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THE EVOLUTION OF RETAIL TRADE IN POLAND FOLLOWING ECONOMIC TRANSFORMATION

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Purpose: The article aims to present the development of the retail trade sector in Poland after the economic transformation and to identify the key stages of this development from 1990 to 2021. Additionally, the article will explore the changes seen at the regional level, focusing on specific years.
Design/methodology/approach: The article begins by explaining the terminology and types of trade. It then describes the five stages of retail trade development in Poland from 1990 to 2021. The third section of the article analyzes the changes in trade by region in the years 2010 and 2021. The methods used in this article includes desk research and statistical analysis. Desk research involves a thorough review and analysis of relevant literature, industry reports, and legal acts, outlined in the literature section. Statistical analysis uses data from Statistics Poland (GUS) and involves a process of inference. The research is based on statistical data from the GUS Local Data Bank and industry publications. The study covers 16 voivodships in Poland with a time frame from 1990 to 2021.
Findings: The study revealed significant regional variations in the Polish retail trade sector, which has experienced notable growth at specific stages throughout its development. The most important factors influencing the differentiation of trade at the voivodship level have been outlined.
Research limitations/implications: The subject of the development of retail trade in Poland since the advent of the market economy, which encompasses the processes of concentration and diversification of trade formats in functional-spatial terms, is seldom addressed in scientific research. This represents a significant research gap that requires further investigation.
Practical implications: The retail trade sector is experiencing rapid growth in Poland. The intensifying competitive landscape and integration processes are driving the modernisation and organisation of retail trade networks, a trend that is also evident in traditional small-scale trade. New forms of trade are emerging, and the implementation of increasingly modern information and communication technologies is becoming more prevalent. The strategies of big-box stores are undergoing a transformation, with an investment in smaller retail outlets in smaller cities and a reimagining of the concepts of their outlets in big cities.
Originality/value: The findings of the research have implications for both cognitive and pragmatic aspects, particularly in the context of further development of the retail trade and the planning of additional retail outlets across various regions of the country. This research represents the initial phase of a larger investigation, the objective of which is to develop a ranking of the voivodships based on the TOPSIS linear ordering method.
Keywords: retail trade, stages of development, voivodships.
Category of the paper: Research paper.

1. Introduction

The most visible results of the economic restructuring and privatisation processes initiated in Poland in 1989 are in commodity trading. These processes led to very rapid structural and ownership transformations in the trade sector. Within a few years, the trade sector was completely privatised. Internationalisation and trade concentration processes emerged. There has been a diversification of trade forms and distribution channels, along with the development of innovations in trade owing to the inflow of foreign capital and the expansion of experienced international retail chains.

According to Bartoszewicz and Obłąkowska (2022, pp. 48-65), Polish trade has undergone not only transformations, but outright revolutions, from the scarcity of goods on the market, through bazaar, small-container sales, marketplace, small- and large-scale trade to e-commerce and the assortment diversity of goods desired by the population.

Trade is an important and broad sector of the Polish economy. It has a significant position, both in terms of the generated gross added value and the number of employees. Through its functions in the market economy system, it influences the supply and demand of goods, i.e. the producer, the seller, and the consumer of these goods. Due to its special position in the market economy system, it performs economic, social, and cultural functions and significantly affects the quality and standard of living of the society. It is a place of market offer and creation and satisfaction of household and consumer needs, at the same time being a key sector that offers jobs and generates income for households.

The modern consumer is described in the market as a smart shopper, i.e. a customer who values their time, compares offers, and uses the available special sale offers in a thoughtful way. This consumer is very discerning, with numerous choice opportunities in the market, thus having the possibility of deciding how much and where to buy (Zalega, 2013). Reaching such a consumer with the right offer is the basis for the success of the retailer, who must meet the expectations of this smart shopper.

The development of retail trade in Poland since the beginning of the market economy, presenting the processes of concentration and diversification of trade forms in functional and spatial form, is not often addressed in scientific research, so it will fill the research gap. The available studies address several separate areas within a limited time frame: (1) concentration and integration processes in trade, (2) trade development in a specific product industry, e.g. food, groceries, FMCG[1], (3) consumer behaviour and preferences, and (4) marketing strategies used by traders and competition in the market.

