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team

Internal Trade Section:Jolanta Biernat, Agata Dec, Marta Nerlewska,
Sylwia Piątek, Małgorzata Rajkowska,
Sylwia Ulatowska, Rafał Wołodkiewicz-Donimirski

supervisor

Ewa Adach-Stankiewicz
Director of Department**Preparation of graphs:****Statistical Publishing Establishment**
Halina Sztrantowicz**When publishing the Central Statistical Office data – please indicate the source**Publication available on <http://www.stat.gov.pl>

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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 entities. The study shows the results of survey in connection with these enterprises as well as basic data on phenomena and trends 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 shown 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.

According to our costumers’ requests, edition is expanded for more detailed information about the volume of trade and food service network and their infrastructure in regional division.

Data concerned with business activity is presented in the separate study on the page of the CSO (<http://stat.gov.pl/obszary-tematyczne/ceny-handel/handel/uslugi-biznesowe,16,2.html>)

Presenting you with The Internal Market in 2016, 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 Department



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

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	G Section		I Section
		Trade units		Catering units
		wholesale	retail sales	
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 units.

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,
- **universal** are stores primarily selling foodstuff goods for daily consumption, with a sales area between 120 and 399 m²,
- **specialized** are stores selling a wide assortment of articles to fully meet specific needs (e.g. clothing, home furnishing, car parts, furniture, sporting goods, etc)'
- **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 .

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;

¹ Research is conducted in three year cycle

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;
- **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.

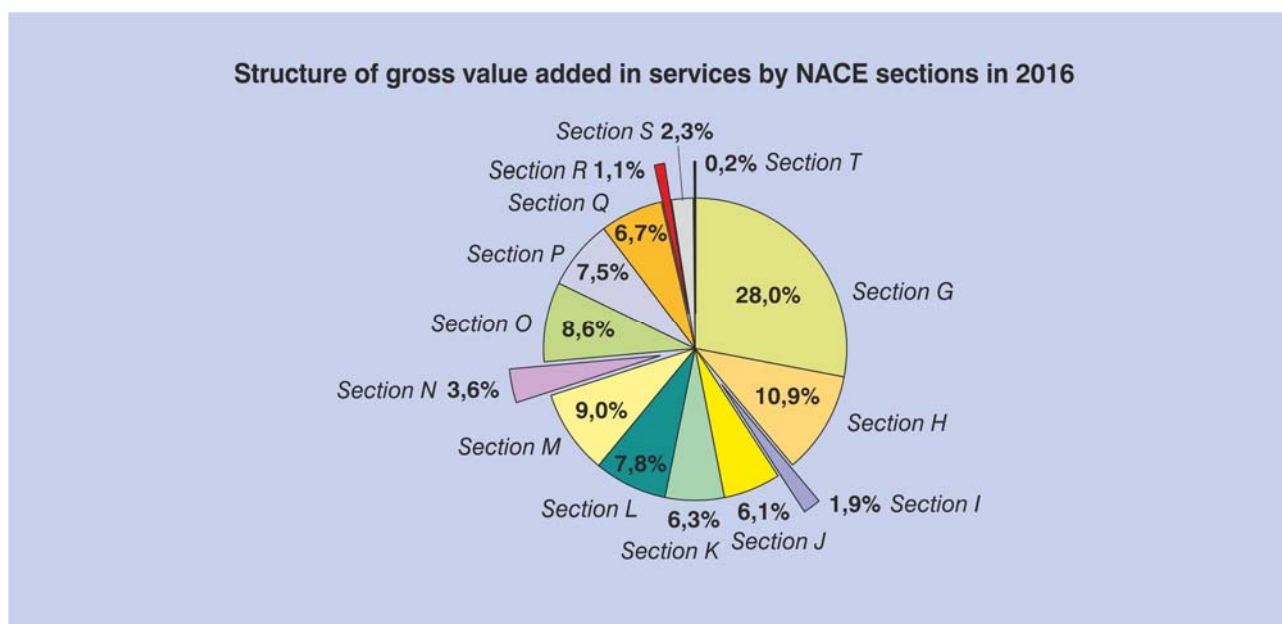
NOTES:

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 4% sample of these entities (SP-3).

II. ANALYTICAL COMMENTARY

1. Service activities in Poland and EU countries

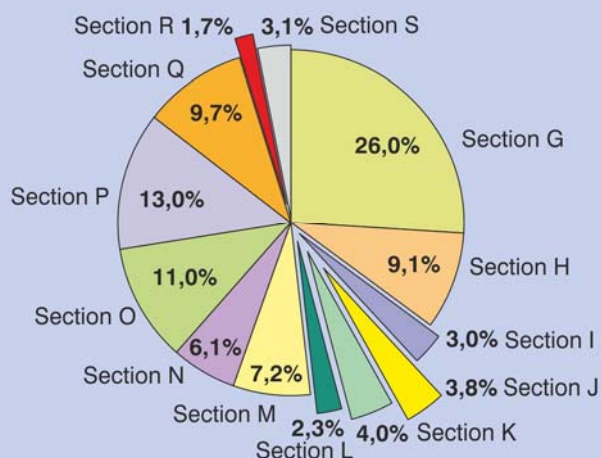
In 2016 in Poland, according to preliminary data, the gross value added generated by entities dealing with service activities constituted 64.2% of the gross value added of the whole national economy. At the same time, these units employed 58.3% of all employees. The dominant activity among service units in terms of value added constituted trading activities, the share of which was 28.0% of the value added generated by all entities dealing with service activities (increase of 0.2 percentage points in comparison with 2015). The share of the second activity, in terms of value added - transport and storage (according to PKD section H) ran at the level of 10.9% (increase of 0.8 percentage points), while the share of professional, scientific and technical activities (according to PKD section M) amounted to 9.0% (decrease by 0.2 percentage points). In comparison with 2015 (0.3 percentage points each) the share of activities related to information and communication (according to PKD section J) and with human health and social care decreased to the largest extent (according to PKD section Q).



See Methodical Notes, p. 7

At the end of 2016, the most people (26.0% of all working persons in service entities) were employed in enterprises classified as "Trade; repair of motor vehicles" (according to PKD section G). Second place, owing to the number of working persons, accounted for educational activities (according to PKD section P) – 13.0% and subsequent of the section "Public administration and defence; compulsory social security" (according to PKD section O) – 11.0%.

Structure of employed persons in services by NACE sections in 2016



See Methodical Notes, p. 7

In 2016, the dominant activity among service units, in terms of average employment, was also trading activity which employed 1 653.8 thous. persons (growth of 3.6%, in comparison with 2015). The second position was occupied educational activities (according to PKD section P) with average employment of 1 056.3 thous. persons (growth of 0.9% in comparison with 2015). The highest percentage growth of average employment among service activities was recorded in section N "Administration and support service activities" – by 8.3%, while drop was recorded only in financial and insurance activities (according to PKD section K) – of 1.7%. The lowest average employment at the level of 122.6 thous. persons was recorded in section R "Arts, entertainment and recreation", in spite of a growth of 1.4%, in comparison with 2015.

In 2016, the highest average gross wages were recorded in the section "Information and communication" (according to PKD section J) – PLN 7 061 "Financial and insurance activities" (according to PKD section K) – PLN 6 741 and "Public administration and defence; compulsory social security" (according to PKD section O) – PLN 5 050. The lowest average gross wages at the level of PLN 2 594 were recorded in entities classified as section I "Accommodation and food service activities". In section G "Trade and repair of motor vehicles", the average gross wages amounted to PLN 3 429 and increased by 4.6%, in comparison with 2015. The largest percentage increase in the average monthly wages in 2016, of 5.6%, in comparison with 2015, was recorded in section J "Information and communication" with simultaneous growth in the average employment of 5.6%, accordingly. A significant growth in the average monthly wages of 5.5% was recorded also in section O "Public administration and defence; compulsory social security" and of 5.4% in section I "Accommodation and food service activities".

In 2016, value added being the result of service enterprise activities was the predominant part of value added generated in EU member countries. Among EU member countries, the highest share of value added generated by services was recorded in Luxembourg – 87.4%, Cyprus – 86.7% and Malta – 83.9%. A significant share of services in value added of the whole economy was recorded in Greece (80.2%), UK (80.2%), France (78.8%) and Netherlands (78.2%). In Central and Eastern European countries this share was shaped at the level of 59.9% in the Czech Republic to 74.9% in Latvia, in Poland it constituted 64.2%.

With regard to 2010, the most significant increase of share of service activities in creation of value added was demonstrated by Romania (of 10.9 percentage points), Cyprus (of 5.8 percentage points) and Malta (of 5.7 percentage points). In Poland was recorded small increase (of 0.3 percentage points). The highest decrease in the share of services was recorded in Ireland (of 13.2 percentage points) and Slovenia (of 1.9 percentage points) and the Czech Republic (of 1.6 percentage points).

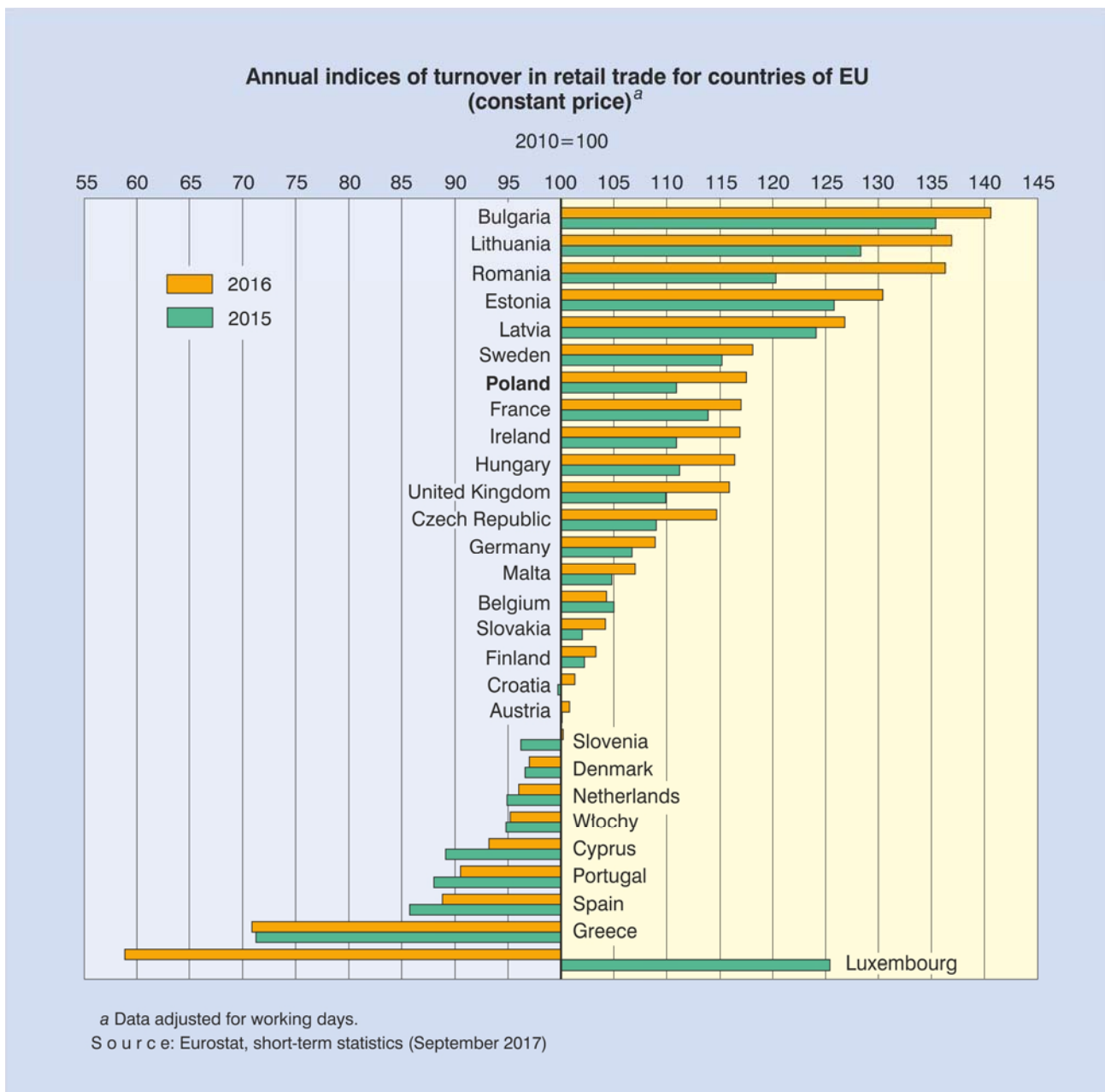
The share of gross value added* generated by services in the gross value added generated by the national economy (current prices) – NACE Rev. 2

