

# Let's Go to CEE!

Playbook  
by Proficio



**proficio**

**Looking to expand  
into the CEE region?**

**You've come  
to the right place!**

**Since the inception of the Proficio Group we've striven to connect. For ten years we have been successfully establishing a direct link between marketing and business consultancy. And right now we are building a bridge between the DACH and CEE regions.**

**How do we do it? By utilising peak performance with a focus on efficiency and data we bring evidence-based and results-driven marketing to the table. We help companies grow through establishing and executing strategies and expanding into new markets.**

**That's where the playbook you are reading right now comes into play. We've written it as a tour guide for your journey towards success in a region you may not have much experience with. That may seem daunting and too difficult to access... so let us make this task easier for you and show you the specifics of the CEE region and its countries!**

**So let's dive in!**

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## Proficio Group

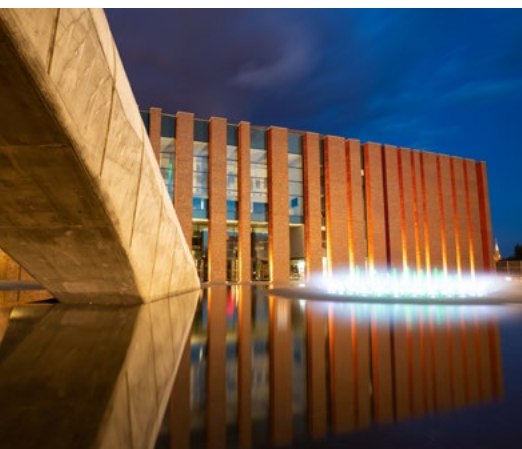
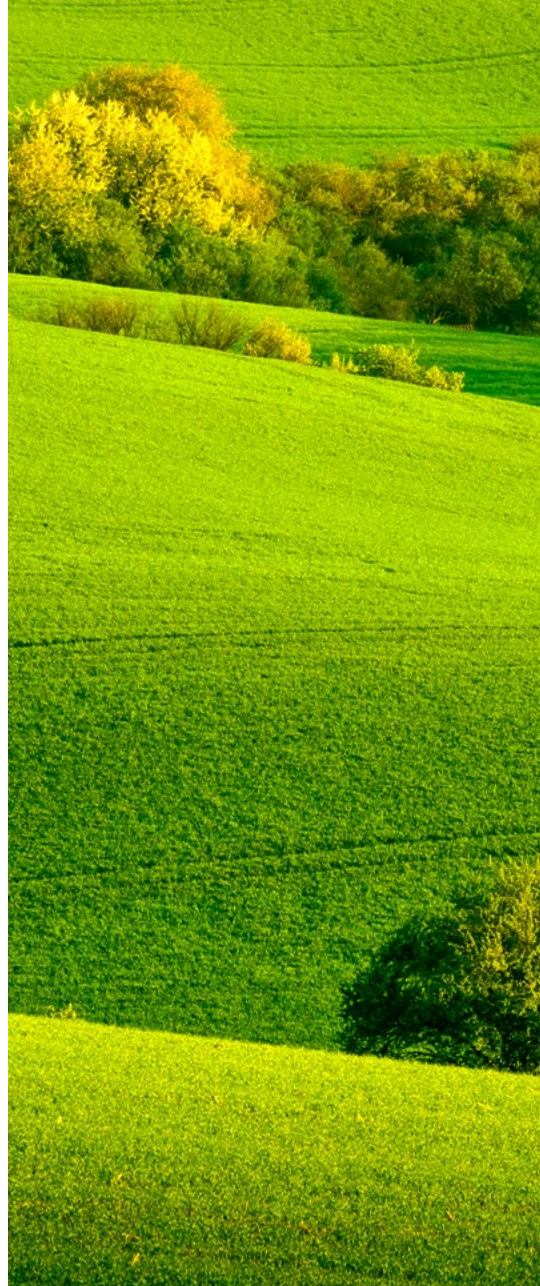
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Compiled and analysed by the Proficio team.  
Rights of third parties are preserved.

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# The First Step on Our Journey

As you probably know from any trip you've ever taken, a key part of preparing for a journey is knowing the country as a whole. Before you start planning out the specific hotspots you will be visiting, it's always good to look at the bigger picture.

And what does the bigger picture entail in this case?