[1] FMCG: Fast Moving Consumer Goods.

2. Theoretical aspects of trade

Trade is understood as a specific form of commodity and monetary exchange. In a structural sense, trade is a branch of the national economy in which the movement of products from production to consumption, as commodities, is carried out by means of buying and selling (Boczar, Kossut, 1970, p. 9). It also includes professional intermediation in trading in goods (commodities). Trade extends to cover activities related to the completion of exchange, generally commodity into money, as well as activities resulting from exchange but carried out by institutions specialised in the relevant field. Related concepts such as exchange, distribution, market, or commodity trading are linked to the concept of trade, with significant differences in their meanings (Marak, 2000, p. 7).

A distinction is made between internal and external trade (imports and exports). Internal trade can be divided by form into wholesale and retail. Retail trade focuses on the sale of goods and services to the end customer, i.e. the consumer, who may only use them for their own non-commercial needs (Cox, Brittain, 2000).

Trade includes the activities of various institutions specialised in specific commercial transactions, for example in purchase and sale of goods, physical movement of tangible goods (transport and storage), and facilitation of the exchange (standardisation and normalization of goods, financing of transactions, risk bearing, or transmission of market information). It is distinguished from other activities not only by functional (subject) criteria, but also by institutional (entity) criteria (Altkorn, Kramer, 1998, p. 90).

The essence of trade is the participation in the reproduction process, which includes the production, distribution, exchange, and consumption stages. Trade provides services to consumers. The essential service is to provide access for consumers to a wide range of desired goods located in a specific place. Trade features a number of tasks defined as functions. The starting point for determining the function of retail trade is generally the finding of an objective discrepancy in the economy between the supply of goods created by producers and demand from end customers (Pilarczyk, Sławińska, 1992). Assuming that trade is a specific form of exchange, as it combines various tasks related to bringing about the conclusion of a transaction, Dietl (1991) emphasises the distributive function of trade, which consists in bringing about the conclusion of a purchase and sale contract and its implementation. Dietl also lists several other auxiliary functions related to the tasks of trade enterprises, such as:

- The function of creating various usability options for intermediaries and end customers, as well as for suppliers. This refers to the definition of assortment, place, time and form of sale.
- The function of securing and monitoring the inventory. This is about the fluidity of commodity supply from producer to consumer. Pursuing the reduction of trade costs by minimising stock levels is important here.

- The function of stimulating demand by actively influencing the market. A marketing orientation of the trade is necessary here.
- The function of redistributing social income, particularly the income of the population. This is because consumer spending accounts for a high share of income.
- The growth-forming as well as civilisation and cultural function of trade. Trade is a carrier of information about new and better options for satisfying needs. It brings about real, tangible contact between the consumer and the product. The purchase of goods by consumers creates new production and supply opportunities for producers.

In recent research, the evaluation of the effectiveness of alternative forms of commercial activity using the transaction cost theory developed on the basis of new institutional economics is becoming a subject of consideration and analysis. It largely concerns the realm of trade intermediation from producer to consumer. The economic rationale for trade intermediation services is to minimise transaction costs incurred by the participants in the exchange. The theory is applied in the analysis of trade costs incurred in specific trade formats and by individual traders, the structure of which has changed in Poland over the years, both in terms of the form and location of shops. The reduction of these costs, with an optimal adjustment of the commercial offer to meet expectations of buyers, is a criterion for choices and decisions in trade and, consequently, may determine the market position of individual commercial enterprises, their location, as well as further development (Sławińska, 2008, p. 16). This theory is a rather large research gap owing to the difficulties in accessing data.

3. Stages of trade development in Poland

The process of the changes in the Polish trade can be divided into five main stages:

- Stage I: 1990-1992,
- Stage II, 1993-2003,
- Stage III, 2004-2014,
- Stage IV, 2015-2019
- Stage V, 2020-now.