Countries	Years	Share in %	Countries	Years	Share in %
Austria	2010	69,9	Lithuania.....	2010	67,6
	2016	70,7		2016	68,0
Belgium	2010	76,0	Luxembourg	2010	87,0
	2016	77,0		2016	87,4
Bulgaria	2010	67,8	Latvia.....	2010	71,7
	2016	67,6		2016	74,9
Croatia	2010	68,1	Malta.....	2010	78,2
	2016	69,4		2016	83,9
Cyprus	2010	80,9	Germany	2010	69,1
	2016	86,7		2016	68,9
Czech Republic.....	2010	61,5	Poland.....	2010	63,9
	2016	59,9		2016	64,2
Denmark.....	2010	75,8	Portugal	2010	75,2
	2016	75,3		2016	75,3
Estonia.....	2010	68,8	Romania.....	2010	52,4
	2016	70,5		2016	63,3
Finland.....	2010	67,3	Slovakia	2010	62,0
	2016	70,2		2016	61,4
France	2010	78,6	Slovenia	2010	67,4
	2016	78,8		2016	65,5
Greece.....	2010	81,1	Sweden	2010	69,4
	2016	80,2		2016	72,7
Spain.....	2010	71,4	Hungary	2010	66,4
	2016	74,1		2016	65,1
Netherlands.....	2010	76,0	United Kingdom	2010	79,2
	2016	78,2		2016	80,2
Ireland.....	2010	72,9	Italy.....	2010	73,8
	2016	59,7		2016	73,7

*Source: Eurostat 07.09.2017; according to ESA 2010.

In 2016, turnover in retail trade of EU countries was by 6.6% higher in comparison with the base year (2010 = 100). The highest growth was recorded in Bulgaria (of 40.6%), Lithuania (of 36.9%) and Romania (of 36.3%). In Poland the value of turnover increased by 17.7%. From among countries with the highest significance for the European economy, growth in turnover was recorded in France (of 17%), United Kingdom (of 15.9%) and Germany (of 8.9%). In 2016, very low dynamic was recorded in Luxembourg, which was associated with change in classification of business activities as non-trade in the case of two key units. Significant drop in turnover was recorded also in Greece (of 29.2%), Spain (of 11.2%) and Portugal (of 9.5%).

In comparison with 2015, in 2016 turnover in most countries was by 6.6% higher, except for Luxembourg (organizational changes), Belgium and Greece.



2. Internal trade

According to preliminary data, in 2016 the share of trade in creation of gross domestic product amounted to 15.9% and in gross value added it constituted 18.0%.

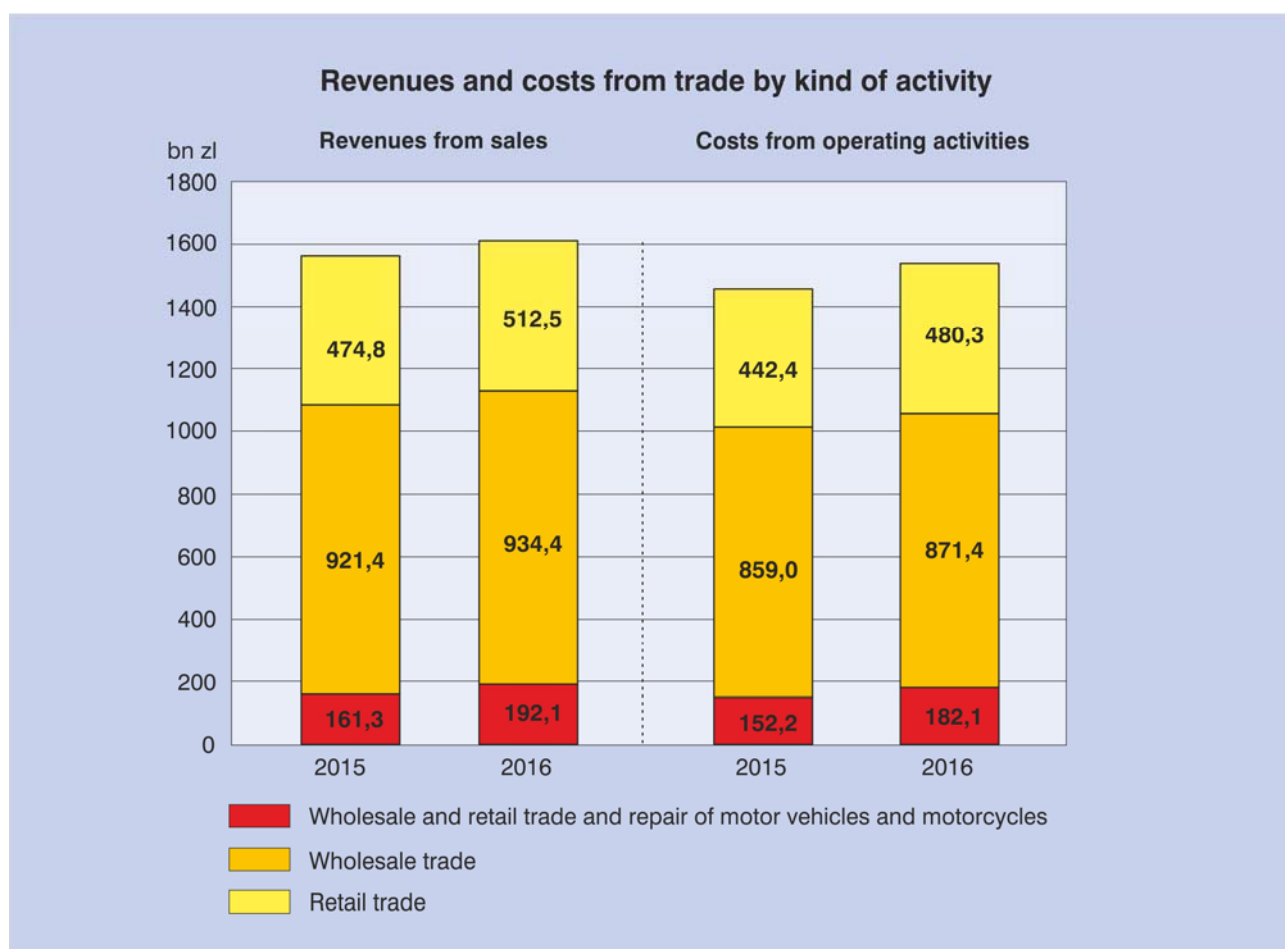
Specification	2014	2015	2016*
Share of trade in creation GDP (%).....	15,8	15,7	15,9
Share of trade in gross value added (%)	17,8	17,6	18,0

* Provisional data

In 2016, value of revenues from sales at current prices achieved by trade enterprises was shaped at the level of PLN 1639.0 bn (i.e. by 5.2% higher in comparison with 2015). The largest part of these revenues was completed by enterprises dealing with wholesale activities - 57.0%. The share of retail trade amounted to 31.3%, whereas wholesale and retail trade and repair of motor vehicles and motorcycles amounted to 11.7%. Enterprises employing more than 49 persons reached revenues at the level of PLN 788.2 bn, namely 48.1% of total revenues, enterprises employing from 10 to 49 persons reached revenues in the amount of PLN 417.8 bn (accordingly 25.5% of total revenues) and revenues of enterprises employing 9 and less persons amounted to PLN 433.0 bn, which is 26.4% of total revenues. Revenues from sale of goods and materials constituted 91.2% of total revenues from operating activities of trade enterprises.

The costs of operating activities incurred by entities employing more than 49 persons amounted to PLN 736.0 bn and constituted 48.0% of total operating costs reported by trade units, whereas enterprises employing from 10 to 49 persons incurred costs in the amount of PLN 395.5 bn and entities employing 9 and less persons incurred PLN 402.3 bn. Significant share in costs constituted employment costs (5.5%). The largest share of employment costs in the costs of operating activities was recorded in enterprises employing more than 49 persons (6.3%).

Average margin realized in 2016 by commercial unit (classified to section "Trade, repair of motor vehicles") amounted to 16.2% and was shaped at the same level as in 2015. The highest margins expressed in percentage were recorded by enterprises dealing with retail trade.



Flow of trade goods

An important element allowing the evaluation of distribution channels and circulation of goods is the analysis of revenue structure according to the types of customers as well as division of purchases executed in wholesale enterprises according to the type of suppliers (boards no. 18 and 19). Both behaviour of wholesale and retail enterprises in the selection of its suppliers and structure of their customers remain at the stable level. In commercial - wholesale and retail enterprises, the share of purchases directly from manufacturers and domestic producers and directly from imports remain at the similar level, in comparison with the previous period. Trading enterprises² performed ca. 51% of purchases directly from domestic producers and manufacturers, direct imports constituted slightly more than 25% and wholesale purchases were shaped at the level of 23%. Depending on the type of conducted commercial activities (wholesale or retail trade) the structure of purchases was more diverse.

Regarding wholesale trade, slightly more than 49% of enterprises purchased from domestic producers and manufacturers, while almost 29% directly from imports. The share of purchases

² Data concern enterprises employing more than 9 persons.

wholesaler – wholesaler recorded a slight decrease (of 1 percentage points) and amounted to slightly more than 21%.

In retail trade, purchases of goods were made mainly directly from domestic producers and manufacturers (slightly more than 57%), less frequently from wholesalers (less than 27%) and the share of purchases directly from imports amounted to 15%.

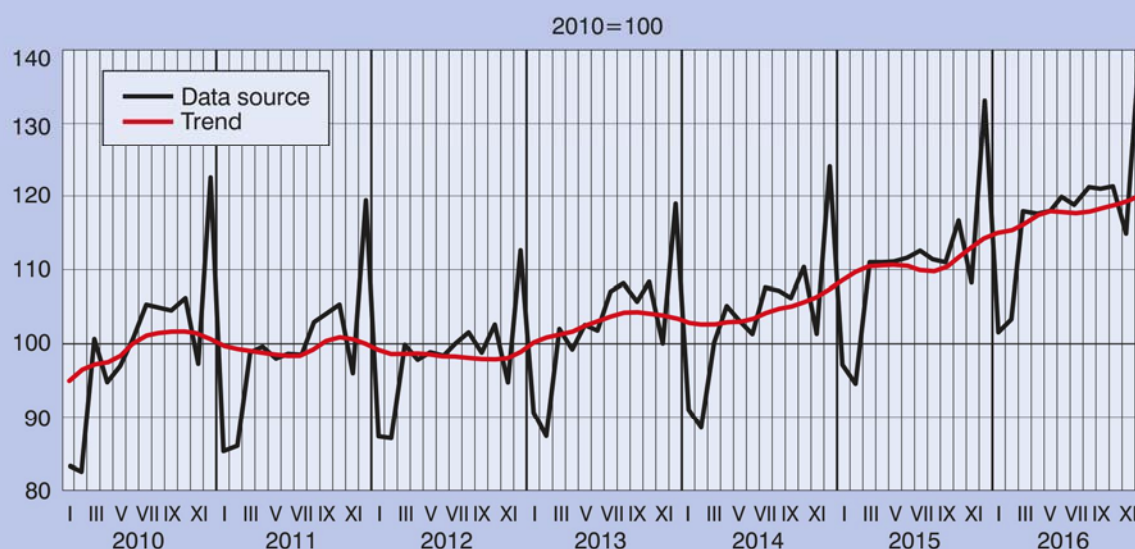
Foreign ownership enterprises most often purchased directly from domestic producers and manufacturers (approx. 45% in total value), directly from imports (42%) and less frequently from wholesalers (12%).

Within the structure of revenues from sales of wholesale enterprises approx. 42% of revenues came from the sales for wholesale, 29% of revenues was obtained from retail enterprises and approx. 19% from domestic producers. Slightly more than 6% were direct inflows from individual consumers.