**Go CEE for  
yourself!**

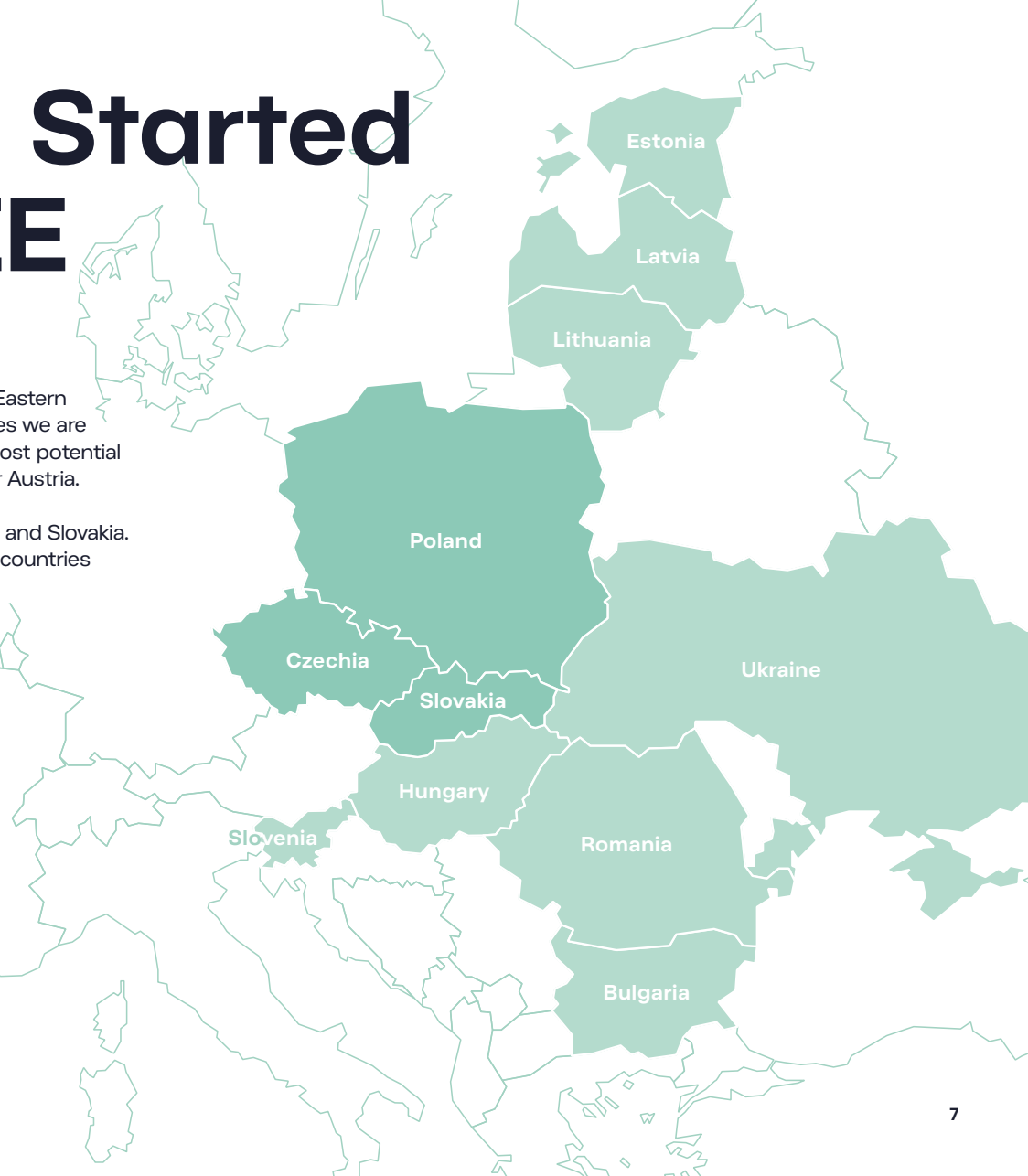




# Getting Started with CEE

Even though the region of Central and Eastern Europe encompasses up to ten countries we are focusing on the ones which have the most potential for companies coming from Germany or Austria.

Those would be Poland, Czech Republic and Slovakia. For simplicity we will be using the three countries as representatives of the CEE region on the following pages of our playbook.



# Let's Talk Demographics

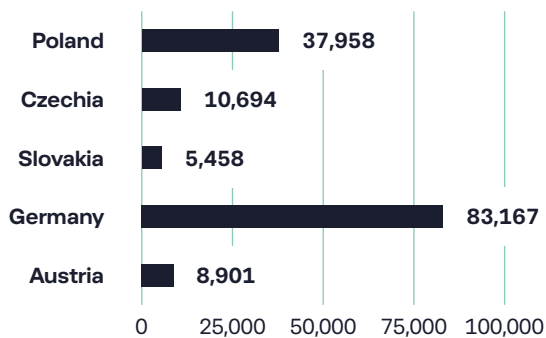
## Population, GDP in PPS

Let's be honest, the three countries together are about **65% of the size of the German market**.

Average annual GDP per capita is also lower in the Central European region in comparison to Germany and Austria.

**However, prices in advertising systems are also lower and this can be reflected in the cost per new customer.**

**Population**  
(in thousands)



**GDP per capita (PPS)**  
(in EUR)



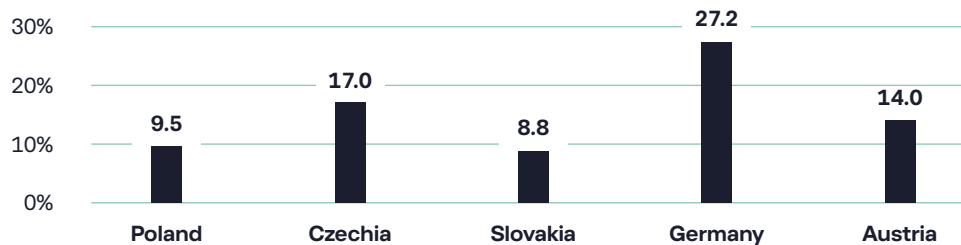
Source: Eurostat

# Some E-com Insights

## E-commerce share in retail sales

Poland and the Czech Republic have a 9.5% and 17% share of e-commerce compared to total retail and Slovak e-commerce is at 8.8%.

**With e-commerce shares still trending upwards, there is still room to increase market share.**



Source: Statista (2021), ecommercedb.com (2021)

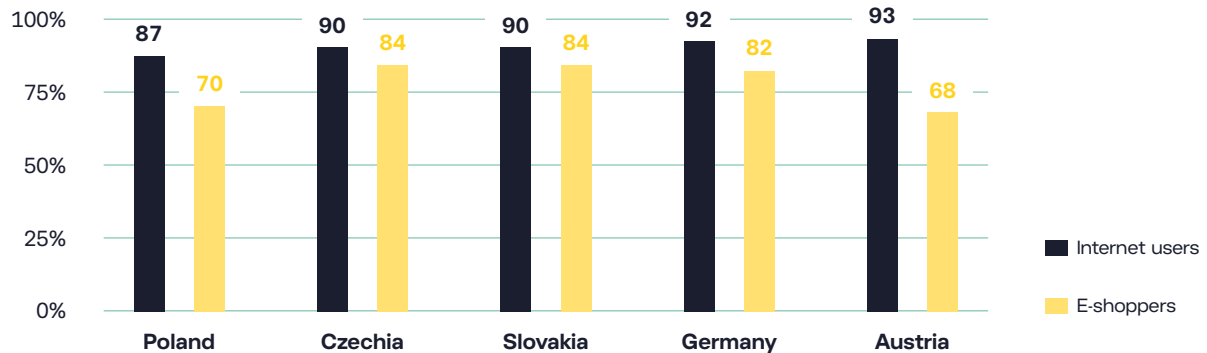
# And Even More Demographics

## Share of active internet users and e-shoppers

Especially in the Czech Republic and Slovakia, there is a large proportion of active internet users who shop online primarily – which is on the same level as in Germany and remarkably higher than in Austria.

In Poland, 70% of users shop online, ahead of the Austrian market.

**As the shares have an increasing tendency the market becomes ever more relevant for e-commerce players.**



# proInsight for the CEE Region



Even though the CEE representatives cannot compare to Germany in terms of market size, the advertising costs can more than make up for it.



Internet coverage for the three countries is very similar to Austria or Germany, going from 90% upwards.



Almost everyone who uses the internet is shopping online with ratios comparable or even higher than the one in Austria.

**Do you want to get more proInsights?**





# Poland

Traditional yet thriving  
and dynamic!



# Market Specifics

36,7 million internet users (YoY +8.5%)

In Poland, users search almost exclusively on Google, followed by Bing with a 2.9% share.

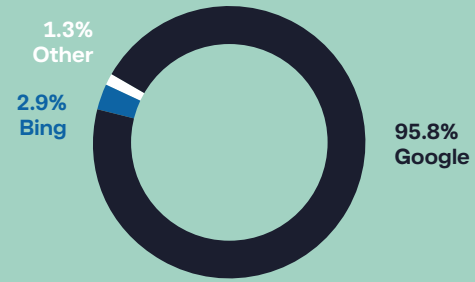
YouTube has the most users, with 27.5 million users, almost 3/4 of the population, that can be potentially reached by advertising. Facebook is the second largest with 17.8 million users, most of whom also use Messenger, followed by Instagram and TikTok.

