

# OUTLOOK OF POLISH RETAIL SECTOR



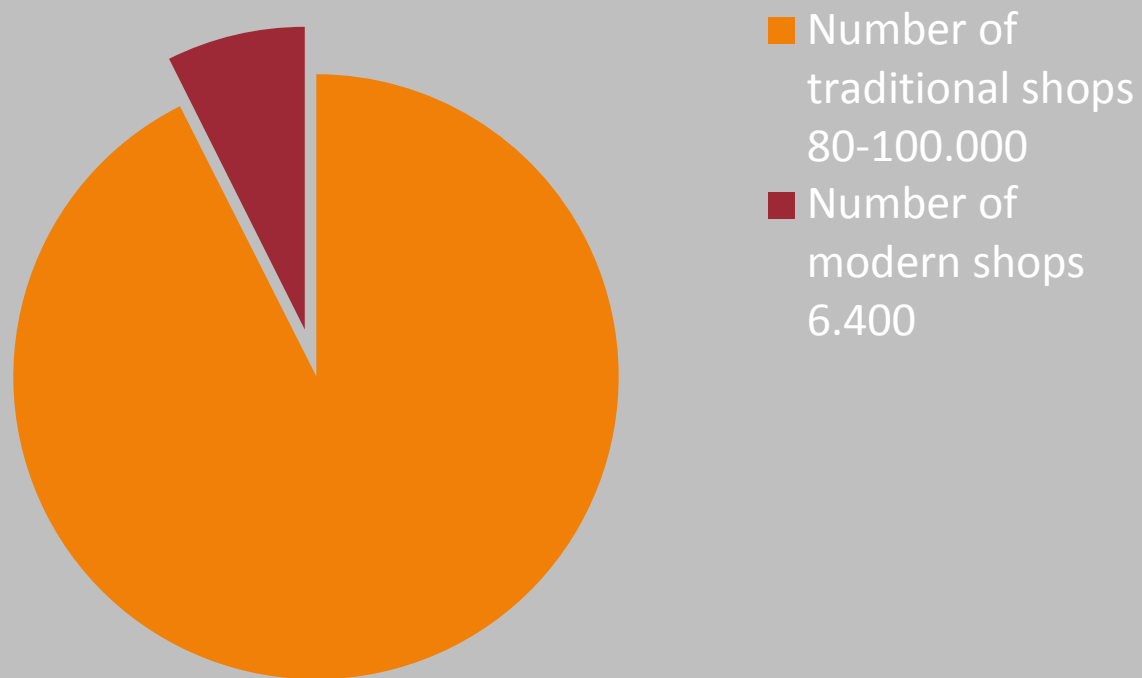
April 15<sup>th</sup> 2015, World Food Warsaw Fair

## DIFFERENCES BETWEEN POLAND AND OTHER EU COUNTRIES

Poland	EU countries
The largest number of shops per 1000 persons (2,5)	0,5 per 1000 persons
52 % retail is modern trade	75-80 % retail is modern trade
40 % population lives in rural areas	majority of population lives in cities and towns
49 % of population lives in small and medium cities	majority of population lives in big cities and towns
only 11 % of population lives in major cities	majority of population lives in big cities and towns
50 % of consumers buy fruits and vagatables in markets and bazaars	33 % consumers buy fresh fruits and vegetables in markets and bazaars