Turnover of trade enterprises

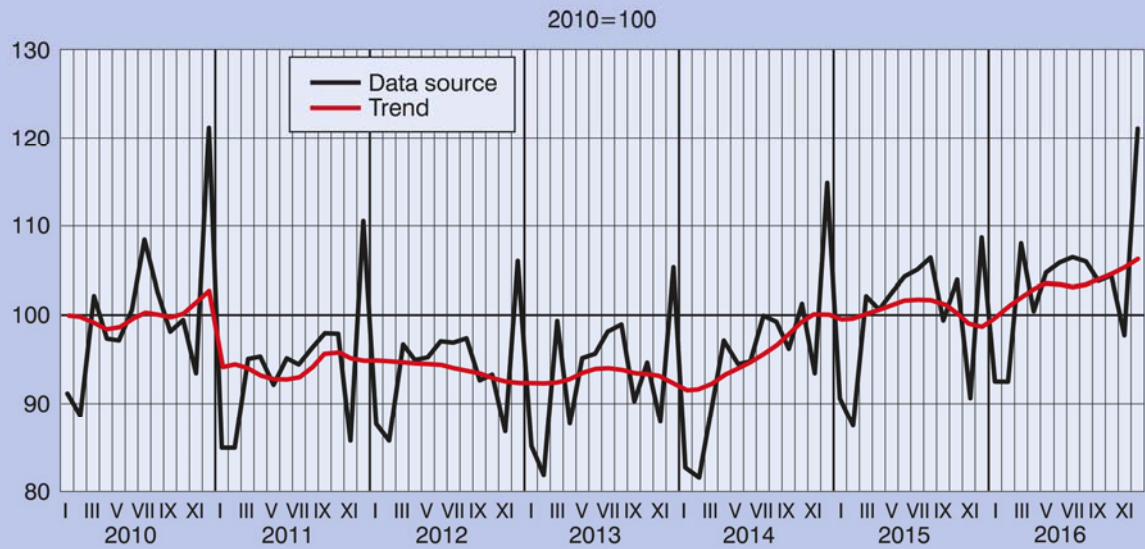
In 2016, turnover in retail trade (at constant prices) was by 6.3% higher in comparison with 2015. Growth in turnover was recorded both, in enterprises selling non-food goods (of 7.5%) and in enterprises selling food, beverages and tobacco products (of 3.5%). High growth in turnover, in the following year, was recorded in enterprises engaged in wholesale and in retail trade of motor vehicles (of 20.2%). Turnover of enterprises engaged in retail sales of fuels increased by 7.6%.

Deflated turnover of retail sale enterprises^a



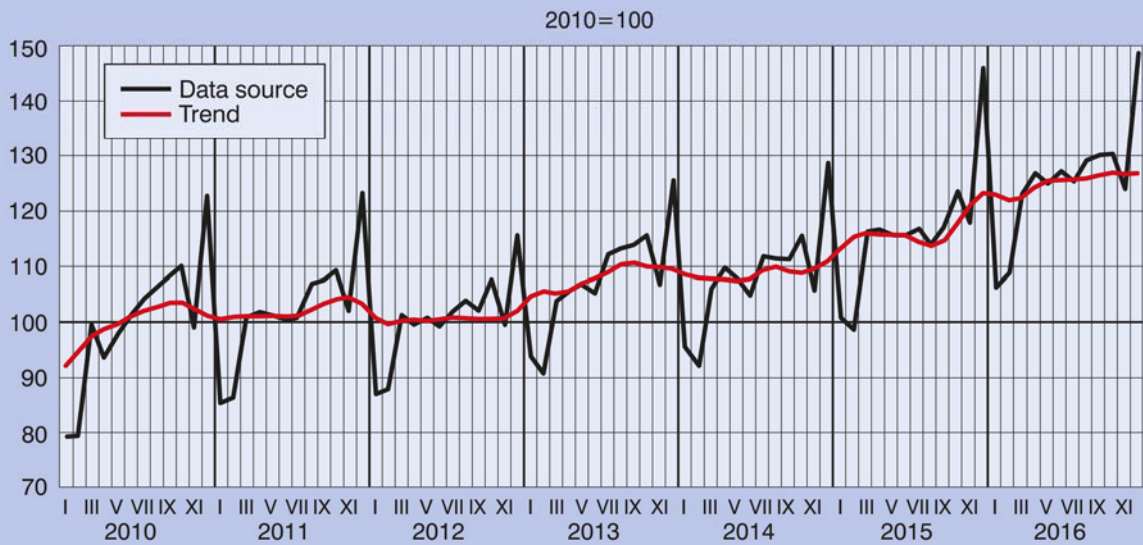
^a Enterprises classified according to NACE Rev.2 in the division 47.

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.

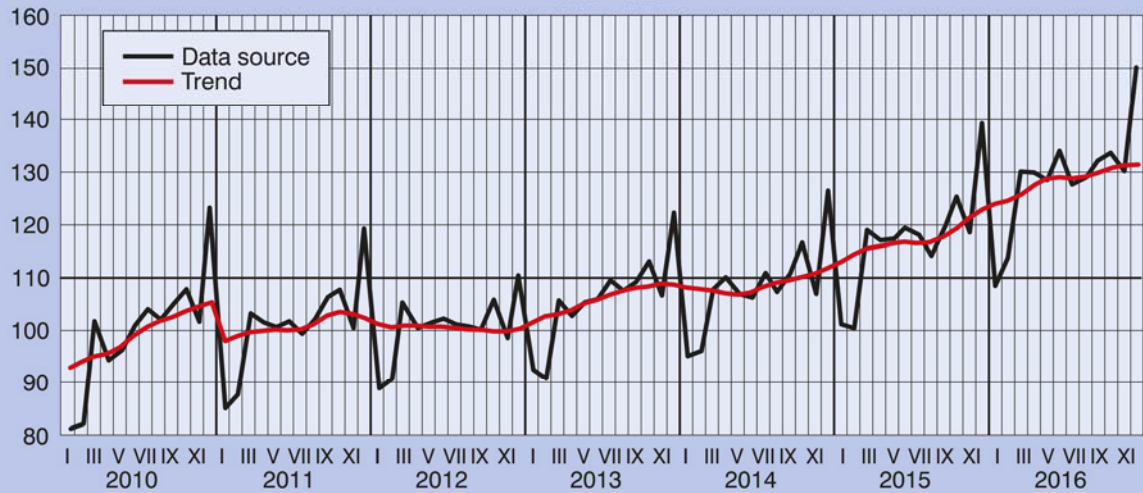
Deflated turnover of enterprises selling non-food goods^a



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

2010=100

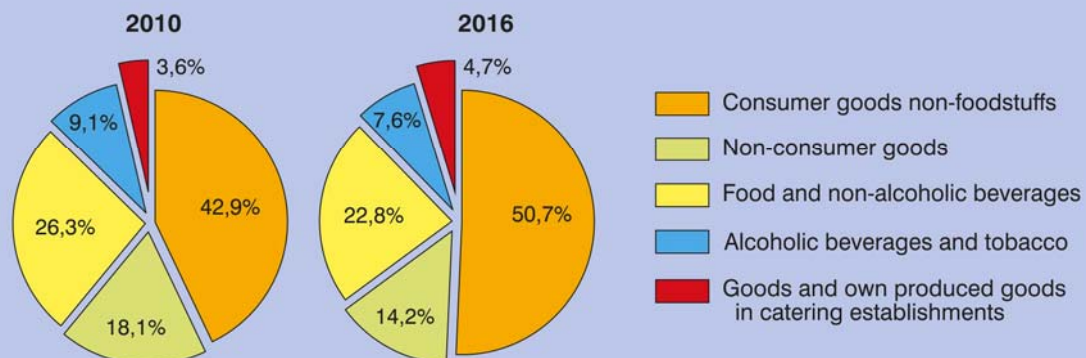


a 45 Division – Wholesale and retail trade repair of motor vehicles and motorcykles.
47 Division – Retail trade, except of vehicles and motorcykles.

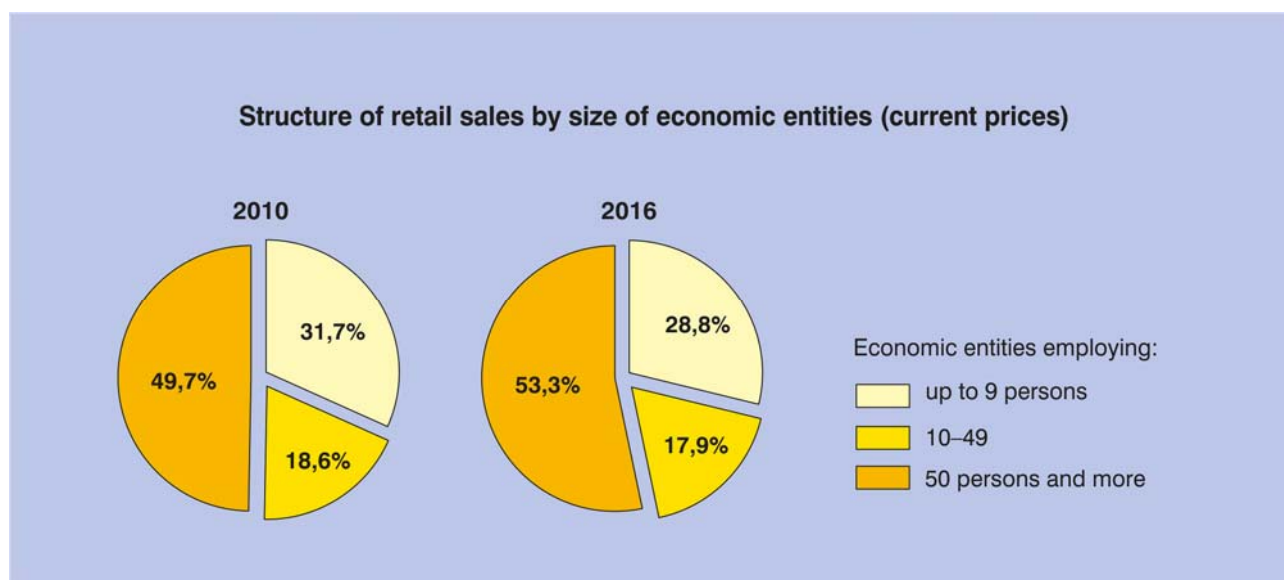
Retail sales

In 2016, retail sales at current prices completed, by trade and non-trade enterprises, amounted to PLN 755.0 bn and were by 4.6% higher than in 2015. In retail sales outlets, the value of the sold goods amounted to PLN 719.8 bn (growth of 4.2%) of which value of food and non-alcoholic beverages - PLN 172.3 bn (growth of 4.3%), alcoholic beverages and tobacco products - PLN 57.5 bn (growth of 5.0%) and non-foodstuff goods – PLN 490.1 bn (growth of 4.0%). Retail sales in catering establishments amounted to PLN 35.1 bn (growth of 13.6%).

Structure of retail sales (current prices)



The share of retail sales completed in 2016 by economic entities employing 50 and more persons was 53.3%, while by entities employing up to 9 persons - 28.8%, and by enterprises employing from 10 to 49 persons - 17.9%.



Sales in trade enterprises (at current prices) amounted 87.4% of total value of retail sales and their share was by 0.4 percentage point higher than in 2015. The remaining sales performed by enterprises, whose basic activity was not trade, but e.g. production or catering.