Stage I (1990-1992) saw changes characteristic of the transformation and restructuring process of trade that began in 1989. Trade, compared to other activities, was the least demanding, rapidly privatised sector, creating the cheapest jobs. Street and door-to-door trade developed actively during these years, to be reduced over time, with the shift towards market and bazaar trade. Stalls, kiosks and so-called “jaws” (small metal containers, easily set up and easily closed down when needed) came into existence, operating on sites selected for this purpose. As a result of the takeover of state-owned shop premises by individuals from the existing workforce and by associates, there was a dynamic growth of new private establishments, and the number of operators increased. The share of the private sector in commercial activity changed fundamentally. There were 383,000 registered retail undertakings at the end of 1990, the number almost doubled to 718,000 in 1992 (GUS Internal Market, 1995). The private sector in 1992 comprised 97% of all entities in this area of the economy, including cooperatives. Commercial undertakings of natural persons formed the "core" of the private sector (95-98% of the total number of entities) (Banasik, 2000, p. 144).

Stage II (1993-2003): the total number of shops continues to grow, with the largest number of outlets (over 451,000) operating in Poland in 1998 (twice as many as in Spain, almost six times as many as in the UK), reaching almost 950,000 retail outlets with kiosks and stalls included. There were 86 people per shop and only 40 per outlet. In 2000, the average sales area in a shop in Poland was 62.3 m^2, while the average sales area converted for 1000 inhabitants was 697 m^2 (Maleszyk, 1997).

The number of cooperative shops is decreasing. Foreign capital in the form of direct foreign investment began to flow into the Polish market. International retail chains applied the so-called concave strategy, i.e. market diversification: they entered the market slowly and cautiously, and then intensified their activities (Sznajder, 1992, p. 79). Foreign chains introduced new, fast-growing forms of trade to the Polish market: discount shops[2], supermarkets[3], and hypermarkets[4]. Between 1993 and 1995, their number increased by more than 63%. An example is the entry of the large German retail chain "HIT", operating since 1993, and the French "Leclerc" operating since 1995 (sd.tradepress.com.pl).

Foreign investors were primarily involved in (Ministry of Economy, 2002):

- Construction of shopping centres and complexes, including mass-market facilities: hypermarkets, supermarkets, discount shops (43.3% of total expenditure).
- Development of petrol stations together with retail (mostly convenience stores) and service facilities (mostly restaurants and fast food bars) and the distribution of motor vehicles, their parts and accessories (19.6%).
- Multidirectional activities in wholesale and retail of concerns (holdings) with capital: German Metro AG (Real hypermarkets, M1 shopping centres, Makro Cash and Carry wholesale hypermarkets, Praktiker superstores, Alder fashion houses, Media Markt shops, logistics systems); Portuguese Jeronimo Martins (Eurocash warehouses,

[2] **Discount** - a shop of 100 to 600 m^2. Prices lower than those in supermarkets are mainly achieved by the standard of retail service being reduced to a minimum. These shops have simple decoration and furnishings, goods are sold directly from cartons or containers that may be placed on the shop shelves, but are often left on pallets. The work of the staff is reduced to replenishing goods and collecting payments. The assortment sold is usually limited in terms of the number of goods and their selection (Iwińska, 1993).

[3] **Supermarket** is a large self-service shop with a full selection of food goods and a basic range of drugstore and household items. The sales area varies from 400 to 1500 m^2. Most supermarkets are located in free-standing buildings, and may also occupy the basement or ground floor of department stores. The price level is lower than average, but with a tendency to increase due to rent and personnel costs (Ditel, 1991).

[4] **Hypermarket** is a self-service, large-format shop with a sales area of more than 2500 m^2, offering articles of all industries. Non-food items of frequent purchase account for approximately 50% of the shop's total annual turnover (Czubala, 201).

Biedronka discount shops, Jumbo hypermarkets); German Rewe Zentral and Otto Versand (Selgros wholesale hypermarkets, Minimal supermarkets, mail order); Czech Interkontakt (acquisition of former PHS assets): 19.5%.

- Specialised wholesale trade and integrated logistics systems (9.3%).

1992-1995 was the period of the highest foreign investment in retail trade. The dynamics of investment in retail exceeded the growth rate of investment in the national economy as a whole by more than double. In the following years, there was a marked slowdown in the rate of investment, which meant that the niche of shop infrastructure was quickly filled, and a downward trend in investment in trade began in 1998 (Fig. 1).