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## Modern vs. traditional

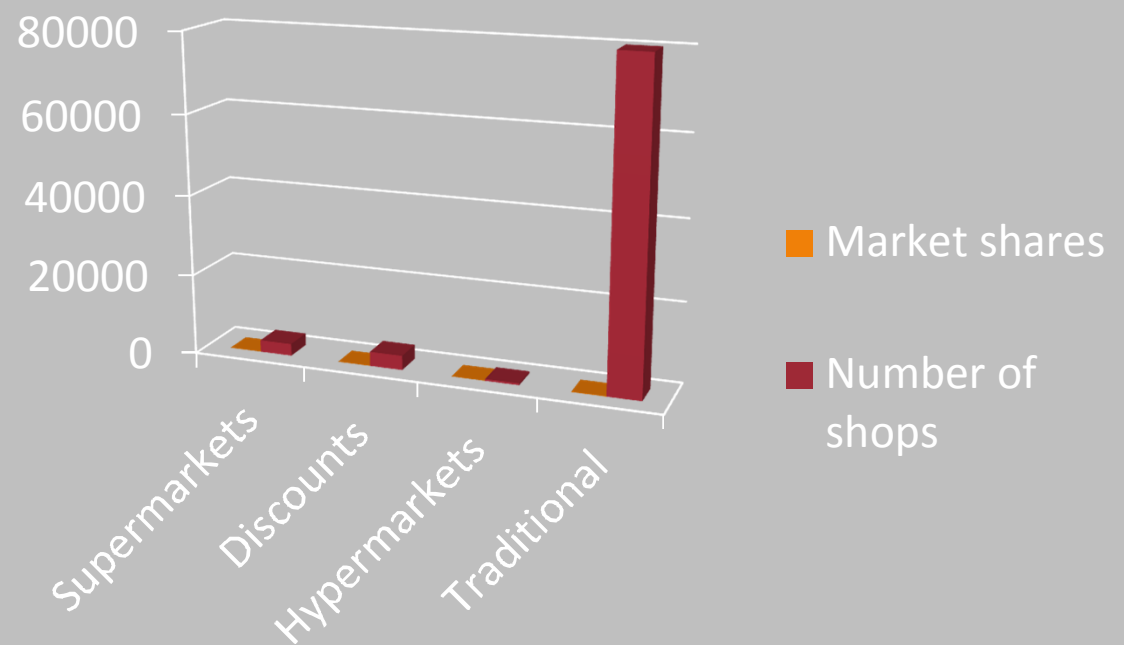


MARKET IS DEVIDED INTO 2 CHANNELS:  
TRADITIONAL WITH 48% MARKET SHARE AND MODERN 52 %

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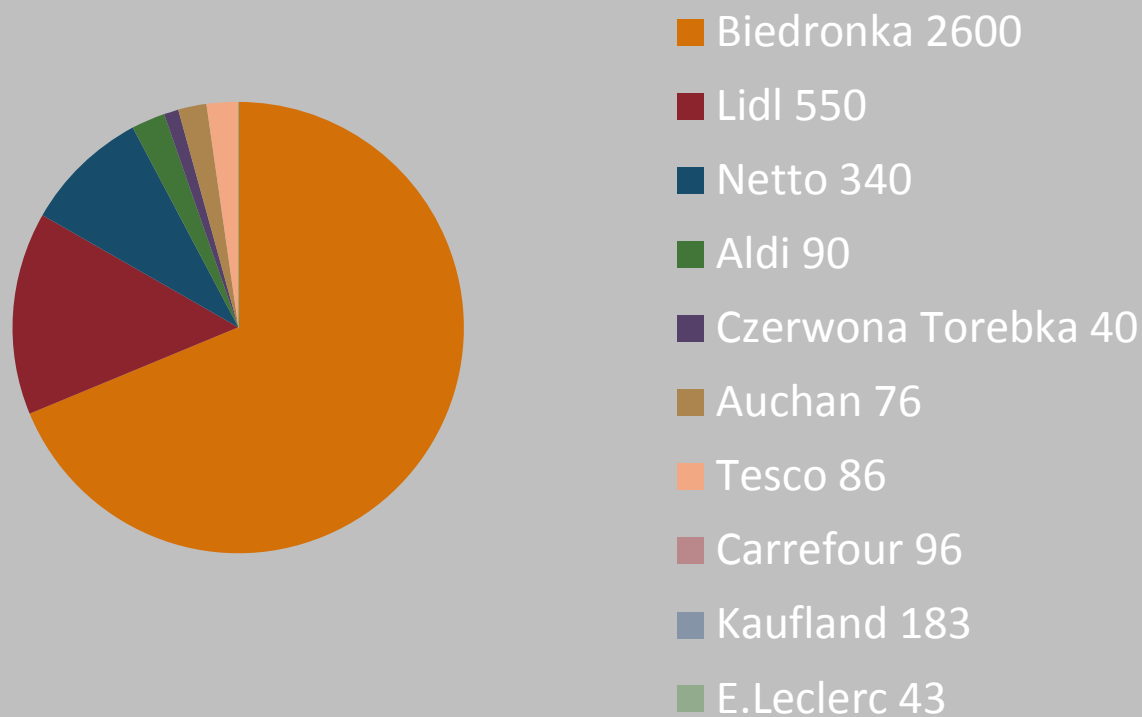
POLISH FMCG MARKET IS  
WORTH 210-250 BILLION  
PLN