Users are still more likely to use computers and laptops than mobile devices for online shopping, but the share of mobile devices is growing. Compared to other markets, users use tablets for online shopping to a relatively high extent.

10.5% of people use voice assistants like Siri or Google Assistant to search the internet.

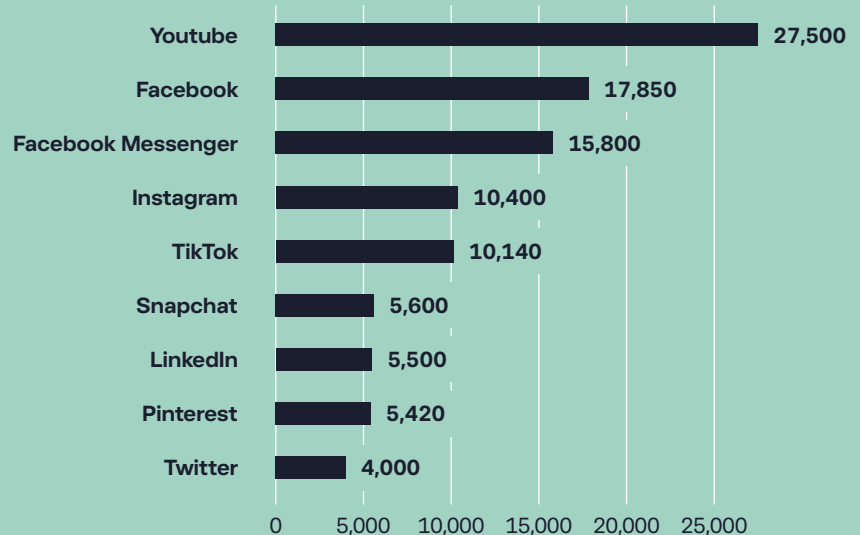
Source: Datereportal.com, Kepios

## Search engines



## Social media users 2023

(in thousands)





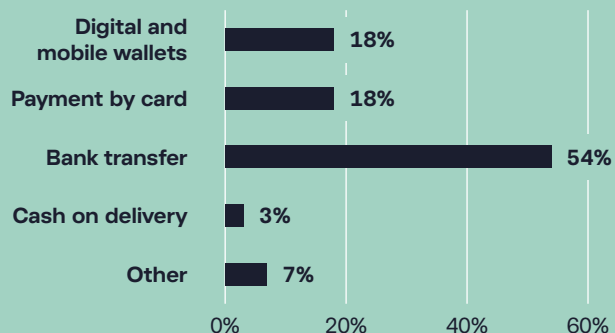
# Shopping Habits

When shopping online, customers most often pay by bank transfer (54%). Direct card payment and mobile digital wallets have the same share of 18%.

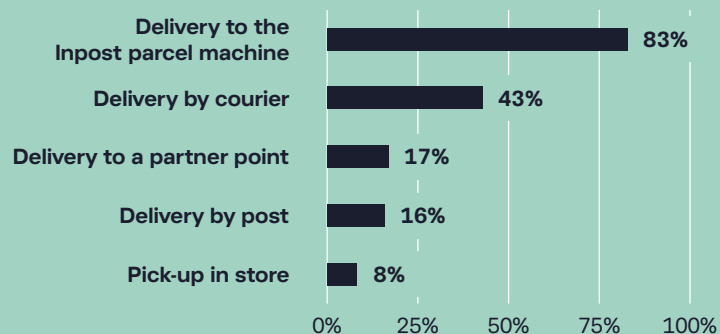
Customers prefer to pick up goods from Inpost parcel machines, which have the largest share among these boxes. 83% of people use this option.

43% of customers have goods delivered to their address by a courier.

## The most common payment methods



## The most common shipping options



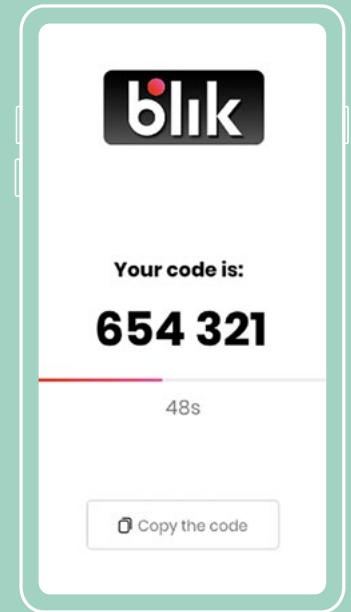
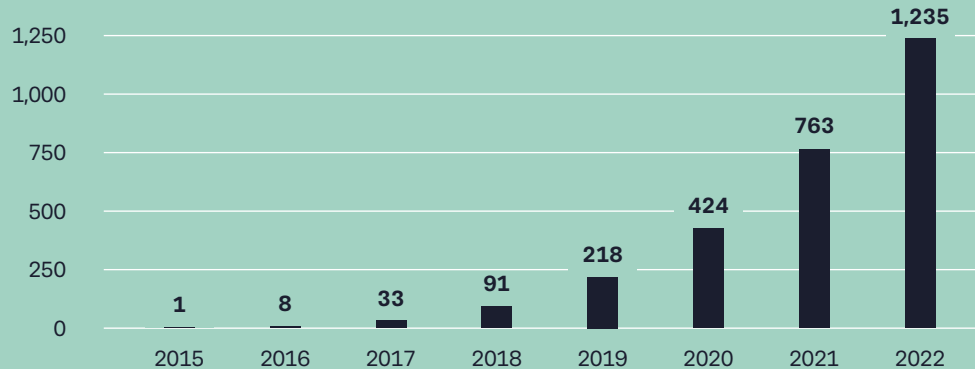
Sources: [ecommercenews.eu](https://ecommercenews.eu) / research by Gemius, [www.ppro.com](https://www.ppro.com) (2022), © StatCounter 2023

# Payment Methods

Blik is a purely Polish alternative to mobile phone payments via NFC technology with more than 14 million active users.

It works similarly to Google and Apple Pay, payments are confirmed by a Blik code.

