

OUTLOOK OF POLISH RETAIL SECTOR



April 10th, 2018

FACTORS THAT INFLUENCE THE RETAIL SECTOR

FMCG RETAIL SECTOR INCREASES BY 3,1 % YEAR BY YEAR (IN 2017 IT WAS WORTH 260 BLN PLN)

BETTER ECONOMIC CLIMATE (LOW UNEMPLOYMENT, 500+, INCREASE OF SALARIES BY 3,4 %)

EMPHASIS ON BETTER QUALITY

INCREASE OF FOOD PRICES BY 4,6 %

STRONG PRESSURE ON SUPPLIERS AND PRODUCERS

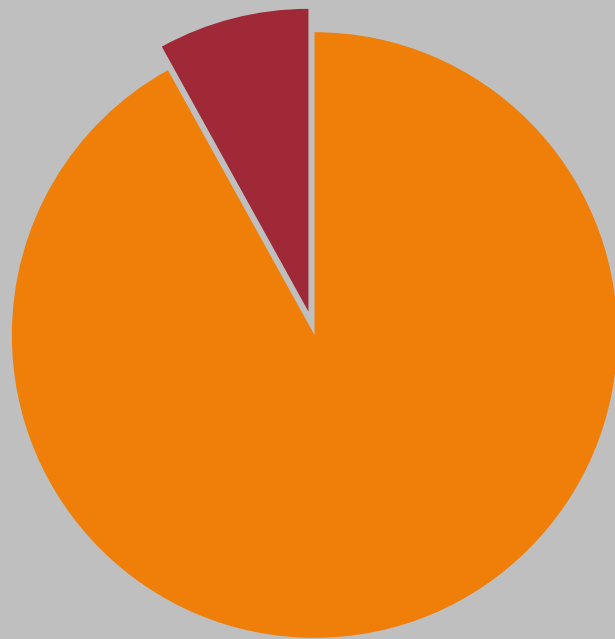
INSTANT PROMOTIONAL SALES

CONSUMER PATRIOTISM (LOCAL PRODUCTS, LOCAL SUPPLIERS)

LEGAL REGULATIONS

April, 10th 2018

MODERN VS. TRADITIONAL



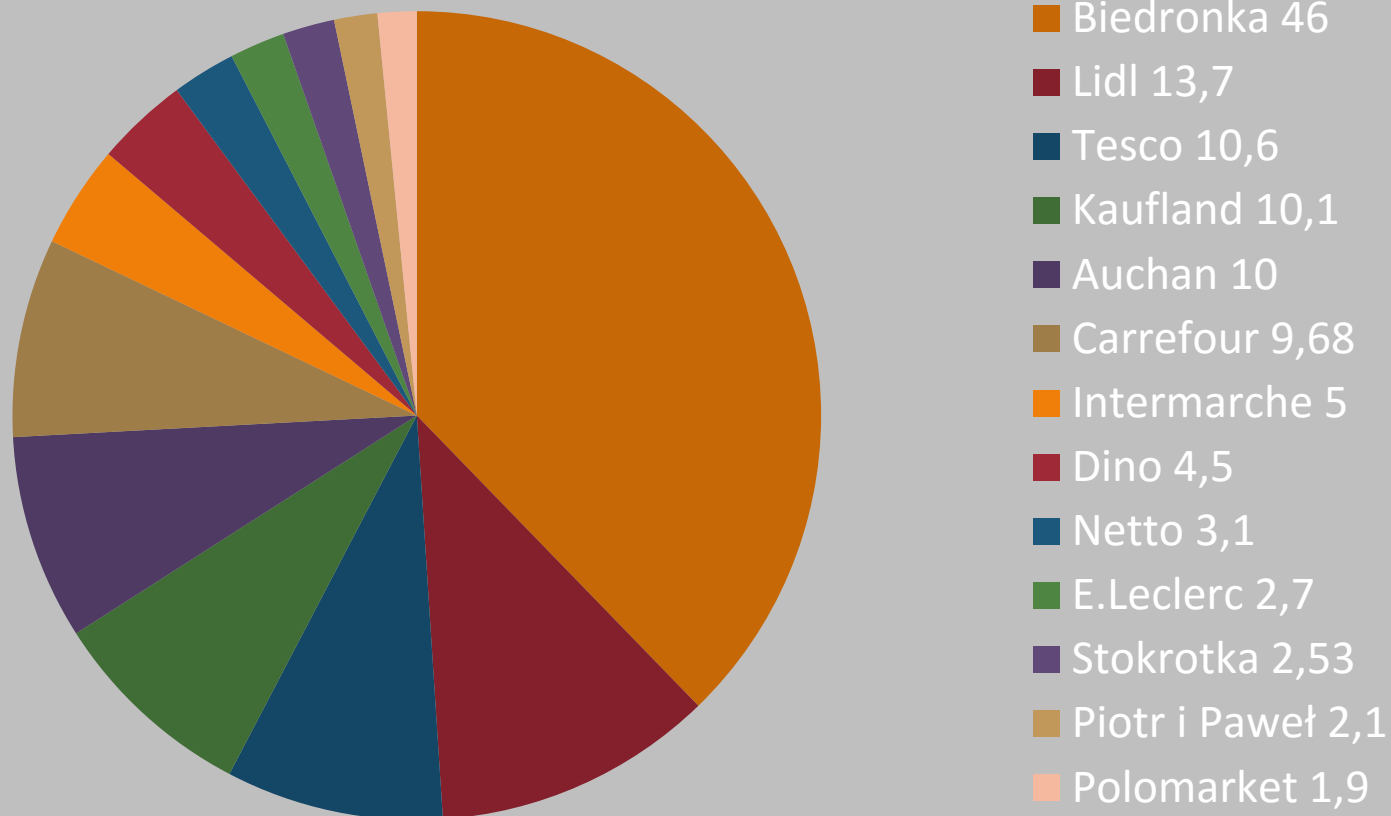
- Number of traditional shops
80.000
- Number of modern shops
7.000