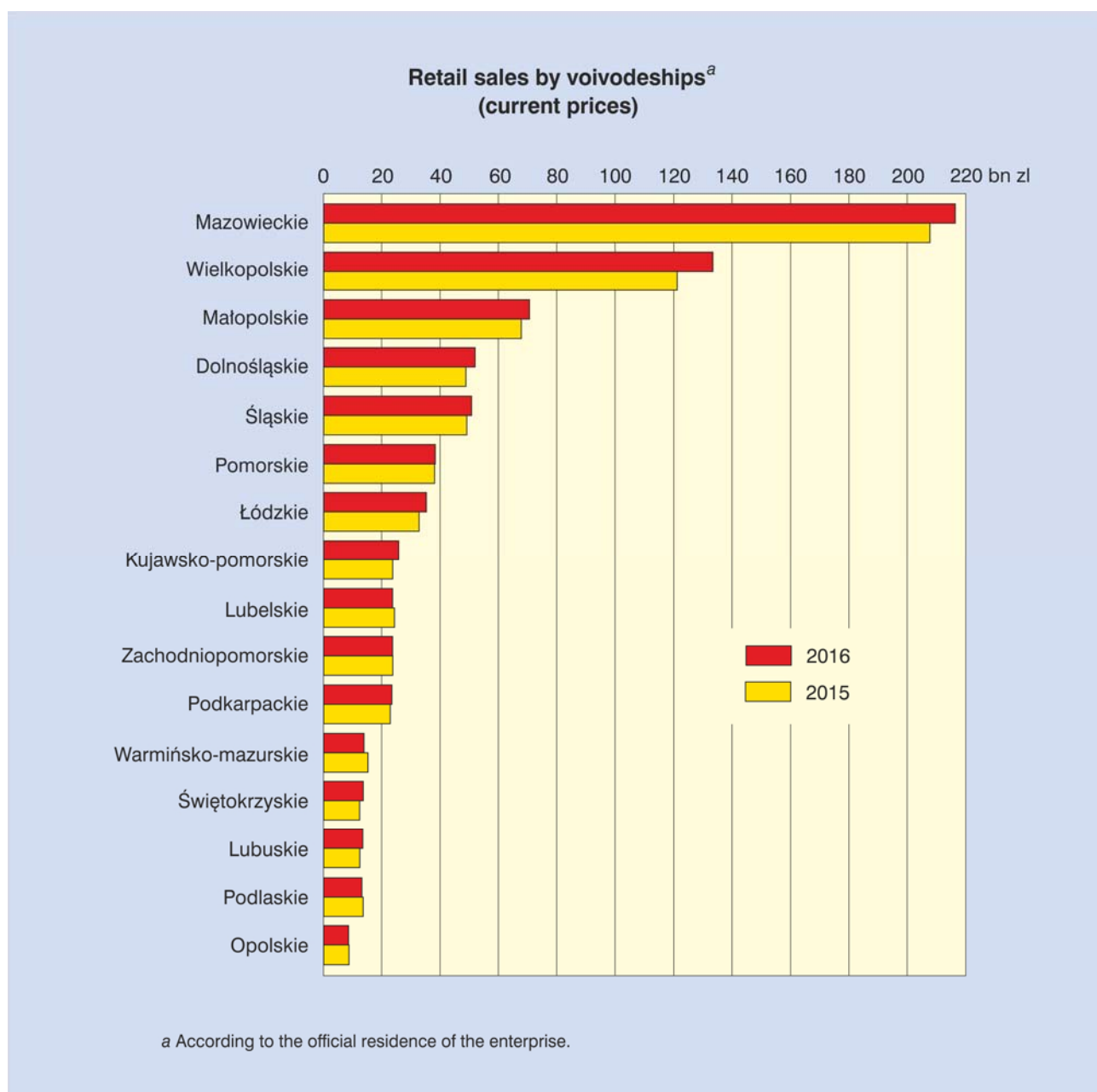
Retail sales in 2014 – 2016 (current prices)

Specification	2014	2015	2016
a – absolute numbers b – corresponding period of the previous year =100			
	PLN mln		
Total..... a	704841,5	721998,5	754964,4
b	102,8	102,4	104,6
of which trade enterprises..... a	609103,4	628419,2	659915,1
b	102,5	103,2	105,0

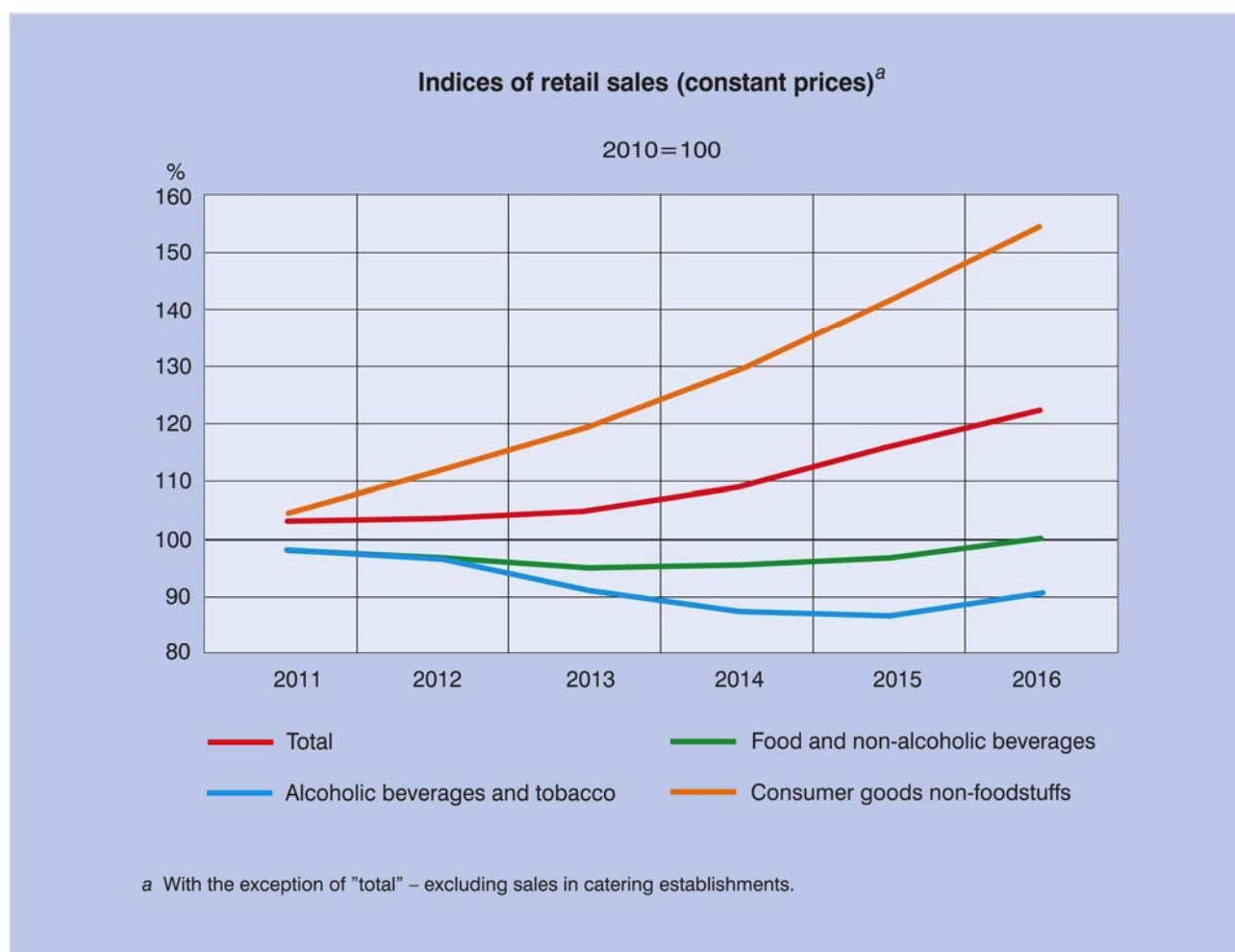
Retail sales by groups of goods (current prices)

Specification	2014	2015	2016	
	PLN mln			2015=100
Total	704841,5	721998,5	754964,4	104,6
food and non-alcoholic beverages	189242,8	191697,7	202530,8	105,7
alcoholic beverages and tobacco	58646,7	58939,1	62072,1	105,3
non-foodstuffs (excluding tobacco).....	456951,9	471361,6	490361,5	104,0

In 2016, retail sales at current prices were higher in the majority of Voivodeships in comparison with 2015. In Mazowieckie Voivodeship whose share in sales in total remained dominant and amounted to 28.7%, sales increased by 4.2%. The second Voivodeship with significant share in sales in total (17.7%) was similarly, as the year before, Wielkopolskie Voivodeship and enterprises having registered office within its area, recorded growth in sales by 10.1%. In addition, in 2016 growth in sales, as compared with 2015 was observed in: Małopolskie, Dolnośląskie, Śląskie, Pomorskie, Łódzkie, Kujawsko-Pomorskie, Podkarpackie, Świętokrzyskie and Lubuskie Voivodeships. In remaining Voivodeships sales recorded decrease and the largest was observed in the Warmińsko-Mazurskie Voivodeship (by 9.1%).

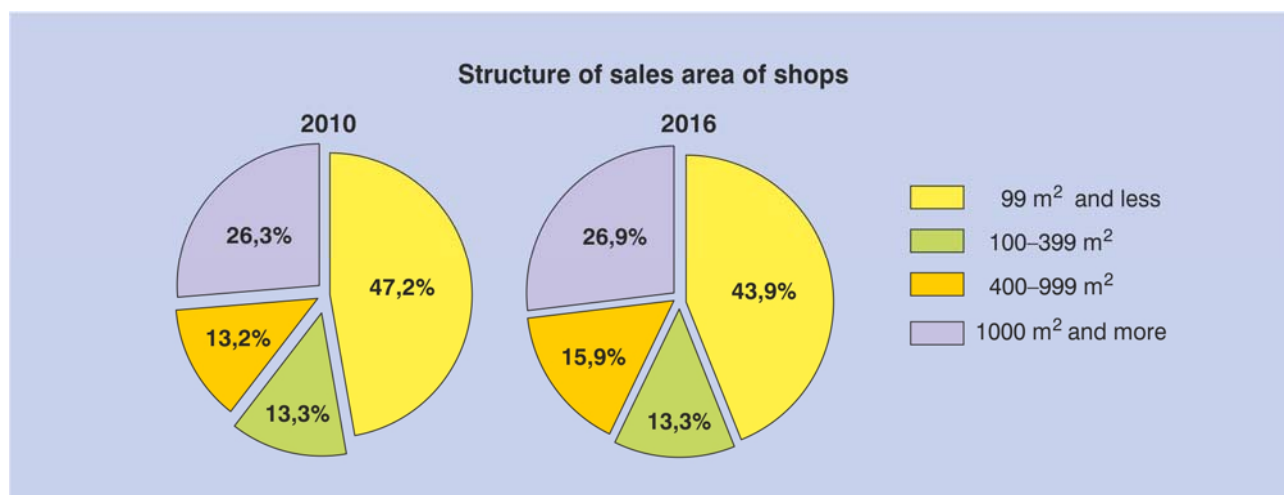


In 2016, retail sales at constant prices completed by trade and non-trade enterprises were by 6.2% higher than in the previous year (against a growth of 5.4% in 2015). The highest growth was recorded in the sale of consumer goods non-foodstuffs (of 9.1%). Sales of alcoholic beverages and tobacco products also recorded a growth (of 4.2%). Retail sales of goods and own products in catering establishments were by 12.1% higher than in 2015.