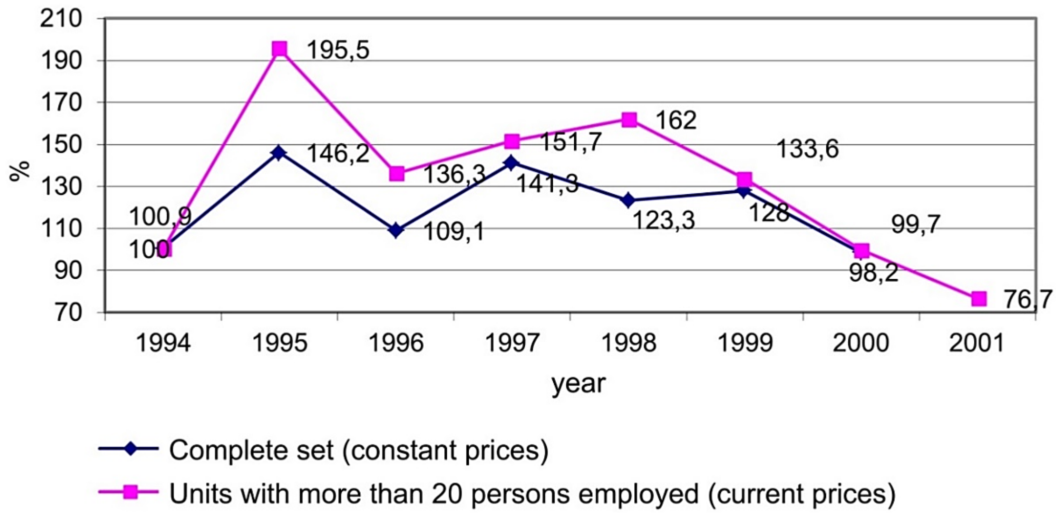

Figure 1. Dynamics of investment expenditures in the "Trade and repair" section, 1994 to 2001.

Source: Calculations based on GUS data.

Ownership changes led to the full privatisation of retail enterprises. Concentration processes have deepened, expressed above all in the systematic increase in the size of retail units above 400 m^2, the number of which doubled between 1995 and 2001, and their share of retail sales increased from 3 to 13 % (Fig. 2).

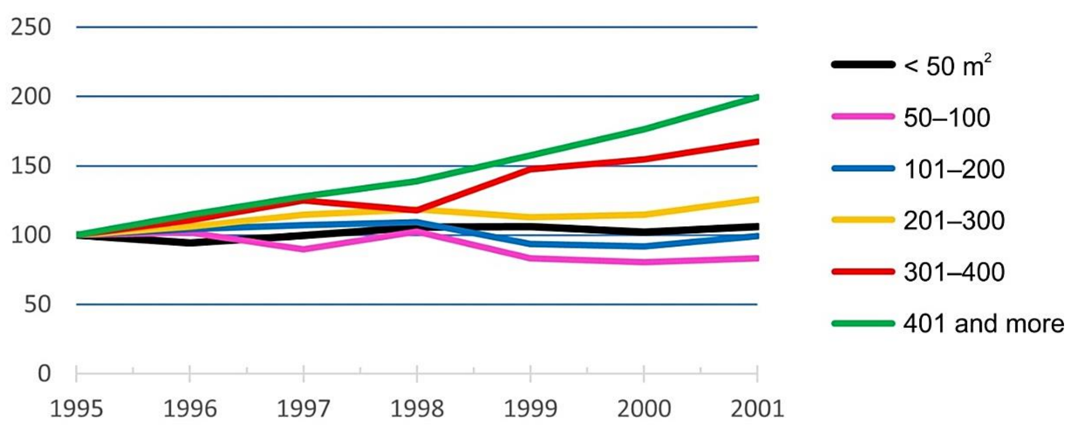

Figure 2. Change dynamics of the number of shops by sales area in Poland between 1995 and 2001 (1995 = 100) (%).

Source: Calculations based on GUS data.

As a result of the increasing competition of large and efficient foreign retailers, many owners of smaller shops in Poland are joining retail chains. Following in the footsteps of the "Piotr i Paweł" chain of shops established in 1990, Polish commercial franchise chains are developing, such as: Rabat (1997), Chata Polska (1997), Delikatesy Centrum (1999) (Wrzesińska, 2012, pp. 34-45).