RETAIL SALE IS GROWING  
3-4 % PER YEAR



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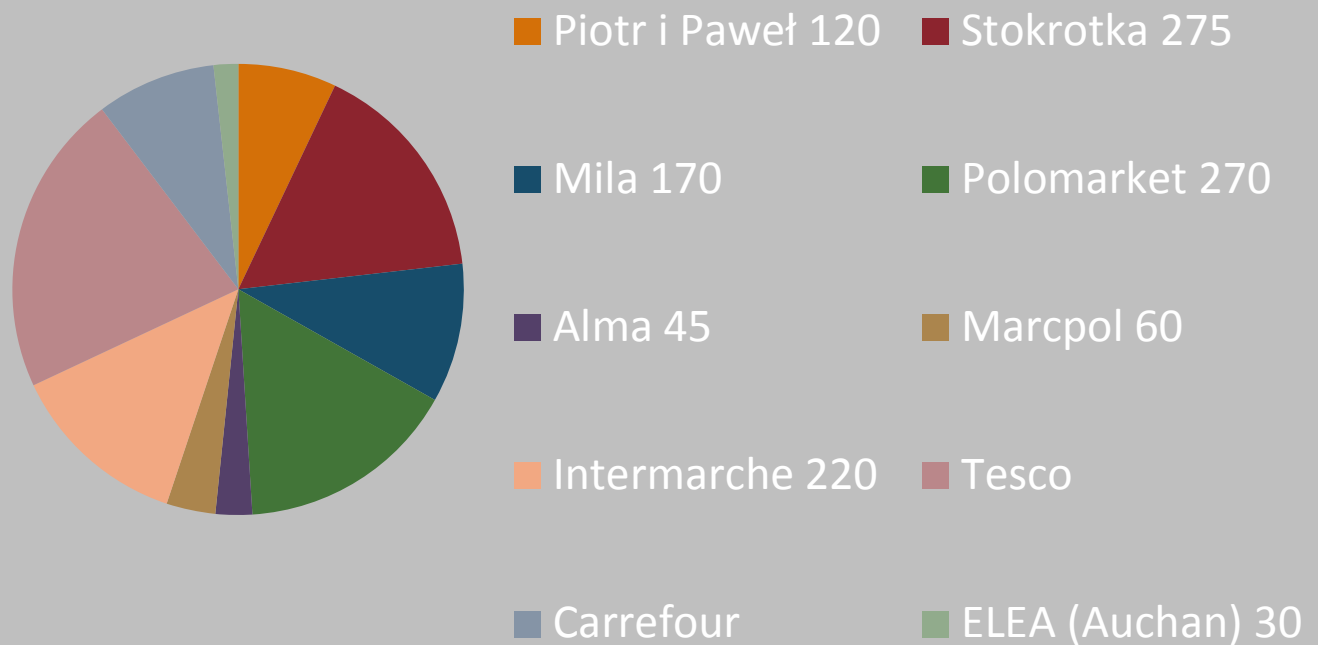
## Brands of discount stores and hypermarkets on the Polish market



