



Internal market in 2018



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Preface

We would like to present next edition of the "Internal Market" publication published every year. The current edition of the publication has been prepared in a modern graphic form and in the publishing series called "Statistical analyses".

The study shows a complex analysis of activity of trade entities on the basis of 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.

The publication uses information from the statistical reports expanded with administrative sources concerning all types of economic entities conducting service activity. The results of the statistical surveys are shown in territorial breakdowns and by organizational structure and ownership form of entities. Data by type of activity are presented according to the Polish Classification of Activities PKD 2007.

According to requests from data users, this study is expanded with more detailed information about the size of trade and food service networks and their infrastructure in regional division.

Presenting you with "The Internal Market in 2018", we 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
of the Trade and Services Department



Ewa Adach-Stankiewicz

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Dominik Rozkrut, Ph. D.

Warsaw, October 2019

Contents

| | |
|--|----|
| Preface | 3 |
| Contents | 4 |
| Symbols, abbreviations and accepted groupings | 5 |
| Executive summary | 6 |
| Service activities in Poland and countries in European Union | 7 |
| Trading activities | 10 |
| Flow of trade goods | 12 |
| Turnover in retail trade | 13 |
| Retail sales | 16 |
| Stores | 20 |
| Petrol stations | 24 |
| Marketplaces | 25 |
| Trade warehouses | 26 |
| Wholesale | 27 |
| Catering establishments | 29 |
| Revenues from catering activity | 31 |
| Market supply | 33 |
| Methodological notes | 36 |
| Sources and scope of data | 36 |
| Main definitions | 41 |

Symbols

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

Abbreviations

| Abbreviation | Meaning | Abbreviation | Meaning |
|--------------|------------|--------------|--------------------------------|
| PLN | zloty | art. | article |
| No. | number | tabl. | table |
| vol. | volume | GDP | Gross Domestic Product |
| g | gramme | SAD | Single Administrative Document |
| kg | kilogramme | pp | percentage point |

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).

Executive summary

In 2018, according to preliminary data, in Poland gross value added generated by entities carrying out service activities constituted 64.9 % of the gross value added of the entire national economy. At the same time 58.7 % of all employees found employment in these units. The prevailing activity among service entities in terms of value added was trading activity which share accounted for 17.6 % of gross value added generated in the entire national economy.

Retail sales in current prices realized in 2018 by trade, and non-trade enterprises amounted to PLN 862.1 billion, and were by 6.4 % higher than a year before while wholesale in trade enterprises (in current prices) amounted to PLN 1 417.6 billion, and was by 10.2 % higher than last year.

At the end of 2018 the estimated number of stores in Poland amounted to almost 340 thousand, and was by 4.3 % lower than last year. In turn the sales area of shops increased (by 0.2 %) and amounted to approx. 37 312 thousand m². The almost 340 thousand stores were run by approximately 270 thousand entities. Estimated number of petrol stations was 9 340, and was by 0.2 % higher than in the previous year. The largest concentration of petrol stations was recorded in the Śląskie Voivodship – 93 facilities per 1000 km².

The total revenues from catering activity in current prices in 2018 amounted to over PLN 43.2 billion and in comparison to the previous year have increased by 10.3 % (in constant prices they were higher by 7.0 %). The number of catering establishments (fixed and seasonal) in the country was estimated at over 69.8 thousand of which 38.2 % were catering outlets, 28.2 % restaurants, 27.6 % bars and 6.0 % canteens. The total number of catering establishments decreased by 0.4 % compared to 2017.

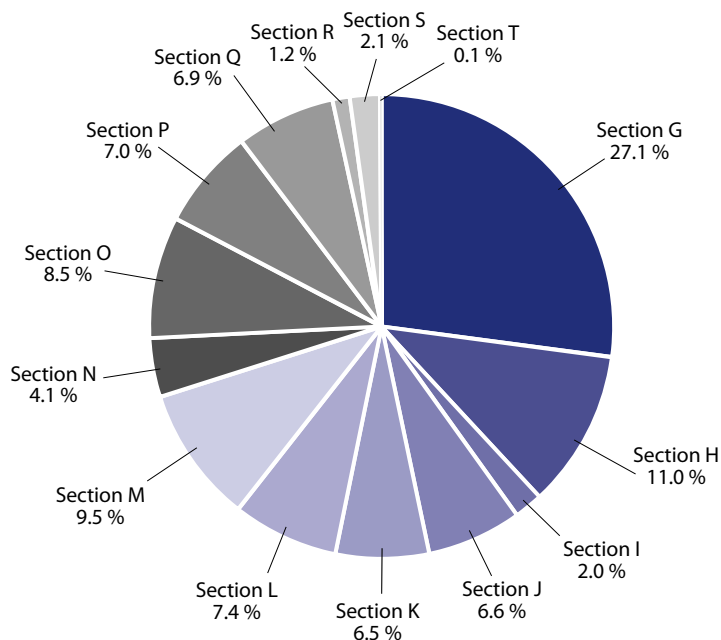
In 2018 as part of supplying the internal market, deliveries of the majority of surveyed consumer articles were higher than in the previous year. The increase in deliveries of mainly foodstuffs was related to the increase in production of those goods.

Service activities in Poland and countries in European Union

SERVICE ACTIVITY, in accordance with the adopted convention, is the activity of entities whose main activity is classified by NACE in sections: 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.

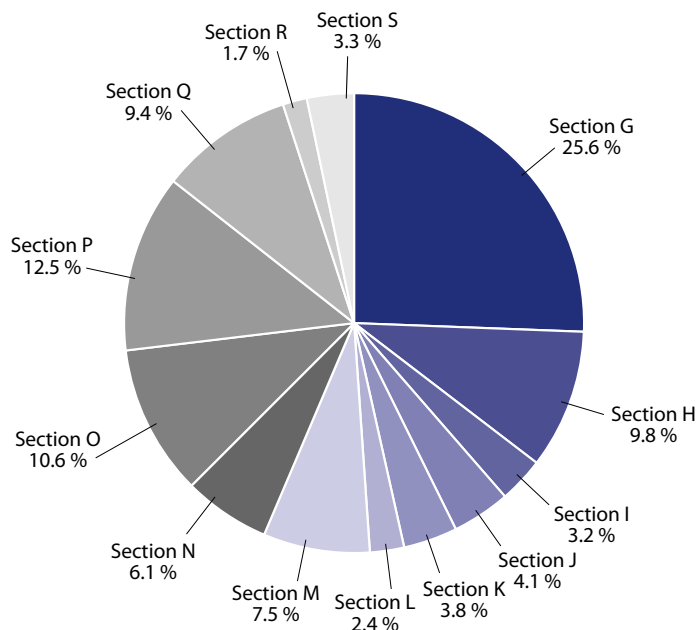
In 2018, according to preliminary data, in Poland gross value added generated by entities carrying out service activities constituted 64.9 % of the gross value added of the entire national economy. At the same time 58.7 % of all employees found employment in these units. The dominant activity among service entities in terms of value added was trading activity, the share of which was 27.1 %, of the value added generated by all entities dealing with service activities (decrease by 0.1 percentage points in comparison with the previous year). The share of the second activity, in terms of value added, transport and storage (section H according to NACE) was at the level of 11.0 % (increase of 0.4 percentage point), while the share of professional, scientific and technical activities (section M according to NACE) amounted to 9.5 % (increase by 0.3 percentage point). In comparison with the previous year the share of financial and insurance activities decreased to the greatest extent (by 0.4 percentage point) (section K according to NACE).

Chart 1. Structure of gross value added in services by NACE section in 2018



At the end of 2018, the most people (25.6 % of all working persons in service entities) were employed in enterprises classified in section "Trade; repair of motor vehicles" (section G according to NACE). Second place, owing to the number of working persons, accounted for educational activities (section P according to NACE) – 12.5 %, and subsequent of the section "Public administration and defense; compulsory social security" (section O according to NACE) – 10.6 %.

Chart 2. Structure of employed persons in services by NACE sections in 2018



In 2018, the dominant activity among service units, in terms of average employment, was also trading activity which employed 1 733.4 thousand persons (increase of 2.6 %, in comparison with 2017). The second position was occupied by educational activities (section P according to NACE) with average employment of 1 089.7 thousand persons (increase of 0.2 % in comparison with the previous year). The highest percentage growth of average employment among service activities was recorded in section M "Professional, scientific and technical activities" – by 5.0 %, while drop was recorded in real estate activities (section L according to NACE) – of 1.2 %, and in financial and insurance activities (section K according to NACE) by 0.5 %. The lowest average employment at the level of 127.1 thousand persons was recorded in section R "Arts, entertainment and recreation", in spite of a growth of 1.4 %, in comparison with 2017.

In 2018, the highest average gross wages were recorded in the following sections: "Information and communication" (section J according to NACE) – PLN 7 981, and "Financial and insurance activities" (section K according to NACE) – PLN 7 510. In turn, the lowest average gross wages at the level of PLN 3 029 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 3 990 and has increased by 7.0 %, in comparison with 2017 which was the medium percentage increase in the average monthly wages among in national economy. The largest percentage increase in the average monthly wages of 10.3 % was observed in section Q "Human health and social work activities", and in section N "Administrative and support service activities" (of 8.3 %).

In 2018, value added resulting from service enterprise activities constituted 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 – 86.7 %, Malta – 85.3 % and Cyprus – 83.6 %. A large share of services in value added of the whole economy was recorded in countries such as France (79.2 %), Great Britain (79.2 %), Greece (78.2 %) and the Netherlands (78.1 %). In Central and Eastern European countries this share was shaped at the level from 61.8 % in Slovakia, up to 73 % in Latvia, in Poland it accounted for 64.9 %.

