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Preparation of the publication**Central Statistical Office
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team

Internal Trade Section:

Jolanta Biernat, Agata Dec, Marta Nerlewska,
Małgorzata Rajkowska, Sylwia Rudzińska
Rafał Wołodkiewicz-Donimirski

supervisor

Ewa Adach-Stankiewicz
Director of Department

and team

Business Services Section:

Agnieszka Kaźmierczak,
Katarzyna Lipowska,
Dorota Szewczyk

supervisor

Agnieszka Matulska-Bachura
Deputy Director of Department

Preparation of graphs:**Statistical Publishing Establishment**

Halina Sztrantowicz
Robert Chmielewski

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TABLE OF CONTENTS		Table	Page
	Preface.....	x	4
	Major abbreviations	x	5
I	METHODOLOGICAL NOTES	x	6
	1. Sources and scope of data	x	6
	2. Main definitions	x	11
II	ANALYTICAL COMMENTARY	x	17
	1. Services	x	17
	Analysis of selected activities	x	24
	2. Internal trade	x	31
	Flow of commercial goods	x	33
	Turnover of trade enterprises	x	33
	Retail sales	x	37
	Trade infrastructure	x	39
	Food services	x	44
	Wholesale	x	45
	Market supply	x	47
III	TABLES.....		

PREFACE

This publication is the latest edition of The Internal Market, published as a part of the annual series “Information and Statistical Papers” by the Central Statistical Office.

The presented data concerns phenomena taking place on the internal market, and allow for a complex analysis of activity of trade and services entities. The study contains information on the financial results of those enterprises and basic data on phenomena and tendencies observed on the market, i.e. the volume of sales, the development of the trade network, and international conditions. The information on market processes is supplied with data on the deliveries and stocks of selected products and their consumption.

Data presented in the publication are obtained from the reports expanded administrative data in relation to all types of economic entities conducting service activity. The results of the statistical surveys are presented in regional breakdowns and by organisational structure and ownership form of entities. Data by type of activity are presented according to the Polish Classification of Activities PKD 2007.

The publication consists of three parts: methodological notes including sources of information, a glossary, analysis of the survey results and a set of tables.

Presenting you with The Internal Market in 2014, I would like to express our gratitude to all persons and institutions for information and suggestions, which provide a valuable contribution to the enrichment of its next editions.

Director
Trade and Services Departament

Ewa Adach-Stankiewicz

Major abbreviations

Classifications

PKD	=	Polish Classification of Activities
NACE	=	Nomenclature des Activités de Communauté Européenne
PKWiU	=	Polish Classification of Goods and Services
CN	=	Combined Nomenclature of Foreign Trade

Major abbreviations

thous.	=	thousand
mln	=	million
bn	=	billion
PLN	=	zloty
No.	=	number
vol.	=	volume
g	=	gram
kg	=	kilogram
t	=	tonne
l	=	litre
hl	=	hectolitre
art.	=	article
tabl.	=	table
GDP	=	Gross Domestic Product
SAD	=	Single Administrative Document
pp	=	percentage point

Symbols

(-)	-	magnitude zero;
Zero: (0)	-	magnitude not zero, but less than 0,5 of a unit;
(0,0)	-	magnitude not zero, but less than 0,05 of a unit;
(.)	-	data not available or not reliable;
(x)	-	not applicable;
(*)	-	data revised;
(Δ)	-	categories of applied classification are presented in abbreviated form; their full names are given in the methodological notes;
“In which”	-	indicates that not all elements of the sum are given;

Accepted groupings:

- **EU 28** (28 countries-members of EU: Austria, Belgium, Bulgaria, Croatia, Cyprus, Denmark, Estonia, Finland, France, Greece, Spain, Ireland, Lithuania, Luxembourg, Latvia, Malta, Netherlands, Germany, Poland, Portugal, Czech Republic, Romania, Slovakia, Slovenia, Sweden, Hungary, United Kingdom, Italy).
- **Euro-zone** – (19 countries-members of Economic and Monetary Union: Austria, Belgium, Cyprus, Estonia, Finland, France, Greece, Spain, Ireland, Lithuania, Luxembourg, Latvia, Malta, Netherlands, Germany, Portugal, Slovakia, Slovenia, Italy).

I. METHODOLOGICAL NOTES

1. Sources and scope of data

The information presented in this publication was compiled on the basis of the results of statistical surveys, conducted using the following reports:

a) As regards entities employing 9 persons or less:

SP-3	Report on economic activity of enterprises
H-01/k	Quarterly survey on revenues of trade enterprises

b) As regards entities employing 10 persons or more:

BS	Report on turnover of business services
H-01a	Report on the activity of retail sales outlets and petrol stations
H-01g	Report on catering establishments
H-01s	Report on retail sales and wholesales
H-01w	Report on trade network
DG-1	Report on economic activity
F01/I01	Report on revenues, expenditures and financial result, and outlays on fixed assets
F-02	Statistical financial report
SP	Annual enterprise survey
P-01	Production report

c) As regards entities employing more than 49 persons:

P-02	Report on product manufacturing and stocks
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The use was also made of the SG-01 report – Gmina statistics: dwelling and municipal economy, and administrative systems information of the Ministry of Finance (SAD, INTRASTAT).

The service sector constitutes the units which conducting the main economic activity classified into the following sections of NACE rev. 2:

- G – Wholesale and retail trade; repair of motor vehicles and motorcycles;
- H – Transportation and storage;
- I – Accommodation and food service activities;
- J – Information and communication;
- K – Financial and insurance activities;
- L – Real estate activities;
- M – Professional, scientific and technical activities;
- N – Administrative and support service activities;
- O – Public administration and defence; compulsory social security;
- P – Education;
- Q – Human health and social work activities;
- R – Arts, entertainment and recreation;
- S – Other service activities;
- T – Activities of households as employers; undifferentiated goods- and services-producing activities of households for own use;
- U – Activities of extraterritorial organizations and bodies

According to **Polish Classification of Goods and Services** the concept of **services** includes:

- every activities provided for economic units, which carrying out manufacturing activities but not creating directly new material goods – services for manufacturing,
- every activities provided for the national economic units and for the population, designed for the individual, collective and national society consumption

According to NACE Rev. 2 economic units classified to the section “WHOLESALE AND RETAIL TRADE; REPAIR OF MOTOR VEHICLES , MOTORCYCLES” are defined as trade units. These units are classified as follows:

SECTION “G” WHOLESALE AND RETAIL TRADE; REPAIR OF MOTOR VEHICLES AND MOTORCYCLES

DIVISION 45 WHOLESALE AND RETAIL TRADE AND REPAIR OF MOTOR VEHICLES AND MOTORCYCLES

GROUP

- 45.1 Sale of motor vehicles
- 45.2 Maintenance and repair of motor vehicles
- 45.3 Sale of motor vehicle parts and accessories
- 45.4 Sale, maintenance and repair of motorcycles and related parts and accessories

DIVISION 46 WHOLESALE TRADE EXCEPT OF MOTOR VEHICLES AND MOTORCYCLES

GROUP

- 46.1 Wholesale on a fee or contract basis
- 46.2 Wholesale of agricultural raw materials and live animals
- 46.3 Wholesale of food, beverages and tobacco
- 46.4 Wholesale of household goods
- 46.5 Wholesale of information and communication equipment
- 46.6 Wholesale of other machinery, equipment and supplies
- 46.7 Other specialised wholesale
- 46.9 Non-specialised wholesale trade

DIVISION 47 RETAIL TRADE, EXCEPT OF MOTOR VEHICLES AND MOTORCYCLES

GROUP

- 47.1 Retail sale in non-specialised stores
 - 47.2 Retail sale of food, beverages and tobacco in specialised stores
 - 47.3 Retail sale of automotive fuel in specialised stores
 - 47.4 Retail sale of information and communication equipment in specialised stores
 - 47.5 Retail sale of other household equipment in specialised stores
 - 47.6 Retail sale of cultural and recreation goods in specialised stores
 - 47.7 Retail sale of other goods in specialised stores
 - 47.8 Retail sale via stalls and markets
 - 47.9 Retail trade not in stores, stalls or markets
-

The names of some classification levels used in the publication have been abbreviated; the list of used abbreviations and their full names are given below:

abbreviation	full name
sections	
Trade; repair of motor vehicles	Wholesale and retail trade; repair of motor vehicles and motorcycles
Accommodation and catering	Accommodation and food service activities
divisions	
Wholesale trade	Wholesale trade, except of motor vehicles and motorcycles
Retail trade	Retail trade, except of motor vehicles and motorcycles
Renting of machinery and equipment	Renting of machinery and equipment without operator and of personal and household goods
Computer programming, consultancy	Computer programming, consultancy and related services
Office administrative, business support services	Office administrative, office support and other business support services
other classification	
Legal, accounting and management consulting services	Legal and accounting services. Management consulting services

According to the Council Regulation No 1165/98 amended by 1158/2005 concerning short term statistics the following grouping of activity kinds is applied:

NACE Rev. 2	Activity kinds
47	Turnover in retail trade
47.11, 47.2	Retail sale of food, beverages, and tobacco
47.19, 47.3, 47.4, 47.5, 47.6, 47.7, 47.8, 47.9	Retail sale of non-foodstuffs
47.11	Retail sale in non-specialised stores with food, beverages or tobacco predominating
47.19	Other retail sale in non-specialised stores
47.21, 47.22, 47.23, 47.24, 47.25, 47.26, 47.29	Retail sale of food, beverages and tobacco in specialised stores
47.30	Retail sale of automotive fuel in specialised stores
47.73, 47.74, 47.75	Retail sale of pharmaceutical and medical goods, cosmetic, and toilet articles
47.51, 47.71, 47.72	Retail sale of textiles, clothing, footwear
47.43, 47.52, 47.54, 47.59, 47.63	Retail sale of household equipment
47.41, 47.42, 47.53, 47.61, 47.62, 47.64, 47.65, 47.76, 47.77, 47.78	Retail sale of books, newspapers, and other sale in specialised stores
47.91	Retail sale via mail order houses or via Internet

Groups of retail sales by type of enterprise activity were created using undermentioned key of transition from classification units. An enterprise is included to specific type of activity according to predominating kind of sale, realized by trade and non- trade units in sales outlets.

Retail sales grouping by the kind of activity^a:

Specification	Producing (non-trade) units according to NACE	G section		I Section
		Trade units		
		wholesale	retail sales	catering establishments
Motor vehicles, motorcycles, accessories	29.1, 29.2, 29.3, 3091		4511, 4519, 4531, 4532, 4540	-
Solid, liquid and gaseous fuels	19.1, 19.2	4671	4730	-
Food, beverages and tobacco	10.1, 10.2, 10.3, 10.4, 10.5, 10.6, 10.7, 10.8, divisions: 11 and 12	4617, 4631- 4639	4711 4721- 4726, 4729	-
Other retail sale in non-specialised stores			4719	-
Pharmaceutical , orthopaedic goods, cosmetic articles	20.4, 21.1, 21.2, 26.6, 32.5	4645, 4646	4773-4775	-
Textile products, clothing and footwear	13.1, 13.2, 13.3, 13.9, 14.1 ,14.2, 14.3, 15.1, 15.2	4616, 4624, 4641, 4642	4751, 4771, 4772	-
Furniture, radio, TV and household appliances	26.3, 26.4, 27.4, 27.5, 31 division	4615, 4643, 4647, 4649	4743, 4752, 4754, 4759, 4763	-
Press, book-shops, other sale in specialised stores	1712, 17.2,18.1, 26.2, 2652, 2823, 32.1 except for 3211, 32.3, 32.4, 58.1, 59.2	4651, 4648	4741, 4742, 4753, 4761, 4762, 4764, 4765, 4776, 4777, 4778	-
Retail sale via mail order houses or via Internet			4791	-
Others	All not mentioned in this table types of activity according to NACE Rev.2.			

^a Retail sales are researched by type of enterprise activity, i.e. these cover sales conducted by the trade and non-trade establishments.

2. Main definitions

TRADE MARGIN – the price of the trade services. This is the difference between the purchase and sale price of the commodities, destined for the covering of the expenses and own profits. There is the gross trade margin i.e. difference between purchase value and value of sale, as well as the net trade margin - which is difference between sale value and own costs of sale.

The gross margin is:

- the percentage reductions of retail and wholesale prices;
- the percentage surcharges added to sale prices;
- amount rate added to the sale or wholesale prices.

The value of the margin and the principles of its calculating are established by the trade enterprise. The total trade margin is obtained as the sum of the retail, wholesale, and catering establishment margins and is the main source of information about revenues in a trade enterprise destined for the covering of the expenses, taxes and own profits.

GROSS OUTPUT in the non-financial corporations sector includes:

- 1) revenues from the sale of self-manufactured products (goods and non-financial services),
- 2) margins realized on the sale of commodities purchased for re-sale,
- 3) the value of products in the form of settlements in kind,
- 4) products designated for increasing the value of own fixed assets,
- 5) the changes in inventories of finished goods and work in progress.

GROSS VALUE ADDED – the part of the value of Gross Domestic Product produced in the frame of the exploitation activity of the trade units. This value is the difference between the gross output and intermediate consumption.

INVESTMENT OUTLAYS are financial or tangible outlays, the purpose of which is the creation of new fixed assets or the improvement (rebuilding, enlargement, reconstruction, adaptation or modernization) of existing capital asset items, as well as outlays on so-called initial investments.

TURNOVER comprises the totals invoiced by the observation unit during the reference period, and this corresponds to market sales of goods or services supplied to third parties. Turnover also includes all other charges (transport, packaging, etc.) passed on to the customer, even if these charges are listed separately in the invoice. Turnover excludes VAT and other similar deductible taxes directly linked to turnover as well as all duties and taxes on the goods or services invoiced by the unit. Reduction in prices, rebates, and discounts as well as the value of returned packing must be deducted. Price reductions, rebates, and bonuses conceded later to clients, for example at the end of the year, are not taken into account.

Income classified as other operating income, financial income and extraordinary income in company accounts is excluded from turnover.

WORKING DAY ADJUSTMENT consists in elimination of the calendar variability effect and variability of working days (changes of working time in succeeding months).

RETAIL SALES OF GOODS (including VAT) – sale of goods, own-produced and second-hand goods in the retail sale outlets, catering establishments and other outlets (i.e. magazines, warehouses and storehouses etc.) for the individual consumption purpose.

Retail sales include also sales via mail order houses or via Internet. The value of the retail sales is the sum of the sale realized by the trade and non-trade units.

SALE OF FOOD – covers the products of plant and animal origin, which in the natural state or after the technological processing became the food. Excluding alcoholic beverages, tobacco products, and medicines.

SALE OF NON-FOODSTUFF GOODS covers the necessities of the people, connected with clothing, accommodation and household maintenance, personal hygiene and health care; with culture, education, tourism and transport. As well as it includes the goods using by the households for agricultural and construction purposes.

SALE OF ALCOHOLIC BEVERAGES covers:

- pure or high-quality spirit products, i.e. alcoholic beverages with more than 18% of alcohol,
- wine (grape, fruit and sparkling) aperitif or cocktail beverages and meads,
- beer with or without alcohol and extracts.

RETAIL SALES OUTLETS include:

- large format stores;
- shops including pharmacies;
- permanent small - retail sales outlets (kiosks, market stalls);
- other mobile small - retail sales outlets;
- petrol stations.

SHOP – the room-space with the trade purpose, accessible for all consumers. The shop can be located in a separated building or in the dwelling-house. If the part of the sales area in the big stores (department stores or shopping centre) is hired by another natural person or corporate body, than this space constitutes another shop.

Classification of the stores according to the branch specialization is not based on formal register but on the real sale of goods from the selected branches.

There are the following selected forms of stores:

- **department stores** are stores divided into separate departments, each selling a broad and universal assortment, particularly non-foodstuff goods, with a sales area of 2000 m² or more.

This kind of outlets usually conduct also subsidiary catering or service activity,

- **trade stores** are stores divided into separate departments (no less than two departments), each selling a broad and universal assortment similar to department stores, with a sales area between 600 and 1999 m²,
- **supermarkets** are stores with a sales area between 400 and 2499 m², selling goods in a self-service system and offering a wide assortment of foodstuff goods and frequently bought non-foodstuff goods,
- **hypermarkets** are stores with a sales area of 2500 m² or more, selling goods in a self-service system while offering a wide assortment of foodstuff goods and frequently bought non-foodstuff goods, usually with a parking place,
- **petrol stations** – units conducting sale of petrol, oil, gas as well as the products used for car maintenance.

Sales area of shops – the part of shop used for goods display and sales (i.e. the part used for display of goods and service of customers) measured in square metres .

The **persons employed in the store** are persons who actually work there: owners, co-owners as well as the contributing family workers or persons employed on the basis of labour contracts, including seasonal workers and odd-workers, agents and persons employed by agents.

PERMANENT SMALL RETAIL SALES OUTLETS:

- **kiosk** – stationery trading post with a shopping window in which the interior is not accessible to customers;
- **stall** – small mobile outlet with an open front, especially outdoors;
- **warehouse** – producer's or trade warehouses conducting the retail sales;

OTHER SMALL RETAIL SALES OUTLETS (the mobile outlet type):

- mobile sale outlets,
- hawking sale outlets;

Various outlets of the retail sales without permanent localisation, which are selling directly to the customer. They are placed usually in non-urbanized areas i.e. rural area, tourist area.