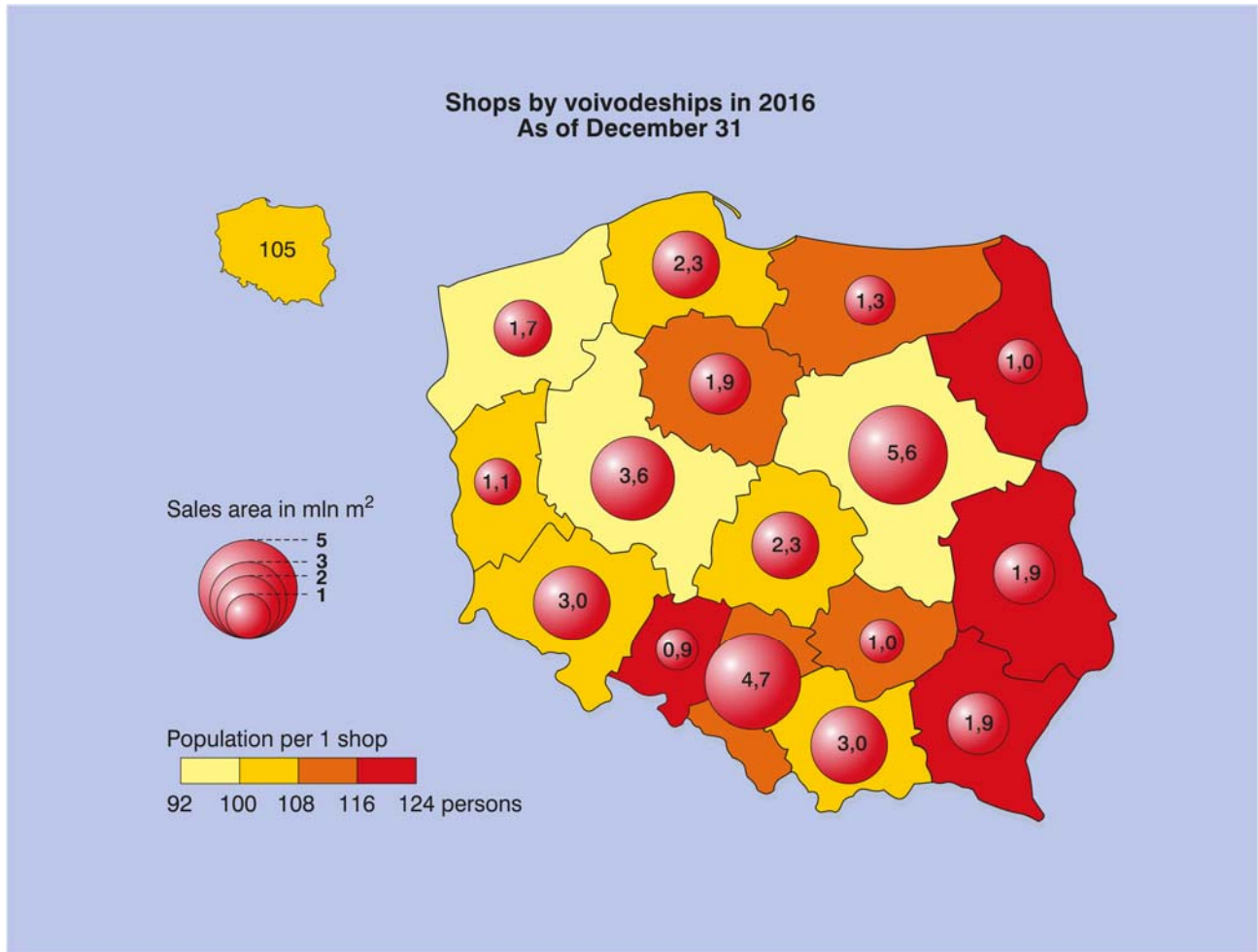
Trade infrastructure

At the end of 2016, estimated number of shops in Poland amounted to slightly more than 367 thous. and was by 1.7% higher than in 2015. The sales area of shops also increased (growth of 2.5%) and constituted approx. 37 094 thous. m². Stable growth of sales area was recorded in all presented area compartments. The largest percentage growth of sales area occurred in shops ranging from 400-999 m² (of 3.0%), slightly smaller in shops of total area of 99 m² and less (of 2.8%) and in shops of total area of 100-399 m² (of 2.7%). The lowest growth in sales area was recorded in the largest shops (of 1.6%).



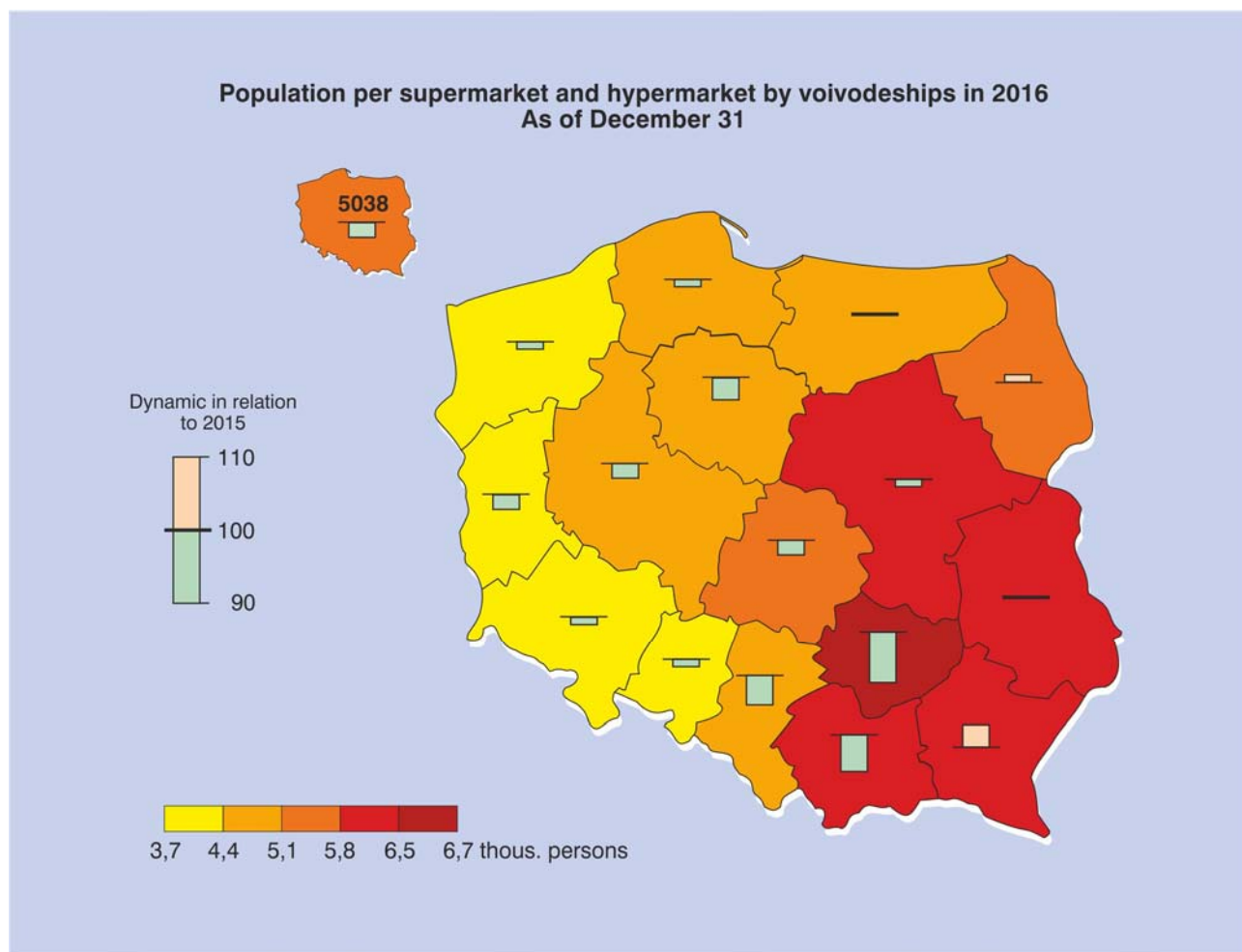
In the regional system, the highest percentage increase of sales area in the range of 400-999 m² occurred in shops located in: Wielkopolskie (of 6.8%) and Małopolskie (of 6.2%) Voivodeships.

In 2016, there were 105 persons per one shop on average, whereas in 2015 accordingly 107 persons.



In 2016, a slight increase was recorded in the number of supermarkets and hypermarkets in comparison with 2015 (by approx. 2%); per one shop of these category fell on average 5038 persons, whereas in 2015 there were accordingly 5130 persons. In the regional system, the most population falling per 1 supermarket and hypermarket was recorded in Świętokrzyskie (6629 persons against 7103 persons in 2015) Voivodeship, while the least persons – accordingly 3700 – in Lubuskie Voivodeship, where in 2015 there were 3785 persons.

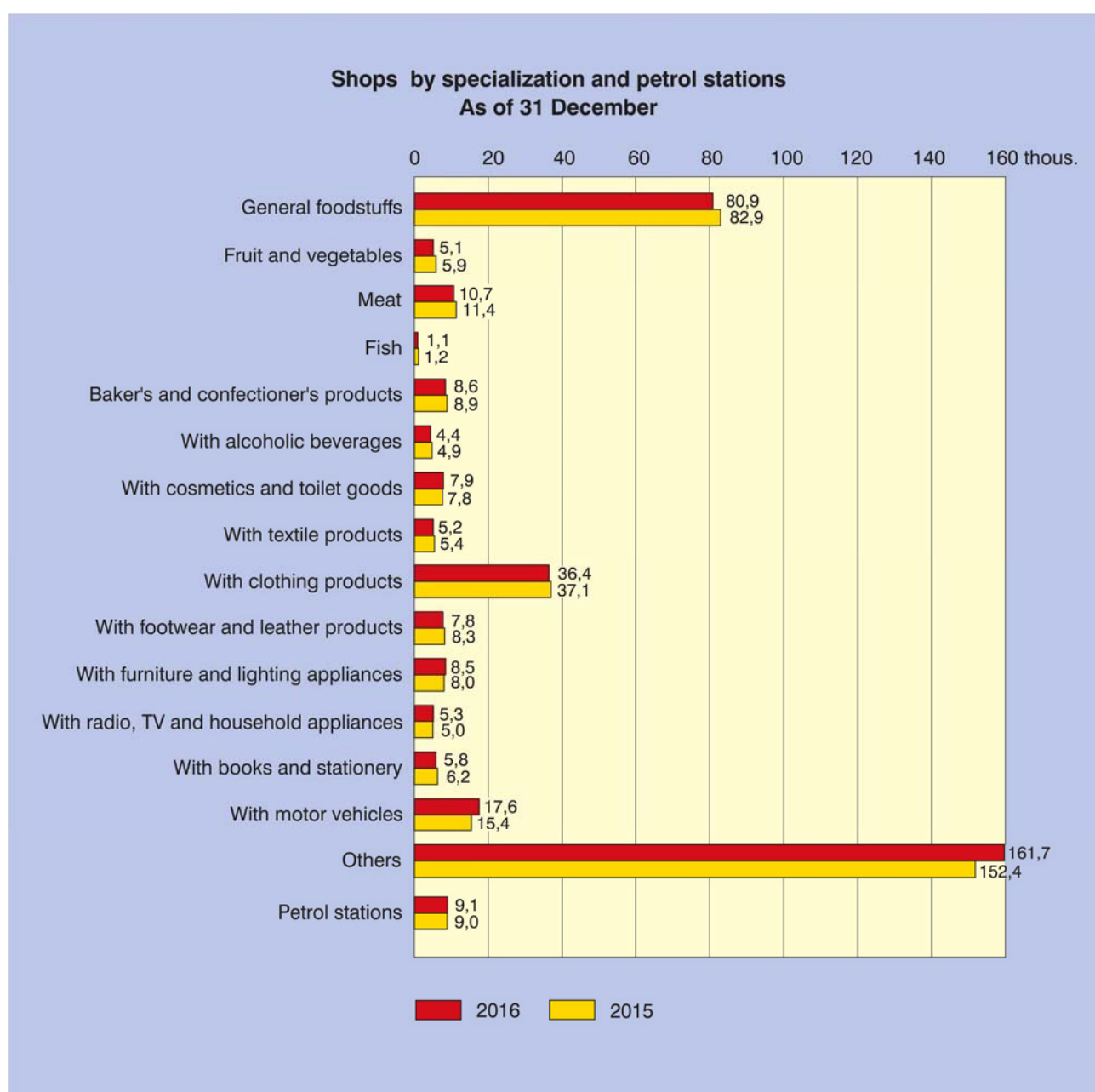
In 2016, estimated share of sales value performed together by supermarkets and hypermarkets in retail sales in shops and petrol stations was 25.0% and was by 0.4 percentage point higher than in 2015.



Estimated 367 thous. number of shops in 2016 was run by nearly 297 thous. enterprises. The largest group of entities conducting shops constituted enterprises running up to 2 shops, in 2016 their share was as much as 97.9% and remained unchanged to 2015. With regard to other presented divisions of entities according to number of owned shops, the greatest increase was recorded in the group of enterprises running more than 200 shops (by 15.6% against a growth of 3.2% recorded in 2015) and in the range of 101-200 shops (by 4.3% against a growth of 9.3% in 2015). The number of enterprises conducting 21-50 shops decreased (drop by 4.0% against a growth of 2.5% recorded in 2015).

From among the total number of 367 thous., the greatest share was constituted by other specialised shops (44.1%), general food shops (22.0%) and clothing stores (9.9%). The least numerous were shops with fishing specialization which constituted 0.3% of shops in total.