**Number of transactions**  
(in millions)



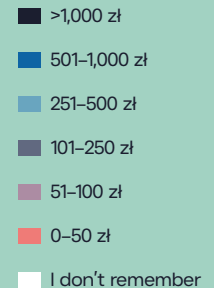
Sources: Statista.com (2022), Blik.com (2023)

# Polish Shopping Baskets and Basket Values

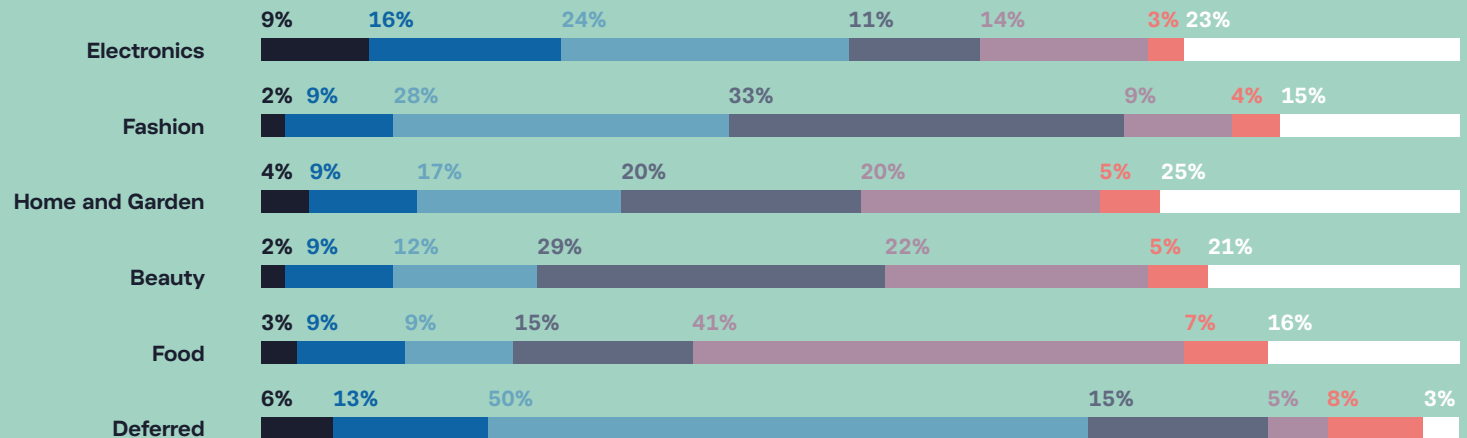
Customers spend the largest amounts (more than EUR 108 / PLN 500 per order) on electronics.

The most frequent spenders in the category are from 101 to 500 PLN (EUR 22–108), it is the largest share among all categories.

Deferred payment option increases potential order size.



## Basket value in 2022

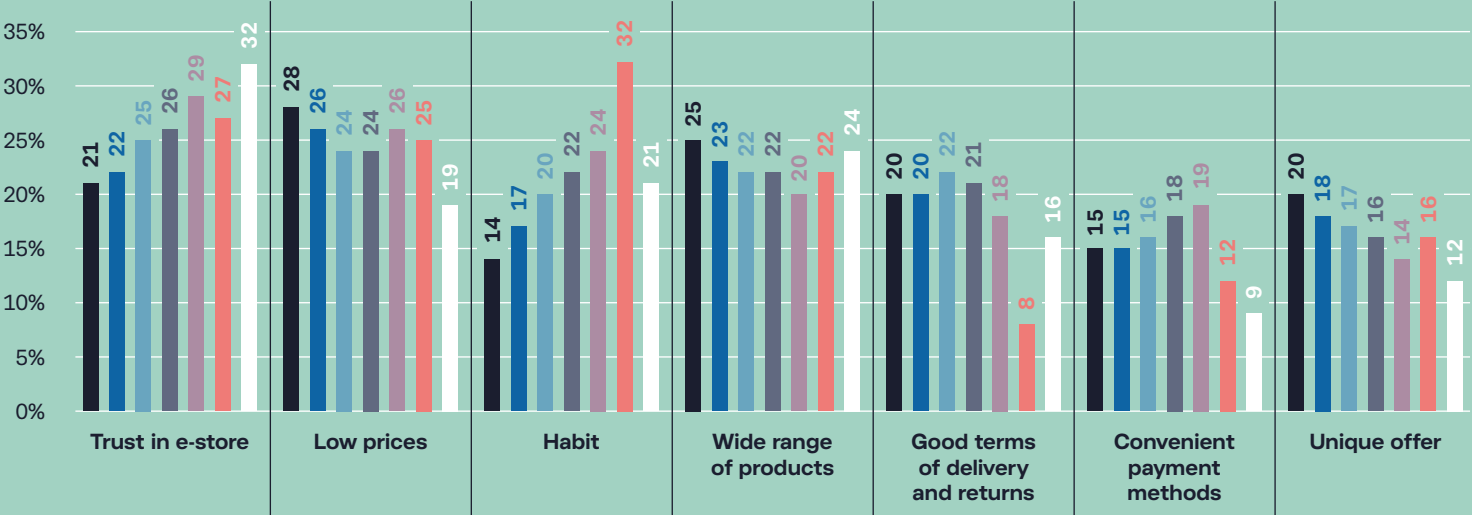
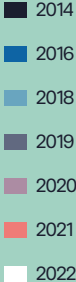


Source: Decade of Polish e-commerce (2013–2023, e-Chamber Report)

# Selection of E-stores in Poland

The motivation to buy from a particular e-shop changes over time, as customer trust is becoming ever more important and so does the product range.

Conversely, prices or special offers are becoming less important.



Source: Decade of Polish e-commerce (2013–2023, e-Chamber Report)

# Online Sales Channels

## Marketplaces

One of the world's largest marketplaces is Poland's Allegro. The website has over 200 million visits every month. 14 million people in Poland shop on Allegro at least once a year.

OLX.pl is the second largest marketplace with around 100 million users per month.

In the list we see the largest marketplaces in specific markets.

Monthly visits  
**220.4 M**

### Allegro.pl

- ▶ The largest online marketplace in Poland, 9th biggest marketplace in the world
- ▶ Offers a wide range of products, including electronics, fashion, home and garden, beauty, and more

Monthly visits  
**8,596**

### eMAG.pl

- ▶ A fast-growing online marketplace in Poland
- ▶ Offers a wide range of products, including electronics, fashion, home and garden, and more

Monthly visits  
**100.0 M**

### OLX.pl

- ▶ A classified ads website and online marketplace
- ▶ Offers a wide range of products, including cars, real estate, electronics, fashion, and more
- ▶ Provides users with a messaging system to communicate with sellers

Monthly visits  
**4.4 M**

### Morele.net

- ▶ An online marketplace specialising in electronics and IT products
- ▶ Offers a wide range of products, including computers, laptops, smartphones, and more
- ▶ Allows both individuals and businesses to sell products

Source: Similarweb (2023)

# Price Comparison Platforms

In Poland, the most used is Ceneo.pl, Skapiec.pl or Nokaut.pl with 23 million users shopping on Ceneo in 2022.

Skapiec and Nokaut can be considered relevant for product sales, Radar.pl and others have a very low share.

Monthly visits  
**51.1 M**

## Ceneo.pl

- ▶ 72% traffic share in the segment
- ▶ A price comparison website and online marketplace
- ▶ Offers a wide range of products, including electronics, home and garden, fashion, and more
- ▶ Allows users to compare prices and features of products from different sellers
- ▶ Provides user reviews and ratings to help buyers make informed decisions

Monthly visits  
**3.7 M**

## Skapiec.pl

- ▶ Second biggest price comparison platforms in Poland
- ▶ A wide portfolio of products from all major product categories

Monthly visits  
**178,849**  
nokaut.pl

## Smaller price comparison platforms

- ▶ Other relevant comparison sites, such as Nokaut.pl, operate with a smaller market share

# proInsight for Poland



Let's be honest here – Poland should play a pivotal role in your expansion into the CEE region. You should make the entry into this ever growing market your top priority.