Stage III (2004-2014). Following Poland's accession to the European Union, trade globalisation processes are deepening. The increasing competition of foreign retail chains causes new forms of integration of domestic companies to emerge, reflecting the search for more effective forms of cooperation and the creation of traders' lobbies. The Union of Polish Retail Chains (Unia Polskich Sieci Detalicznych) was an expression of these trends, which represented the interests of domestic retailers before local authorities, as well as in cooperation with manufacturers and distributors. It included 1637 retail outlets operating throughout the country. Franchise systems and outlets are developing more and more rapidly. Polish integrated chains include: DSH Grupa Handlowa, Chata Polska, Lewiatan Detal, Delikatesy Centrum, Sieć Groszek, Rabat Katowice. There is an accelerated integration of Polish medium and small companies in an effort to achieve a better position on the market.

During the analysed period, takeovers and capital mergers of shops and retail chains intensified. Mainly the largest shops (super and hypermarkets) were taken over. Among the largest retail chains, French companies dominate the Polish market. In addition, e-commerce and logistics services are developing rapidly in Poland, and logistics centres with full modern infrastructure are being established (Table 1).

Table 1.
Mergers and acquisitions of large-format shops in Poland between 2000 and 2014

Year	Network	Shop name	Shop type	Number of shops	New owner
2000	GB (France)	Globi	Supermarket	26	Carrefour (France)
2001	Rewe (Germany)	Billa	Supermarket	11	Auchan (France)
2002	Dohle (Germany)	HIT	Hypermarket	13	Tesco (UK)
2002	Jeronimo Martins (Portugal)	Jumbo	Hypermarket	5	Ahold (Netherlands)
2003	Edeka (Germany)	E-discount E-supersam	Discount	45	Rojal Markets (Poland)
2003	DRD Food Emporium (Norway)	Rema 1000	Supermarket	16	Jeronimo Martins (Portugal)
2003	Ahold (Netherlands)	Hypernova	Hypermarket	2	Carrefour (France)
2004	Ahold (Netherlands)	Hypernova	Hypermarket	13	Carrefour (France)
2006	ABC (Poland)	ABC	Supermarket	17	Polomarket (Poland)
2006	Delikatesy Centrum (Poland)	Delikatesy Centrum	Chain shops	200	Eurocash (Poland)
2006	Geant (France)	Leader Price	Discount	142	Tesco (UK)
2006	Geant (France)	Geant	Hypermarket	19	Metro/Real (Germany)
2006	Ahold (Netherlands)	Albert, Hypernova	Supermarket Hypermarket	183 15	Carrefour (France)
2009	Billa (Austria)	Billa	Supermarket	25	E.Leclerc (France)
2014	Metro/Real (Germany)	Real	Hypermarket	54	Auchan (France)

Source: Wrzesińska-Kowal, 2016, p. 27.

Stage IV (2015-2019). Multiformatisation, i.e. diversification of trade formats by retail companies, increasingly visible in Poland, combining different shop concepts in one retail company, diversified in terms of area and adapted to the potential of local markets. Retail chains place emphasis on the construction of smaller outlets such as discount stores of 100-199 m^2 and 400-999 m^2.

In addition, multichannel operations have developed, i.e. the creation of synergies between online and offline sales through additional online sales with home delivery, the development of e-commerce. This has been influenced by non-economic factors: the significant role of social media, the rise of social responsibility – CSR priorities (Kłosiewicz-Górecka, 2016).

On 1 March 2018, the law limiting trade on Sundays came into force in Poland. Pursuant to this law, there were two trading Sundays per month in 2018, one per month in 2019, and shops will only be open on four Sundays per year beginning with 2020 (Dz.U. poz. 305, as amended).

Stage V (from 2020). The pandemic situation related to COVID-19 has changed retail trading in Poland. The temporary closure of shops and shopping centres and shopping under a strict sanitary regime translated into large drops in turnover from stationary sales and the withdrawal of many players from the market. On the other hand, at the same time, the popularity of online shopping increased and a huge development of e-commerce and the e-commerce market was recorded. Preferences of consumers for forms of shopping have changed because of safety factors, service and convenience of shopping. The diagnosed threats due to the pandemic forced companies in the retail trade to revise their previous strategies. Companies that wanted to stay in business had to combine stationary and digital commerce, allowing customers to move seamlessly between multiple channels, as this determined their attractiveness in the eyes of consumers. Many retailers switched to digital channels for communication, sales and customer service, adapted to the new reality, e.g. adapted their product offerings to the growing demand for health-promoting and self-care products (Wrzesińska-Kowal, 2021).