The largest growth, in comparison with 2015, was recorded in the number of stores with the following specialization: motor vehicles (of 14.0%), remaining (of 6.2%), furniture and lighting appliances (of 5.9%), radio-television and household appliances (of 4.8%). The greatest drop was recorded in stores selling fruits and vegetables (of 13.2%).



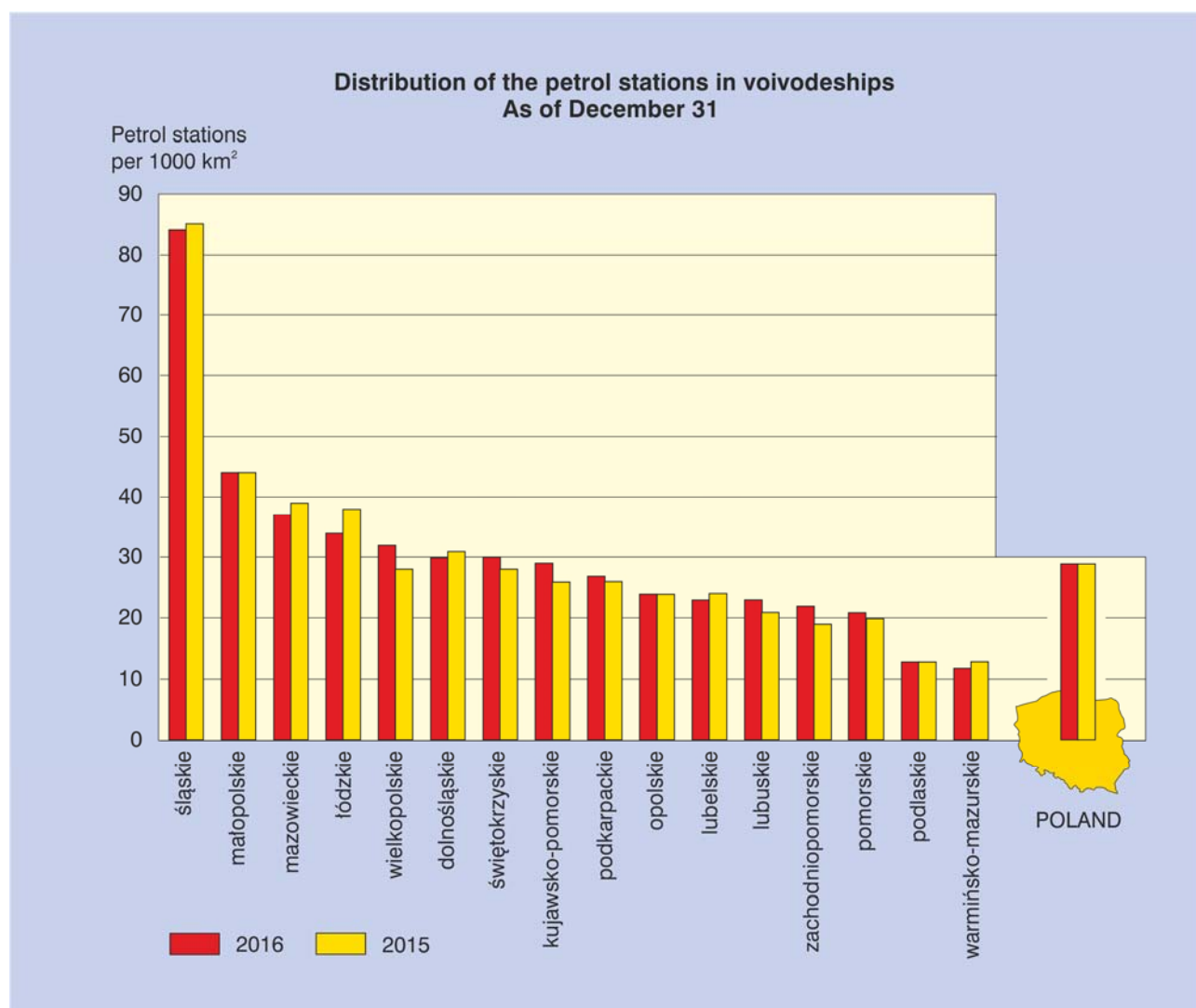
In the group of enterprises employing more than 9 persons, number of stores being part of foreign capital establishments was by 1.9% higher in 2016 in comparison with 2015 and sales area of these stores increased only by 0.1%. Average sales area of foreign enterprises amounted to 644.5 m² (accordingly in stores of private national property enterprises – 183.5 m²). The share of sales area of shops with foreign capital in total area decreased by 0.7 percentage points in comparison with 2015.

Number of shops owned by enterprises with foreign capital ^a

Specification	2015	2016
Number of shops.....	15821	16116
Share in total shops (%).....	4,4	4,4
Sales area (thous. m ²)	10377,1	10386,8
Share in total sales area (%)	28,7	28,0

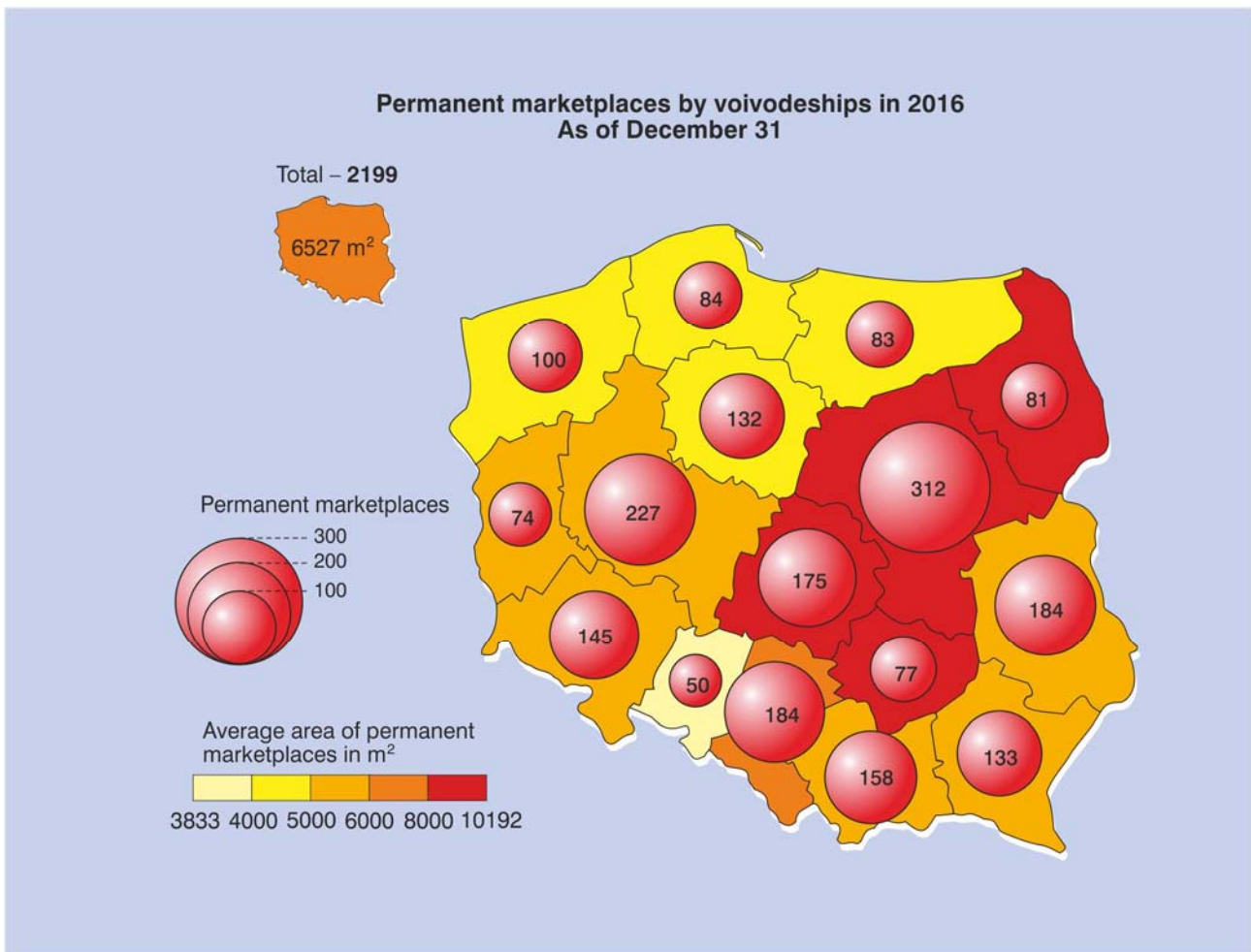
^a Data concerns entities employing more than 9 persons.

At the end of 2016, the estimated number of petrol stations amounted to 9099 and was by 1.2% higher than in 2015. In the regional system, the largest density of petrol stations was recorded in Śląskie Voivodeship - in 2016 it was 84 facilities per 1000 km² of the area. The lowest ratio was recorded in Warmińsko-Mazurskie Voivodeship, where it was 12 facilities, whereas average for Poland amounted to 29 petrol stations per 1000 km² of area.



In 2016, national register kept by communal local government units, registered 2199 permanent marketplaces (including 2112 with predominance of small-retail sales outlets). Number of permanent marketplaces dropped by 1% in comparison with 2015. The largest number of new marketplaces was recorded in Małopolskie Voivodeship (growth of 2%). General area of permanent marketplaces dropped nearly by 2% in comparison with 2015. In the area of: Mazowieckie, Łódzkie and Śląskie Voivodeships, recorded the largest area of permanent marketplaces.

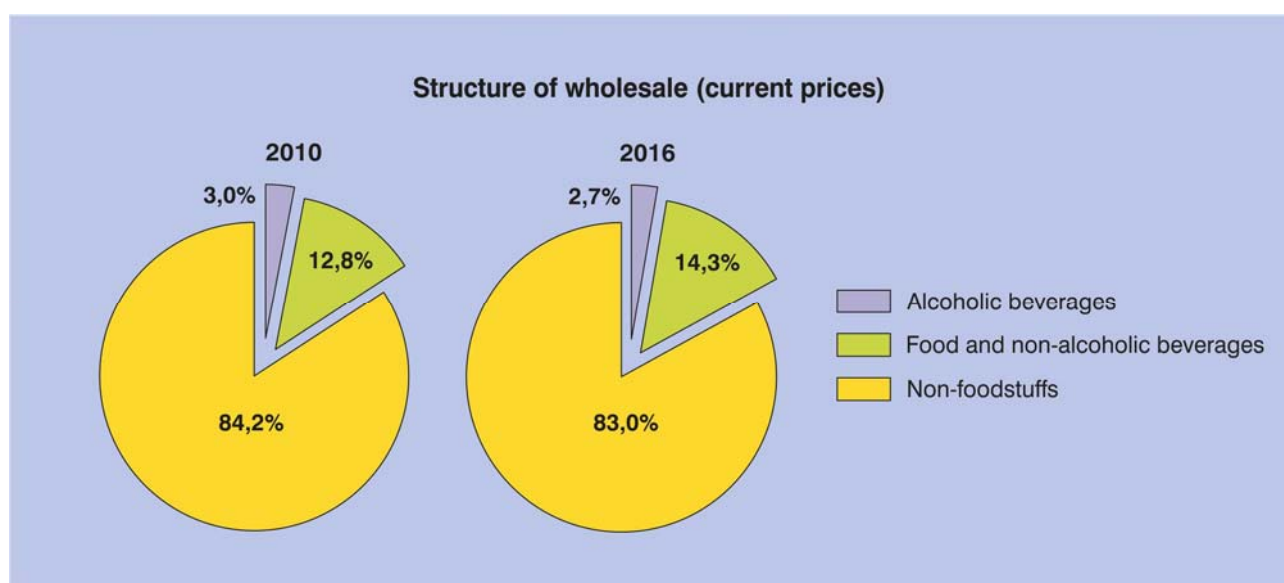
In the area of permanent marketplaces transactions were executed in approx. 96.5 thous. permanent points of small-retail sales, among which 56.3 thous. operated every day. A supplement to permanent marketplace network were seasonal markets which in 2016 constituted 6938 and was increase by 2.5% in comparison with 2015. Annual trade fee were by 7.5% lower in comparison with 2015.