With regard to 2010, the most significant increase of share of service activities in creation of value added was demonstrated by Romania (of 11.2 percentage points), Malta (of 7.1 percentage points), Sweden (of 3.5 percentage points), and Spain (of 3.4 percentage points). The highest decrease in the share of services, in comparison with 2010, was recorded in Ireland (of 13.6 percentage points), in Greece (of 2.9 percentage points) and in Slovenia (of 2.5 percentage points).

Table 1. 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 |
| | 2018 | 69.9 | | 2018 | 68.4 |
| Belgium | 2010 | 76.0 | Luxembourg | 2010 | 87.0 |
| | 2018 | 77.2 | | 2018 | 86.7 |
| Bulgaria | 2010 | 67.8 | Latvia | 2010 | 72.2 |
| | 2018 | 68.4 | | 2018 | 73.0 |
| Croatia | 2010 | 68.6 | Malta | 2010 | 78.2 |
| | 2018 | 70.7 | | 2018 | 85.3 |
| Cyprus | 2010 | 80.9 | Germany | 2010 | 69.2 |
| | 2018 | 83.6 | | 2018 | 68.7 |
| Czech Republic | 2010 | 61.5 | Poland | 2010 | 63.9 |
| | 2018 | 62.0 | | 2018 | 64.9 |
| Denmark | 2010 | 75.8 | Portugal | 2010 | 75.2 |
| | 2018 | 75.0 | | 2018 | 75.5 |
| Estonia | 2010 | 68.8 | Romania | 2010 | 52.0 |
| | 2018 | 69.2 | | 2018 | 63.2 |
| Finland | 2010 | 67.3 | Slovakia | 2010 | 62.0 |
| | 2018 | 68.6 | | 2018 | 61.8 |
| France | 2010 | 78.4 | Slovenia | 2010 | 67.4 |
| | 2018 | 79.2 | | 2018 | 64.9 |
| Greece | 2010 | 81.1 | Sweden | 2010 | 69.5 |
| | 2018 | 78.2 | | 2018 | 73.0 |
| Spain | 2010 | 71.4 | Hungary | 2010 | 66.6 |
| | 2018 | 74.8 | | 2018 | 64.5 |
| Netherlands | 2010 | 76.1 | United Kingdom | 2010 | 79.4 |
| | 2018 | 78.1 | | 2018 | 79.2 |
| Ireland | 2010 | 73.3 | Italy | 2010 | 73.7 |
| | 2018 | 59.7 | | 2018 | 74.0 |

Source: Eurostat 04.10.2019; according to ESA 2010.

Trading activities

GROSS DOMESTIC PRODUCT (GDP) presents the final result of the activity of all entities of the national economy. Gross domestic product is equal to the sum of gross value added generated by all national institutional units increased by taxes on products and decreased by subsidies on products. Gross domestic product is calculated at market prices.

GROSS VALUE ADDED (GVA) measures the newly generated value as a result of the production activity of national institutional units. Gross value added is the difference between gross output and intermediate consumption, and is presented at basic prices.

BASIC PRICE is defined as the amount of money received by the producer (including the trading unit) from the buyer per unit of product (product or service) less taxes on the product and any discounts and rebates plus subsidies on product.

According to preliminary data, in 2018 the share of trade in creation of gross domestic product amounted to 15.4 % and in gross value added it constituted 17.6 %.

Table 2. Share of trade in creation GDP and in gross value added

| Specification | 2015 | 2016 | 2017 | 2018 |
|---|------|------|------|------|
| Share of trade in creation GDP (%) | 15.6 | 15.4 | 15.4 | 15.4 |
| Share of trade in gross value added (%) | 17.6 | 17.5 | 17.5 | 17.6 |

NET REVENUES FROM SALES AND EQUAL THEREWITH (excluding VAT) include revenues from the sale of products (i.e. amounts obtained or receivable from the sale of: finished products in generating entities, works and services in entities providing service activities), goods and materials. Revenues from sales are determined in the value expressed in real sales prices including reduction in prices, discounts and rebates – excluding value added tax.

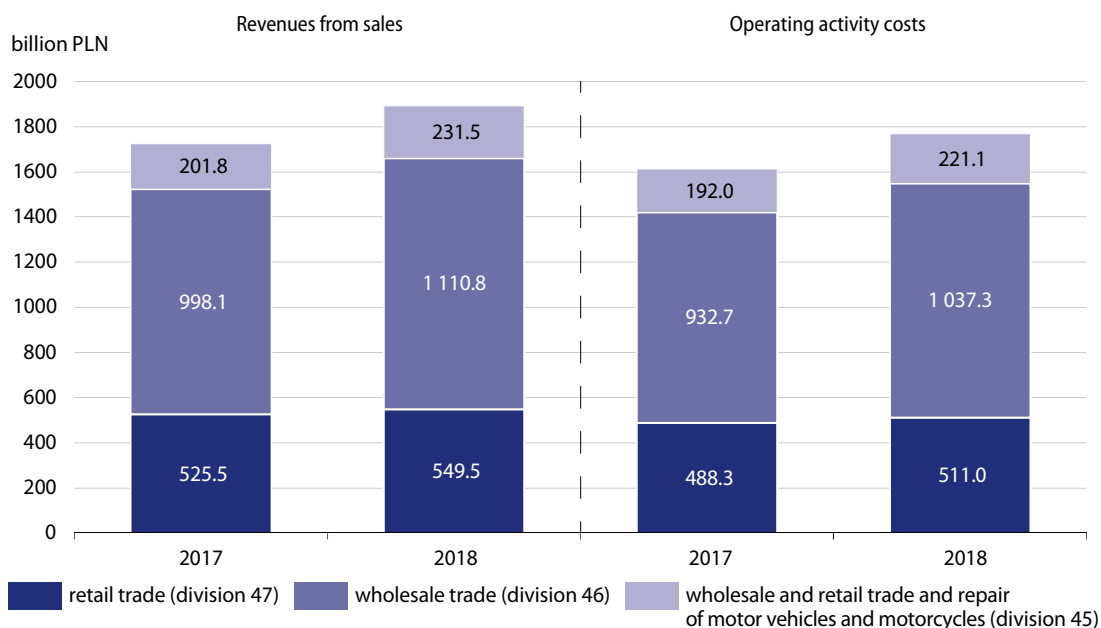
In 2018, according to preliminary data, value of sales revenues at current prices achieved by enterprises classified in section G "Wholesale and retail trade; repair of motor vehicles including motorcycles" was shaped at the level of PLN 1 892.0 billion (i.e. by 9.7 % higher than in the previous year). The largest part of these revenues was realized by enterprises dealing with wholesale activities – 58.7 %. The share of retail trade amounted to 29.0 %, whereas wholesale and retail trade and repair of motor vehicles and motorcycles amounted to 12.2 %. Enterprises employing 10 and more persons reached revenues in the amount of PLN 1 363.9 billion, namely 72.1 % of total revenues, and revenues of enterprises employing 9 and less persons amounted to PLN 528.0 billion, accounting for 27.9 % of total revenues.

OPERATING ACTIVITY COSTS include intermediate consumption, costs related to employment, value of goods and materials sold. Depreciation costs have not been taken into account.

INTERMEDIATE CONSUMPTION is the net value of used materials (including fuels), raw materials (including packaging), energy, technical gases, and external services (external processing, transport services, rental of equipment, telecommunications and computing services, commissions paid for banking services, business travel costs (without allowance) and other costs (e.g. costs of advertising, representation, lease and rental costs, business tickets costs, lump sum costs for using one's own vehicles for business purposes, exchange fees).

In 2018, according to preliminary data, costs of operating activity (excluding depreciation) incurred by trade entities amounted to PLN 1 769.5 billion and were by 9.7 % higher than in the previous year. The operating activity costs incurred by entities employing 10 and more persons amounted to PLN 1 280.5 billion, and constituted 72.4 % of total operating activity costs demonstrated by trade entities. Entities employing 9 and less persons incurred costs in the amount of PLN 489.0 billion. Significant share in costs constituted employment costs. The share of employment costs in the costs of operating activity for entities employing 10 and more persons amounted to 6.1 %.

Chart 3. Net revenues from sales and equal therewith and costs of operating activities of trade enterprises



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 in trade enterprises^a according to the type of suppliers (tables no. 18 and 19). Both behavior of wholesale and retail enterprises in the selection of their suppliers and structure of their customers remain stable. In trade – wholesale and retail enterprises, the share of purchases directly from domestic manufacturers and producers remained at the similar level (about 51 %), in comparison with the previous period, however, there was an increase in the share of purchases from imports to more than 27 %, while the share of purchases from wholesalers decreased and accounted for about 21 %. Depending on the type of conducted trade activities (wholesale or retail trade) the structure of purchases was more diverse.

In wholesale trade, almost 50 % of enterprises made purchases at domestic manufacturers and producers, while 31 % of them directly from imports. The share of purchases wholesaler – wholesaler decreased and amounted to 18 %.

In retail trade, purchases of goods were made mainly directly from domestic producers and manufacturers (about 56 %), less frequently from wholesalers (slightly more than 25 %) there was recorded a slight increase in the share of purchases directly from imports to 18 %.

Foreign ownership enterprises most often purchased directly from domestic producers and manufacturers or directly from imports (purchases from both suppliers constituted about 44 % each) and less frequently from wholesalers (almost 11 %).