Even though the stereotype states that Poles value low prices above everything, their commercial behavior is slowly getting more customer experience focused.



Poland is the home of Allegro as the marketplace has a set-into-stone position with its 20 million customers making it a surefire option for your e-commerce.

Do you want to get more proInsights?

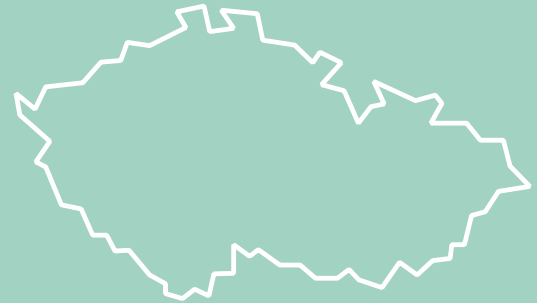






# Czechia

Progressive and entrepreneurial



# Market Specifics

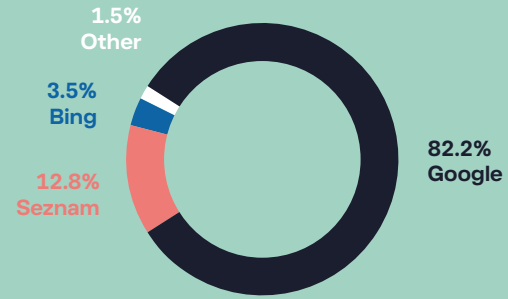
Czechs primarily search on Google (82.2%), but Seznam (12.8%) with its Sklik advertising system (search and exclusive display network) still has a large, yet declining presence.

Bing has a growing share, with its Ads being one of the high-converting channels.

YouTube is the largest social network in terms of users. More than 8 million people use it and advertising can reach up to 77% of the population. The second largest is Facebook, which is used by almost 5 million Czechs and most of them also have Messenger. The professional network LinkedIn is used by 2.2 million people, which is above average in the region, and offers the opportunity to run successful HR and B2B campaigns.

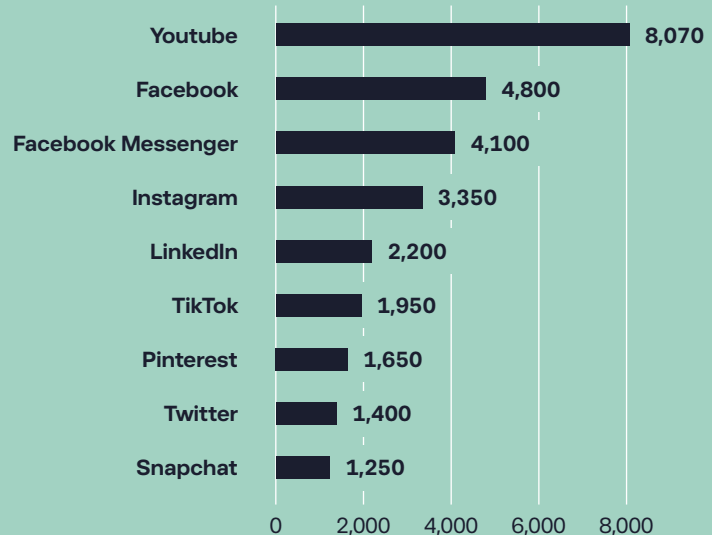
Source: Datereportal.com, Kepios

## Search engines



## Social media users 2023

(in thousands)

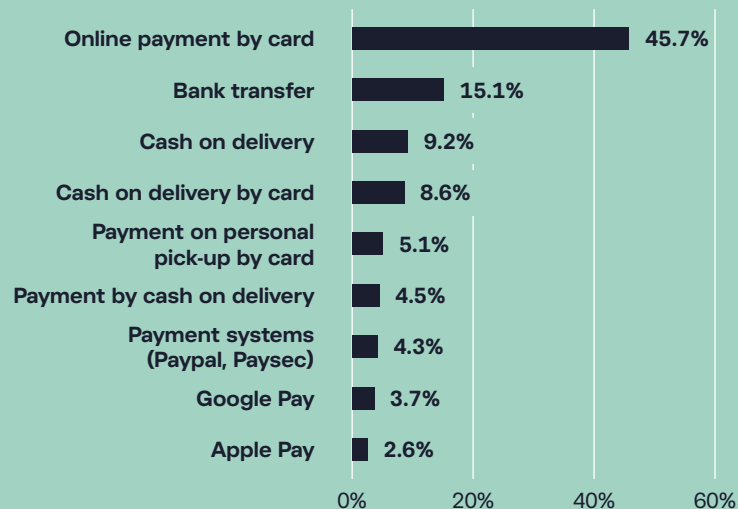


# Shopping Habits

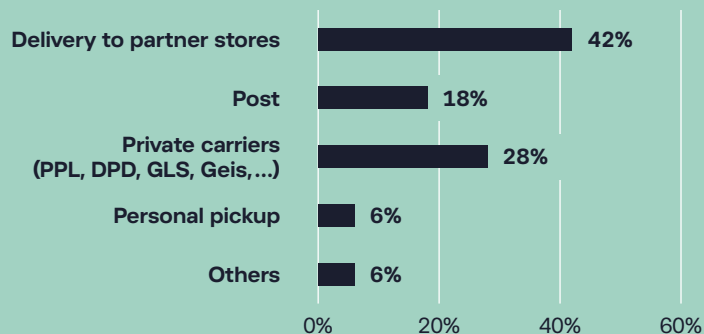
Customers most often pay by credit card (45.7%) and use bank transfer in 15% of cases. Cash on delivery is still relatively strongly represented, but the share is decreasing. On the other hand, payments via Apple pay and Google pay are growing.

Delivery services to partner stores are very popular in the Czech Republic, with a 42% share. Private delivery services are the second most common delivery method with 28%. In 6% of cases, customers pick up their goods at the store and the physical location of the retailer is also important to them.

## The most common payment methods



## The most common shipping options



Sources: [www.ceska-ecommerce.cz](http://www.ceska-ecommerce.cz),  
APEK: Přínosy e-commerce v ČR (2023)

# Device Preferences

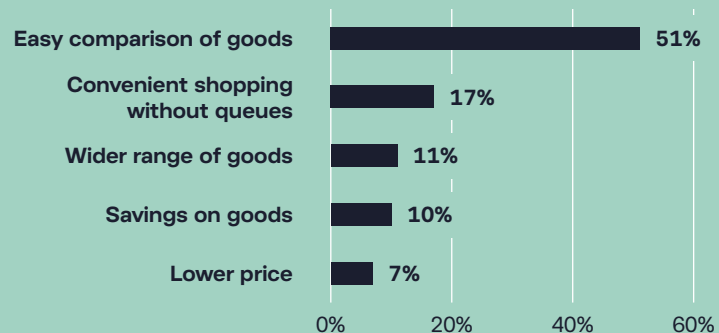
In 2021, 51% of people shopped via a mobile device (mobile phone or tablet).