Traditional market 46 %
Modern trade 54 %
Each year 10.000 shops are closed out of which 50 % are traditional grocery stores

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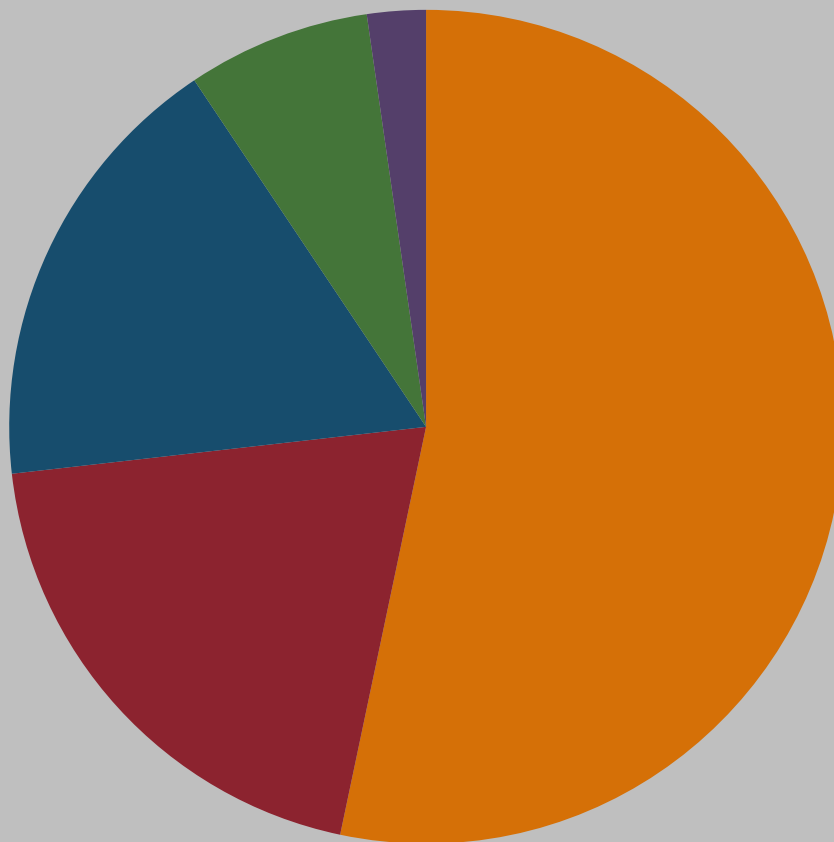
MAIN RETAIL PLAYERS

Turnover 2017 in bln PLN



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MAIN WHOSELALE AND FRANCHISE PLAYERS



- EUROCASH 15.000; 23,2 BLN PLN
- SPECJAŁ 5.600; 8 BLN PLN
- MID EUROPA PARTNERS (ŻABKA AND FRESHMARKET - 4.900; 5,6 BLN PLN)
- MAKRO (ODIDO) 2.000; 6,9 BLN PLN
- CARREFOUR EXPRESS 640

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MAIN CONSUMERS' BEHAVIORS

POLISH CUSTOMERS ARE „LOYAL” ONLY TO PROMOTIONS, NOT TO THE SHOP BRAND
(WE SHOP AT 6 DIFFERENT STORE BRANDS)

CONSUMERS CHOOSE MODERN CONVENIENCE AND PROXIMITY SUPERMARKETS
(12 VISITS IN DISCOUNTS, 13 IN TRADITIONAL SHOPS, 14 IN BAKERIES/MONTHLY)

CONSUMER PATRIOTISM VS INTERNATIONAL CUISINE

SMALL POPULARITY OF E-GROCERY

HEALTH, ORGANIC AND LOCAL FOOD START TO BE POPULAR

BIG PENETRATION OF PRIVATE LABELS – 30 %

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MAIN LEGAL REGULATIONS

BAN FOR SUNDAY RETAIL (1ST MARCH) – WHO WILL LOSE WHO WILL WIN?

RESTRICTIONS IN SALES AND EXPOSITION OF ALCOHOL BEVERAGES (TILL 10 PM)

TAX FOR OWNERS OF COMMERCIAL CENTERS (0,035 %)

LAW AGAINST WASTING FOOD (BILL IN SENATE)

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MORE INFO

WEBSITES:

DLAHANDLU.PL
PORTALSPOZYWCZY.PL
SADYOGRODY.PL
FARMER.PL
PROPERTYNEWS.PL

EVENTS:

FRSIH (WWW.FRISH.PL)
FOOD SHOW (WWW.FOODSHOW.PL)
EEC (EECPOLAND.EU)

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