Within the structure of revenues from sales of wholesale enterprises almost 44 % of revenues came from the sales for wholesale (against 43 % in the previous period), almost 29 % came from retail traders (against 30 % in the previous period) and nearly 18 % from domestic producers. Slightly more than 5 % were direct inflows from individual consumers.

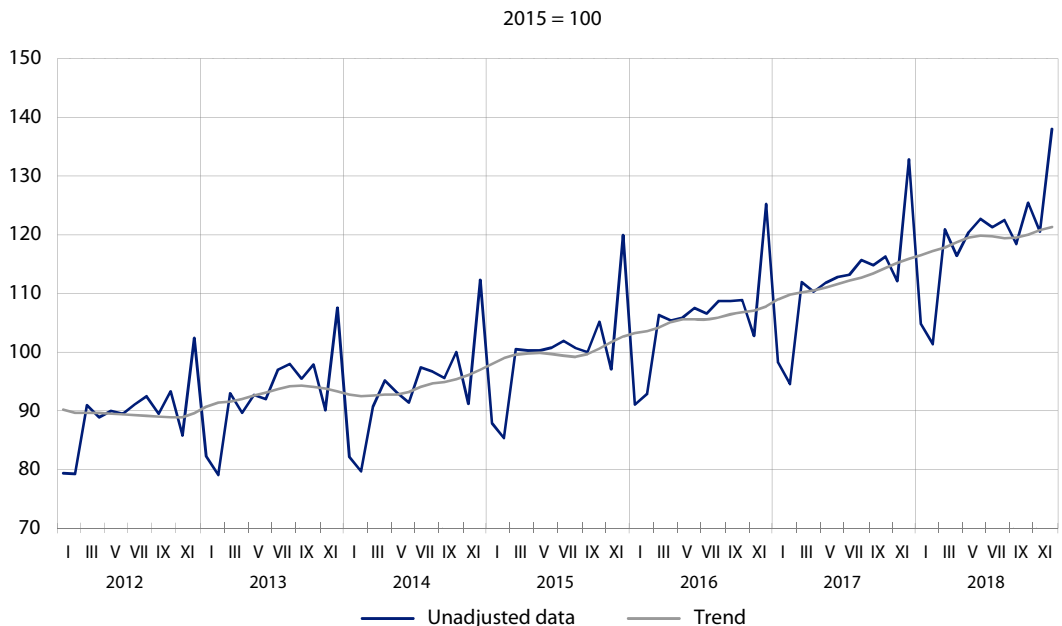
a Data concerns enterprises employing more than 9 persons.

Turnover in retail trade

TURNOVER, otherwise net sales revenues include the value of products sold outside the enterprise (finished goods and services), goods and materials, expressed in real sales prices taking into account reduction in prices, discounts and rebates – excluding value added tax (VAT). However the sale of fixed assets components, subsidies, other operating income, and revenues from financial operations is not taken into account (dividends from these shares, gained interest).

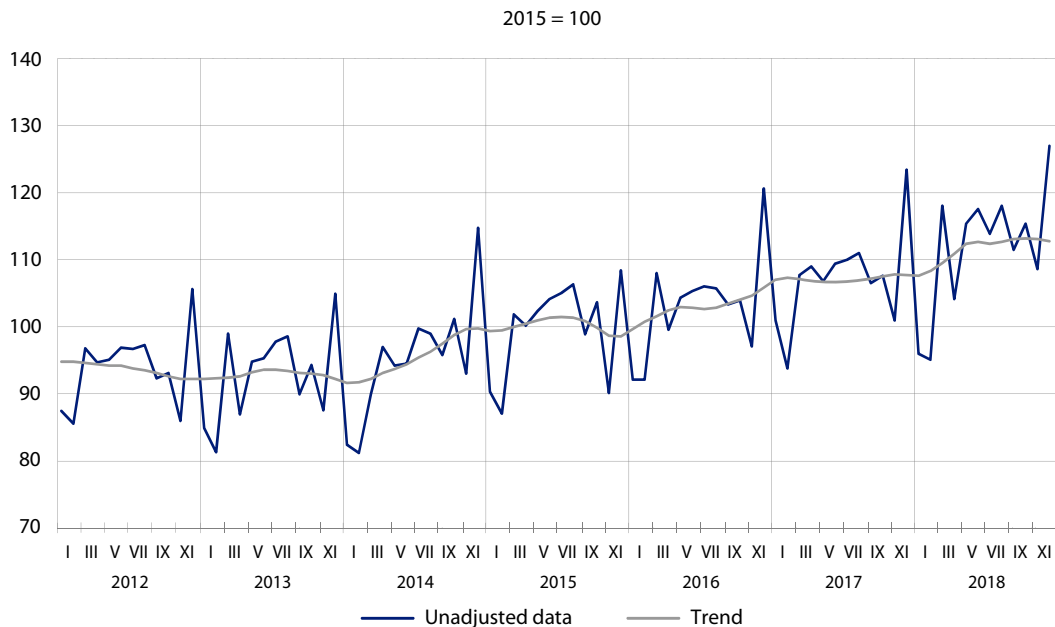
In 2018, turnover in retail trade (at constant prices) was higher by 6.6% in comparison with the previous year. Growth in turnover was recorded both, in enterprises selling non-food goods (of 7.7%) and in enterprises selling food, beverages and tobacco products (of 4.2%). Turnover of enterprises engaged in retail sales of fuels increased by 7.8%.

Chart 4. Indices of turnover in retail sale enterprises (constant prices)^a



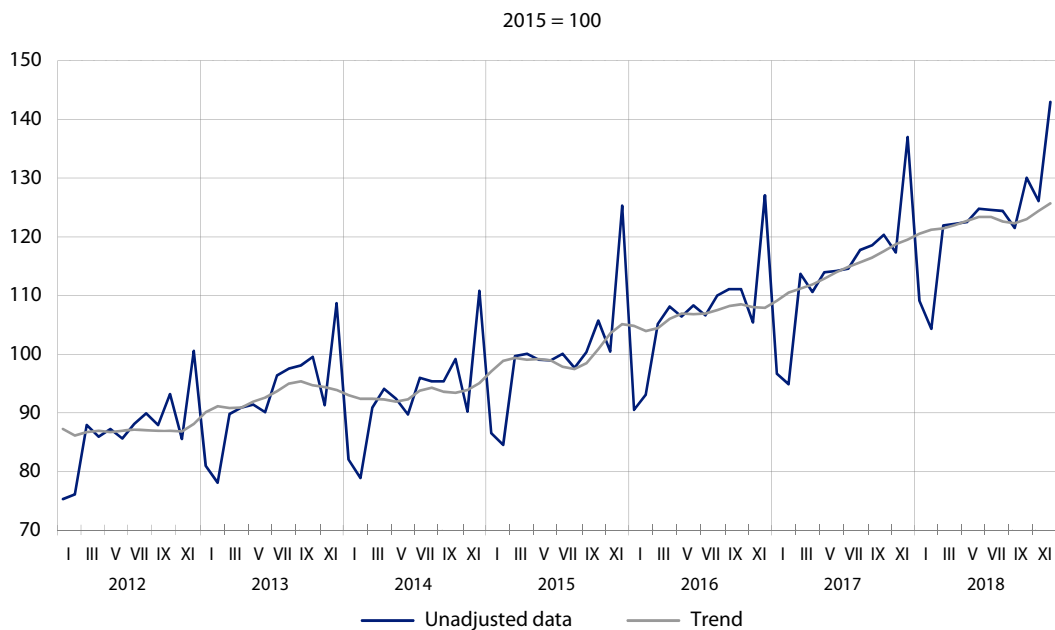
^a Enterprises classified according to NACE Rev. 2 in the division 47.

Chart 5. Indices of turnover in enterprises selling food, beverages and tobacco (constant prices)^a



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

Chart 6. Indices of turnover in enterprises selling non-food goods (constant prices)^a