What customers appreciate most about online shopping is the ability to easily compare items. A positive change is the decreasing motivation to buy online because of low prices.

Devices used for online shopping



Motivation to shop online



Source: [www.ceska-ecommerce.cz](http://www.ceska-ecommerce.cz)

# Online Sales Channels

## Marketplaces

According to the survey on spontaneous knowledge of online stores, respondents most often mentioned Alza.cz, second Mall.cz.

These stores are considered:

Monthly visits  
15.9 M

### Alza.cz

- ▶ The largest Czech online store
- ▶ Specialises in electronics, computers, mobile phones, and home appliances
- ▶ Offers fast delivery, assembly, and installation of products

Monthly visits  
1.3 M

### Kaufland.cz

- ▶ New marketplace, since 4/2023, potential for big growth
- ▶ For example, it has 32 million customers in the German market. Operates in a total of 8 markets where it can expand further
- ▶ Wide range of products

Monthly visits  
8.7 M

### Mall.cz

- ▶ Online store with a wide range of products
- ▶ Offers clothing, cosmetics, electronics, and home appliances
- ▶ Possibility to compare products and purchase from different sellers

Monthly visits  
3.3 M

### Glami.cz

- ▶ Fashion online marketplace
- ▶ Connects customers with a range of fashion brands
- ▶ Offers clothing, shoes, accessories, and cosmetics from over 1,000 different brands

Monthly visits  
2.5 M

### Favi.cz

- ▶ Czech online store with a wide range of products
- ▶ Specialises in electronics, home appliances, sports equipment, and toys

### Allegro.cz

- ▶ One of the largest marketplaces was launched in the Czech Republic in May 2023
- ▶ This is an opportunity for sellers to be among the first on Allegro

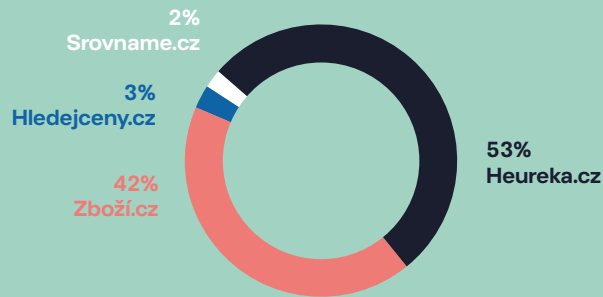
Source: Similarweb (2023)

# Price Comparison Platforms

The biggest price comparison engine is Heureka, closely followed by Zboží with the two of them basically splitting the market in half. Other competitors have a negligible share.

Customers like to compare not only individual products online, but also prices. E-shopping is less and less often about the lowest price with customer experience becoming even more important over time.

## Popularity of price comparison sites



Source: [www.ceska-ecommerce.cz](http://www.ceska-ecommerce.cz) (2023)

## Heureka.cz

- ▶ 53% share, operates in 9 European countries
- ▶ The largest Czech price comparison engine, which also functions as a marketplace with the ability to buy goods directly through the platform

## Zboží.cz

- ▶ Platform operated by Seznam.cz, with a 42% share

## Others

- ▶ There are also smaller price comparison platforms, e.g. Srovname.cz and Hledej ceny.cz
- ▶ Together they have only 5% of the market

# proInsight for Czechia



**Seznam's not dead yet and remains a viable search engine for not only SEO purposes.**



**Cash on delivery is still king but payments via credit card or mobile applications are steadily growing.**



**With the still fresh launch of Allegro in the Czech Republic sellers can use the opportunity to be among the first who utilise the marketplace.**

**Do you want to get more proInsights?**







# Slovakia

Resilient and emerging



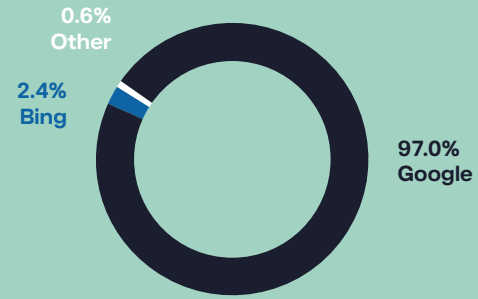
# Market Specifics

Market with more than 3.9 million active internet users and fast growth of e-commerce turnover.

Google has an exclusive position in Slovakia with almost 97% of the market share.

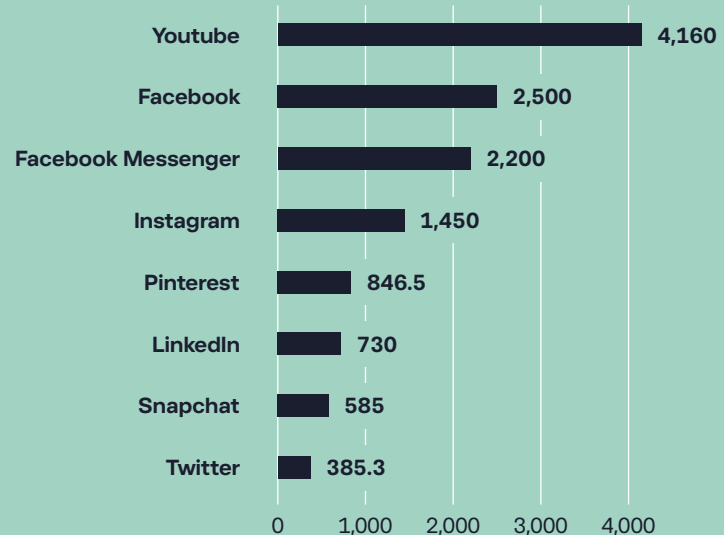
As in other countries in the region, YouTube has the largest number of users (4.16 million users), followed by Facebook (2.5 million) with its Messenger, then Instagram. On these platforms, advertising can be targeted to the vast majority of internet users in Slovakia. The other social networks have a significantly smaller user base, but allow reaching specific target groups.

## Search engines



## Social media users 2023

(in thousands)



Source: Datereportal.com, Kepios

# Shopping Habits

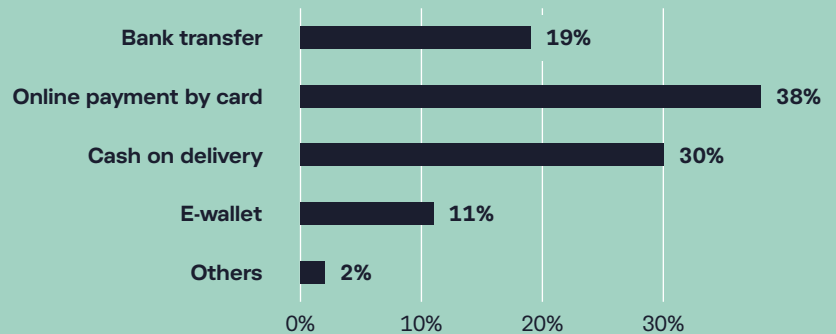
Slovaks pay by card for online purchases (38%), in 19% of cases they pay by bank transfer. The cash on delivery payment option is very important in Slovakia, used by 30% of customers.