MARKETPLACES – separated area or building (place, street, covered market) where permanent or seasonal outlets are conducting retail sales activity every day or several days per week.

SEASONAL MARKETPLACES are open for a certain period of time, with the biggest turnover, but not longer than six months in a calendar year (e.g. holiday at the seaside) and every year in the same period.

WHOLESALE (including VAT) – includes sales from warehouses, in which the commodities stored account for the property of a trade enterprise. The value of wholesale also includes the value of sales realised on the basis of a direct payment or contract (agents, auctioneers), as well as the value of sales realised by settled transit consisting in the transfer of commodities directly from the supplier to the client, by-passing the warehouses which realise the delivery.

TRADE WAREHOUSES¹ - the organizational and functional units engaged in the turnover of commodities.

A **warehouse** is an entity occupying separate storage area, equipped in accordance with rules of the preservation and with the personnel to service these means.

Trade warehouses occupying:

- storage area (in m²) in secured warehouses, separated buildings, roofed warehouses, basements, storage sites as well as rooms with purposes other than storage;
- usage capacity (in m³) containers to store liquids or gas, silos for storing grain, pulverized or fine-grained goods.

Wholesale warehouses - the main units of the wholesale trade; they can be organized as separated buildings (secured warehouses), roofed magazines (umbrella roof), silos, reservoirs, and storage sites.

Storage area of the warehouses – constitutes the part of the area in the storage houses (secured magazines), roofed magazines (sheds), storage sites, and other places to store (leased magazines) goods during different periods.

CATERING ESTABLISHMENTS include permanent and seasonal catering establishments and outlets, the scope of activity of which is the preparation and sale of meals and beverages for on-site and take-out consumption. Seasonal catering establishments are open for a certain period of time and operate not longer than six months in a calendar year. Portable retail sales points and vending machines are not treated as catering establishments.

There are following catering establishments:

- **restaurants** – catering establishments with a wait' staff accessible to consumers, and offering a wide assortment of foodstuffs and dishes according to the menu;
- **bars** – catering establishments conducting activity similar to the restaurants, but offering limited assortment of the popular foodstuffs and dishes. This group includes: canteens, universal and milk bars, fast-foods as well as bistro, cafes, tea-rooms, wine-houses, beer-halls (pubs);
- **canteens** – collective nourishment establishments offering meals for a particular groups of the consumers (especially dinners, but also suppers and breakfasts);
- **catering outlets** – catering establishments conducting limited catering activity i.e. fry houses, drink bars, ice-cream parlours, snack-bars;

REVENUES FROM CATERING ACTIVITY (including Value Added Tax) – cover the incomes from the sale of:

- **trade goods** - purchased and resold in the same condition or after re-packing or bottling, including alcoholic beverages;
- **catering production** - culinary and confectionery products and others prepared for own needs;

¹ Research is conducted in three year cycle

- **offered services** – e.g. charges for parking-places, cloak-rooms and left-language offices, as well as the revenues from the amusement activity, organization of parties or hired rooms;

SUPPLY of the selected goods – the quantity of domestically produced goods, deducted by their exports and increased by their imports. The supply is corrected by stock changes as producers constitutes the **domestic deliveries**.

STOCKS OF PRODUCTS AT THE PRODUCERS – final products stored in the producer's warehouses intended for sale

CONSUMPTION OF THE SELECTED COMMODITIES PER CAPITA - the source of the information are data about the domestic output, imports, exports, stocks at producers and in the trade enterprises. The production of the selected agricultural products (i.e. cereal grains in terms of processed products, potatoes, vegetables and fruit) were decreased by the consumption of those goods necessary for the production (sowing, pasturing, and the raw materials for the alcohol distillery or starch works). The terms of the four cereal grains – wheat, rye, barley, and oats, are made according to the percentage share of the grind.

Data about consumption level were compiled using balance method and are designated for assessment of global changes of food consumption in country and cannot be directly compared with data of food products consumption in households compiled on the basis of results of households surveys.

Data concerning the **employed persons** include full-time paid employees and part-time paid employees in the main workplace.

The average paid employment concerns full-time paid employees as well as part-time paid employees in terms of full-time paid employees (excluding persons employed abroad).

The average monthly gross wages and salaries per paid employee were calculated assuming:

- personal wages and salaries, excluding wages and salaries of persons engaged in outwork as well as apprentices and persons employed abroad,
- payments from profit and balance surplus in co-operatives,
- annual extra wages and salaries for employees of budgetary sphere entities,
- fees paid to selected groups of employees for performing work in accordance with a labour contract, e.g. to journalists, film producers, radio and television program producers.

NOTES:

1. Directed numbers (indices, percentages) were mainly calculated on the basis of absolute data expressed with greater accuracy than those provided in the tables.
2. The data included in the publication were collected according to:
 - a/ The Polish Classification of Activities PKD 2007 introduced on 01.01.2008 by way of the decree of the Council of Ministers of 24 December 2007 (Journal of Laws No. 251, item 1885), which was prepared on the basis of the Statistical Classification of Economic Activities in the European Community – NACE Rev. 2.
 - b/ The Polish Classification of Goods and Services (PKWiU) 2008 introduced on 01.01.2009 by way of the decree of the Council of Ministers of 29 October 2008 (Journal of Laws No. 207, item 1293), which was prepared on the basis of international classifications and nomenclatures.
3. The term “foreign property” applied in the publication describes the enterprises with foreign capital or the ones in which foreign capital constitutes a majority.
4. When computing data per capita within the field of the consumption of selected consumer goods (Table 23), population as of 30 VI was adopted. In the calculation of data concerning population per shop (Table 12), population as of 31 XII was applied.
5. Number of shops and petrol stations as December 31 by the branch specialisations and organisational forms have been established on the basis of outlets list prepared by units employing 10 and more persons, which realize retail sales (H-01w report) and for units employing up to 9 persons have been estimated on the basis of the results of a representative survey conducted on a 5% sample of these entities (SP-3).

II. ANALYTICAL COMMENTARY

1. Services

For many years the services sector has played a significant role in national economies of many states. In EU countries the value added as a result of services-oriented enterprise activities, constitutes the predominant part of total value added generated in the entire economy.

In 2014 among the EU member states, the highest share of value added generated by the services sector was recorded in Luxemburg – 88.0%, Cyprus – 87.1% and Malta – 83.0%. A large share in value added of services in the entire economy can be observed in countries such as Greece (82.8%), the UK (79.5%), France (78.9%) or the Netherlands (77.0%). In countries which accessed the European Union in the period from 2004 onwards the aforementioned share was 60.3% in Romania and 87.1% in Cyprus.

In relation to 2005, the most significant growth in the services sector value added in relation to the entire economy was demonstrated by Cyprus (by 9.9 pp), Malta (by 8.7 pp) and Ireland (by 8.6 pp). In the same period, in some countries the share of the services sector in generating the gross value added decreased - the largest decrease was recorded in Germany (by - 0.8 pp), Poland (by - 0.6 pp), as well as in the Czech Republic (by - 0.5 pp).

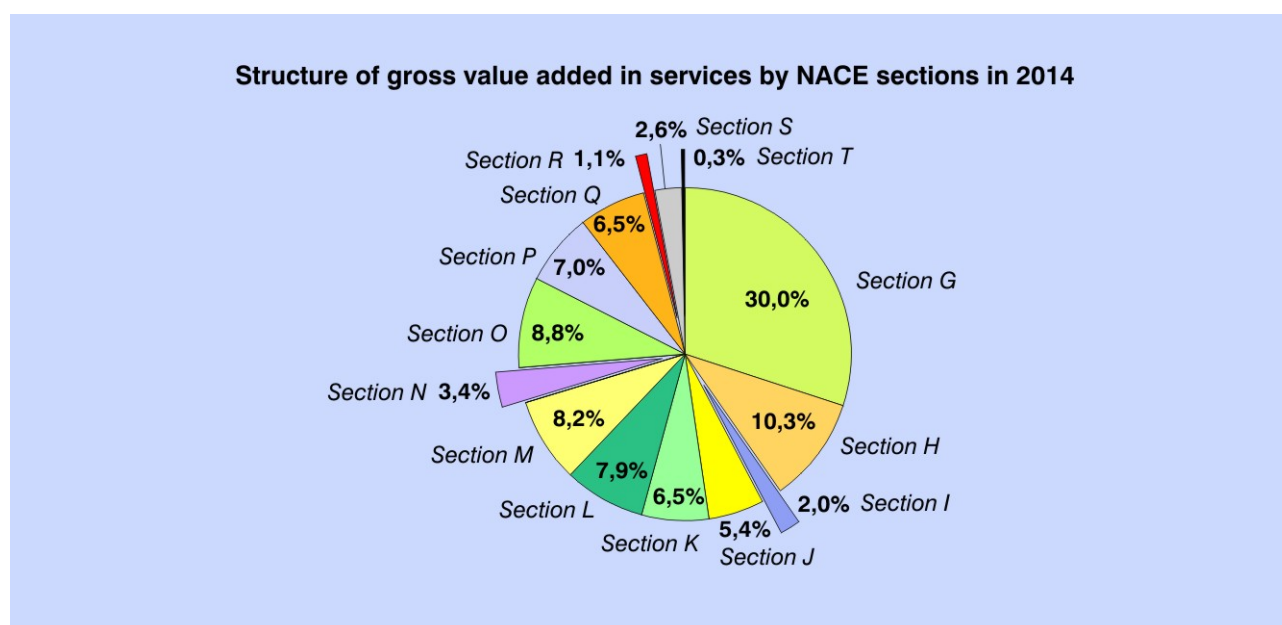
The share of gross value added generated by services in the gross value added generated by the national economy (in current prices) – NACE Rev. 2

Countries	Years	Share in %	Countries	Years	Share in %
Austria.....	2005	68,2	Lithuania	2005	62,5
	2014	70,6		2014	65,5
Belgium.....	2005	73,9	Luxembourg	2005	83,0
	2014	76,8		2014	88,0
Bulgaria.....	2005	62,5	Latvia	2005	72,9
	2014	66,4		2014	73,5
Croatia.....	2005	66,0	Malta	2005	74,3
	2014	69,8		2014	83,0
Cyprus.....	2005	77,2	Germany.....	2005	69,8
	2014	87,1		2014	69,0
Czech Republic	2005	59,8	Poland.....	2005	64,6
	2014	59,3		2014	64,0
Denmark.....	2005	72,4	Portugal	2005	72,7
	2014	76,2		2014	76,5
Estonia	2005	66,7	Romania	2005	54,5
	2014	68,4		2014	60,3
Finland	2005	63,8	Slovakia.....	2005	60,3
	2014	70,6		2014	63,3

Countries	Years	Share in %	Countries	Years	Share in %
France.....	2005	76,6	Slovenia.....	2005	63,3
	2014	78,9		2014	64,7
Greece	2005	75,9	Sweden	2005	69,2
	2014	82,8		2014	72,6
Spain	2005	66,5	Hungary.....	2005	64,3
	2014	74,4		2014	64,9
Netherlands	2005	74,0	United Kingdom.....	2005	76,3
	2014	77,0		2014	79,5
Ireland	2005	65,7	Italy	2005	71,9
	2014	74,3		2014	74,4

Source: Eurostat14.09.2015; according to ESA 2010.

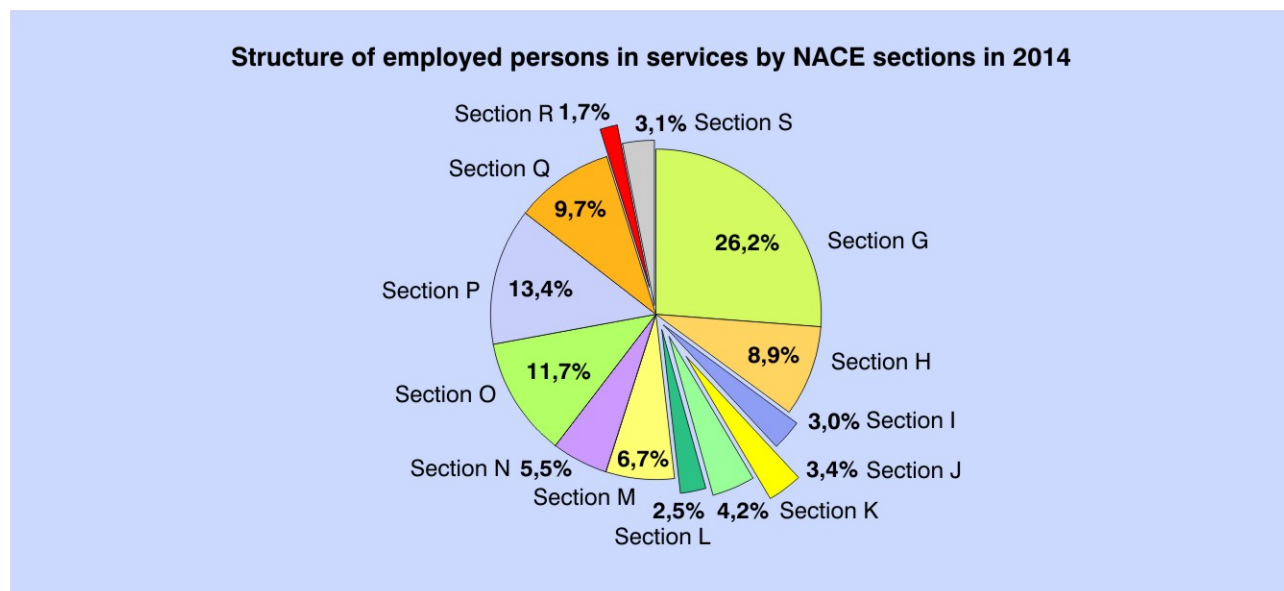
In 2014 in Poland, the gross value added generated by entities operating in the services sector constituted 64.0% of the entire national gross value added ². The number of employees of these enterprises constituted 57.5% of employed persons in total. In 2014, the main activity of the services-oriented enterprises in terms of value added, was wholesale and retail trade, which constituted 30.0% of the value added generated by all enterprises operating in the services sector. The share of activities in transportation and storage (section H according to NACE) reached 10.3%, while the share of public administration and defence sectors (section O according to NACE) amounted to 8.8%. In comparison with the previous year, the share of professional, scientific, and technical activities decreased (section M according to NACE) by 0.1 pp, amounting to 8.2%.



See Methodical Notes, p. 7

² Source: "Annual Macroeconomic Indicators - National Accounts – ESA 2010" of 24.09.2015 (<http://stat.gov.pl/wskazniki-makroekonomiczne/>)

In 2014, the largest number of people were employed in enterprises classified in section G "Trade, repair of motor vehicles" (section G according to NACE) – 26.2% of all persons working for services-oriented enterprises, "Education" (section P according to NACE) – 13.4%, and "Public administration and defence; compulsory social security" (section O according to NACE) – 11.7%.



Source: Concise Statistical Yearbook of Poland 2015.
See Methodical Notes, p. 7

In 2014, the main activity of the services-oriented enterprises in terms of average employment, was wholesale and retail trade, wherein 1 571.2 thousand people were employed (2.7% growth in comparison with 2013). In section P "Education" employment amounted to 1 024.1 persons (0.3% decrease in comparison with the previous year).

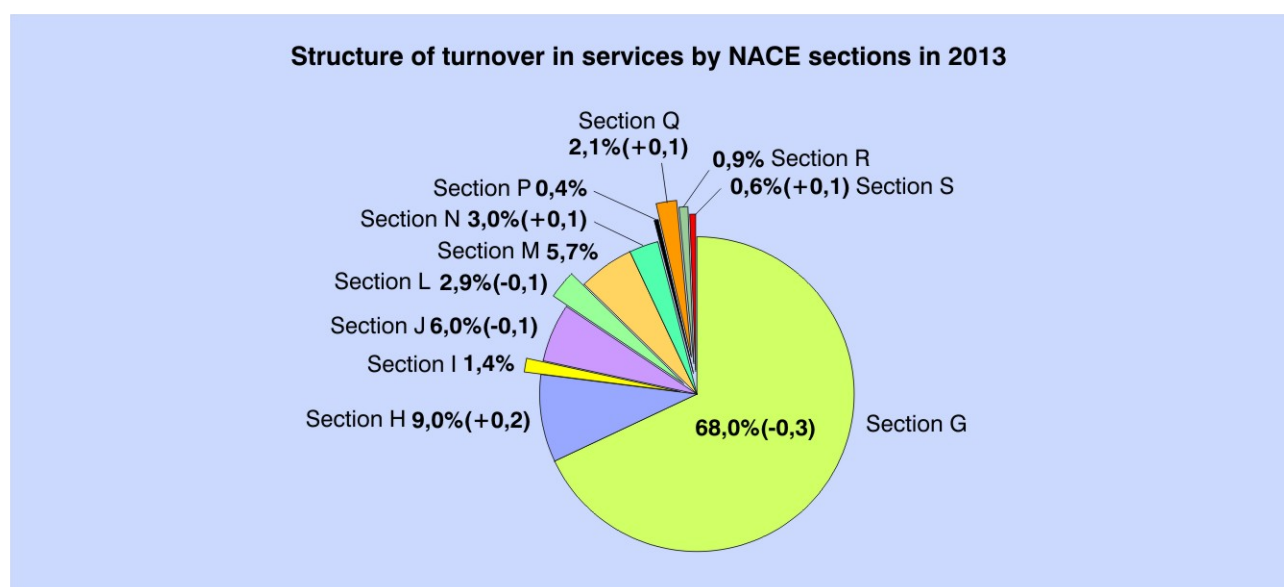
The highest growth of average employment, was recorded in section J "Information and Communication" – by 3.9%, while the largest decrease was recorded in the finance and insurance sectors (section K according to NACE) – by 1.4%. Despite the lowest average employment, an increase was recorded in the number of employed persons by 1.0% in section R "Arts, entertainment, and recreation" (120.8 thousand people).