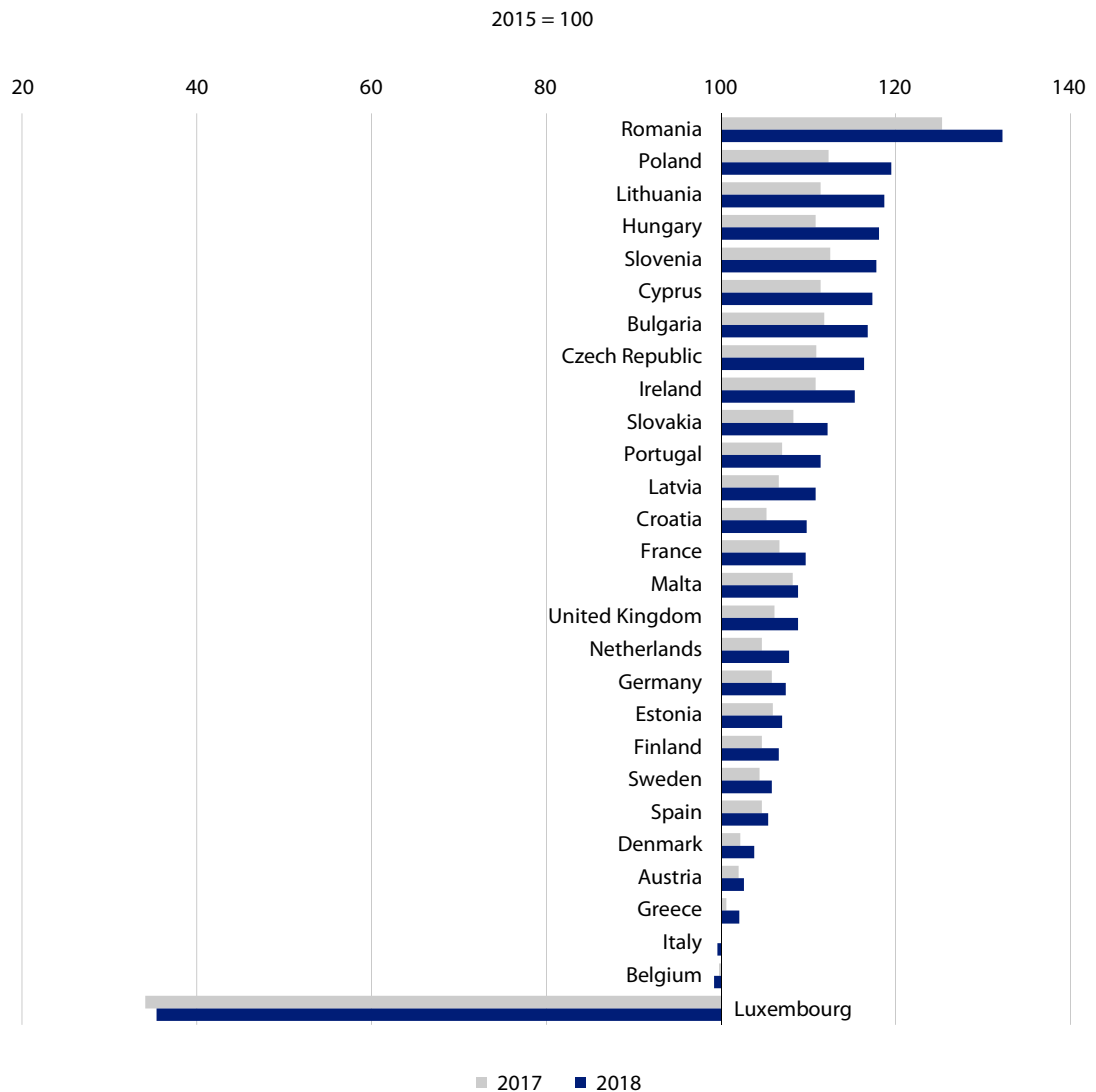


^a Enterprises classified according to NACE Rev. 2 in the class 47.19 and group 47.3–47.9.

In 2018, turnover in the retail trade of EU countries was higher compared to the base year (2015 = 100) by 7.6 %. The largest increase was recorded in Romania (by 32.2 %), Poland (by 19.5 %), and Lithuania (by 18.7 %). Among the countries most important for the European economy an increase in turnover was recorded in France (of 9.7 %), Great Britain (by 8.8 %), and Germany (by 7.4 %). In 2018 a much lower turnover compared to 2015 was observed in Luxembourg (a decrease by 64.6 %) which was connected with a change in the classification of economic activity into non-trade of significant units. A slight decrease in turnover also occurred in Belgium (by 0.8 %) and in Italy (by 0.4 %).

In comparison with the previous year the turnover in 2018 in most countries was higher with the exception of Belgium and Italy.

Chart 7. Indices of turnover in retail trade for countries of EU (constant prices)^a



^a Data adjusted for working days.

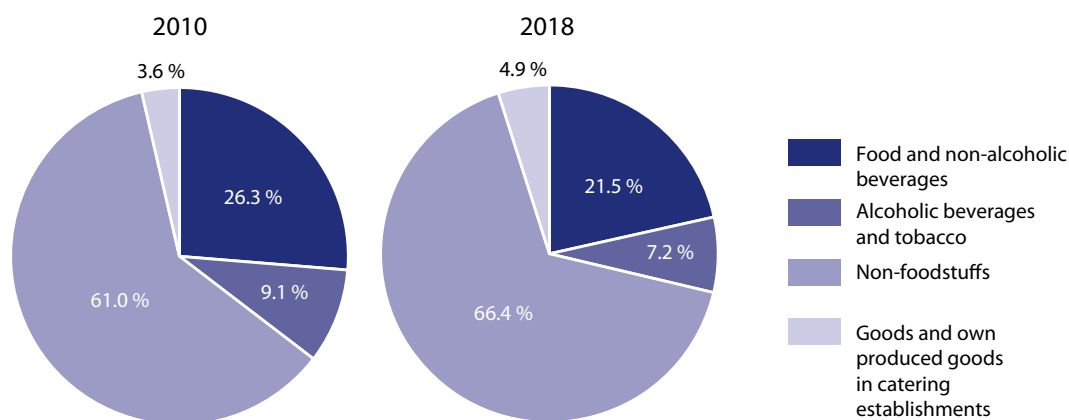
Source: Eurostat, short-term statistics (October 2019)

Retail sales

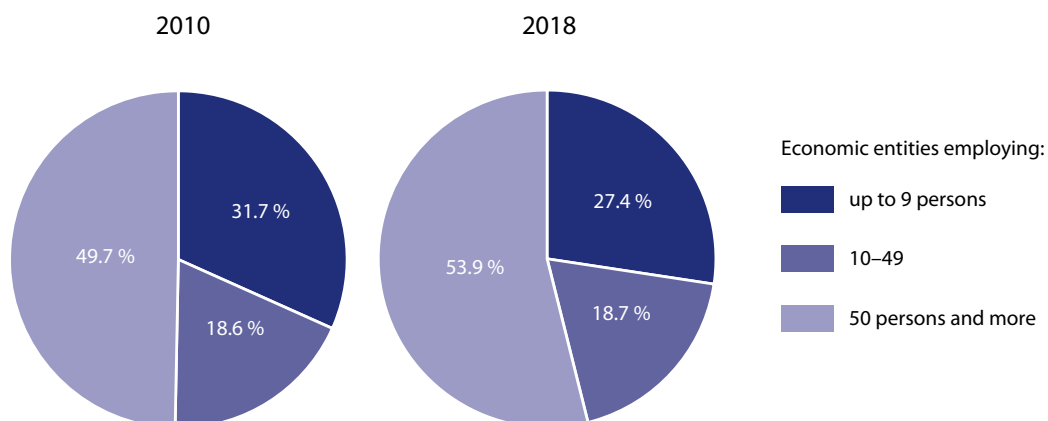
RETAIL SALES OF GOODS (including VAT) are sales of own goods and consignment (new and second-hand) in retail sales outlets, catering establishments and other sales outlets (e.g. stores, warehouses) in amounts satisfying individual needs of consumers. In addition retail sales include sales made by mail order houses or via Internet.

In 2018, retail sales at current prices realized by trade and non-trade enterprises amounted to PLN 862.1 billion and were by 6.4 % higher than in the previous year. In retail sales outlets, the value of the sold goods amounted to PLN 819.5 billion (growth of 6.2 %) of which value of food and non-alcoholic beverages – PLN 185.4 billion (growth of 2.8 %), alcoholic beverages and tobacco – PLN 62.0 billion (growth of 5.2 %), and non-foodstuffs – PLN 572.1 billion (growth of 7.5 %). Retail sales in catering establishments amounted to PLN 42.6 billion (growth of 10.3 %).

Chart 8. Structure of retail sales (current prices)



The share of retail sales realized in 2018 by economic entities employing 50 and more persons was 53.9 %, while by entities employing up to 9 persons – 27.4 %, and by enterprises employing from 10 to 49 persons – 18.7 %.

Chart 9. Structure of retail sales by size of economic entities (current prices)

Sales in trade enterprises (at current prices) amounted to 86.5 % of total value of retail sales and its share was by 0.6 percentage point lower than in a year before. The remaining sales were performed by enterprises, which basic activity was not trade, but e.g. production or catering.

Table 3. Retail sales in 2016 – 2018 (current prices)

| Specification | | 2016 | 2017 | 2018 |
|---|--------------|------------------|------------------|------------------|
| | | million PLN | | |
| a – absolute numbers b – corresponding period of the previous year=100 | Total | 754 964.4 | 810 233.6 | 862 066.3 |
| | | 104.6 | 107.3 | 106.4 |
| Of which trade enterprises | a | 659 915.1 | 705 407.6 | 745 846.6 |
| | b | 105.0 | 106.9 | 105.7 |