Delivery of goods is most often via Slovak Post.

## Shipping options

- ▶ Slovak Post – the most frequently used
- ▶ Courier companies (DPD, Geis, Parcel, GLS, DHL)
- ▶ Personal pickup of shipment
- ▶ Packeta and Uloženska (network of drop-off points at independent retailers)

The most common payment methods



Source: [www.retailys.cz/prehled-e-commerce-na-slovensku](http://www.retailys.cz/prehled-e-commerce-na-slovensku) (2023)

# Online Sales Channels

## Marketplaces

The largest in Slovakia is Mall.sk, with the greatest potential for growth is Kaufland, which is new to the market.

In the list we see the largest marketplaces in specific markets.

Source: Similarweb

Monthly visits

1.2 M

### Mall.sk

- ▶ The largest online shopping mall in Slovakia, offering a massive selection of products from electronics and home appliances to fashion and sports equipment
- ▶ Features a mix of local and international sellers and offers various payment and delivery options

Monthly visits

183,175

### Favi.sk

- ▶ Search engine for furniture and decorations for interior and garden
- ▶ It has more than 13 million visits per month and more than 4.7 million products
- ▶ Operates in 5 countries

Monthly visits

408,520

### Kaufland.sk

- ▶ New marketplace with potential for big growth
- ▶ Wide range of products

Monthly visits

268,856

### Glami.sk

- ▶ Specialised search engine for clothing and fashion
- ▶ It gathers the offer of fashion e-shops in one place

# Price Comparison Platforms

The largest price comparison site is Heureka with a monthly traffic of over 3.36 million visits.

Smaller comparison sites have significantly lower traffic, yet they offer a very wide portfolio of products.

Monthly visits

**3.4 M**

## Heureka.sk

- ▶ The most popular price comparator
- ▶ Over 18 million monthly visits
- ▶ Operates in 8 other countries

Monthly visits

**41,398**

## Pricemania.sk

- ▶ It is the smallest among the three relevant price comparison platforms, with nearly 0.5 million visits a month
- ▶ Over a million products across categories

Monthly visits

**129,496**

## Najnakup.sk

- ▶ Second largest comparison site
- ▶ Over 1.6 million visitors a month with over 1 million products

Source: Similarweb

# proInsight for Slovakia



**Similar to Czechs, Slovaks like to pay via cash on delivery and are getting their goods shipped by the postal services. Given their historic closeness to Czechs out.**



**Facebook maintains a pretty dominant position in the social media field, ensuring its place in your future marketing mix.**

**Do you want to get more proInsights?**

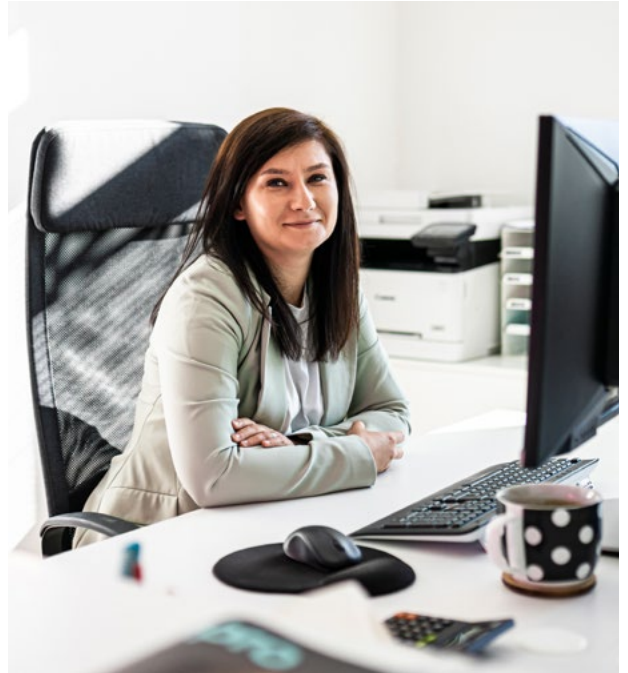


# Now you got some key insights about Poland, Czechia and Slovakia.

But knowing the specifics of where you are going is still just the first step on your journey towards success in the CEE region.

What you really need is an effective strategy.  
Or a reliable partner who can establish one.  
Ideally a proficient one at that.

Someone like the Proficio Group.



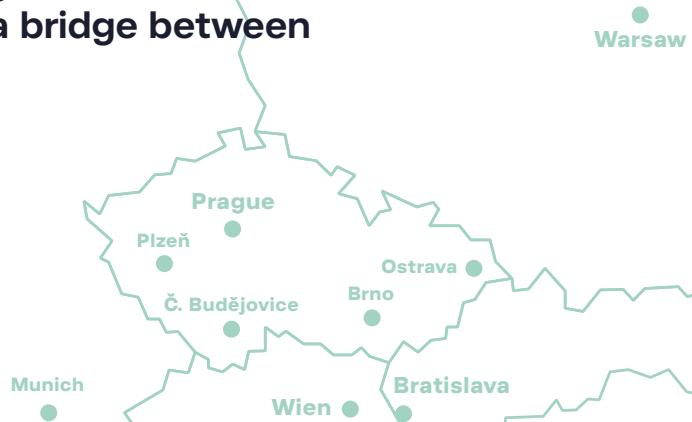




# That's Us

**We are the Proficio Group  
and we like to connect.**

**For ten years we have been successfully establishing  
a direct link between marketing and business.  
And right now we are building a bridge between  
the DACH and CEE regions.**



# What Numbers We Bring to the Table

**150+** professionals  
in our team

**5** countries  
where we have  
9 branch offices

**52** million EUR  
in marketing spends  
we manage

**90%** clients  
have been with us  
for over 5 years

proficicio

# **We'll help with your expansion through**

- ▶ **analysing & identifying your opportunities in the CEE region**
- ▶ **helping with the localisation and logistics**
- ▶ **setting up your marketing activities – from establishing the strategy to executing and evaluating**

# Who Are Our Clients

SANITINO

YTONG

VELUX®

// REGIOJET

 rieber®

 KONICA MINOLTA

Pure Freude  
an Wasser

GROHE

Sportega

ALCINA

D

DEICHMANN

 ataccama

Big  
Green  
Egg

campiri

Continental   
The Future in Motion



HOME  
CREDIT

niceboy®

OLYMPUS

SPP

 teahouse  
TRANSPORT

TANTUM  
VERDE

ThermoFisher  
SCIENTIFIC

Gopass

 TON

# How Can We Help You Expand to CEE

**In order to achieve the international success our clients strive for, we have to utilise a strategic approach. The process involves:**

## **Market Analysis**

We analyse target international markets, including culture, economy, and competition. This helps us identify opportunities and challenges, enabling tailored strategies.