The highest average gross wages and salaries in 2014 was recorded in section J "Information and Communication" – PLN 6 442 "Financial and insurance activities" (section K according to NACE) – PLN 6 227 and "Public administration and defence" (section O according to NACE) – PLN 4 662. The lowest recorded gross average remuneration level was recorded for entities classified in section I "Accommodation and Catering", at the level of PLN 2 344.

The highest growth in the average monthly gross wages and salaries in 2014 (by 5.0%), in comparison with the previous year, was recorded in section N "Administrative and support service activities", with a simultaneous growth of average employment respectively by 3.5%. A significant growth in the average monthly wages and salaries (4.5%) was also observed in section J "Information

and Communication". In section G "Trade and repair of motor vehicles" a growth was recorded of the average salary of level similar to the above mentioned section (by 4.1%).

In 2013 the largest share in total revenue of non-financial enterprises conducting service activities were revenues of trade enterprises (section G according to NACE) 68.0%. Revenue shares of enterprises providing transportation and storage services (section H according to NACE) – 9.0%, and enterprises classified as section J "Information and Communication" – 6.0%. Also, the same level was recorded for the revenue share of entities classified as section M " Professional, scientific and technical activities" - 5.7%.



Source: Activity of the non-financial enterprises in 2013, CSO, Warsaw (section N [excl. 8130.Z], Section Q [excl. 86.10.Z], Section S (95 and 96 divisions).

(...) change of structure in comparison with previous year in pp
See Methodical Notes, p. 7

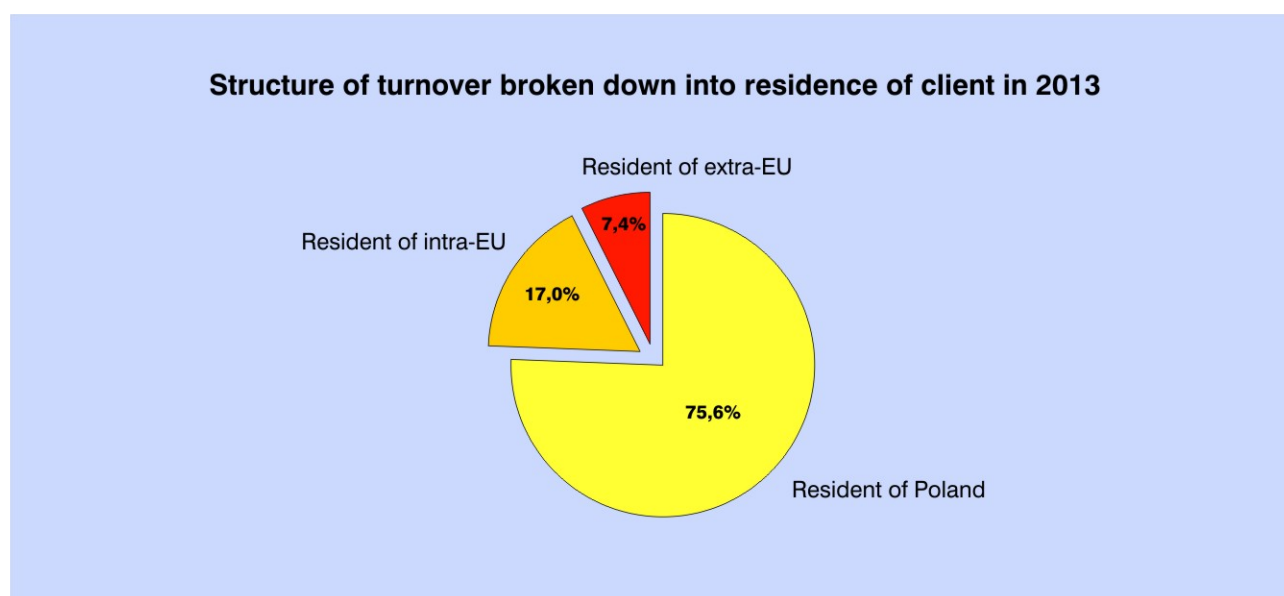
In recent years among the services-oriented entities, a dynamic growth was observed on the market of services related to supporting business activities, commonly known as business services. Entities³ providing business services include enterprises providing among others IT, law, accounting, management engineering, architecture, advertising, and employment services.

In 2013 among all non-financial enterprises, nearly 13.0% were entities providing business services⁴. It is worth noting that despite a slight decrease in the number of non-financial enterprises, in the entire national economy (by about 1.3%), in comparison with the previous year, the population of business service providers recorded an increase by 4.6%. At the same time in the segment of business services, an increase was recorded in the number of employed persons of nearly 5.0%, whereas

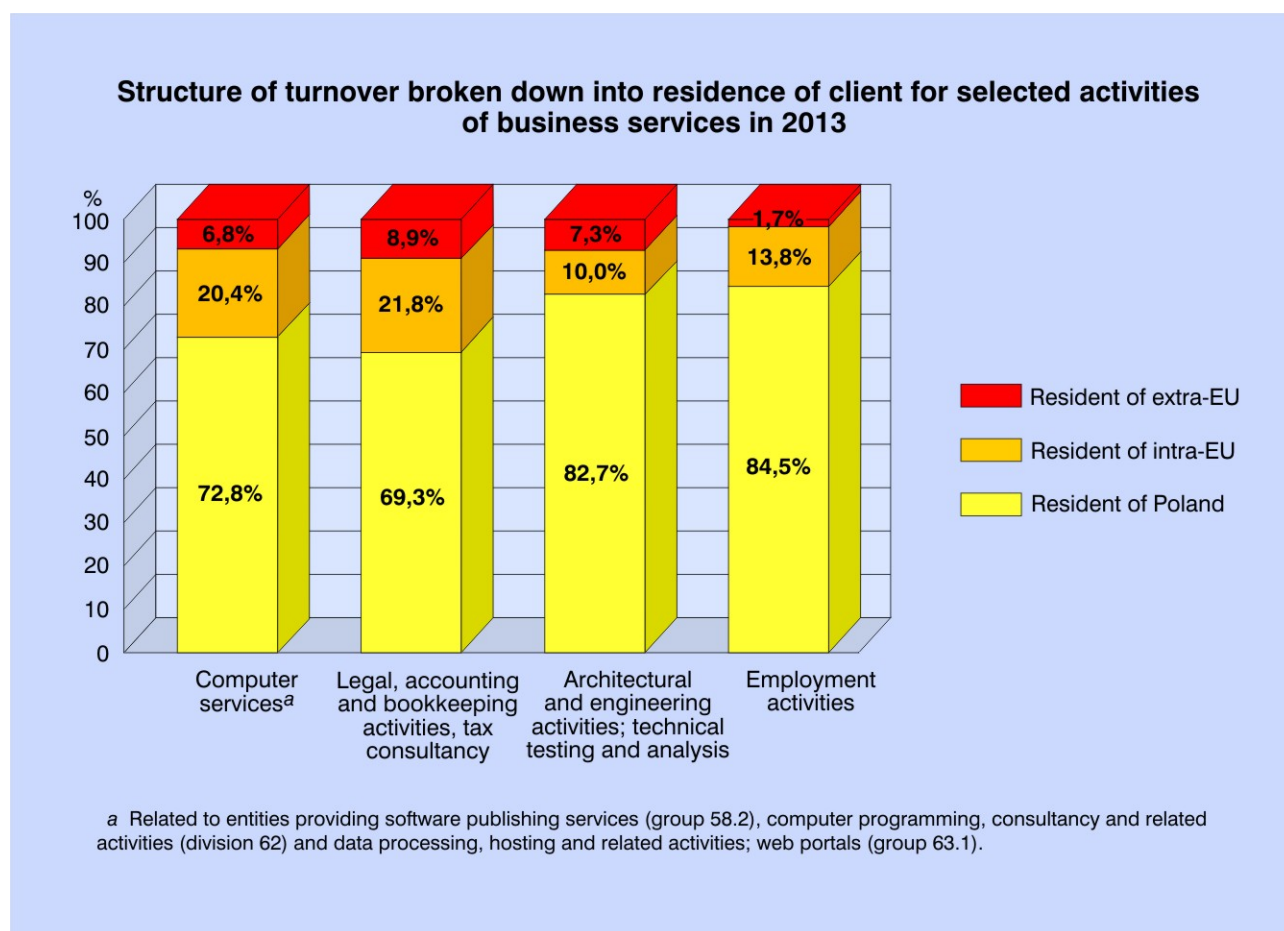
³ Applies to entities employing 9 persons or more.

⁴ Applies to the following groups/departments according to NACE: 58.2 - Publishing activities in the field of software, 62 -Activities related with software and consulting in the field of IT and associated activities, 63.1 -Data processing; web site management (hosting) and similar activities; web portal activities, 69 - Law, accounting and tax consultancy, 70.2 -management consulting, 71 -Activities in the field of architecture and engineering, research and technical analyses, 73 -advertisement, market surveys and opinion polls, 78 -Activities related to employment.

the general number of employees of non-financial enterprises in the country decreased by slightly over 0.4%. Enterprises classified as providing business services, focus their activities mainly on the domestic market. In 2013, 75.6% of the total revenue of these enterprises was earned for providing services to entities having their registered offices within the Republic of Poland. The source of 17.0% of revenue were customers having their registered offices in EU member states, and for the rest (7.4%) - entities with their registered offices located outside the EU. In 2013 an increase was recorded by 1.5 pp in the share of revenues from providing services regarding supporting business activities to entities having their registered offices abroad.



In 2013 among the activities related to supporting business activities, the highest percentage of revenues from sales of services abroad – 30.7% net revenue from sales - was attributed to law, accounting and tax consultancy activities. In comparison with 2012, this share increased by 0.7 pp. The lowest rate of expansion into foreign markets was recorded in the case of enterprises conducting activities connected with employment (ca. 15.5% of net revenues from sales of these enterprises were acquired by providing services to customers located outside of Poland). In relation to the previous year this share decreased by 0.5 pp. A larger share of services' sales abroad was recorded by both businesses operating in the IT sector (an increase by 2.9 pp, to 27.2% of net revenue from sales), and enterprises conducting activities with regard to architecture and engineering, technical research and analysis (an increase by 1.9 pp to 17.3% net revenue on sales).



In 2013, the value of the total net revenues from sales of enterprises providing services related to supporting business activities employing 10 or more persons, amounted to slightly over PLN 84.5 billion (an increase by 6.7% in comparison with the previous year).

The highest growth in revenues in 2013 was recorded by entities conducting activities related to employment (division 78, section N according to NACE) – by ca. 18.7%. In the case of publishing activities concerning software, associated with software, IT consulting, related activities, and information services (group 58.2, division 62 and group 63.1, section J according to NACE), a growth was observed in revenues value of more than 9.0%. A decrease in the value of revenues (by 1.1%), in comparison with the previous year was recorded by enterprises providing services with regard to architecture and engineering, technical research and analysis (division 71, section M according to NACE). This decrease was, however, significantly smaller than in the previous year, when it amounted to 12.8%, mainly due to the growth in sales of these services (by 11.2%) to foreign customers.

For enterprises providing IT services, the total value of revenues amounted to slightly below PLN 29.8 billion. The greatest share (32.2%) in net revenues from the total sales of IT services, constituted revenues from services related to software (62.01 according to PKWiU). This share, in comparison with the previous year, increased by 1.8 pp.

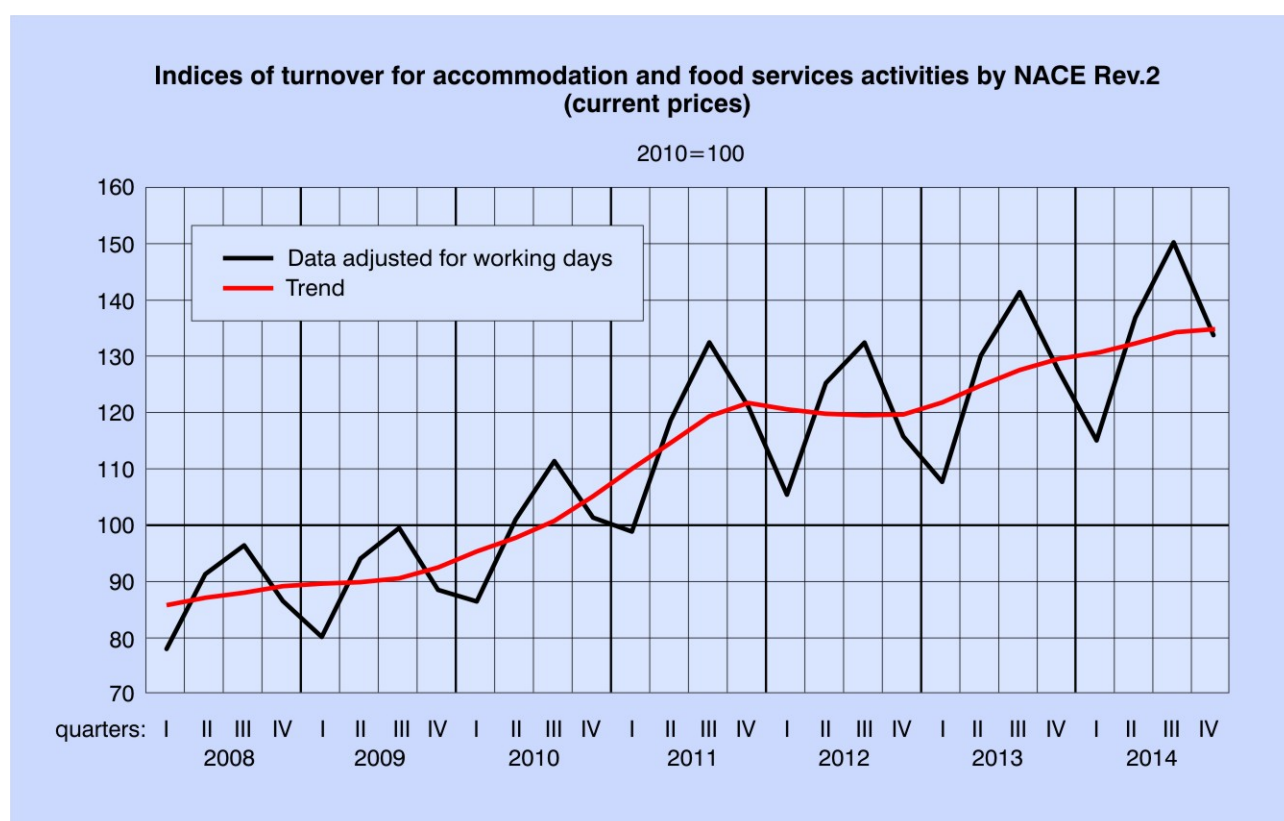
In 2013 the greatest share of net sales revenues (26.3%) for enterprises conducting activities with regard to architecture and engineering, technical research and analysis (division 71 section M according to NACE), constituted engineering services (71.12.1 according to PKWiU), and their share, in comparison with 2012, increased by 0.2 pp. The value of these services amounted to slightly above PLN 2.8 billion, and the total value of services with regard to designated activities exceeded PLN 10.7 billion.

The total net revenues value from the sales of services related to employment (division 78 Section N according to NACE) reached nearly PLN 7.3 billion. The greatest share in these services (55.1%) constituted services provided by temporary labour agencies (78.20.1 according to PKWiU). In relation to 2012, this share decreased by nearly 3.4 pp.