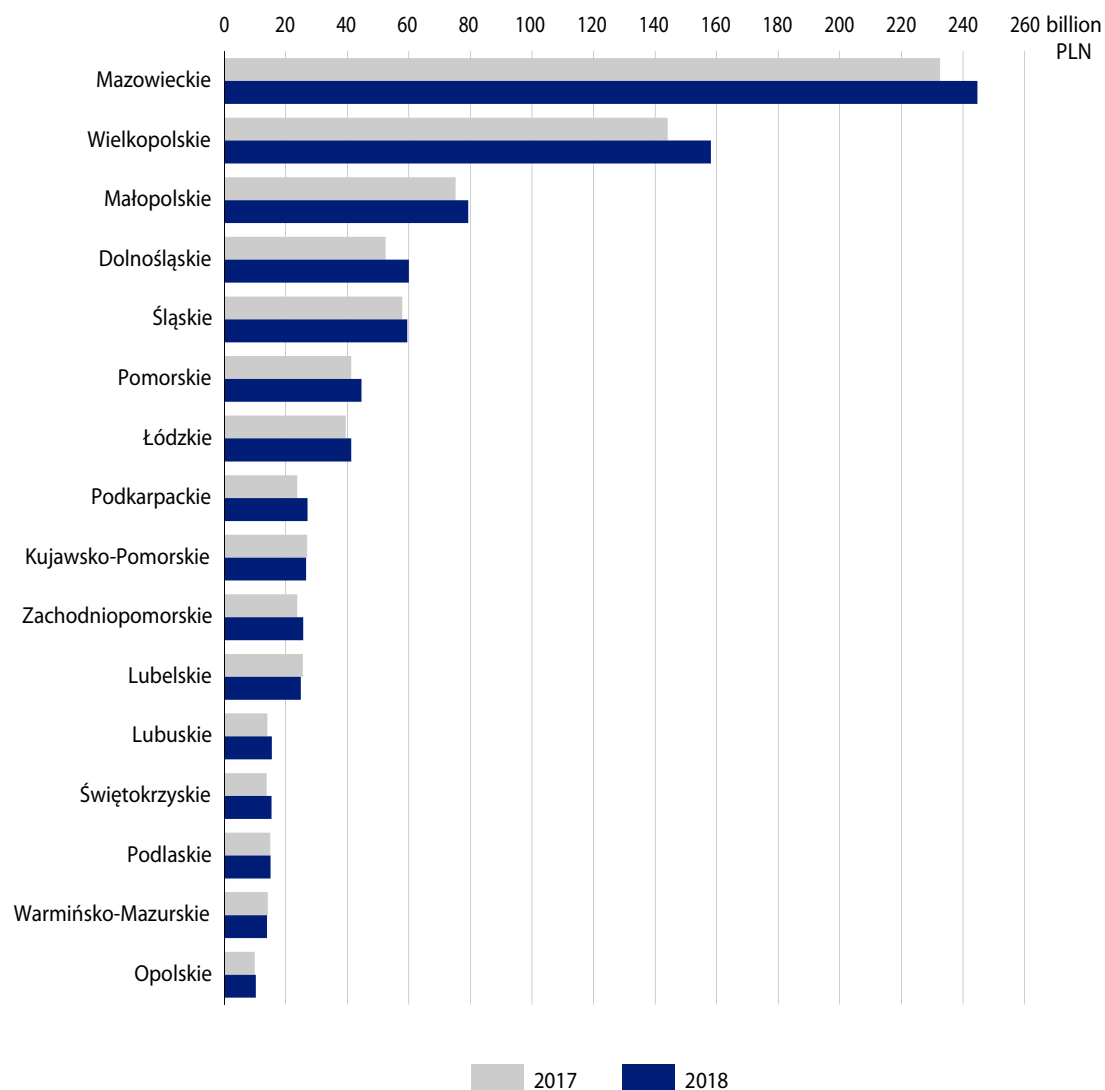
Table 4. Retail sales by groups of goods (current prices)

| Specification | 2016 | 2017 | 2018 | |
|------------------------------------|------------------|------------------|------------------|--------------|
| | million PLN | | | 2017=100 |
| Total | 754 964.4 | 810 233.6 | 862 066.3 | 106.4 |
| Food and non-alcoholic beverages | 202 530.8 | 214 021.3 | 222 943.2 | 104.2 |
| Alcoholic beverages and tobacco | 62 072.1 | 63 499.5 | 66 645.8 | 105.0 |
| Non-foodstuffs (excluding tobacco) | 490 361.5 | 532 712.8 | 572 477.3 | 107.5 |

In 2018, retail sales at current prices were higher in majority of voivodships in comparison with the previous year. In Mazowieckie Voivodship, which share in sales in total was dominant and amounted to 28.4 %, sales increased by 5.2 %. The second voivodship with significant share in sales in total (18.3 %) was Wielkopolskie Voivodship and enterprises having registered office within its area, recorded growth in sales by 9.7 %. Third place, owing to the share of retail sales in total (9.2 %), was taken by Małopolskie Voivodship with growth in sales at the level of 5.4 %.

Decrease in sales was recorded in the following voivodships: Lubelskie (of 2.5 %), Warmińsko-Mazurskie (of 2 %) and Kujawsko-Pomorskie (of 1.6 %).

Chart 10. Retail sales by voivodships (current prices)^a

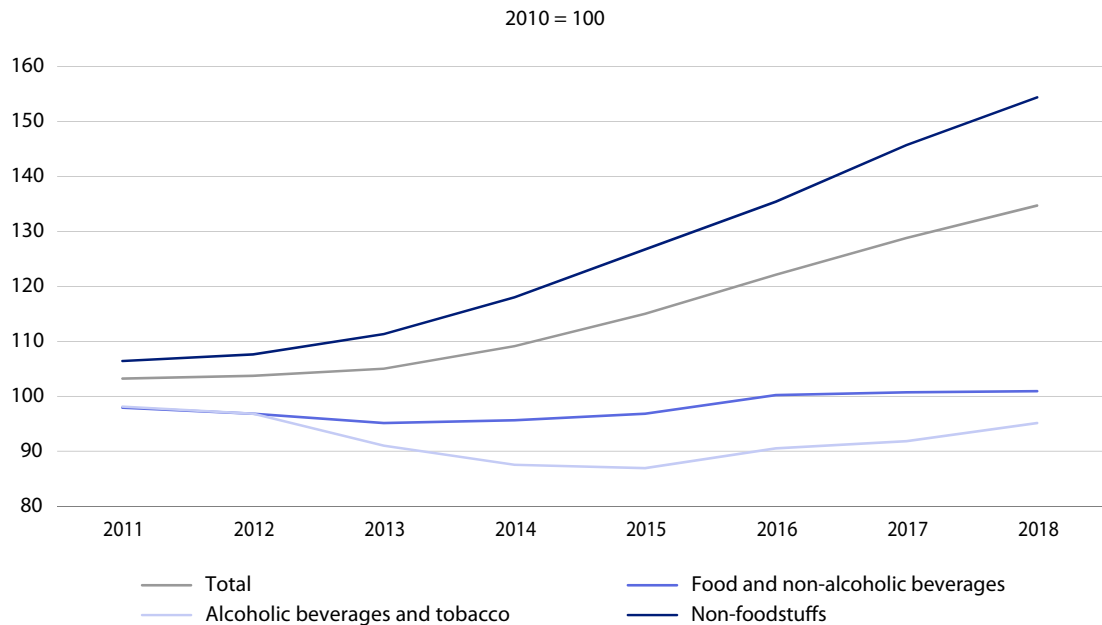


^a According to the official residence of the enterprise.

In 2018, retail sales at constant prices realized by trade and non-trade enterprises were by 4.6 % higher than in the previous year (against a growth of 5.5 % in 2017). The highest growth was recorded in the sale of non-foodstuffs (of 6.0 %). There was also observed an increase in sales of alcoholic beverages and tobacco (of 3.6 %), and food and non-alcoholic beverages (of 0.2 %).

Retail sales of goods and own produced goods in catering establishments were higher by 7.0 % than in 2017.

Chart 11. Indices of retail sales (constant prices)^a



^a With the exception of "total" – excluding sales in catering establishments.

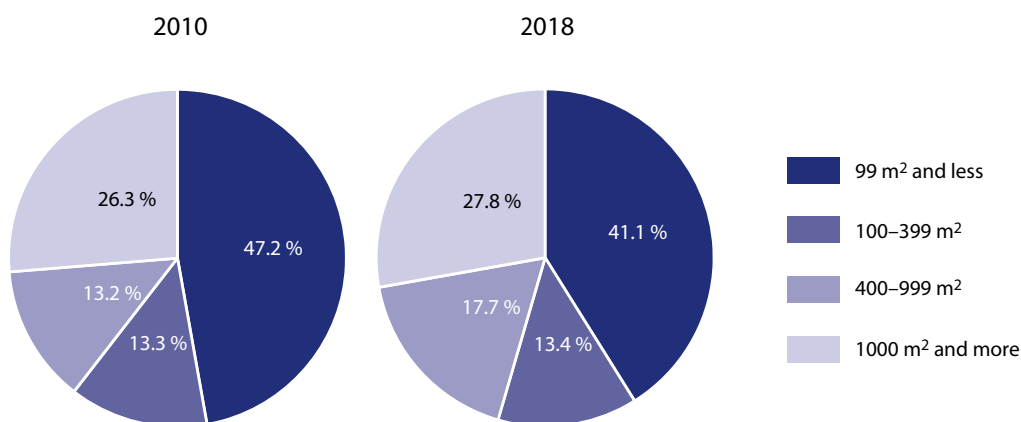
Stores

STORE is a permanent retail outlet having a special room (i.e. a store space) with a store window and an interior accessible to customers. If in large stores (e.g. in department stores, trade stores, mail order outlets) part of the sales area has been leased by another legal or natural person who on this part of the area conducts retail sales on its own account – this part is a separate store.

SALES AREA OF SHOPS is 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.