4. Retail trade in the voivodships 2010-2021

Between 2010 and 2021, the total number of shops in Poland decreased by around 4.3% (i.e. around 15,000 facilities), with the greatest decrease (11.6%) in the number of small establishments up to 99 m^2, and a 60% increase in the number of large-format retail facilities (400 m^2 and above), mainly discount shops (Fig. 3).

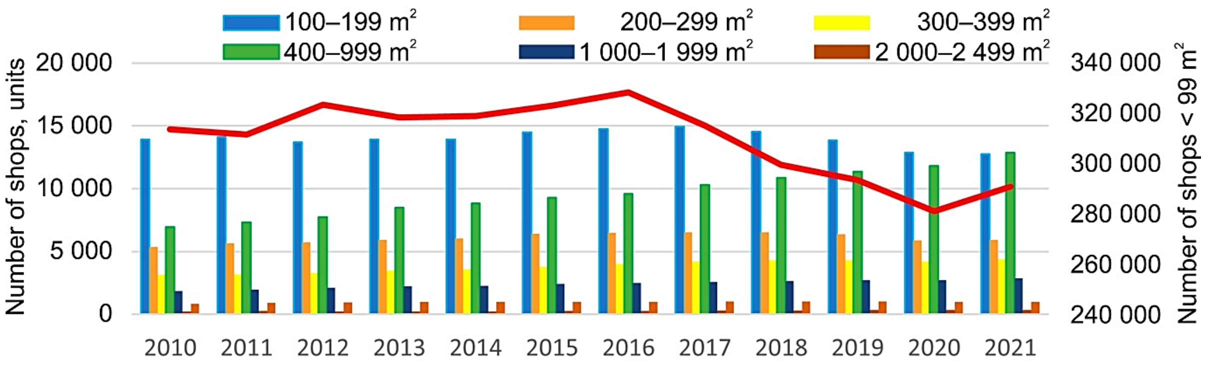

Figure 3. Number of shops in Poland by sales area between 2010 and 2021.

Source: Calculations based on GUS Local Data Bank data.

The structure of shops in terms of shop space and format types in Poland varies regionally. In 2010, 2020, the number of the largest retail outlets (hypermarkets and department stores) decreased, while the number of supermarkets and department stores increased. The latter are operating in highly urbanised voivodships with the largest agglomerations and population centres: in the wielkopolskie, śląskie, mazowieckie and dolnośląskie voivodships (Fig. 4).