## **Strategic Partnerships**

We help clients establish partnerships with local businesses, distributors, or resellers to expand their reach in international markets. These partnerships facilitate market entry, distribution, and customer acquisition for scalable international expansion.

## **Localization and Adaptation**

We collaborate with clients to adapt products/services for target markets. We conduct market research, localise marketing messages, adjust pricing, and ensure compliance with local regulations.

## **Digital Expansion**

We leverage digital platforms to efficiently drive international business outcomes. This includes optimising websites for international SEO, developing multilingual content, localised digital advertising, and utilising social media and influencer marketing strategies.

## **Logistics**

Through strategic partnerships, we methodically coordinate precise delivery schedules, optimise supply chains, and strengthen operations against potential disruptions. This ensures a seamless and efficient flow of goods and services, promoting reliability and customer satisfaction as we navigate the complexities of international markets, mitigating risks and enhancing the overall resilience of your expansion endeavours.

## **Cross-Cultural Communication**

We provide guidance on culturally appropriate messaging, marketing materials, and customer support to build trust and resonate with target audiences.

## **Performance Tracking and Analytics**

We implement tracking and analytics systems to measure the effectiveness of international marketing efforts. This enables monitoring of KPIs, tracking ROI, and making data-driven adjustments to optimise results.

## **Scalable Systems and Processes**

We establish efficient systems and processes for managing international operations. This includes implementing marketing automation tools, standardized reporting frameworks, and project management systems to streamline workflows and ensure consistent service delivery across markets.

## **Google Support**

We use exclusive tools and services provided by Google to evaluate expansion opportunities and cover the expansion process.



**After aligning with the client on the international growth strategy for the specific market(s), we choose the best mix of Google products and other state-of-the-art digital products.**

**The choice of the right product of course depends always on the client's situation and goals.**

In the context of this, when we are preparing a media strategy, we analyse the market, the target group, the size of demand, the competition, etc. For the analysis we also use Google tools – reach planner, ads planner and of course insights from google analytics.

Generally, we're using a mixed portfolio of Google Ads products, mainly search, shopping, display and video campaigns. In addition we're using other Google products such as SA360 and DV360.

## **The choice of specific products is therefore always based on the specific goal we want to achieve:**

- ▶ Performance Campaigns suitable to generate transactions or leads. We're using mainly Google Ads search and remarketing campaigns as well as Performance Max and PLA campaigns.
- ▶ Consideration Campaigns suitable to reach people already considering products / solutions and increase website visits. Here we work mainly with display ads (Google Ads, DV360) and video ads (mainly YouTube).
- ▶ Awareness Campaigns suitable to increase brand awareness, get reach and visibility within a target group. Based on these goals we're using mainly visible banners formats and videos, both served via Google Ads and DV360.

**In order to improve the campaign performance we also use Google and our own automation technology solutions.**

**We leverage multiple tools from the GCP ecosystem to scale our campaigns and analytics solutions.**

1. We use **Google BigQuery** as a data warehouse that serves as a backend for business and marketing reporting. We can easily add data from new markets to our datasets and expand our reporting. Thanks to this we can have real time business reporting that combines data from advertising platforms, web analytics and CRM/ERP of our clients.
2. We also run a **server-side Google Tag Manager** that runs on Cloud run instances in GCP. Cloud run as a scalable service allows us to add new markets on demand and thanks to server-side GTM we can improve precision of our marketing data and do things such as optimise our marketing budget based on margin (instead of revenue). We do it with Firestore integration, which is also part of GCP.
3. Lastly, we run our own automation platform named Logos, completely on GCP using App Engine, Cloud Run and Cloud SQL. We are scaling our campaign automation tasks for all of our clients and their markets.

# How Do We Define Success?

**Simply put – a successful international campaign is the one that reaches the client’s goals.**

Usually the clients are expecting a long run performance so the main KPIs are turnover, number of transactions or lead generation.

To be able to evaluate the results, we’re combining data from various systems in our BI solution. We’re using data not only from advertising systems and Google Analytics, but we’re connecting them as well with various business data (business plans, transaction costs, shipping costs etc.) and market development data (brand share of search, number of relevant searches for products or services etc.).

To optimise the campaigns we’re also evaluating micro data and signals, such as the quality of user behavior on the website, and actions performed.

# Sanitino's Entry into the European Market with Proficio

## Proficio case study

To face the incoming challenges and possible barriers that come with entering into a new market we knew that we had to build on a carefully selected marketing mix, accommodating individual needs of new markets.

Let us show you how we did it and the results we achieved.

### Our results



**From €16 million to over €70 million**

Tenfold increase in revenue in 5 years



**72% increase in ROAS**

with 30% cost reduction in Google Ads and the value of conversions increasing by 22%



**At least 20% increase in revenue efficiency**

across ten European Markets

## The approach

As part of the International Growth Agency Program (IGAP) we were able to use tools that would help us to provide not just insight but a long-term solution for the growth issues of the entire business.

1. An **expansion analysis** was performed by Proficio, detailing all the local particularities of each market, together with a plan on how to wrap the entire strategy around these. With our partner we set a strategy to launch 1–2 new markets per year, successively Italy, Netherlands, Belgium, France, Austria, Spain, Germany, Romania.
2. The introduction of **customized BI reporting** showed the company new possibilities for growth. Financial and data analysts, team leaders and senior management have obtained a top-notch and simple tool with which they could implement strategic changes – eliminate inefficiency, put an end to loss-making products or orders, optimise the way of working in the warehouse and identify changes in the market and respond to them in a short time frame.
3. Additionally, the team changed the **campaign optimisation** paradigm from revenue evaluation to margin evaluation to achieve higher precision and profitability. We implemented enhanced conversion tracking into the optimisation process and started to use automated strategies for bidding on the margin.

## The results

**Not only did Proficio achieve Sanitino's goal, but they surpassed it by almost 300% and grew the revenue tenfold.**

Costs were reduced by ~€17k a month thanks to the optimization of transport costs, €6.5k a month as a result of streamlining processes in the warehouse and more accurate margin calculation down to the level of individual products and across all markets, and revenue grew from €8M at the beginning of the cooperation in 2017 to reaching over €80M in 2022.

**SANITINO**

**“We pushed boundaries,  
built a stellar team, and the  
results speak for themselves.  
Sanitino’s success is proof  
that going the extra mile pays  
off in the fiercely competitive  
international arena.”**

**Jiří Novák,  
Partner in the Proficio Group**

**proficio**

**Google**





**Now you know us.  
And we'd love to get  
to know you and  
help you with your  
expansion plans.**

**So let's get in touch!**



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