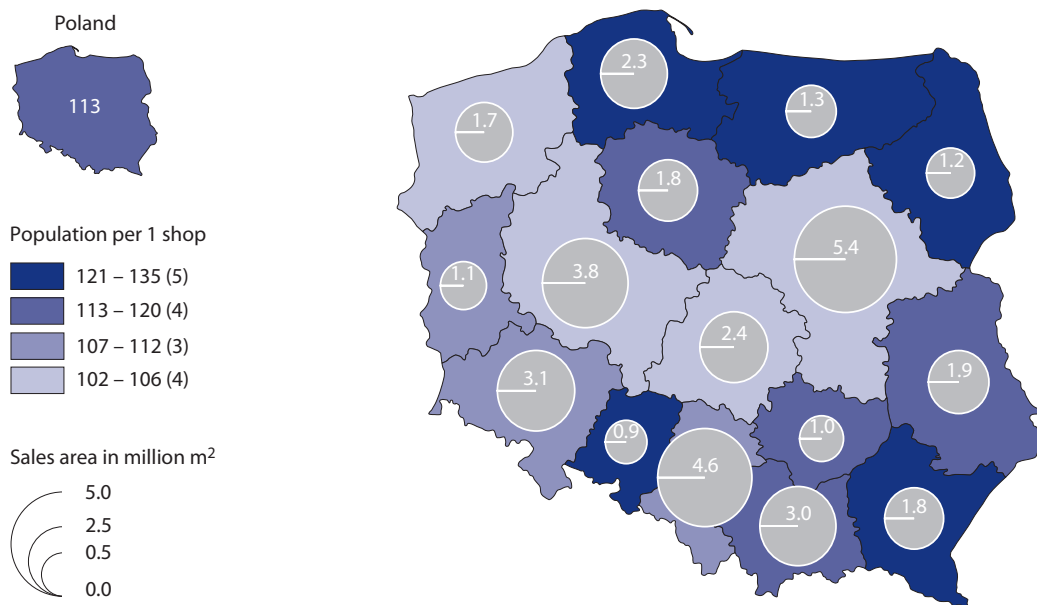
At the end of 2018 the estimated number of stores in Poland amounted to almost 340 thousand, and was by 4.3 % (approximately 15 thousand) lower than last year. In turn the sales area of shops increased (by 0.2 %), which amounted to approx. 37 312 thousand m². Percentage growth of sales area was recorded in shops ranging from 400–999 m² (of 5.1 %), and in shops above 1000 m² (of 1.8 %). Decrease in shop area of 2.8 % was recorded for shops from space segment up to 99 m², and of 0.2 % in 100–399m².

Chart 12. Structure of sales area of shops



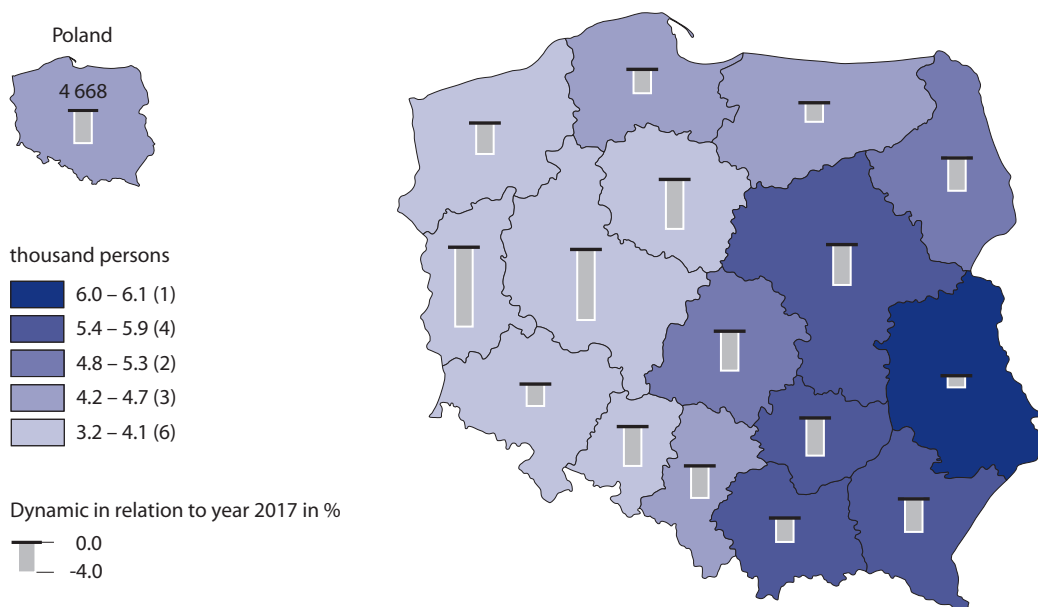
In the regional system, the highest percentage increase of sales area in the range of 400–999 m² occurred in shops located in: Lubuskie (of 10.1 %), Mazowieckie (of 8.7 %) and Wielkopolskie (of 7.6 %) voivodships.

In 2018, there were 113 persons per one shop on average, whereas in 2017 there were 108 respectively.

Map 1. Shops by voivodships (as of 31 December)

In 2018, an increase was recorded in the total number of supermarkets and hypermarkets in comparison with the previous year (of 4.4 %); per one shop of these category fell on average 4 668 persons, whereas in 2017 there were 4 877 persons. In the regional system, the largest population falling per 1 supermarket and hypermarket was recorded in Lubelskie (6 016 persons, against 6 110 persons in the previous year) Voivodship, while the least persons – 3294 – in Lubuskie Voivodship, where in 2017 there were 3 606 persons.

In 2018, estimated share of sales value realized jointly by supermarkets and hypermarkets in retail sales in shops and petrol stations amounted to 24.8 % and was by 0.1 percentage point lower than a year before.

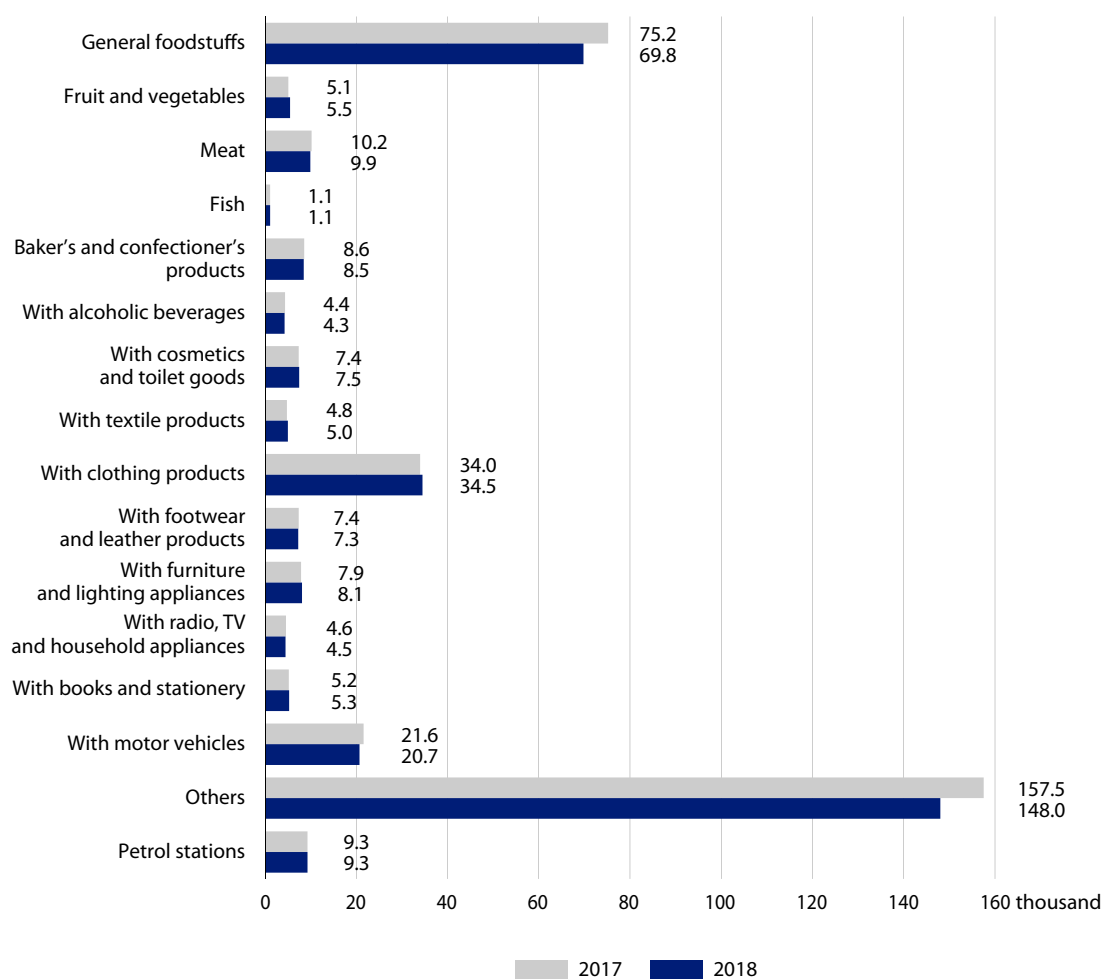
Map 2. Population per supermarket and hypermarket by voivodships in 2018 (as of 31 December)

Estimated at less than 340 thousand number of shops in 2018 was run by nearly 270 thousand enterprises. With reference to the ranges of enterprises by the number of shops owned, the largest decrease was recorded in the number of enterprises running up to two stores – of 14 165 (of 5.1 %) compared to drop of 12 551 enterprises (of 4.3 %) in the previous year. The share of these enterprises in 2018 amounted to 97.7 % and in comparison to the previous year it decreased by 0.1 percentage point. In turn, the greatest increase in the number was recorded in the range above 200 shops (by 16.2 %) and in range 51–100 shops (by 10.3 %) against a decrease of 3.3 % a year before.

In the total number of 340 thousand shops, similar to the previous year, the greatest share was constituted by other specialized shops (43.5 %), general food shops (20.6 %) and clothing stores (10.1 %). The least numerous were shops with fishing specialization which constituted 0.3 % of shops in total.