DISCOUNT STORES: MARKET SHARE 24 %, HYPERMARKETS: 12 %

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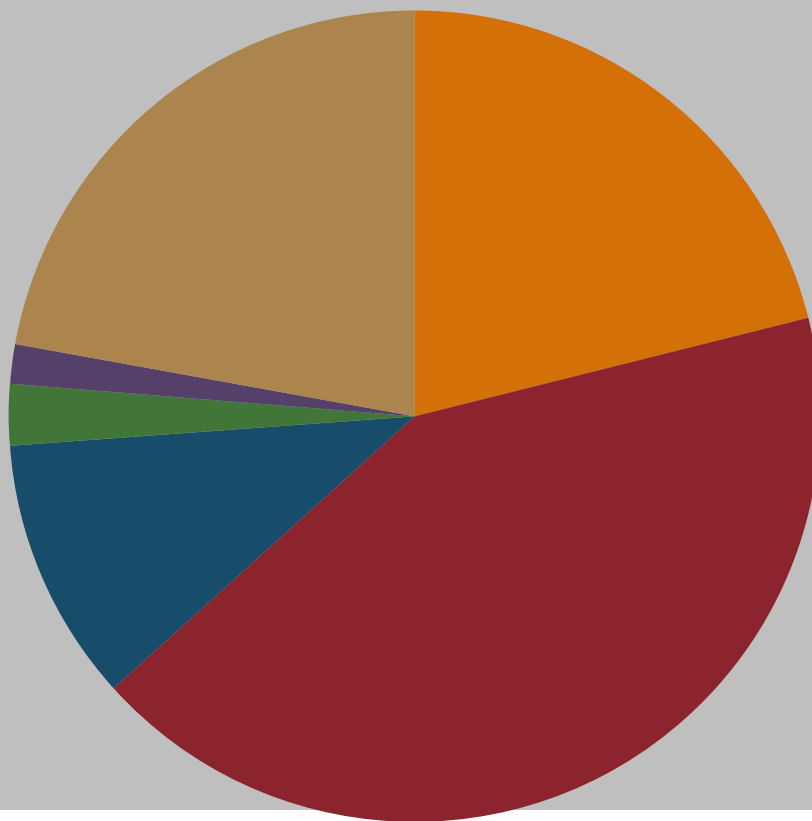
### Brands of supermarkets on the Polish market