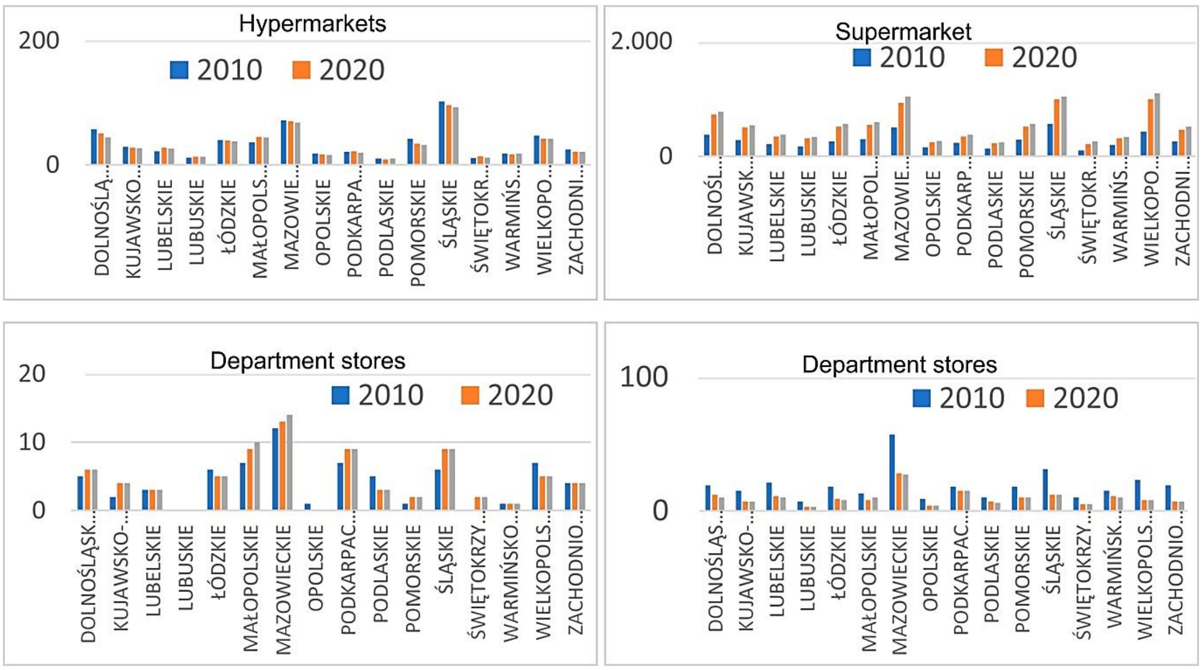

Figure 4. Number of large-format shops in the voivodships in 2010, 2020, 2021.

Source: Calculations based on GUS Local Data Bank data.

The value of retail sales per capita varies greatly between the voivodships. Two of them (wielkopolskie and mazowieckie) stand out, with a significant disproportion in relation to other regions. Wielkopolskie is the leading voivodship, where the value of sales increased by 256% and amounted to 59,647 zł (the average for the country: 26,324 zł) per capita. The location of the AMAZON warehouses distribution centre affects this situation (Fig. 5).

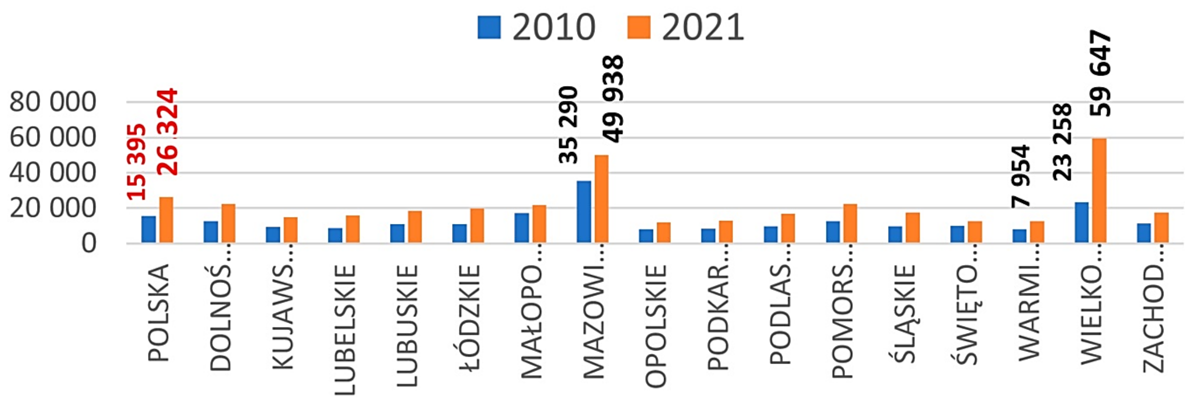

Figure 5. Value of retail sales per capita by voivodship (in zł).

Source: Calculations based on GUS Local Data Bank data.

Depending on the level of industrialisation, population, and the number of retail outlets in the voivodships, there is a noticeable difference in the level of employment and the amount of average wages in the trade section (PKD G). Again, two voivodships (mazowieckie and wielkopolskie) stand out significantly. Between 2010 and 2022, the average salary in trade doubled (Fig. 6).