In comparison to the previous year the number of stores in most of the specializations decreased. The biggest decrease occurred in stores specializing in: other of 9.6 thousand shops (of 6.1 %), general of 5.4 thousand shops (of 7.2 %) and motor vehicles of 0.9 thousand (of 4.3 %). In turn the highest increase in the number of stores was recorded in shops specializing in clothing – almost 500 shops (of 1.4 %) and in fruit and vegetable shops of almost 400 shops (of 7.6 %).

In the group of enterprises employing more than 9 persons, number of stores being part of foreign capital establishments was by 2.8 % higher in 2018 in comparison with the previous year, and sales area of these stores increased by 5.1 %. Average sales area of foreign enterprises amounted to 655.4 m² (accordingly in stores of private national property enterprises – 192 m²). The share of sales area of shops with foreign capital in total area increased by 1.5 percentage points in comparison with the previous year.

Chart 13. Shops by specialization and petrol stations (as of 31 December)**Table 5. Number of shops owned by enterprises with foreign capital^a**

| Specification | 2017 | 2018 |
|---------------------------------------|----------|----------|
| Number of shops | 16 820 | 17 297 |
| share in total shops (%) | 4.7 | 5.1 |
| sales area (thousand m ²) | 10 782.2 | 11 337.3 |
| share in total sales area (%) | 28.9 | 30.4 |

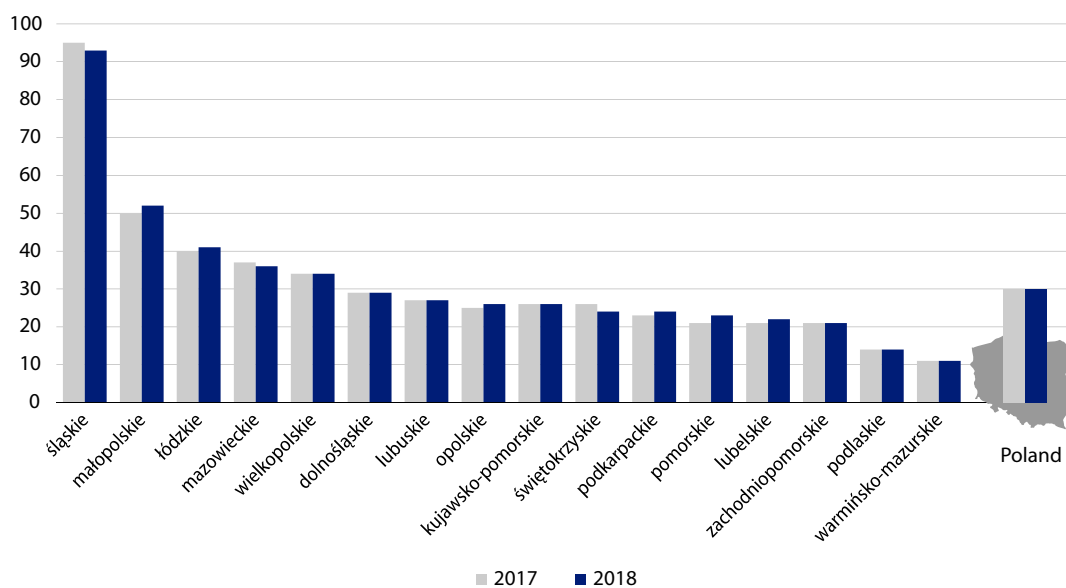
^a Data concerns entities employing more than 9 persons.

Petrol stations

PETROL STATIONS are outlets conducting retail sale of gasoline, diesel oil, LPG gas, other fuels, cooling liquids, cleaning agents, etc.

At the end of 2018, the estimated number of petrol stations amounted to 9 340 and was by 0.2 % higher than in the previous year. In the regional system, the largest density of petrol stations was recorded in Śląskie Voivodship – in 2018 it was 93 facilities per 1000 km² of the area. The lowest ratio was recorded in Warmińsko–Mazurskie Voivodship, where, similar to the previous year, it was 11 facilities, while the average for Poland amounted to 30 petrol stations per 1000 km² of area.

Chart 14. Distributions of petrol stations per 1000 km² of the area by voivodships (as of 31 December)



Marketplaces

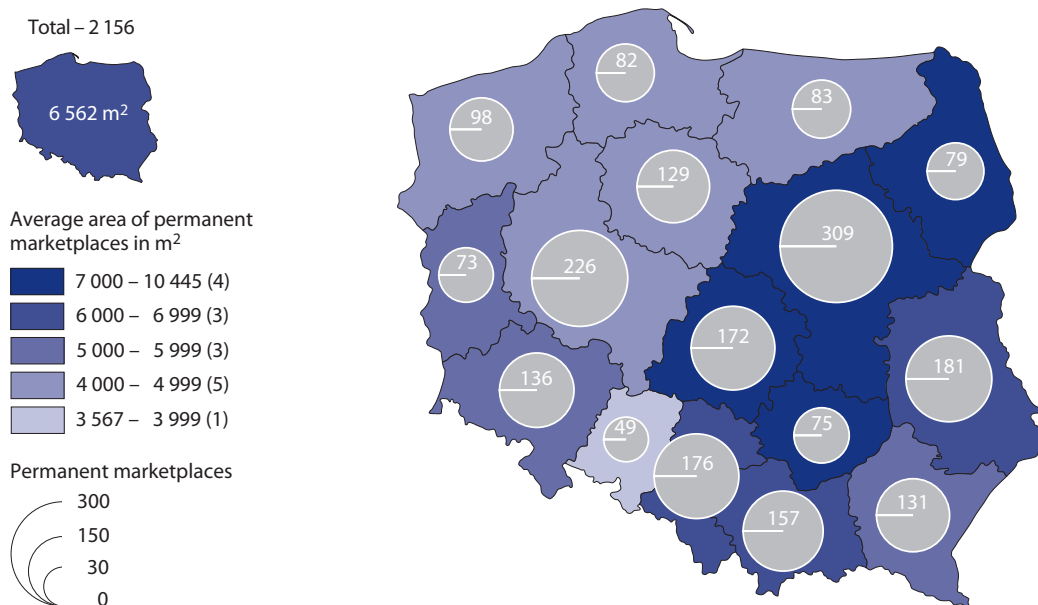
MARKETPLACES are separated area or building (place, street, covered market) where permanent or seasonal outlets are conducting retail sales activity every day or several days per week.



In 2018, national register kept by gmina local government units, registered 2 156 permanent marketplaces (of which 2 073 with predominance of small-retail sales outlets). The number of permanent marketplaces dropped by 0.8 % in comparison with the previous year. An increase in the number by 2 and 1 marketplace was observed only in Wielkopolskie and Mazowieckie voivodships, respectively. In comparison with the previous year, the total area of permanent marketplaces decreased by slightly over 0.1 %. The largest area of permanent marketplaces was observed in Mazowieckie, Łódzkie, Śląskie, Wielkopolskie and Lubelskie voivodships.

In the area of permanent marketplaces transactions were executed in approx. 91.5 thousand permanent points of small-retail sales, among which 51.5 thousand operated every day. A supplement to permanent marketplace network were seasonal markets which in 2018 amounted to 7 127 and recorded decrease of 0.9 % in comparison with the previous year. Annual trade fee income was lower (by 2.0 %) in comparison with 2017.

Map 3. Permanent marketplaces by voivodships in 2018 (as of 31 December)



Trade warehouses

TRADE WAREHOUSES are warehouses of units dealing in trade in goods, organizational and functional units occupying separate storage space equipped with equipment and technical devices enabling storing goods in accordance with the requirements of storage and having personnel for its proper handling.

Trade warehouses occupy:


- storage area (in m²) in closed warehouse buildings, roofed storage buildings (sheds), independent basements, storage yards, non-warehouse rooms, i.e. intended for purposes other than storage of goods, e.g. industrial, office, residential, social;
- usable capacity (in m³): tanks intended for storage of liquid, semi-liquid and gas products; silos (elevators) for storing loose, powdered, fine-grained goods, etc.

At the end of 2018, enterprises carrying out wholesale activity (employing more than 9 persons) stored goods in 35.7 thousand warehouses (excluding silos and reservoirs). The most significant part of the warehouse infrastructure were secured warehouses (26.1 thousand). Other positions are storage sites (4.9 thousand) and roofed warehouses (4.7 thousand). Storage space of warehouses amounted to 46 048.8 thousand m² in total and was larger than in 2015^a by 11.1 %. In the storage structure of warehouses secured warehouses accounted for 60.7 % of the total area (an increase in comparison with 2015 of 2.9 percentage points), roofed warehouses – 6.7 % (drop of 1.2 percentage point), whereas storage sites 32.6 % (decrease of 1.7 percentage points).

Among secured warehouses of trade enterprises (classified according to PKD into section G "Trade and repair of motor vehicles"), warehouses of wholesale entities accounted for 93.7 % of the total number of warehouses and 88.9 % of the total storage space, whereas warehouses of retail entities 5.8 % of the number of warehouses and 10.7 % of storage space. Compared with the previous surveyed period, an increase was observed in the average storage space of secured warehouses from 902 m² to 1004 m² and storage sites from 2715 m² to 2820 m², while the average space of roofed warehouses decreased to 593 m² – from 702 m² in 2015. In the ownership structure the number of warehouses owned by enterprises with foreign capital participation continued to grow. In 2018, the share of the number of those warehouses amounted to 19.1 % of the total number of warehouses (against 14.4 % in 2015), whereas the share of the occupied space increased to 17.6 % of the total storage space (against 15.1 % in 2015).

^a Survey on warehouses (wholesale and retail distribution) conducted every three years.