Wholesale

It is estimated that the value of wholesale in 2016 in trade enterprises (at current prices) amounted to PLN 1 136.4 bn and was by 6.3% higher than in 2015. Increase in the value of wholesale was recorded in all of its groups. In the structure of sales, the share of food and non-alcoholic beverages increased – of 0.6 percentage points, while the share of non-food goods decreased (by 0.5 percentage points) and that of alcoholic beverages (by 0.1 percentage points).

Wholesale executed by enterprises employing 50 and more persons constituted 46.5% and remained at the same level in comparison with 2015.



Wholesale in 2014 – 2016 (current prices)

Specification	2014	2015	2016
a – absolute numbers			
b – corresponding period of previous year=100	PLN mln		
Total a	1018250,2	1068831,0	1136354,5
b	100,8	105,0	106,3
of which enterprises employing			
50 persons and more	479952,3	496679,4	528176,1
b	100,7	103,5	106,3

Wholesale by group of goods (current prices)

Specification	2014	2015	2016	
	PLN mln			2015=100
Total.....	1018250,2	1068831,0	1136354,5	106,3
food and non-alcoholic beverages	136898,5	146636,7	162697,5	111,0
alcoholic beverages.....	24550,9	29439,8	30927,7	105,1
non-foodstuff goods.....	856800,8	892754,5	942729,3	105,6

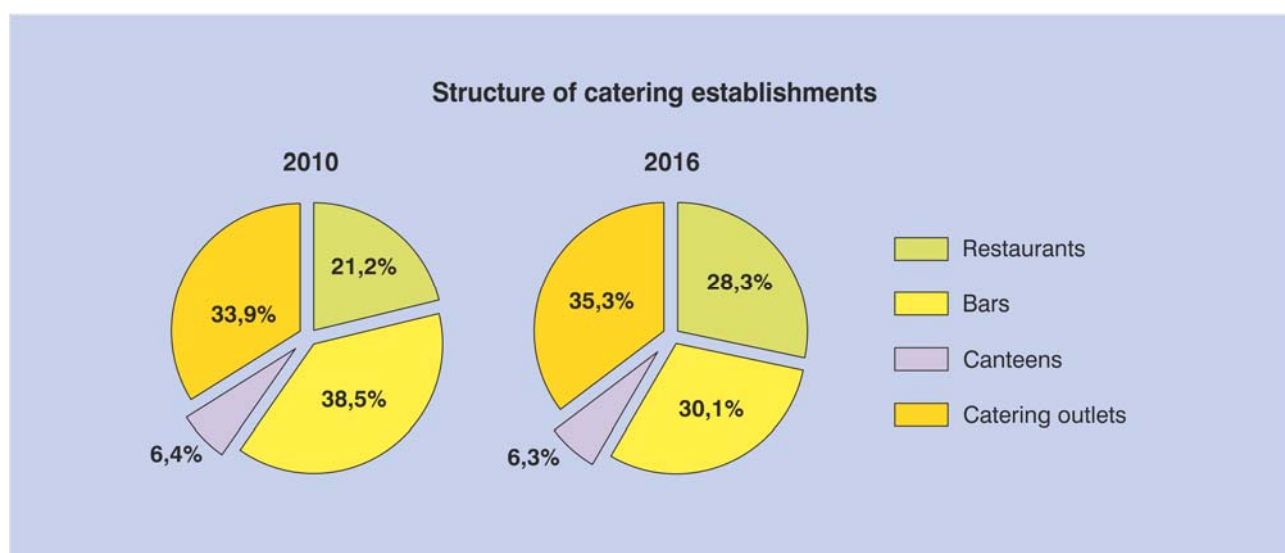
Food services

In 2016 the number of catering establishments (permanent and seasonal) in the country was estimated at the level of 69.4 thous, of which 35.3% were catering outlets, 30.1% - bars, 28.3% - restaurants, and canteens – 6.3%. Total number of catering establishments increased by 1.6% in comparison with 2015. The growth was recorded for all types of establishments except from bars, the number of which dropped by 6.1%.

Private sector in gastronomy included 98.7% of all catering units, (an increase of 0.4 percentage points in the relation to the previous year) containing: 99.4% of restaurants, 99.3% of catering units, 99.1% of bars and 89.9% of canteens.

Catering establishments

Specification	2014	2015	2016	
	number			2015=100
Total	66345	68342	69414	101,6
restaurants	17414	18789	19648	104,6
bars.....	23514	22290	20926	93,9
canteens	3924	4183	4356	104,1
catering outlets	21493	223080	24484	106,1



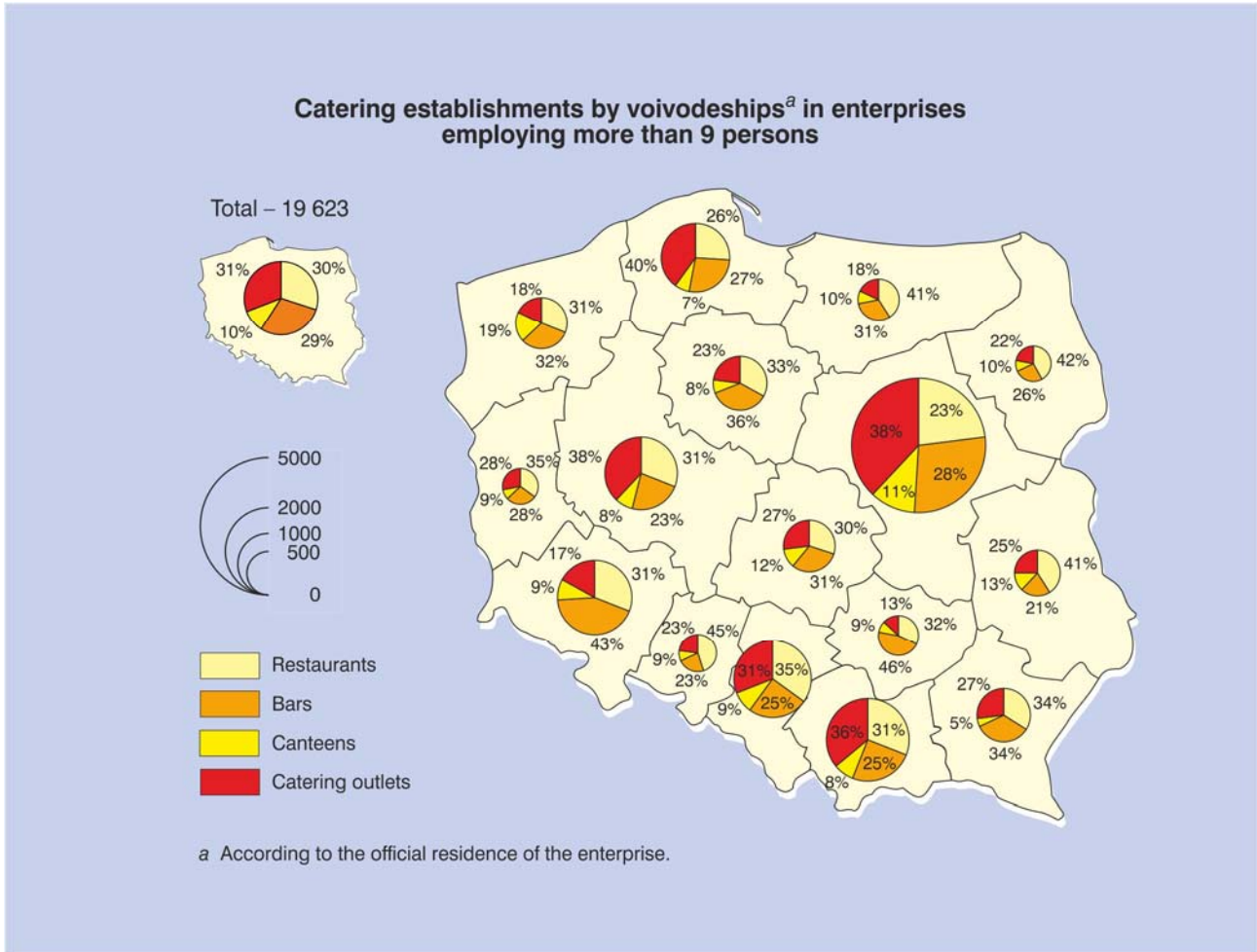
In 2016, the total revenues from catering activities (at current prices) amounted to almost PLN 35.7 bn and increased by 13.6% in comparison with 2015 (at constant prices increased by 12.2%). Private sector generated 98.6% of this value, while public sector - 1.4%.

Food service production generated 80.6% of the total value of revenues, 17.9% - from sales of trade commodities (including 12.8% - sales of alcoholic beverages and tobacco) and 1.5 % - from the other activity. All types of catering activities recorded growth in revenues as compared with 2015, the largest was observed with regard to the revenues from other activity (of 17.3%) and food service production (of 14.3%).

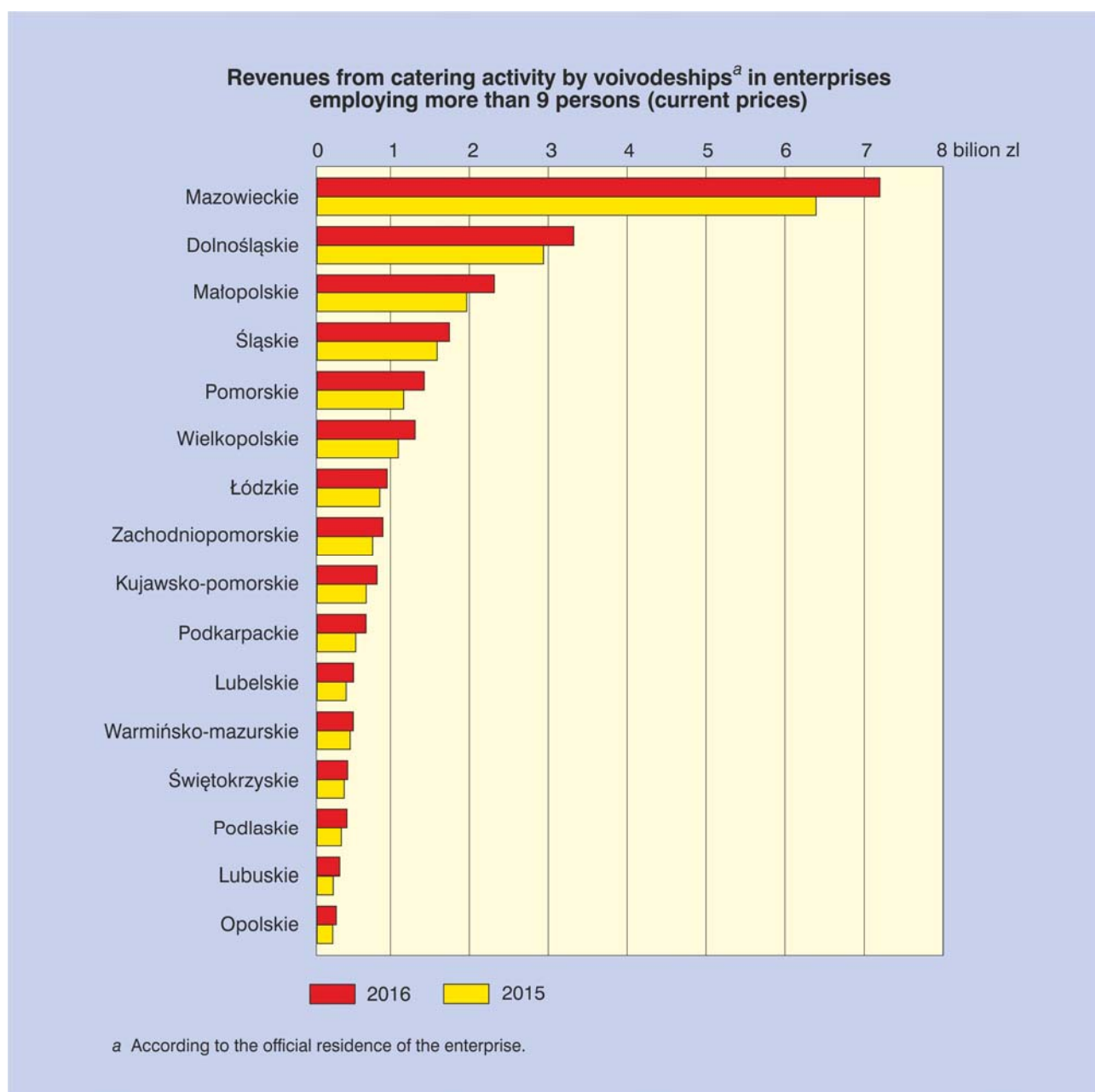
Revenues from food service activity (current prices)

Specification	2014	2015	2016	
	PLN mln			2015=100
Revenues total	28272,8	31387,1	35666,1	113,6
from sales of commodities	5711,0	5787,6	6387,2	110,4
of which from the sale of alcoholic beverages and tobacco.....	4118,6	4157,2	4576,9	110,1
from food service production.....	22067,9	25154,0	28756,4	114,3
from other activity	493,9	455,5	522,5	117,3

The number of catering establishments in enterprises employing more than 9 persons increased by 5.4% in comparison with 2015 and amounted to 19623, which was 28.3% of total catering units in Poland. The structure of catering establishments, by the official residence of the enterprise, in Voivodeship division is presented on the chart below.