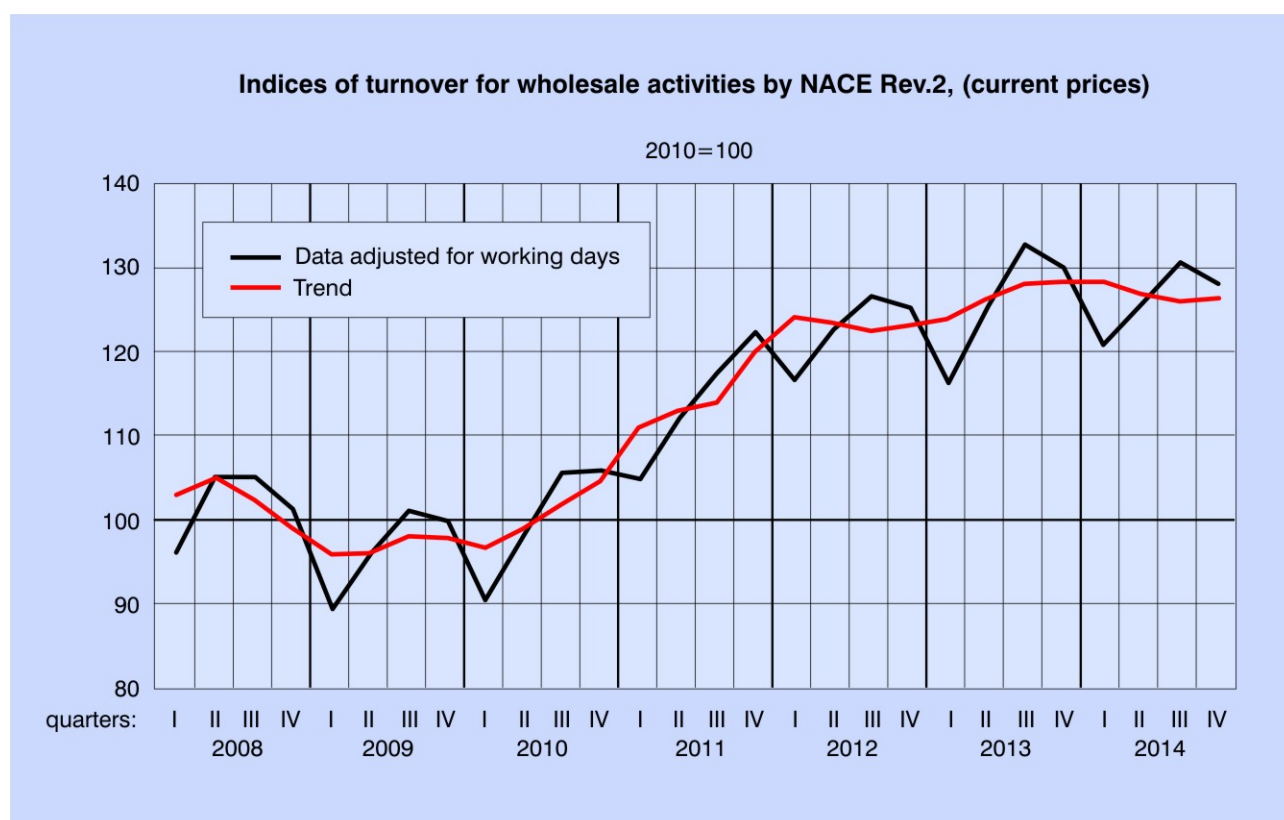
Analysis of selected activities

Among service activities it is possible to distinguish services, whose great importance and development are related to the supporting role for other economic entities. In order to observe changes in this respect short-term research of these services are conducted. The below result data relate to enterprises employing 9 persons or more.

In 2014 entities conducting activities related to accommodation and catering recorded a growth in turnover, in comparison with the previous year, of 5.9%. The number of enterprises classified to section I according to NACE, increased by 1.2%, and the number of employees by 1.1%. A lower costs level indicator from total activity was recorded in comparison with the previous year (94.9% in 2014, compared to 95.5% in 2013). Also, an improvement was recorded of the following ratios: gross turnover profitability (increase from 4.5% in 2013 to 5.2% in 2014), and net turnover profitability (growth from 3.7% in 2013 to 4.4% in 2014).

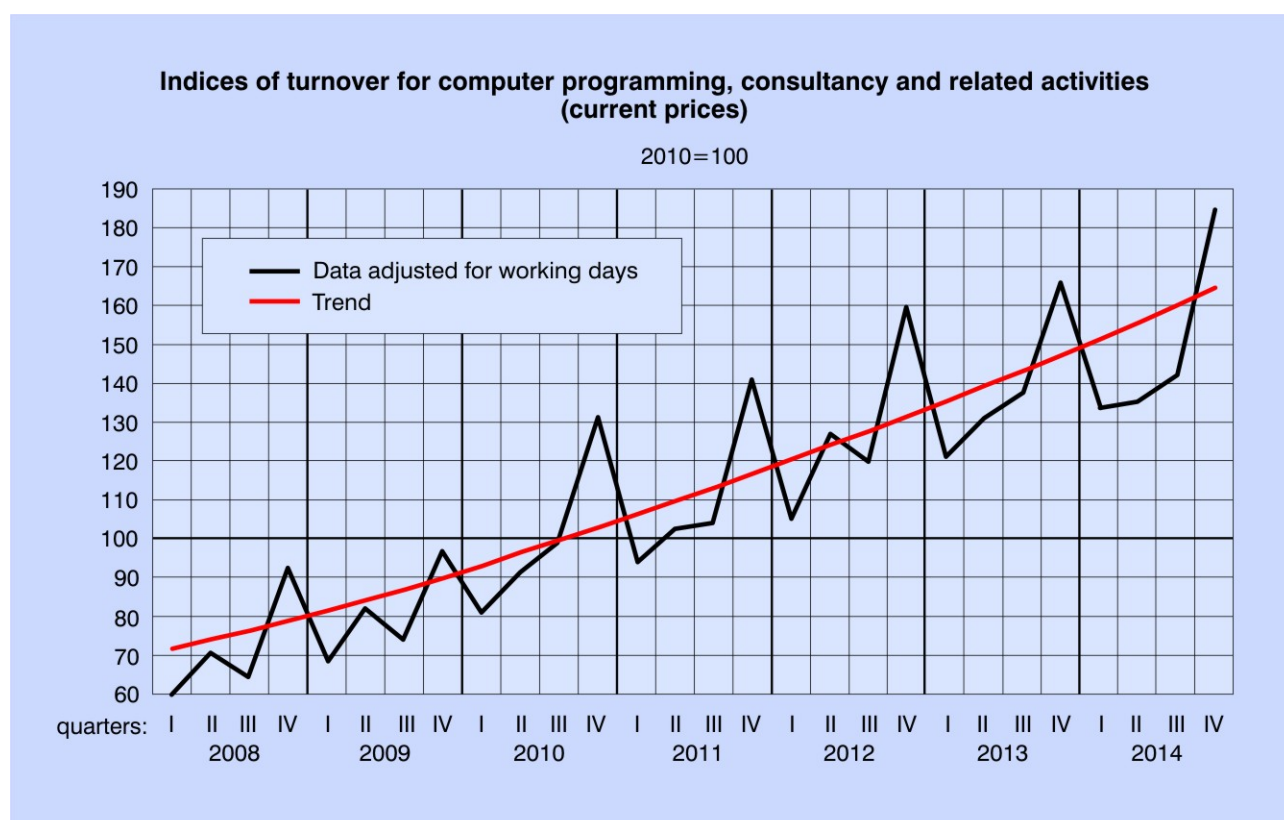


For wholesale enterprises (division 46 according to NACE), turnover size achieved the level from the previous year. On the other hand, the number of enterprises, in comparison with the previous year (by 1.2%), and the number of employees (by 1.5 %) both increased. The costs level indicator decreased to the level of 97.1% (in comparison with 97.5% in the previous year). Both the turnover profitability rate of gross (2.9% compared to 2.5% in 2013) and net (2.5% compared to 2.2% in the previous year) increased.

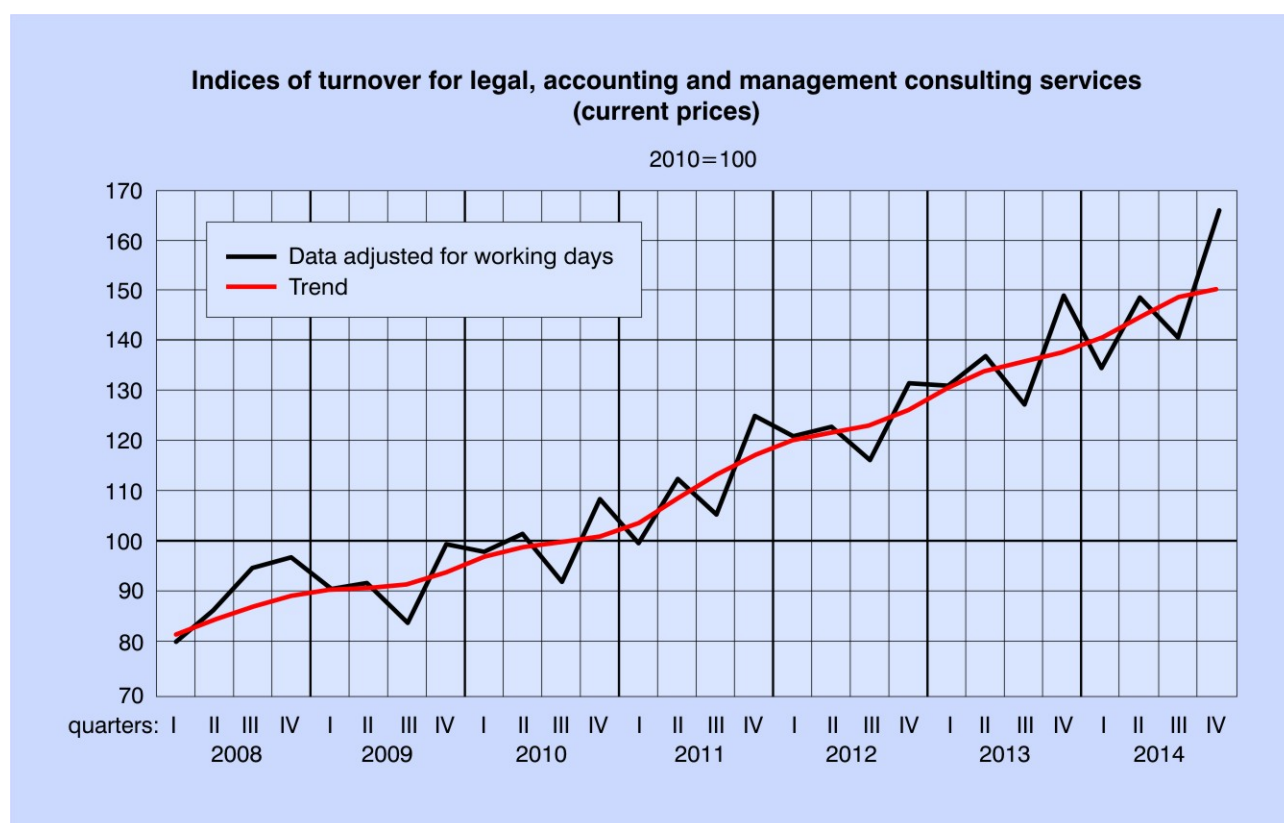


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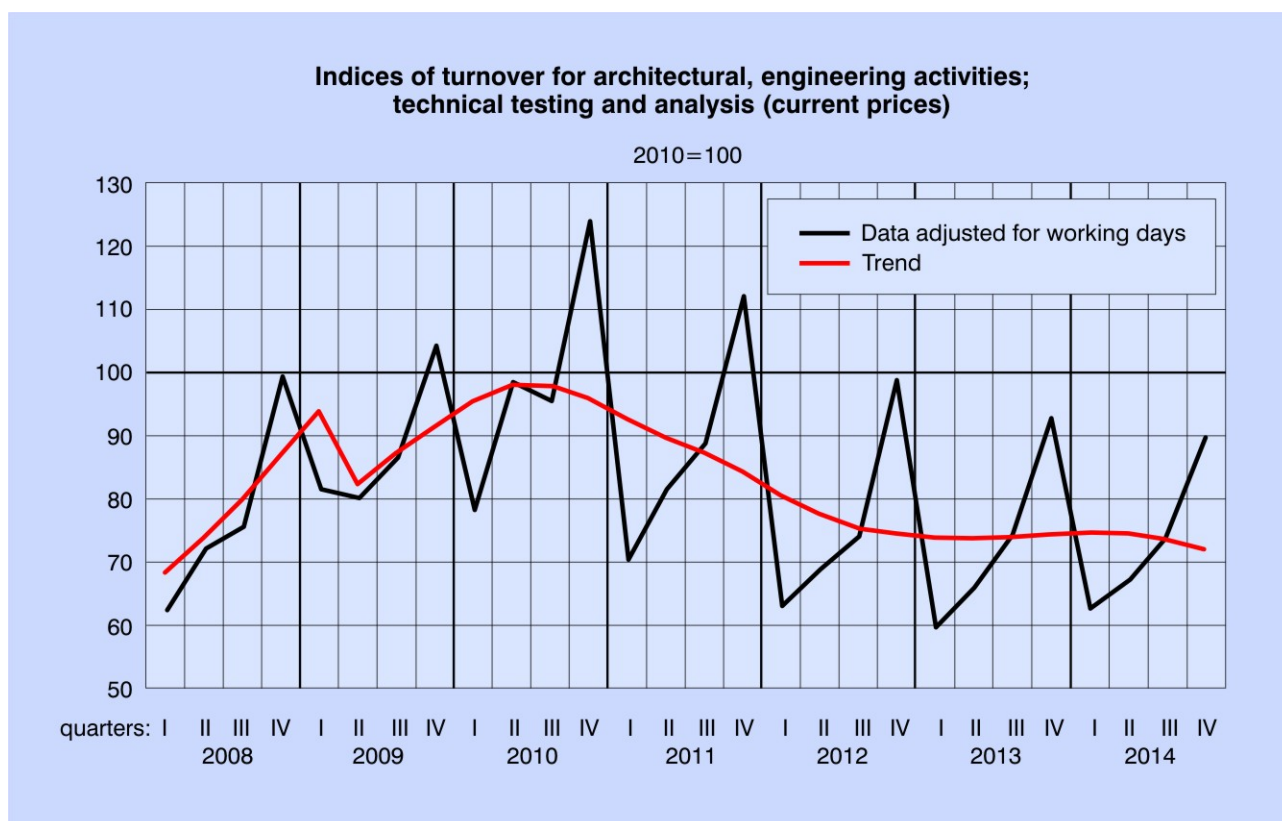
For the IT industry (division 62 according to NACE) in 2014, an increase was recorded of 7.4% in turnover value, in comparison with 2013, with a simultaneous increase in the number of enterprises by 8.0% and the number of employed persons by 11.2%. In 2014, the gross turnover profitability rate decreased in comparison with the previous year, and amounted to 7.3%. The net turnover profitability rate decreased by 7.2% in 2013 to 5.7% in 2014. The costs level indicator from total activity worsened and amounted to 92.8% in 2014 in comparison to 91.4% in 2013.



Legal, accounting, management activities (division 69 + group 70.2 according to NACE) turnover value in 2014, in comparison with the previous year increased by 8.4%, with a simultaneous increase in the number of enterprises by 9.1% and the number of employed persons by 9.5%. Growth was observed in both the gross (from 13.4% in 2013 to 15.9% in 2014) and net (from 12,4% in 2013 to 14,6% in 2014) turnover profitability rate. The costs level indicator from total activity improved, and amounted to 84.1% in 2014, compared to 86.6% in the previous year.

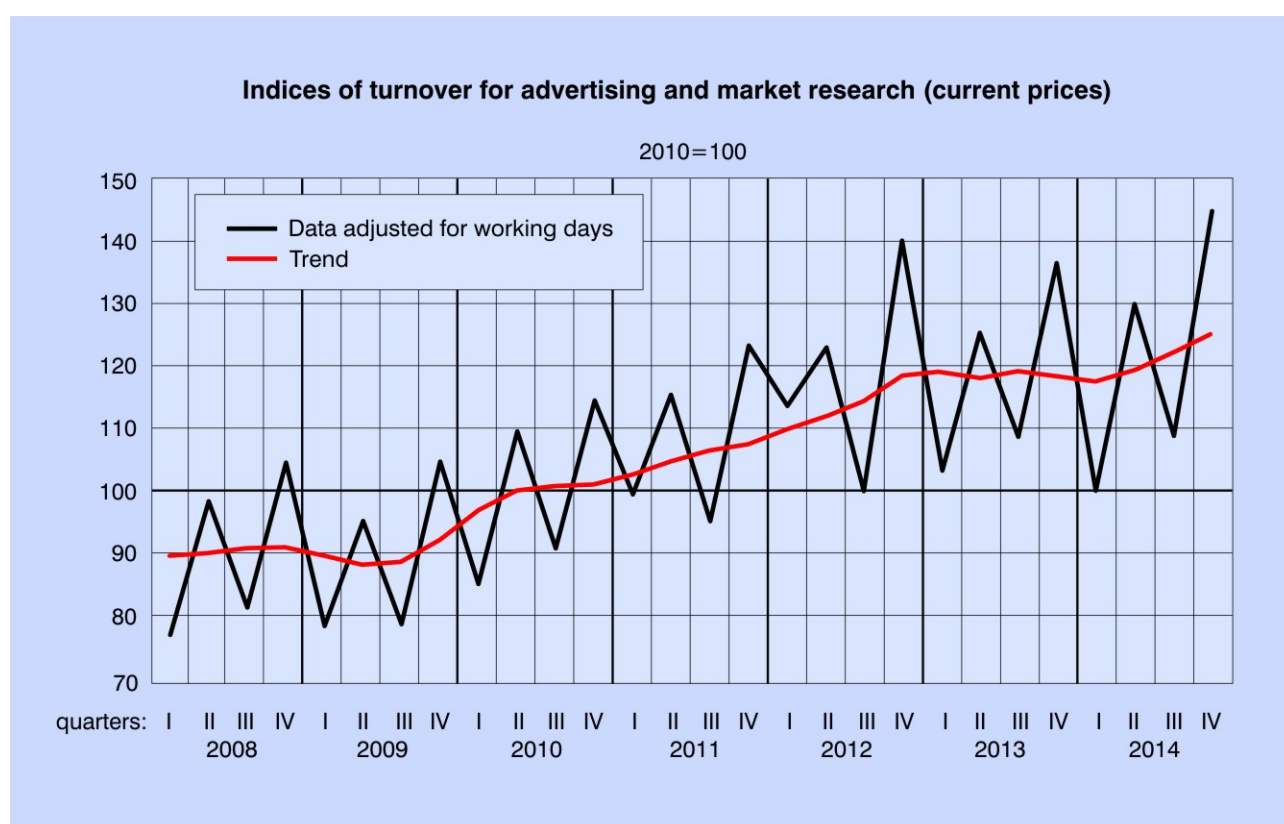


In 2014 activities related to architecture and engineering (division 71 according to NACE), an increase was recorded in the turnover value, by 1.0% in comparison with 2013, with a simultaneous growth in employment by 0.2%. The gross turnover profitability rate increased, in comparison with the previous year, and amounted to 4.7%; similarly, an improvement was recorded in the net turnover profitability rate to the level of 3.6%. An improvement was observed in the costs level indicator from total activity - in 2014 it amounted to 95.3% compared to 96.2% in the previous year.



