POLISH RETAIL SECTOR AD 2020

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HOW TO BITE IT?

Polish FMCG retail sector is worth

260 bln pln

Traditional market has **46 %** of shares, modern trade **54 %**

There is around **80 K** traditional shops and **14 K** modern trade shops

HOW TO BITE IT?

25 % of houshold monthly income is spent on food

Sales of bio product is **0,7 bln pln** **– 0,5 %** of the entire fmcg market (+20 % yty)

Food prices increased by **4 %** in 2020

30 % of sales is “promotional” sale

Big penetraion of private labels **– 30 %**

Strong pressure on suppliers and producers

Frequent changes in legal regulations

POLISH CONSUMER PROFILE

Price oriented

—

„Loyal" to promotions and sales, not to the store brand (shopping at 6 different store brands)

—

1/3 of consumers are promotion hunters

—

ECO, VEGE, BIO is a trend for big cities but most of consumers live outside of big cities

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Consumers choose modern convenience and proximity supermarkets (12 visits in discounts, 13 in traditional shops, 14 in bakeries/monthly)

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Orientation for local and hiper-local products

THE IMPACT OF PANDEMIC ON POLISH RETAIL

In 2020 price is again the main factor of shop and product selection, so retail flirts with hard discount format

Consumers search for “simpler” non-processed products and bigger packages, because they returned to cooking at home

Consumers look for local products, so each supermarket has its Polish, local product shelf

Consumers search for healthy products (+40 % YTY), so each retail chain has its „health corner”

Consumers choose nearby shops: discounts, convenience, traditional

Consumers start to be open for e-grocery

Retailers invest in self-service checkouts and cashless payments and e-commerce solutions

MAIN HEROS – TOUGH PLAYERS

TURNOVERS IN BLN PLN

Biedronka	55,7
Lidl	18,5
Auchan	11,5
Kaufland	10,62
Carrefour	9,62
Rossmann	8,82
Żabka	8,3
Dino	7,9
Tesco	7,1
Stokrotka	4
Netto	3,5
E.Leclerc	3,1
Intermarche	2,1
Polomarket	1,97
Aldi	1,5
SPAR	0,7
bi1	0,37

NUMBER OF SHOPS

Żabka	6002
Biedronka	3002
Delikatesy Centrum	1556
Dino	1218
Lidl	720
Stokrotka	650
Netto	386
Tesco	301
Polomarket	286
Carrefour convenience stores	244 +650
Kaufland	220
Intermarche	200
SPAR	153
Aldi	141
Auchan	74 +33
E.Leclerc	46
bi1	7

WHOLESALERS:

EUROCASH **23,8 BLN PLN,**
15K FRANCHISE SHOPS

SPECJAŁ **8 BLN PLN,**
5,6 K FRANCHISE SHOPS

MAKRO **6,6 BLN PLN,**
2,6 K FRANCHISE SHOPS

SELGROS (TRANSGOURMET)
3,6 BLN PLN

CONTACT INFO

WEBSITES:

Dlahandlu.pl
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