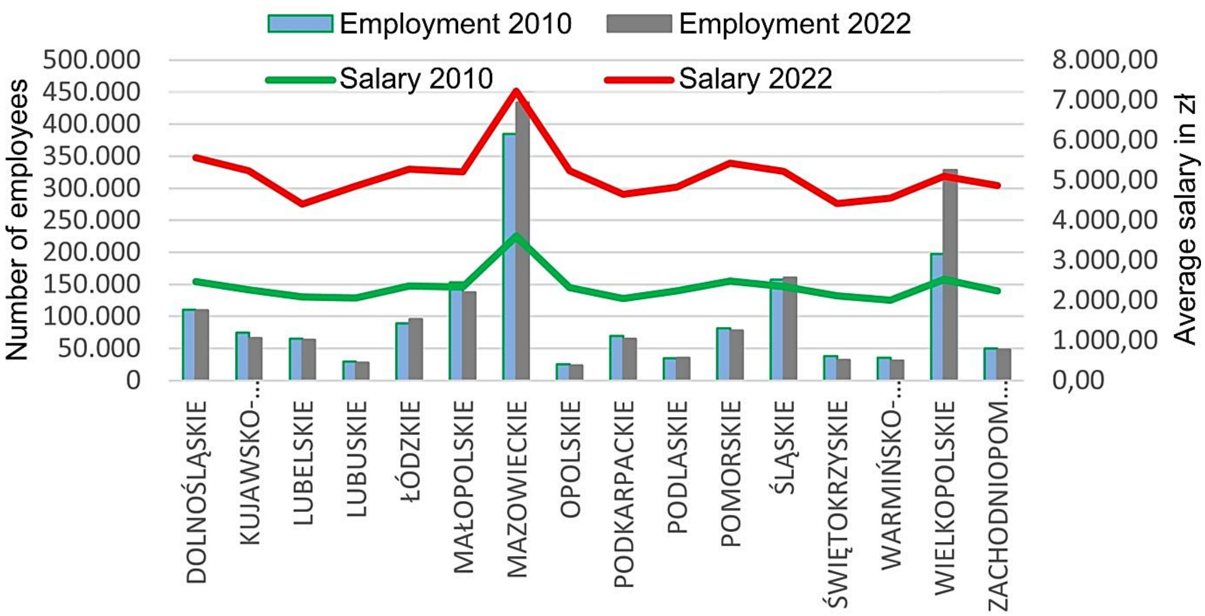

Figure 6. Level of employment and salaries in the PKD G trade section by voivodships in Poland in the years 2010, 2022.

Source: Calculations based on GUS Local Data Bank data.

5. Conclusions

The Polish retail sector has undergone various phases of development over the last 30 years, generally very positive. Shop formats have changed, but so have consumer preferences, behaviour and requirements, which force continuous change in the market.

A characteristic feature of the entity structure of Polish commerce is the existence, on the one hand, of a large number of small shops with an area of up to 99 m^2, and, on the other hand, a smaller number of large retail chains, with large capital, usually foreign, and an increasing share in market turnover.

Foreign capital invested in trade has led to an increase in shop and warehouse space and a functional and spatial retail network, which resulted in the accelerated development of hypermarkets, supermarkets, shopping centres, warehouses, as well as previously insignificant distribution centres and logistics services;

The technical equipment of shops and warehouses has changed radically. The transport service of the trade has improved considerably. IT tools and modern means of communication are actively used in large retail outlets;

Retail trade is a rapidly growing sector of the Polish economy. Increasing competition on the market and integration processes mean that retail trade is increasingly becoming modern and organised in networks, which also applies to the traditional small-scale trade. New forms of trade are emerging and increasingly modern information and communication technologies are being implemented.

Big-box stores are changing their strategies, investing in smaller retail outlets in smaller cities and changing the concepts of their outlets in big cities.

The pandemic situation related to COVID-19 has changed retail trade in Poland. The temporary closure of shops and shopping centres and shopping under a sanitary regime resulted in declines in turnover from stationary sales and the withdrawal of many players from the market. On the other hand, popularity of internet shopping increased and the e-commerce market developed. Consumer preferences for forms of shopping have changed because of the safety, service and convenience of shopping.

Retail trade in Poland is highly differentiated regionally. The mazowieckie and wielkopolskie voivodships lead the way in terms of the number of shops, formats, employment levels and salaries. These are voivodships with the largest urban agglomerations and high population density, which determines the number of shop outlets.

This research is the starting point for further analyses and ultimately the creation of a ranking of the voivodships based on the TOPSIS linear ordering method.

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