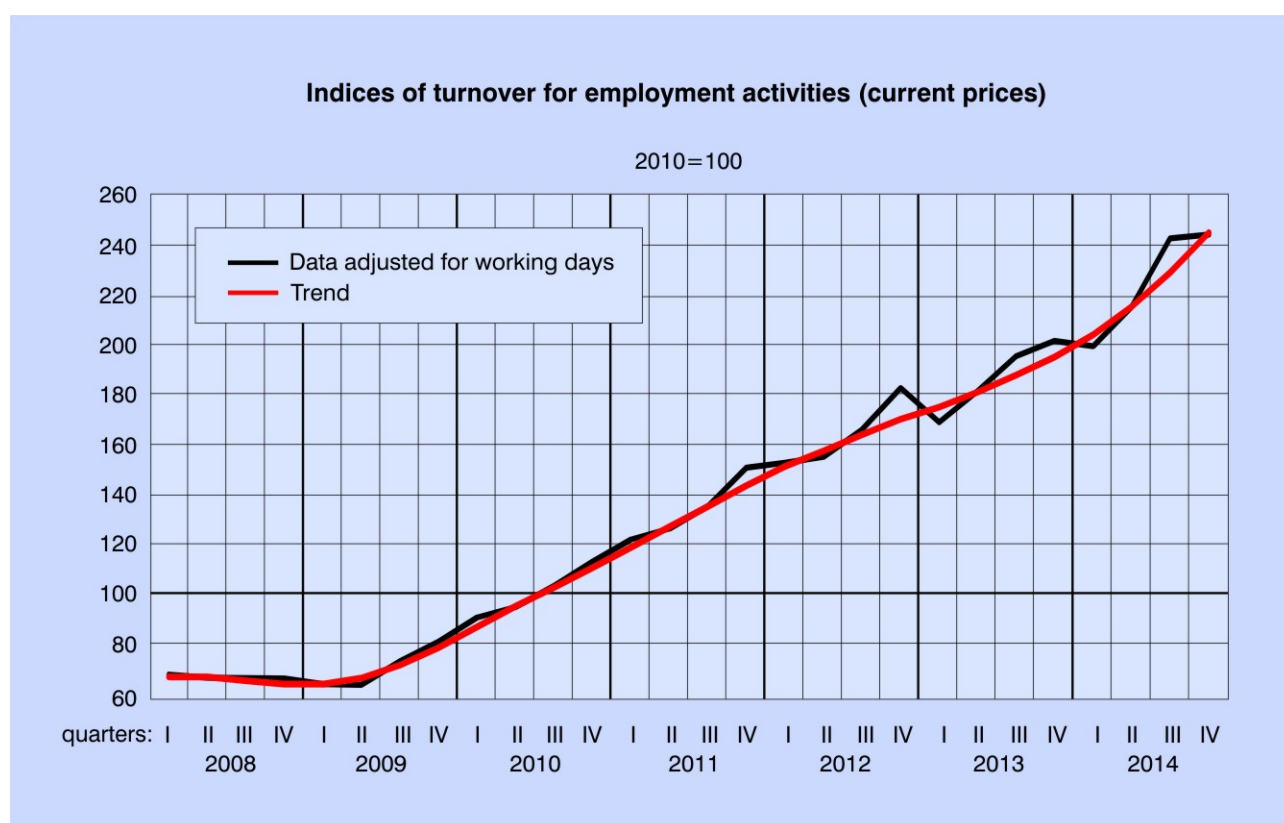
* * *

Entities conducting activities related to advertising, market investigation, and public surveys (division 73 according to NACE) in 2014, recorded a growth in sales in comparison with 2013, by 2.1%, with a simultaneous increase in the number of enterprises by 1.1%, and a decrease in the number of employed persons by 0.9%. The gross turnover profitability rate remained at the same level as in the previous year, amounting to 5.9%, while the net turnover profitability rate increased from 5.0% in 2013 to 5.1% in 2014. The costs level indicator from total activity remained at the same level (94.1%) as in 2013.



* * *

In 2014 an increase in the value of turnover for enterprises conducting activities connected with employment (division 78 according to NACE), in relation to 2013, amounted to 20.8%. An increase in the number of entities by 10.4% was recorded, along with the number of employed persons by 20.1%. At the same time, a decrease was recorded in both the gross (2.0% in 2014, compared to 2.4% in 2013), and net turnover profitability rate (1.3% in 2014, compared to 1.7% in 2013). Also, a deterioration took place in the costs level indicator from total activity to 98.0% in 2014, compared to 97.6% in the previous year.



2. Internal trade

In 2014, according to preliminary data, the share of trade in the gross domestic product amounted to 17.0 and was higher by 0.1 pp than in the previous year. The gross value added (in constant prices) generated by trade enterprises increased by 3.5%, in comparison with the previous year, and at the same time an increase was recorded in the share of trade in the gross added value generated in the national economy (in current prices) by 0.1pp.

Specification	2012	2013	2014
Share of trade in GDP %	17,0	16,9	17,0
Share of trade in gross value added in %	19,2	19,1	19,2

Source: "Annual Macroeconomic Indicators - National Accounts – ESA 2010" of 24.09.2015

In 2013, sales revenues in current prices achieved by trade enterprises were higher than in 2012 by 2.6%. The largest part of these revenues was realized by enterprises conducting wholesale activity 60.5% (decrease by 0.5 pp in comparison with the previous year), the share of retail trade amounted to 30.6% and was at the same level as in the previous year, and wholesale and retail trade of motor vehicles and their repair was 8.9% (increase by 0.5 pp). Enterprises with the number of employed persons above 49 attained 48.5% of total revenues. The revenues from sale of goods and materials constituted 92.7% of total revenue value of trading enterprises.

The average margin realized by trade entities in 2013 (classified in section G - Trade, repair of motor vehicles), amounted to 16.7% and was at the same level as in the previous year. The highest margins expressed in percentage, were obtained by retail enterprises, and the diversification in levels of realized margins were dependent on the type of the enterprises' activities.

Margins of trade enterprises in 2011 – 2013.

Specification	2011	2012	2013
	%		
WHOLESALE AND RETAIL TRADE AND REPAIR OF MOTOR VEHICLES AND MOTORCYCLES.....	15,0	14,4	14,0
of which:			
Sale of motor vehicles	9,3	8,8	8,5
Sale of motor vehicle parts and accessories.....	21,4	20,3	20,4
Sale, maintenance and repair of motorcycles and related parts and accessories...	23,1	23,9	21,9
WHOLESALE TRADE ^Δ	14,7	15,0	14,8
of which:			
Wholesale on a fee or contract basis ^a	17,6	19,3	21,3
Wholesale of agricultural raw materials and live animals	12,4	12,9	11,2
Wholesale of food, beverages and tobacco	16,1	17,7	17,8
Wholesale of household goods	16,8	17,6	17,1
Wholesale of information and communication equipment	11,8	11,3	9,7
Wholesale of other machinery, equipment and supplies.....	15,6	15,5	15,4
Other specialised wholesale.....	11,6	11,4	11,3
Non-specialised wholesale trade	17,6	17,5	17,4
RETAIL TRADE ^Δ	20,7	20,7	21,2
of which:			
Retail sale in non-specialised stores	18,2	18,8	19,5
Retail sale of food, beverages and tobacco in specialised stores	18,3	20,2	18,4
Retail sale of automotive fuel in specialised stores	9,8	6,9	7,3
Retail sale of information and communication equipment in specialised stores.....	15,7	15,8	15,2
Retail sale of other household equipment in specialised stores	24,1	23,6	22,9
Retail sale of cultural and recreation goods in specialised stores	29,5	27,7	26,2
Retail sale of other goods in specialised stores.....	29,0	30,1	30,2

a Provision.

Flow of commercial goods.

An important element, allowing the evaluation of distribution channels and goods circulation, is the revenue structure analysis according to the types of clients, as well as the division of purchases made in wholesale enterprises according to the types of suppliers (tables no 18 and 19). Both wholesale and retail enterprise activities in the selection of suppliers, as well as their clients structure remained stable. In trade enterprises - both wholesale and retail, the share in purchases directly from domestic producers and manufacturers, and directly from import, remained at a similar level, as compared with the previous period. Trade enterprises⁵ made 53% of purchases directly from domestic producers and manufacturers, direct import was nearly 24%, and purchases at wholesalers ca. 23%. Depending on the type of conducted trade activities (wholesale and retail), the structure of purchases made is more diverse.

Regarding wholesale trade – slightly over 52% of enterprises purchase supplies from domestic producers and manufacturers, and nearly 27%, directly from import. The share of wholesaler – wholesaler purchases remains unchanged, reaching nearly 20%.

In retail, the purchase of goods was mainly made directly from domestic producers and manufacturers, (ca. 57%), less frequently from wholesalers (slightly over 28%). Also, a slight increase was recorded in the share of purchases directly from import, to nearly 14%.

Enterprises with foreign ownership have most often performed purchases directly from domestic producers and manufacturers (they constituted 50% of the total value), or directly from import (almost 40%), and less frequently from wholesalers (ca. 9%).

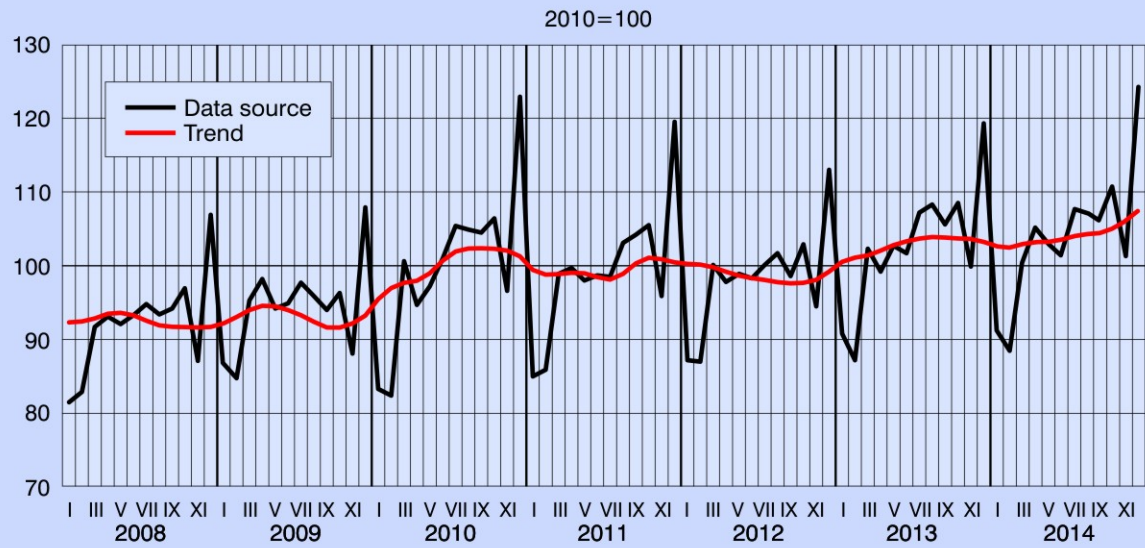
Within the revenue structure of wholesale enterprises, nearly 41% of revenues came from wholesales (compared to ca. 44% in the previous period), slightly over 27% came from retail traders, and 20% from domestic producers (compared to 18% in the previous year). Nearly 8% were direct receipts from individual consumers.

Turnover of trade enterprises

In 2014, the turnover in retail trade (in constant prices) was by 1.1% higher, in comparison with the previous year. The turnover increased of both enterprises selling food, beverages, and tobacco products (by 2.4%) and selling non-food products (by 0.6%). A significant growth (by 5.6%) was recorded by enterprises conducting wholesale and retail trade of motor vehicles (division 45 according to NACE). The examined enterprises involved in retail sales of fuels showed a decrease in turnover by 4.0%.

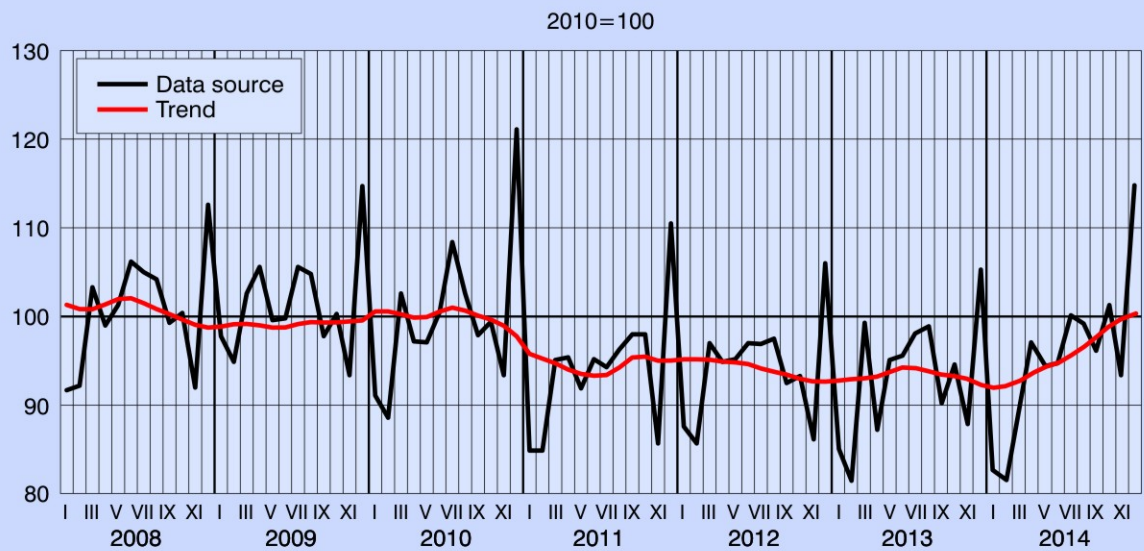
⁵ The data relates to enterprises where the number of workers exceeds 9 persons.

Deflated turnover of retail sale enterprises^a



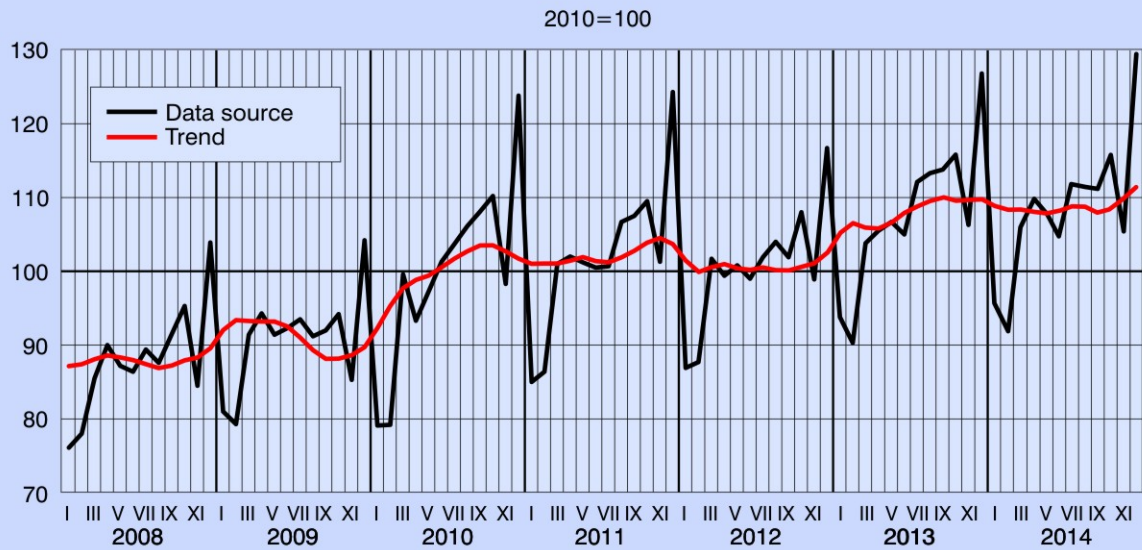
^a Enterprises classified according to NACE Rev.2 in the division 47.