SUPERMARKETS: MARKET SHARE 16 %

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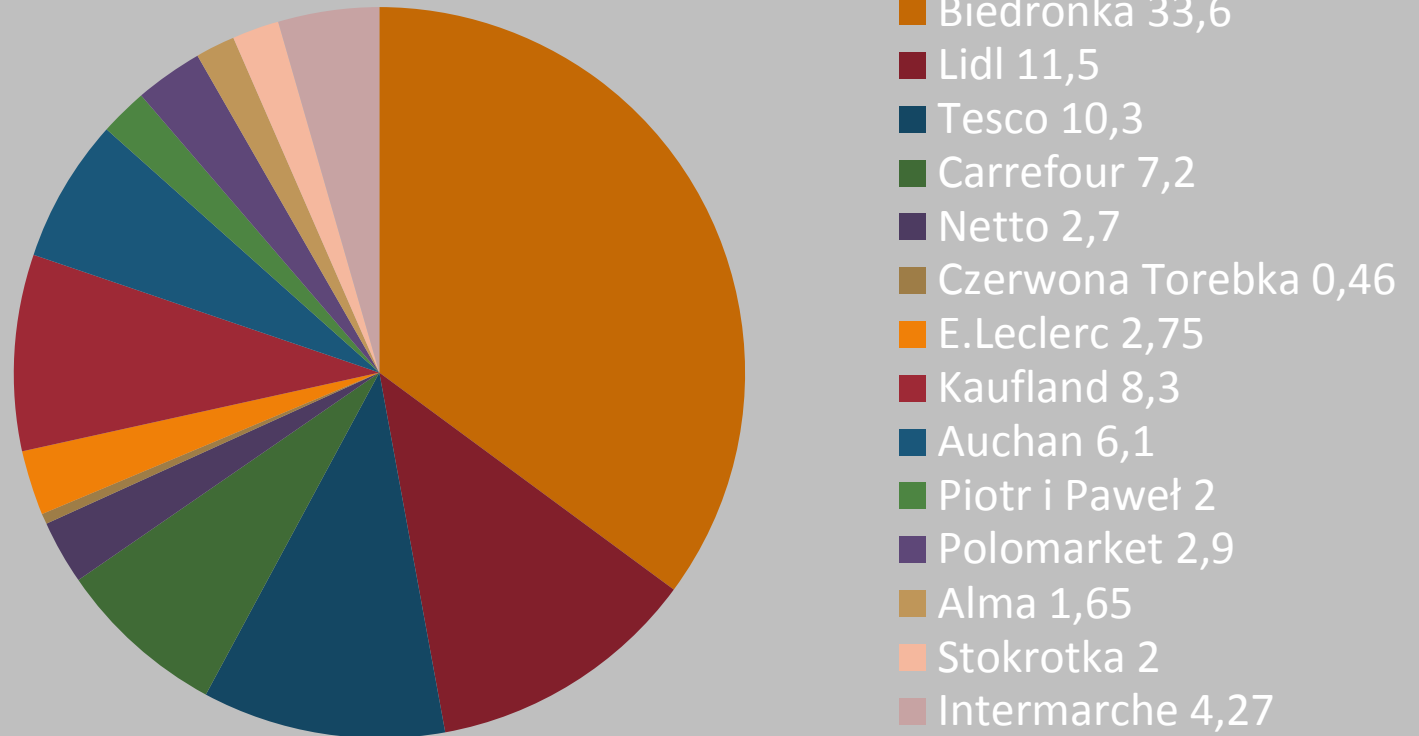
### Franchise systems



- MID EUROPA PARTNERS (ŻABKA AND FRESHMARKET - 4.000, 5.2 BLN PLN TURNOVER
- EUROCASH 8.000, 16.7 BLN PLN TURNOVER
- MAKRO (ODIDO) 2.000
- CARREFOUR EXPRESS 460
- MAŁPKA EXPRESS 300, 0.16 BLN PLN TURNOVER
- SPECJAŁ 4200, 6,2 MLD PLN TURNOVER

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**Turnover in billions of PLN**



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## MAIN CONSUMERS' BEHAVIORS:

60 % OF POLISH CITIZENS SHOP 3-4 TIMES A WEEK IN BAKERIES, BUTCHERS' SHOPS AND FRUIT STANDS/MARKETS

CONSUMERS CHOOSE STORES IN THEIR NEIGHBOURHOOD

POLISH CUSTOMERS ARE „LOYAL” ONLY TO PROMOTIONS, NOT TO THE SHOP BRAND (IN 2014 THEY VISITED 7,1 STORE PER MONTH AS COMPARED WITH 5,7 IN 2013)

POLAND HAS NOT DEVELOPED AN „EATING OUT” CULTURE

# MAIN TRENDS IN CONSUMER MARKET:

CONSUMER IS GETTING RICHER

PRIVATE LABELS ENTER THE PREMIUM CATEGORY

SPECIALIZATION

E-COMMERCE

COVENIENCE – NEARBY AND CARRY EVERYTHING

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# MAIN TRENDS IN RETAIL SECTOR:

BIG PROMOTIONAL ACTIVITY  
(3 MAIN CHAINS SPENT 17.5 MLN PLN DURING THE WEEK BEFORE EASTER)

DEFLATION

UNIFICATION OF FORMATS

EMPHASIS ON FRESH PRODUCTS: OWN BAKERIES, BUTCHERS

STRONG PRESSURE ON SUPPLIERS AND PRODUCERS

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THANK YOU

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