - naturally to Greece. Balsamic vinegar is not made of wine but from a reduction of cooked grape juice (must), from where the vinegar gets its sweet taste from.

Vinegar in all its versatility is not only used in salads and as a condiment for various cooked dishes but has become an important ingredient for many chefs in the preparation of dishes, and especially of sauces, to which vinegar lends its unique sweet taste. When vinegar is added to cooked food, all the acidity

of the vinegar evaporates during the cooking process, leaving behind only the rich flavor of the vinegar.

Vinegar is not only used for cooking but can be utilized in many other ways. It can be used as an antibacterial wash for fresh fruits and vegetables.

PAPADIMITRIOU C.C. S.A.

REGION

Messinia

PRODUCTS

Corinthian currants

Balsamic Vinegar

Mediterranean Mustards

CONTACT DETAILS

Thouria, Messinia 24009

Tel.: +30 27210 32960-3

Fax: +30 27210 33018

www.papadim.com

info@papadim.com



ALL VINEGAR VAIMAKI

REGION

Ioannina

PRODUCTS

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grape varieties

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CONTACT DETAILS

P.O. Box 23, Koutselio, Anatoli

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