Deflated turnover of enterprises selling food, beverages, and tobacco^a



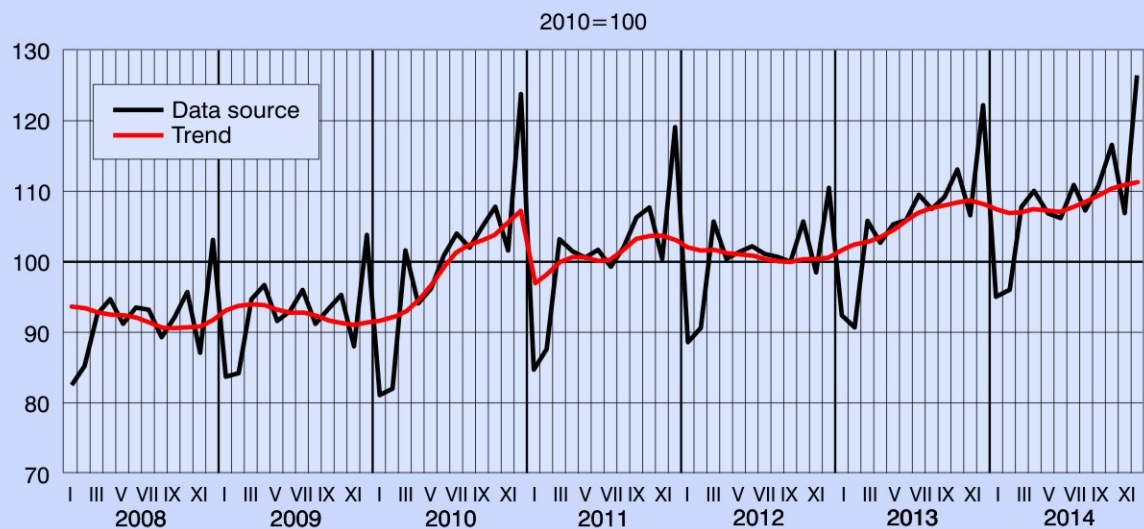
^a Enterprises classified according to NACE Rev. 2 into the class 47.11 and the group 47.2.

Deflated turnover of enterprises selling non-food goods^a



^a Enterprises classified according to NACE Rev. 2 into the class 47.19, and the groups: 47.3 – 47.9.

Deflated turnover of enterprises classified according to NACE Rev. 2 into divisions 45 and 47^a

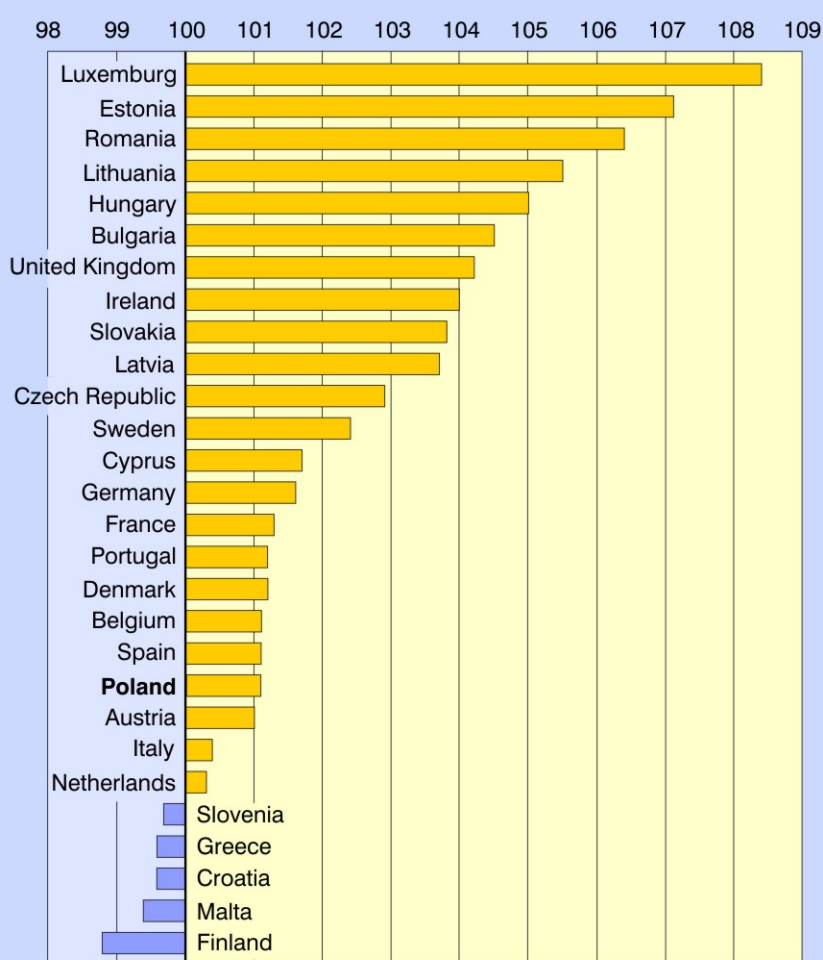


^a 45 Division – Wholesale and retail trade repair of motor vehicles and motorcycles.
47 Division – retail trade, except of vehicles and motorcycles.

In 2014, the turnover in retail trade of EU member states was higher in comparison with the previous year by 1.9%. The highest growth in turnover, was recorded for another year, in Luxembourg. Subsequent places belonged to Estonia, Romania and Lithuania. From the countries of the greatest importance for the European economy, the turnover increased in the UK (by 4.2%), Germany (by 1.6%) and France (by 1.3%). A decrease in turnover was recorded in Finland, Malta, Croatia, Greece, and Slovenia.

**Annual indices of turnover in retail trade for countries of EU in 2014
(constant price)^a**

2013 = 100

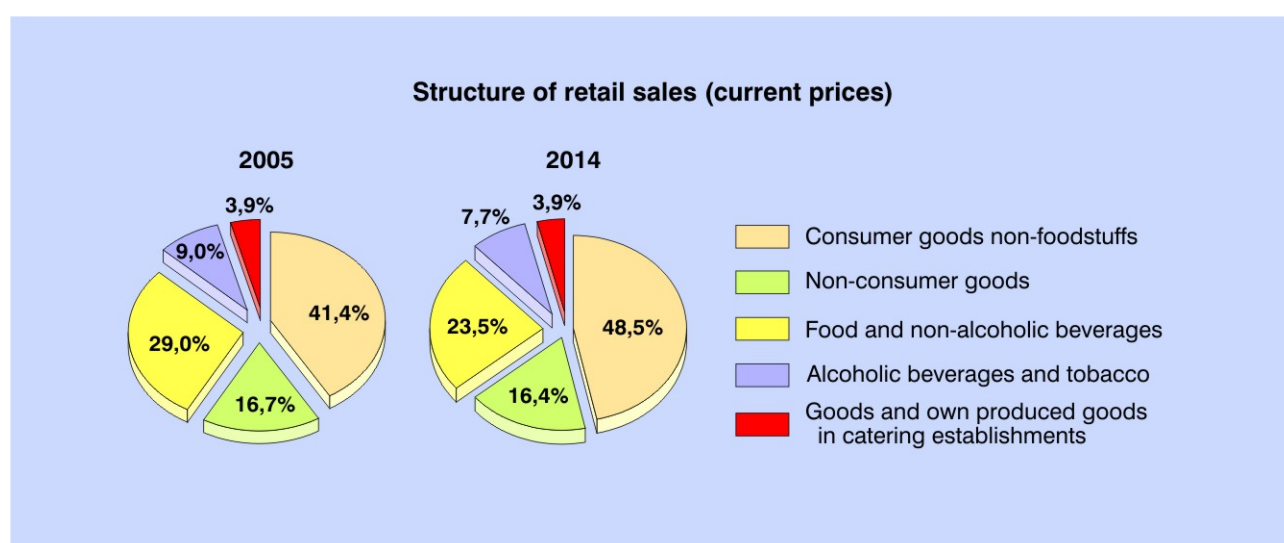


^a Data adjusted for working days.

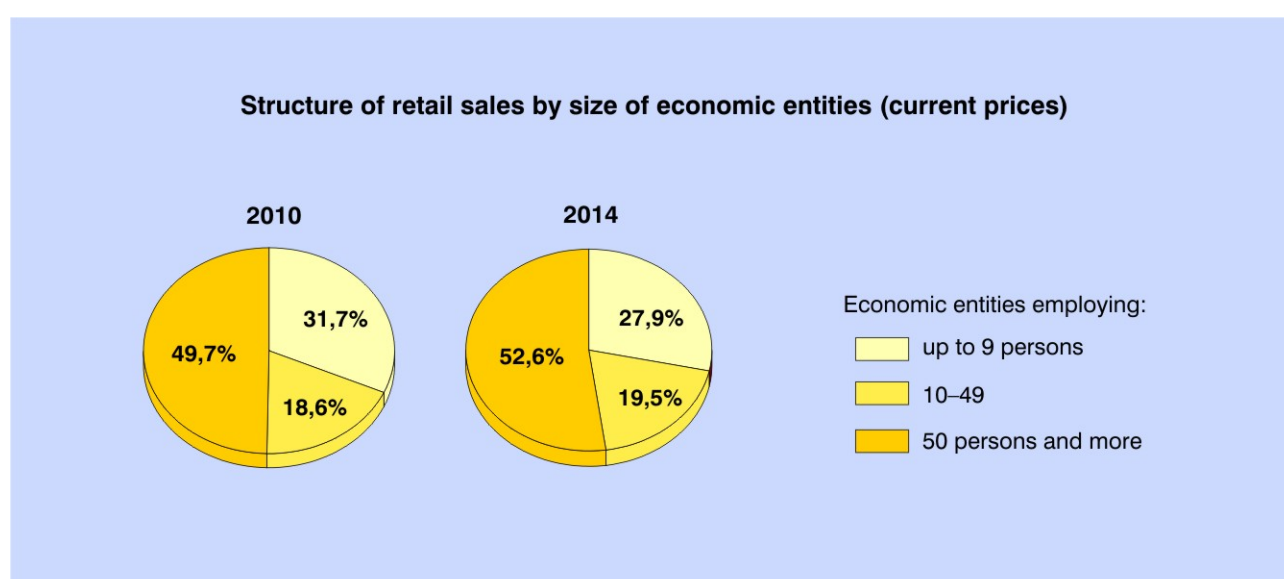
S o u r c e: Eurostat, short-term statistics (September 2015)

Retail sales

In 2014 retail sales in current prices realized by trade and non-trade enterprises amounted to PLN 704.8 billion and were by 2.8% higher than in the previous year. In retail sale points, the value of sold goods amounted to PLN 677.1 billion (increase by 2.6%), of which the value of food and non-alcoholic beverages – PLN 165.8 billion (decrease by 0.4%), alcoholic beverages and tobacco products – PLN 54.5 billion (decrease by 0.2%) and non-foodstuff goods – PLN 456.7 billion (increase by 4.1%). At catering establishments, retail sales amounted to PLN 27.8 billion (increase by 8.2%).



The share of retail sales realized in 2014 by economic entities with employing 50 or more persons, was 52.6%, by entities with employing up to 9 persons - 27.9%, and businesses employing 10-49 persons -19.5%.



Sales in trade enterprises (in current prices) amounted to 86.4% of total retail sales value, and its share was 0.3% lower than in the previous year. Other sales were realized by enterprises whose main activities were not trade, but e.g. production or catering.

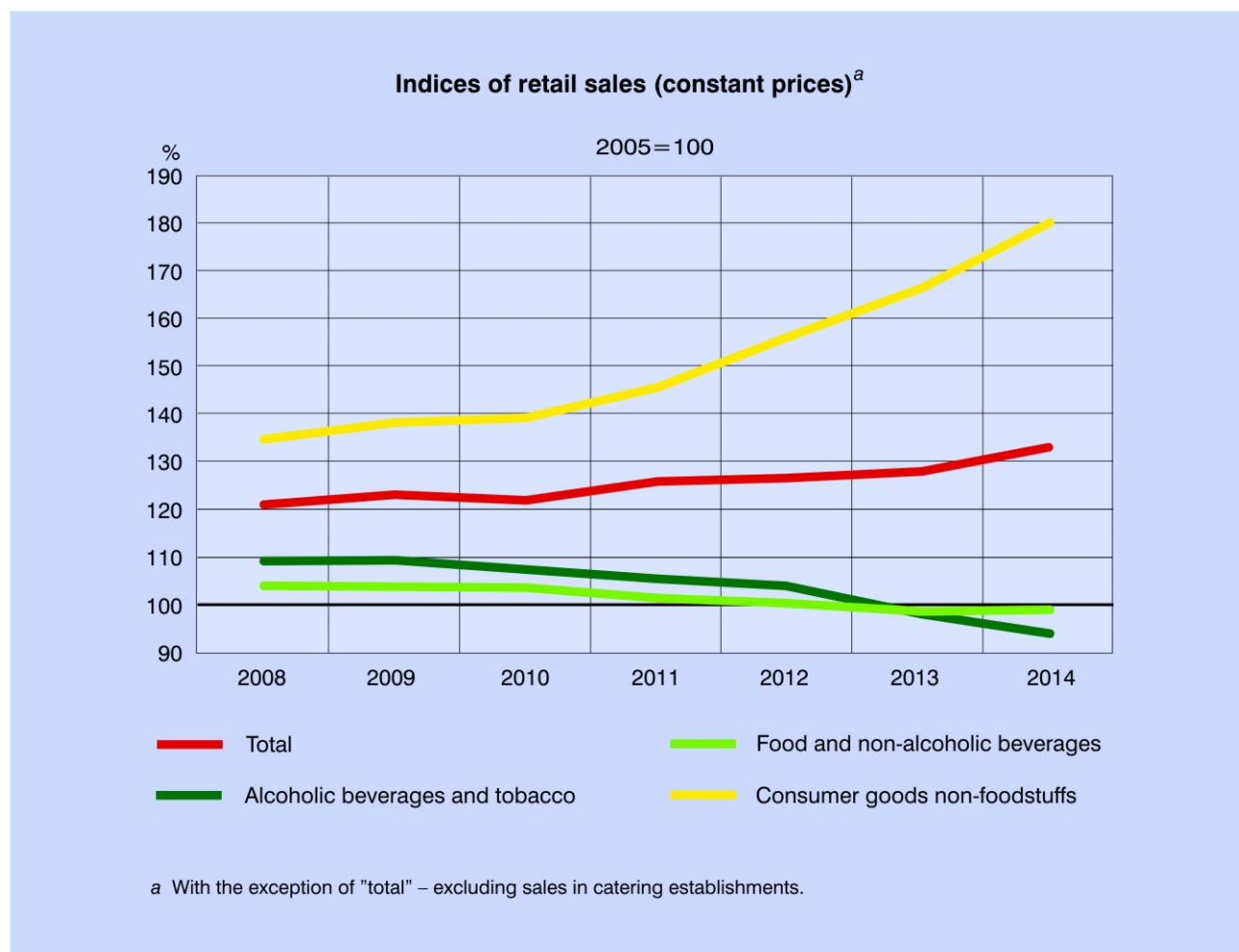
Retail sales in 2012 – 2014 (current prices)

Specification	2012	2013	2014
a – absolute numbers b – corresponding period of the previous year =100	PLN mln		
Total..... a	675992,6	685658,7	704841,5
b	104,6	101,4	102,8
of which trade enterprises a	586190,9	594454,9	609103,4
b	104,3	101,4	102,5

Retail sales by groups of goods (current prices)

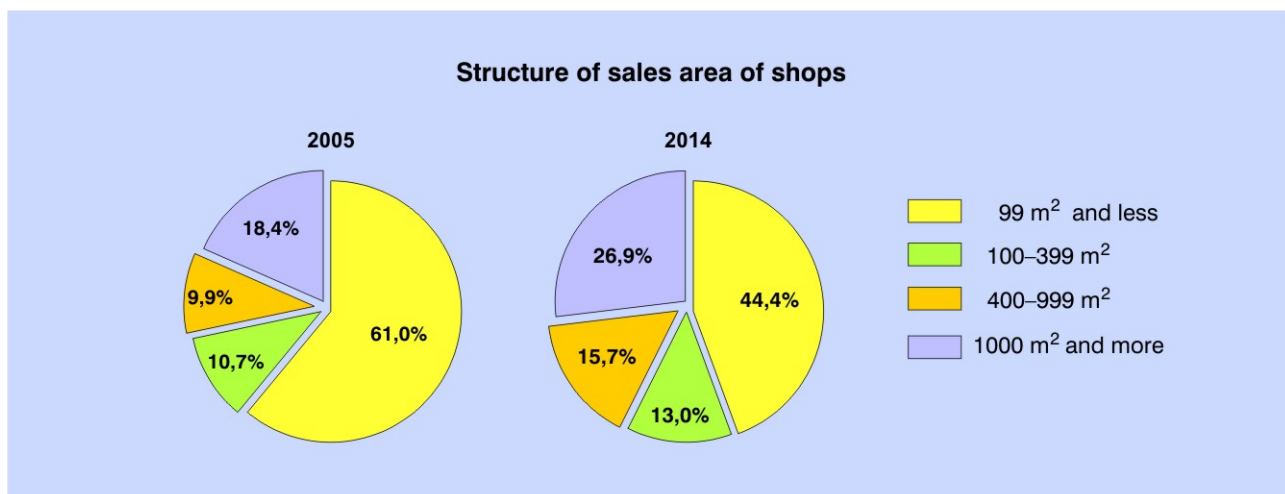
Specification	2012	2013	2014	
	PLN mln			2013=100
Total	675992,6	685658,7	704841,5	102,8
food and non-alcoholic beverages	185631,5	187541,1	189242,8	100,9
alcoholic beverages and tobacco	60755,1	59039,9	58646,7	99,3
non-foodstuffs (excluding tobacco).....	429606,0	439077,7	456951,9	104,1

In 2014 retail sales in constant prices, realized by trade and non-trade enterprises were 3.9% higher than in the previous year (compared with 1.3% growth in 2013). The growth in sales of consumer, non-foodstuff goods was above average (by 8.3%). An increase in sales of food and non-alcoholic beverages was also recorded (by 0.5%). As compared with the previous year, a decrease in the sales of alcoholic beverages and tobacco products was also recorded (by 3.8%), as well as in non-consumer goods. (by 0.3%). Retail sales of goods and own products in catering establishments were on the other hand by 6.7% higher than in 2013.