In enterprises employing more than 9 persons, revenues from catering activities (at current prices) amounted to PLN 22.2 bn (growth of 15.7% in comparison with 2015), which was 62.2% of the total revenues from catering activities in Poland. Percentage increase in revenues was recorded in all Voivodeships and the largest was observed in Lubuskie, (by 36.4%) and Podkarpackie Voivodeship (by 26.3%), while the smallest growth was observed in Warmińsko-Mazurskie Voivodeship (of 9.4%) and Śląskie Voivodeship (of 9.8%).



Revenues from food service production constituted 84.5% of revenues from catering activities of enterprises employing more than 9 people and amounted to PLN 18.7 bn.

The second in terms of size, group of revenues from catering activities constituted revenues from sale of alcoholic beverages and tobacco products (8.6%) and amounted to PLN 1.9 bn.

The third group with the value of PLN 1.4 bn comprised revenues from sale of trade commodities and their share in revenues from catering activities of surveyed enterprises amounted to 6,1%.

Revenues from the other catering activity constituted only 0.9% of total revenues and amounted to PLN 0.2 bn.

Market supply

In 2016, in producers' warehouses³ average supply of surveyed articles were higher in comparison with 2015.

In the group of foodstuffs significantly greater were stocks of beef and veal meat; beer from malt; canned and preserved fish; cheese and curd; mineral waters and non-alcoholic beverages; poultry meat; groats and meal. Growth was recorded also in, e.g. hams and canned shoulder and other canned meat, as well as wine and honey wine.

Decrease was recorded, among others, in fruit jams; vodka, liqueurs and other alcoholic beverages; soups and broth and preparations; chocolate (including white); edible animal fats melted; variety meat products from poultry; milk and cream in a solid form as well as wheat and rye flour.

Among of non-foodstuffs was recorded significant growth in supply of dish washing machines; radio receivers (including sets); bicycles; passenger cars; automatic washing machines including machines which both wash and dry. Larger were also supplies, among others, of electric, gas and mixed cookers and cigarettes containing tobacco or mixtures of tobacco and tobacco substitutes.

Smaller than in 2015 were, among others stocks of carpets, mats and textile floor coverings; vacuum cleaners; tyres for passenger cars; TV receivers; tights and stockings; fabric and knitted outerwear and clothing.

In 2016 deliveries⁴ of the majority of surveyed foodstuffs and non-foodstuffs were higher in comparison with 2015. Growth of deliveries was related to the growth of production and imports, which took place as a result of better economic situation.

High level of deliveries of foodstuffs mainly concerned, among others, beef and veal meat; soups and broth and preparations; coffee; milk and cream in a solid form; poultry meat; mineral waters and non-alcoholic beverages; edible animal fats melted; cured meats; margarine and spreads (excluding liquid margarine); frozen sea fish as well as butter and dairy spreads.

Decrease in the level of deliveries of foodstuffs in comparison with 2015 occurred in the following groupings: chocolate products; fruit jams; wine and honey wine and candies (excluding chocolate).

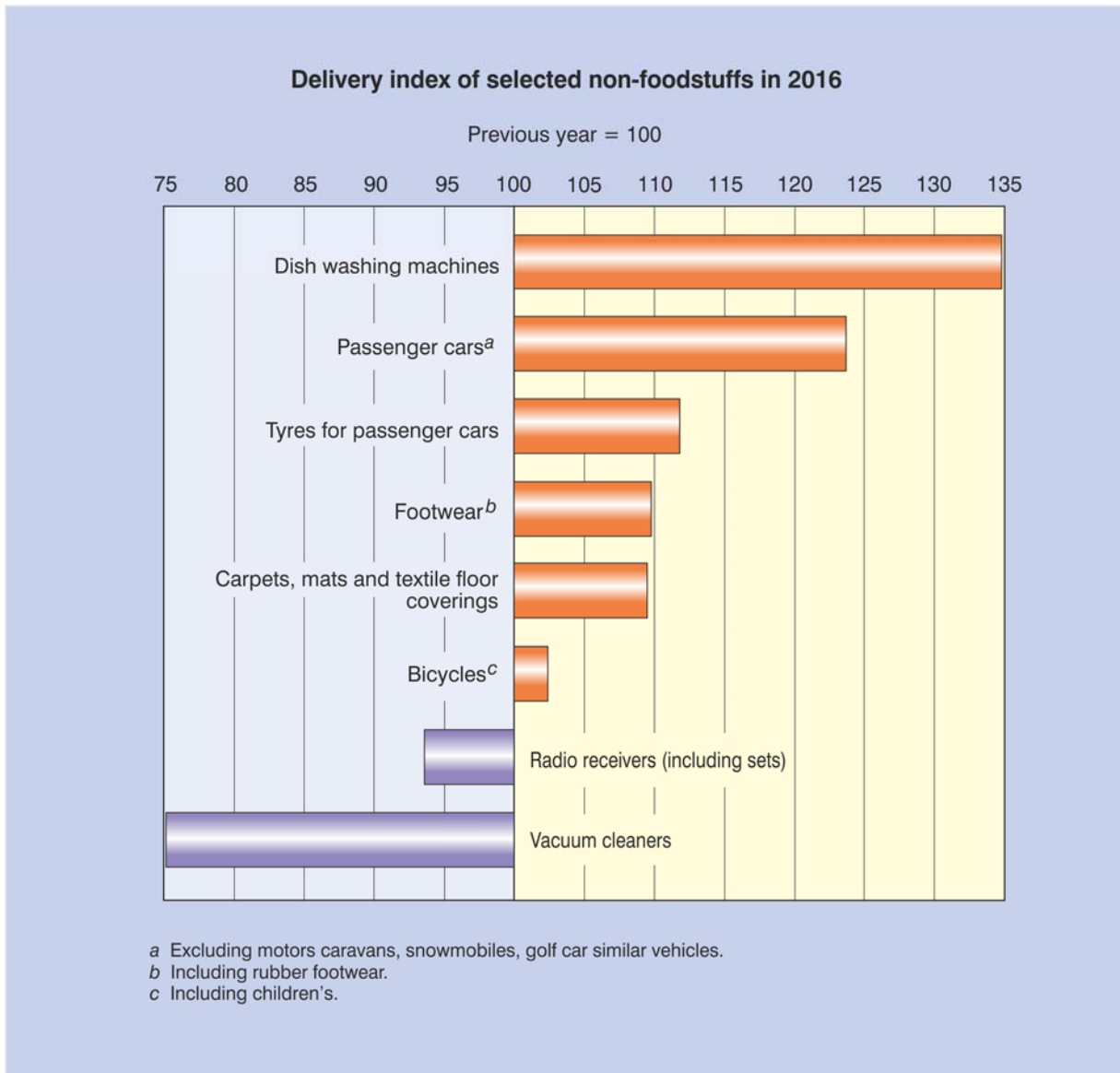
From among non-foodstuffs significant growth of deliveries was recorded for household appliances, i.e. refrigerator and freezers including combined refrigerators-freezers; automatic washing machines including machines with both wash and dry and dish washing machines.

³ In enterprises employing more than 49 persons.

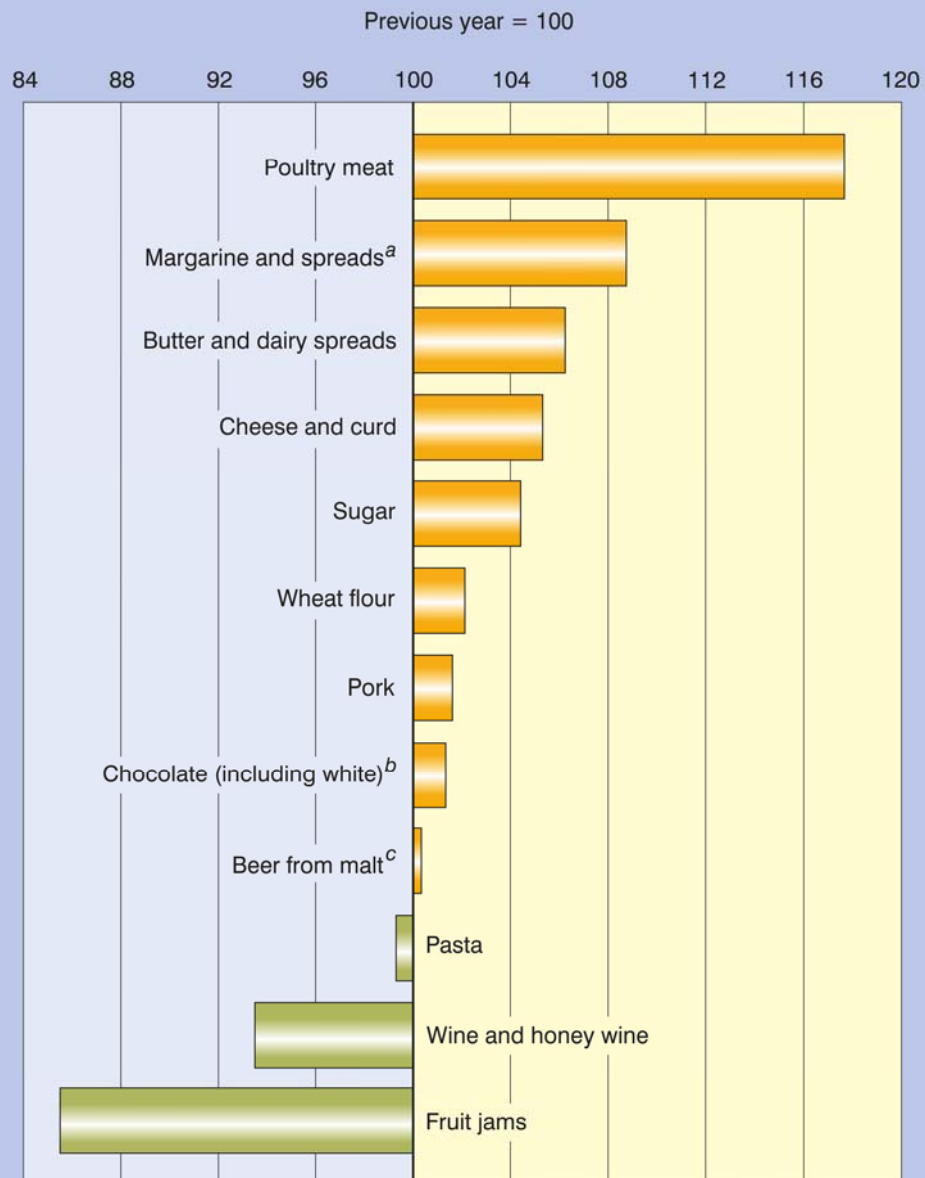
⁴ The amount of products produced domestically (data concern enterprises employing more than 9 persons), minus their exports and plus their imports adjusted by the balance of changes in the stocks of producers employing more than 49 persons.

Deliveries of cigarettes containing tobacco or mixtures of tobacco substitutes; passenger cars; table sets and kitchen vessels; tyres for passenger cars and footwear were larger than in 2015.

In the group of surveyed non-foodstuffs, deliveries of electric, gas and mixed cookers; soap, organic surface-active products and preparations used as soap; vacuum cleaners and underwear excluding knitted or crocheted were significantly lower than in 2015.



Delivery index of selected foodstuffs in 2016



^a Reduced and low fat, excluding liquid margarine.

^b With sweet and chocolate goods.

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