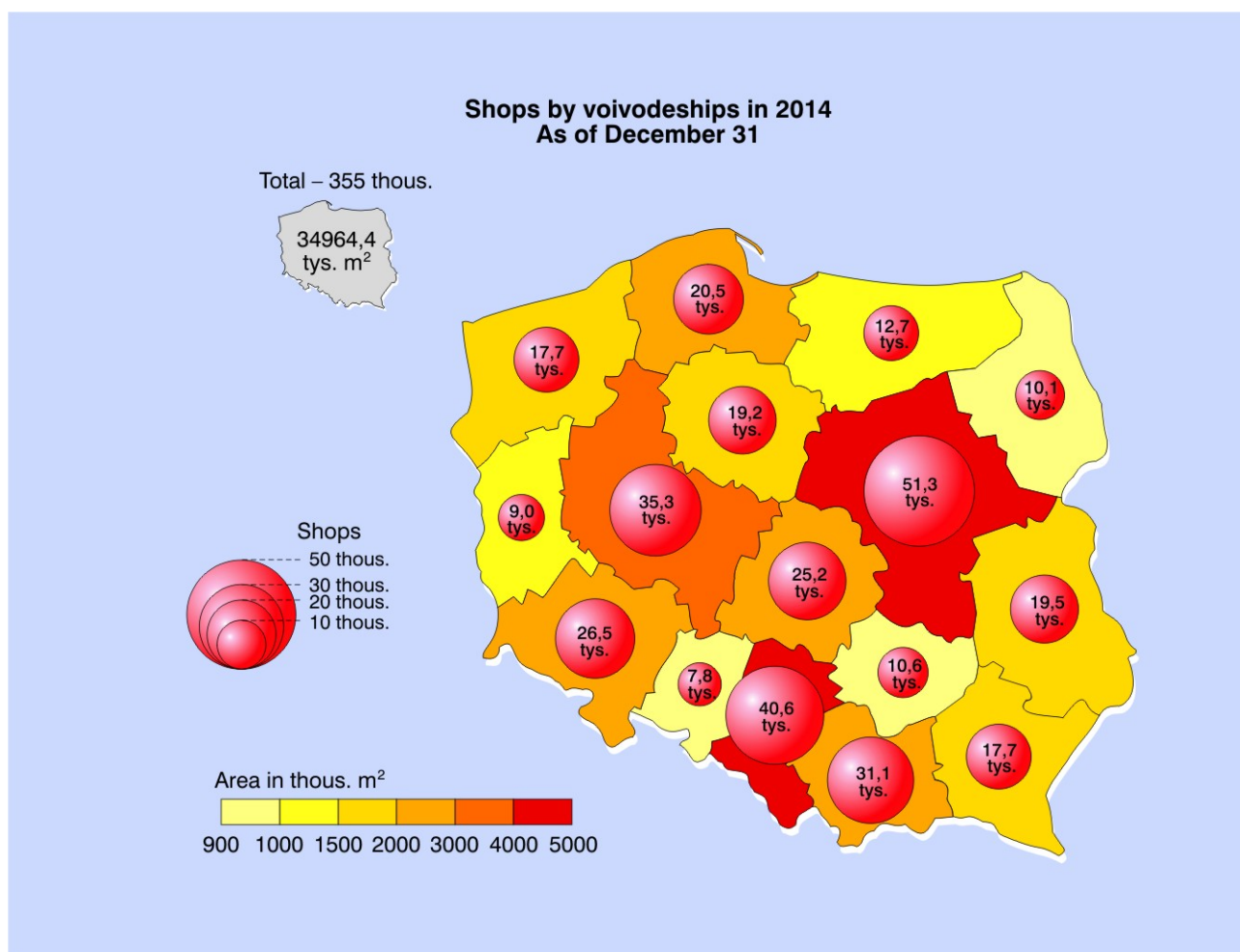


Trade infrastructure

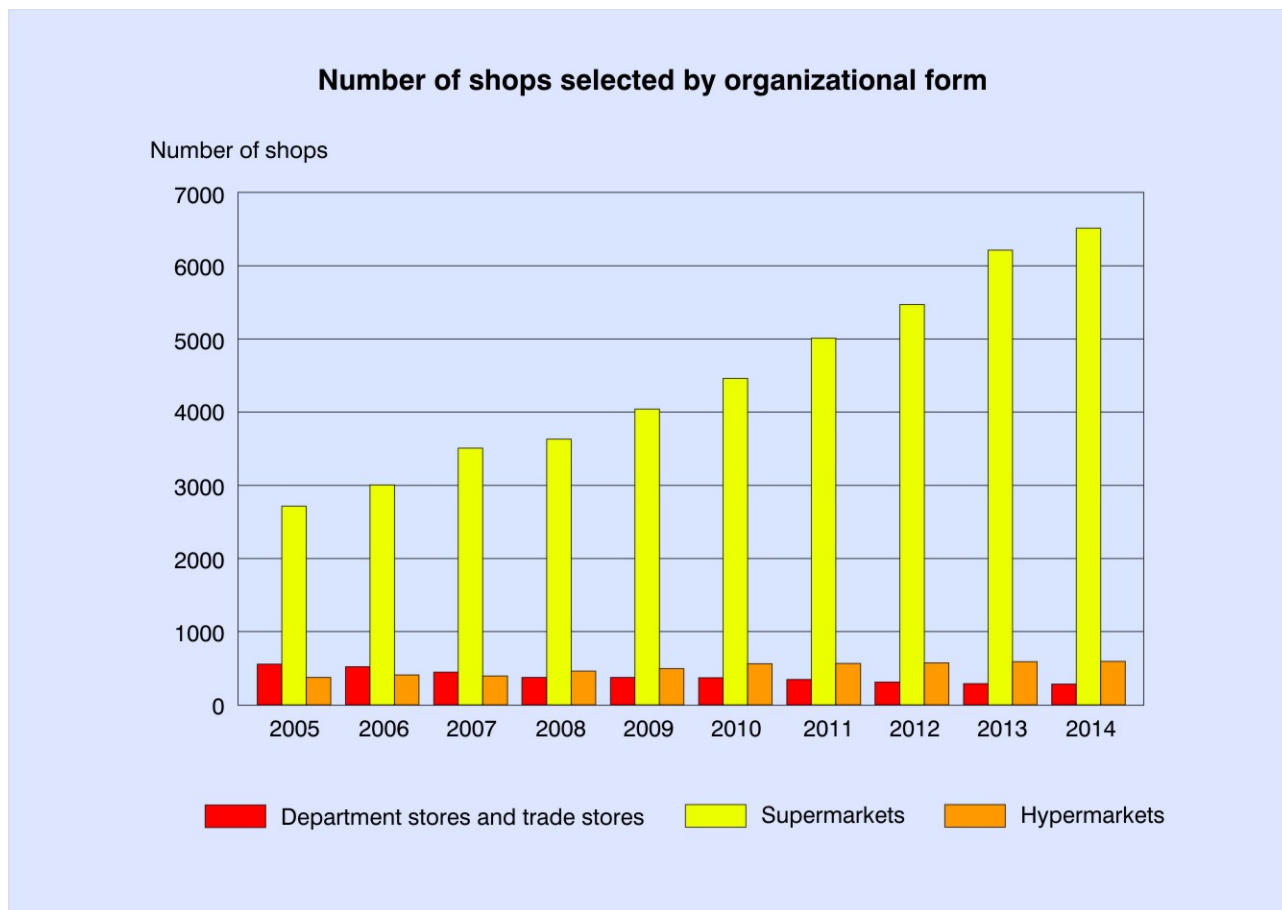
At the end of 2014, the estimated number of shops in Poland amounted to nearly 355 thous. And was by 0.3% higher than in the previous year. The sales area of shops also increased (by 3.4%) and amounted to ca. 34 964 thous. m². A growth of sales area was recorded in all presented sales levels. The greatest growth in the area in m² was observed both in shops with total sales area ranging from 99 m² and less (almost by 690 thous. m²) and 400-999 m² (by ca. 240 thous. m²). On both levels a growth of sales area amounted to 4.6%.



In the regional setup the highest percentile increase of sales area among the smallest shops occurred in Mazowieckie, Wielkopolskie and Dolnośląskie voivodeships. The highest growth of sales area was among shops of the 400-999 m² range in: Pomorskie, Warmińsko-Mazurskie, Lubelskie and Łódzkie voivodship.

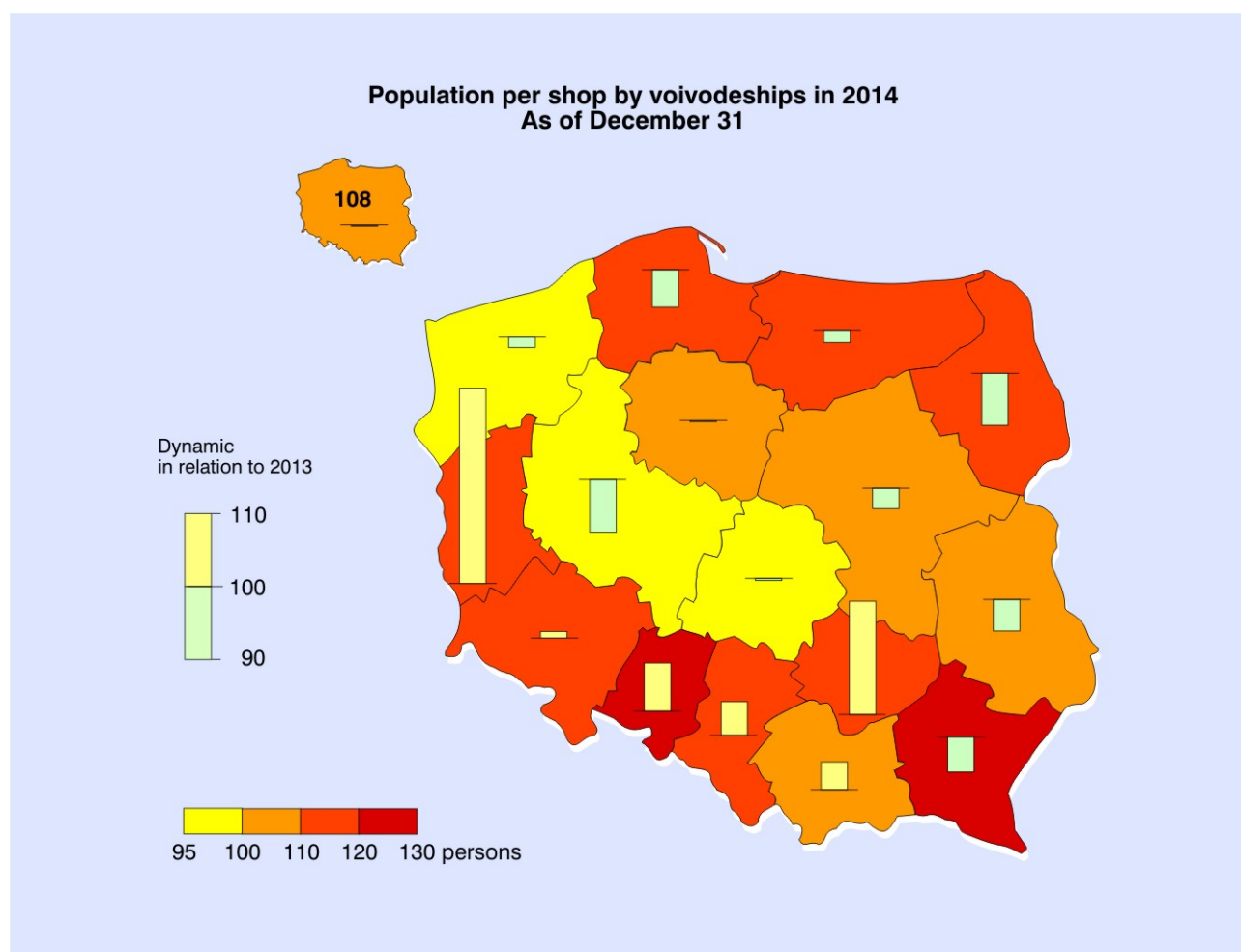


Among the large-area trade facilities, the greatest increase in the number of shops was observed in the supermarket category (by 4.8%), however this growth was not as intensive as in recent years. As compared with 2013, the number of hypermarkets increased slightly (by 0.2%).



In 2014, the estimated share of sales value realized together by supermarkets and hypermarkets in retail sales at stores and petrol stations amounted to 24.2% and was higher by 0.6% pp than in the previous year.

In 2014, there were 108 people per one shop, whereas in 2013, it was accordingly 109 people.



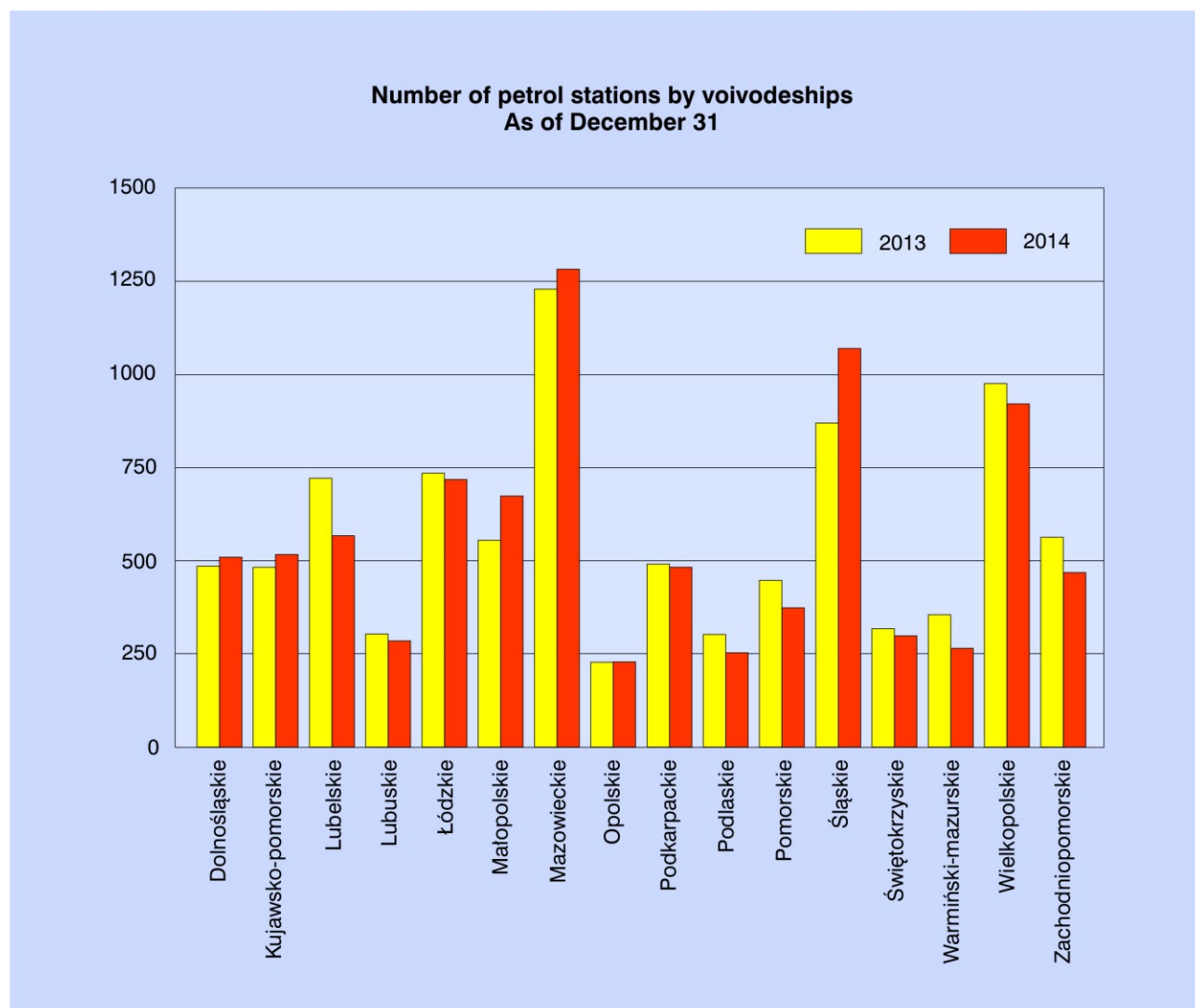
In the group of enterprises employing 9 persons or more, the number of shops belonging to enterprises with foreign capital increased in 2014 by 4.3%, and sales area by 0.8%. The average area of shops of foreign enterprises amounted to 635.6 m² (accordingly in shops of private, domestic enterprises – 177.5 m²). However the share of the area of shops with foreign capital was decreased by 0.7% pp in comparison with the previous year.

Number of shops owned by enterprises with foreign capital^a

Specification	2013	2014
Number of shops	14268	14881
Share in total shops (%)	4,0	4,2
Sales area (thous. m ²)	9384,3	9459,1
Share in total sales area (%)	27,8	27,1

^a Data concerns entities employing more than 9 persons.

At the end of 2014, the estimated number of petrol stations amounted to 8905 and was lower by 1.6% than in the previous year. The greatest decrease in the number of petrol stations was recorded in: Lubelskie, Zachodniopomorskie, Warmińsko-Mazurskie and Pomorskie voivodeships. The highest growth was on the other hand observed, in Śląskie and Małopolskie voivodeships.



In 2014 the national records kept by communal local government units evidenced 2210 permanent marketplaces (including 2114 marketplaces with predominance of small retail sales), which constitutes a 0.1% growth in comparison with the previous year. A significantly smaller number of marketplaces was recorded in the Opolskie voivodeship (by 3.9%). As in the previous years, 40% of all area of marketplaces in the country was located in the following three voivodeships: Mazowieckie, Łódzkie and Wielkopolskie.

Within the marketplaces, transactions were realized in ca. 100.3 thous. permanent small-retail sale outlets, among which 59.2 thous. operated every day. Permanent marketplaces were supplemented with seasonal marketplaces, which amounted to 6729 in 2014, which constitutes a growth by 4.2%, in comparison with the previous year. Also, higher annual receipts from the market-place fee were recorded by 2.7% in comparison with 2013.

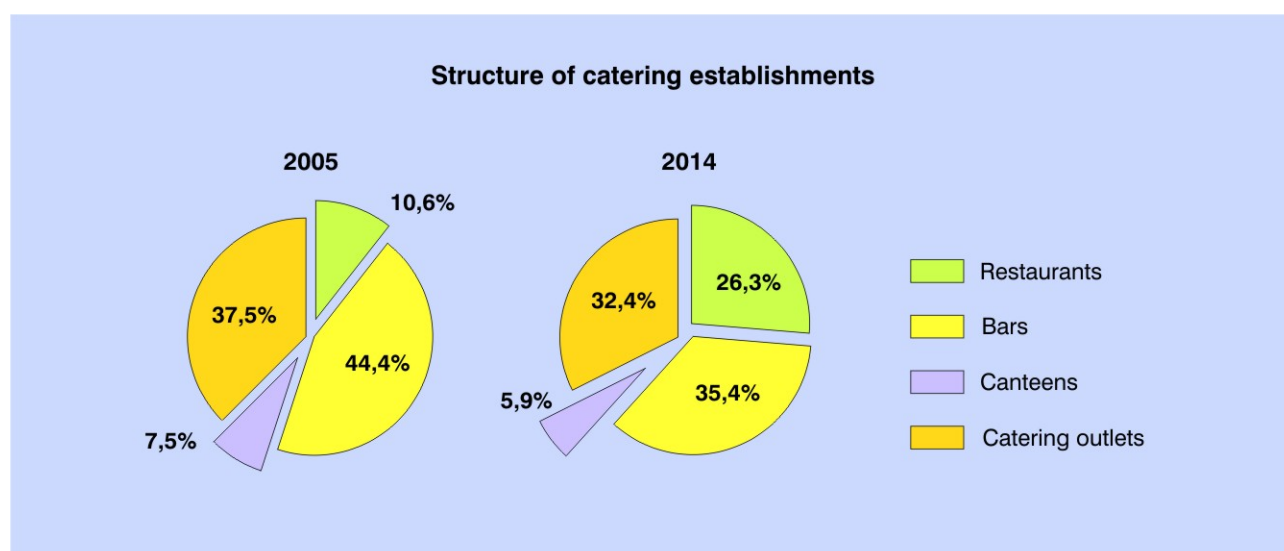
Food services

In 2014 the number of catering establishments (permanent and seasonal) in the country was estimated more than 66.3 thousand, of which 35.4% were bars, 32.4% - catering outlets, 26.3% - restaurants and 5.9% – canteens. The total number of catering establishments in 2014, was reduced by 0.9% compared to 2013. A decrease was recorded for all types of establishments except restaurants, the number of which increased by 7.5%.

The private sector in food services covered 98.4% of all catering establishments, (an increase of 0.2 pp in comparison to the previous year), therein: 99.3% restaurants, 99.0% bars, 98.7% catering outlets and 89.8% canteens.

Catering establishments

Specification	2012	2013	2014	
	Number			2013=100
Total.....	68787	66966	66345	99,1
restaurants.....	16478	16202	17414	107,5
bars.....	25885	24931	23514	94,3
canteens	4304	4072	3924	96,4
catering outlets	22120	21761	21493	98,8



In 2014, total revenues from food service activity in current prices, amounted to almost PLN 28.3 billion, and increased by 8.0% in comparison with the previous year, (in constant prices, they were higher by ca 6.5%). The private sector constituted 98.7% of this value, the share of the public sector amounted to 1.3% (a decrease by 0.2 pp compared to 2013).

Food service production constituted 78.1% of the total value of revenues, 20.2% - from sale of trade goods (including 14.6% - from sales of alcoholic beverages and tobacco products) and 1.7% - from other activities. The growth in revenues was observed in the field of food service production (by 12.3%), however in other types of gastronomic activities a decrease in revenues in comparison with 2013 was recorded, the largest one in revenues from sales of alcoholic beverages and tobacco products (by 6.4%).

Revenues from food service activity in current prices

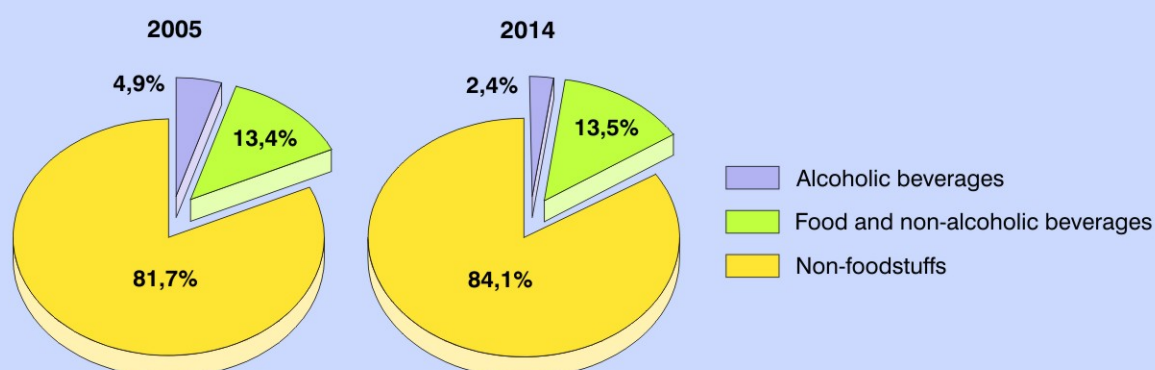
Specification	2012	2013	2014	
	PLN mln			2013=100
Revenues total	24868,3	26174,2	28272,8	108,0
from sales of commodities.....	6499,1	6033,1	5711,0	94,7
of which from the sale of alcoholic beverages and tobacco	4601,5	4402,5	4118,6	93,6
from food service production	17788,1	19643,7	22067,9	112,3
from other activity	581,1	497,3	493,9	99,3

Wholesale

Wholesale value in 2014 in trading enterprises (in current prices) is estimated as PLN 1 018.3 billion, and was by 0.8% higher than in the previous year. A growth in all groups of wholesale was recorded. The above changes slightly affected the wholesale structure, in which the share of alcoholic beverages remains unchanged, the share of food and non-alcoholic beverages increased by 0.2% pp, in comparison with the previous year, while the share of non-foodstuffs decreased by 0.2% pp.

Wholesale realized by enterprises employing 50 persons and more was similar as in the previous year, i.e. 47.1%.

Structure of wholesale (current prices)



Wholesale in 2012 - 2014 (current prices)

Specification	2012	2013	2014
a – absolute numbers	PLN mln		
b – corresponding period of previous year=100			
Total..... a	980452,1	1010623,7	1018250,2
b	103,6	103,1	100,8
of which enterprises employing 50 persons and more..... a	466589,9	476415,8	479952,3
b	103,2	102,1	100,7

Wholesale by group of goods (current prices)

Specification	2012	2013	2014	
	PLN mln			2013=100
Total	980452,1	1010623,7	1018250,2	100,8
food and non-alcoholic beverages	121349,8	134828,7	136898,5	101,5
alcoholic beverages	24784,8	24051,2	24550,9	102,1
non-foodstuff goods	834317,5	851743,8	856800,8	100,6

Market supply

In 2014 the average stocks of the majority of researched wares in producers' warehouses⁶, was higher than in the previous year.

In the group of foodstuffs a considerable growth was recorded in the inventories of butter and dairy spreads; canned and preserved fish, milk and cream in a solid form. Also, stocks increased of among others: pork; pasta; beer obtained from malt; frozen vegetables; wine and honey wine; cheese and curd.

Stocks decreased of among others: groats and meals; vodkas, liqueurs, and other alcoholic beverages; rye flour; wheat flour; canned meat, offal and fats; juices, drinks fruit-and vegetable and sweets.

Among non-food goods, a significant increase was recorded, in comparison with the previous year of radio sets; cigarettes containing tobacco or mixtures of tobacco and tobacco substitutes; automatic washing machines; shoes with fabric uppers; carpets, mats and textile floor coverings; soap, organic surface-active products and preparations used as soap.

Decreased stocks was observed for: television sets; refrigerators and freezers, as well as the fabric underwear.

In 2014, **deliveries**⁷ of the majority of examined consumer food and non-food goods were higher than in the previous year. The growth in deliveries was related to higher production and increased import.

Significantly greater production was recorded, for the following goods: radio sets; milk and cream in a solid form; sweets; electrical, gas and mixed stoves; cured meats products (excluding cured poultry meat); carpets, mats and textile floor coverings; mineral waters; bicycles; fabric outerwear and clothing; grinders and food mixers, juicers with own electrical engine.

A high share of import and at the same time its large growth in comparison with the previous year, was recorded for: knitted outerwear and clothing; grinders and food mixers, juicers; household refrigerators and freezers; fabric underwear; fabric outerwear and clothing.

Among the researched **foodstuffs**, deliveries were substantially higher than in the previous year of among others: sweets; milk and cream in a solid form; beef; cured meats products (excluding cured poultry meat); mineral water and lower among others: coffee; vodkas, liqueurs, other alcoholic beverages; processed cheeses; fruit jams, as well as chocolate products.

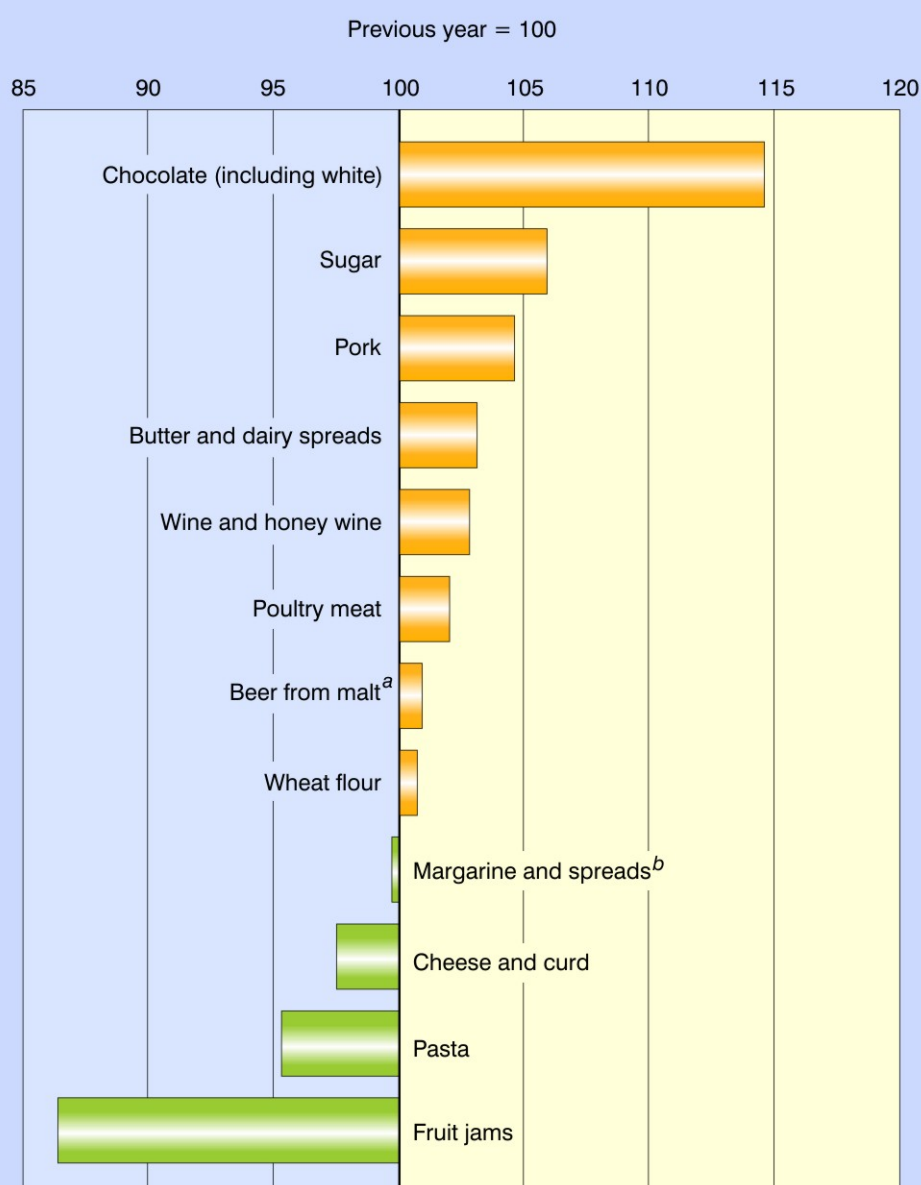
⁶ In the enterprises with the number of employees exceeding 49 persons

⁷ The quantity of goods manufactured in the country (data relates to business entities where the number of workers exceeds 9 persons), reduced by their export and increased by imports, corrected by balance changes in manufacturers' inventories with the number of employees exceeding 49 persons.

In the group of surveyed **non-food articles**, in 2014 deliveries were mostly higher than in the previous year, of among others: knitted outerwear; television sets; electrical, gas and mixed stoves; grinders and food mixers, juicers; tires for passenger cars; fabric clothing; carpets, mats and textile floor coverings; passenger cars; radio sets; footwear and fabric underwear.

Significantly lower than in 2013 the deliveries were of among others: cigarettes containing tobacco or mixtures of tobacco and tobacco substitutes; refrigerators and freezers of the household type; as well as soap, organic surface-active products and preparations used as a soap.

Delivery index of selected foodstuffs in 2014

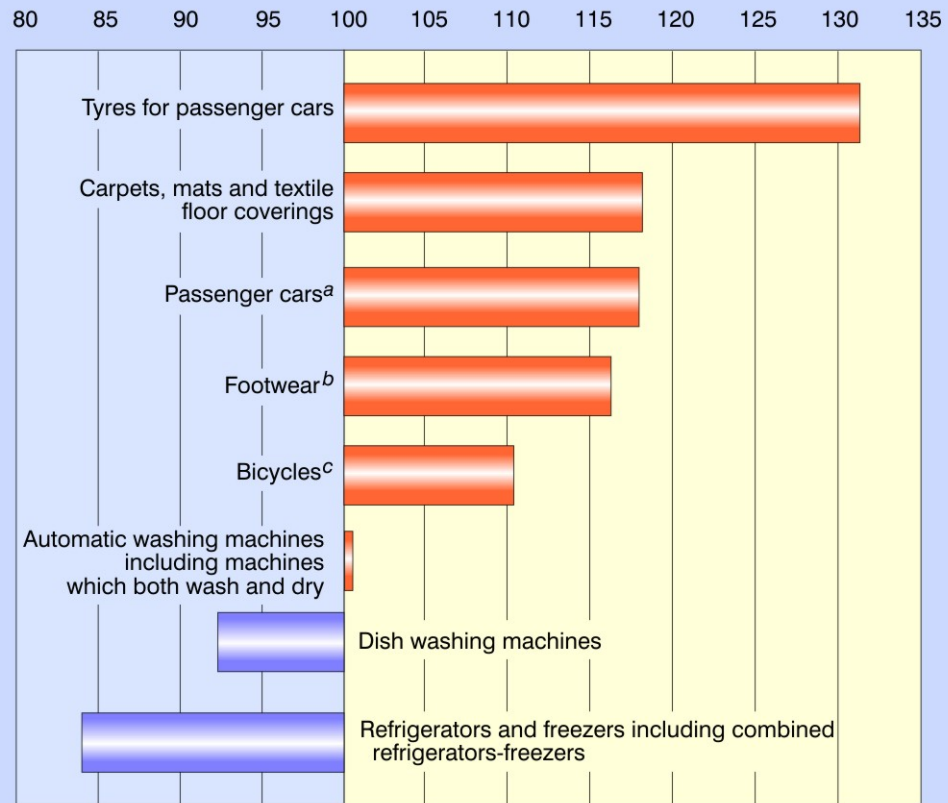


^a Of an alcoholic strength of 0,5% and more.

^b Reduced and low fat, excluding liquid margarine.

Delivery index of selected non-foodstuffs in 2014

Previous year = 100



^a Excluding motor caravans, snowmobiles, golf car similar vehicles.

^b Including rubber footwear.

^c Including children's.