Wholesale

WHOLESALE (including ) is an activity consisting in the resale of purchased goods on its own behalf usually to non-financial recipients (other wholesalers, retailers, producers). It includes the sale of goods from commercial, one's own or leased warehouses in which stored goods are the property of a commercial enterprise. The wholesale value also includes the value of sales realized on the basis of a direct payment or contract (agents, auctioneers), as well as the value of sales performed by cleared transit consisting in the transfer of goods directly from the supplier to the consignee omitting the warehouses that carry out the delivery.

It is estimated that the value of wholesale in trade enterprises (at current prices) amounted to PLN 1 417.6 billion and was by 10.2 % higher than a year before. In the value of wholesale decrease of 3.3 % was recorded only in the group of food and non-alcoholic beverages. In the structure of sales, the share of non-food goods increased by 1.8 percentage points, while decrease in sales was observed in terms of share of food and non-alcoholic beverages (by 1.7 percentage points) and alcoholic beverages (by 0.1 percentage points).

Wholesale executed by enterprises employing 50 and more persons constituted 46.9 % and was by 0.4 % higher compared to the previous year.

Chart 15. Structure of wholesale (current prices)

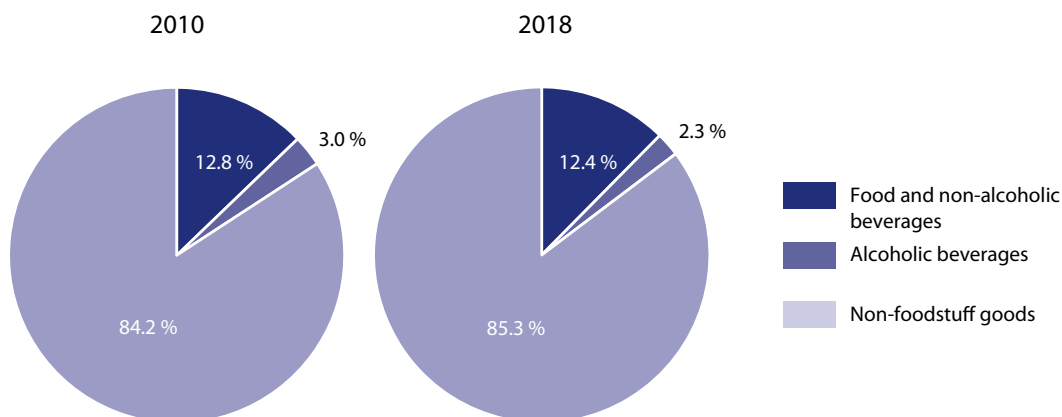


Table 6. Wholesale in 2016–2018 (current prices)

| Specification a – absolute numbers b – corresponding period of previous year=100 | | 2016 | 2017 | 2018 |
|--|----------|--------------------|--------------------|--------------------|
| | | million PLN | | |
| Total | a | 1 136 354.5 | 1 286 638.0 | 1 417 614.9 |
| | b | 106.3 | 113.2 | 110.2 |
| Of which enterprises employing 50 persons and more | a | 528 176.1 | 598 038.8 | 664 476.3 |
| | b | 106.3 | 113.2 | 111.1 |

Table 7. Wholesale by group of goods (current prices)

| Specification | | 2016 | 2017 | 2018 | |
|----------------------------------|--|--------------------|--------------------|--------------------|--------------|
| | | million PLN | | | 2017=100 |
| Total | | 1 136 354.5 | 1 286 638.0 | 1 417 614.9 | 110.2 |
| Food and non-alcoholic beverages | | 162 697.5 | 181 667.4 | 175 604.1 | 96.7 |
| Alcoholic beverages | | 30 927.7 | 31 119.0 | 32 334.3 | 103.9 |
| Non-foodstuff goods | | 942 729.3 | 1 073 851.6 | 1 209 676.5 | 112.6 |

Catering establishments

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 takeout consumption. Seasonal catering establishments are open for a certain period of time and operate not longer than six months in a calendar year. Mobile retail sales points and vending machines are not treated as catering establishments.

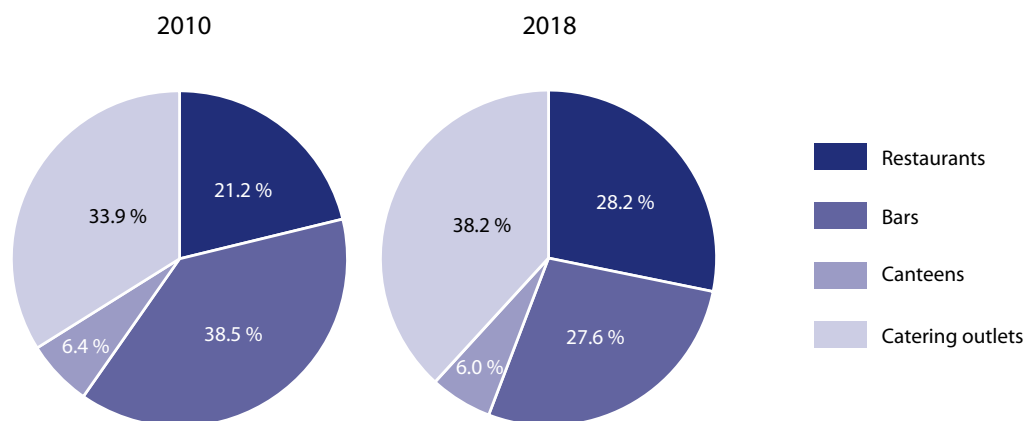
In 2018 the number of catering establishments (permanent and seasonal) in the country was estimated at over 69.8 thousand, of which 38.2 % were catering outlets, 28.2 % – restaurants, 27.6 % – bars, and canteens – 6.0 %. Total number of catering establishments decreased by 0.4 % in comparison with 2017, drop was recorded for restaurants (of 2.2 %), canteens (of 1.1 %) and bars (of 0.5 %) while the number of catering outlets increased by 1.2 %.

Table 8. Catering establishments

| Specification | 2016 | 2017 | 2018 | |
|------------------|---------------|---------------|---------------|-------------|
| | number | | | 2017=100 |
| Total | 69 414 | 70 108 | 69 829 | 99.6 |
| Restaurants | 19 648 | 20 127 | 19 675 | 97.8 |
| Bars | 20 926 | 19 410 | 19 317 | 99.5 |
| Canteens | 4 356 | 4 221 | 4 174 | 98.9 |
| Catering outlets | 24 484 | 26 350 | 26 663 | 101.2 |

Private sector in gastronomy included 98.7 % of all catering establishments, (similar as in previous year), including: 99.4 % of restaurants, 99.1 % of bars and 99.0 % of catering outlets and 90.9 % of canteens.

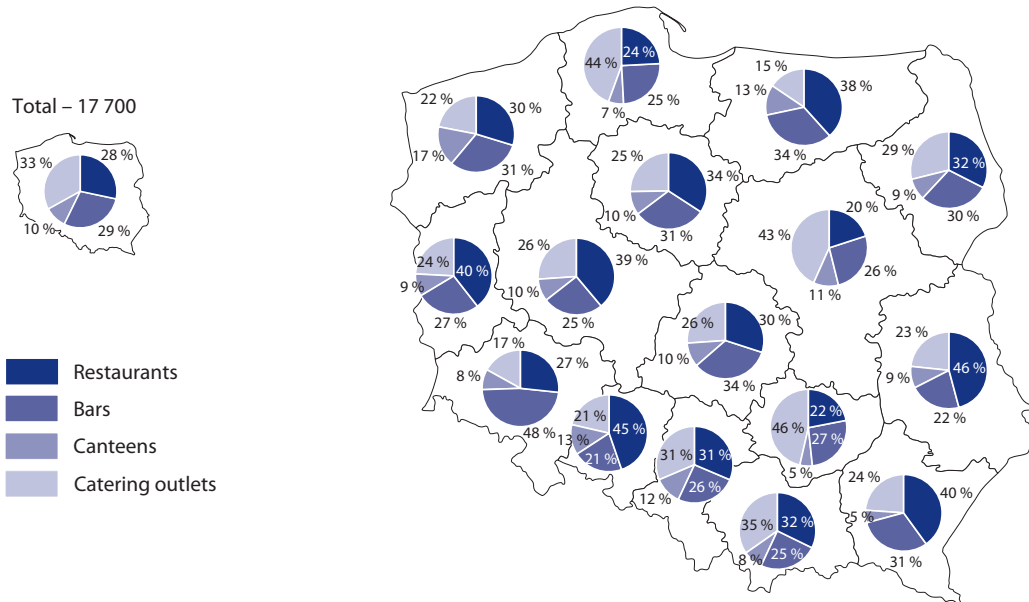
Chart 16. Structure of catering establishments



The number of catering establishments in enterprises employing more than 9 persons decreased by 7.5 % in comparison with the previous year and amounted to 17 700, which was 25.3 % of total catering units in Poland. A decrease was observed in all catering establishments: in the number of restaurants of 10.1 %, bars – 5.8 %, canteens – of 3.8 %, and catering outlets – of 7.5 %.

The structure of catering establishments in voivodship division, by the official residence of the enterprise is presented on the chart below.

Map 4. Catering establishments by voivodships^a in enterprises employing more than 9 persons



^a According to the official residence of the enterprise.

Revenues from catering activity

REVENUES FROM CATERING ACTIVITY (including VAT) cover revenues obtained from the sale of:

- trade commodities – 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;
- other activity – offered services e.g. charges for parking-places, cloak-rooms and left-luggage offices, as well as the revenues from the amusement activity, organization of parties or hiring restaurant rooms.

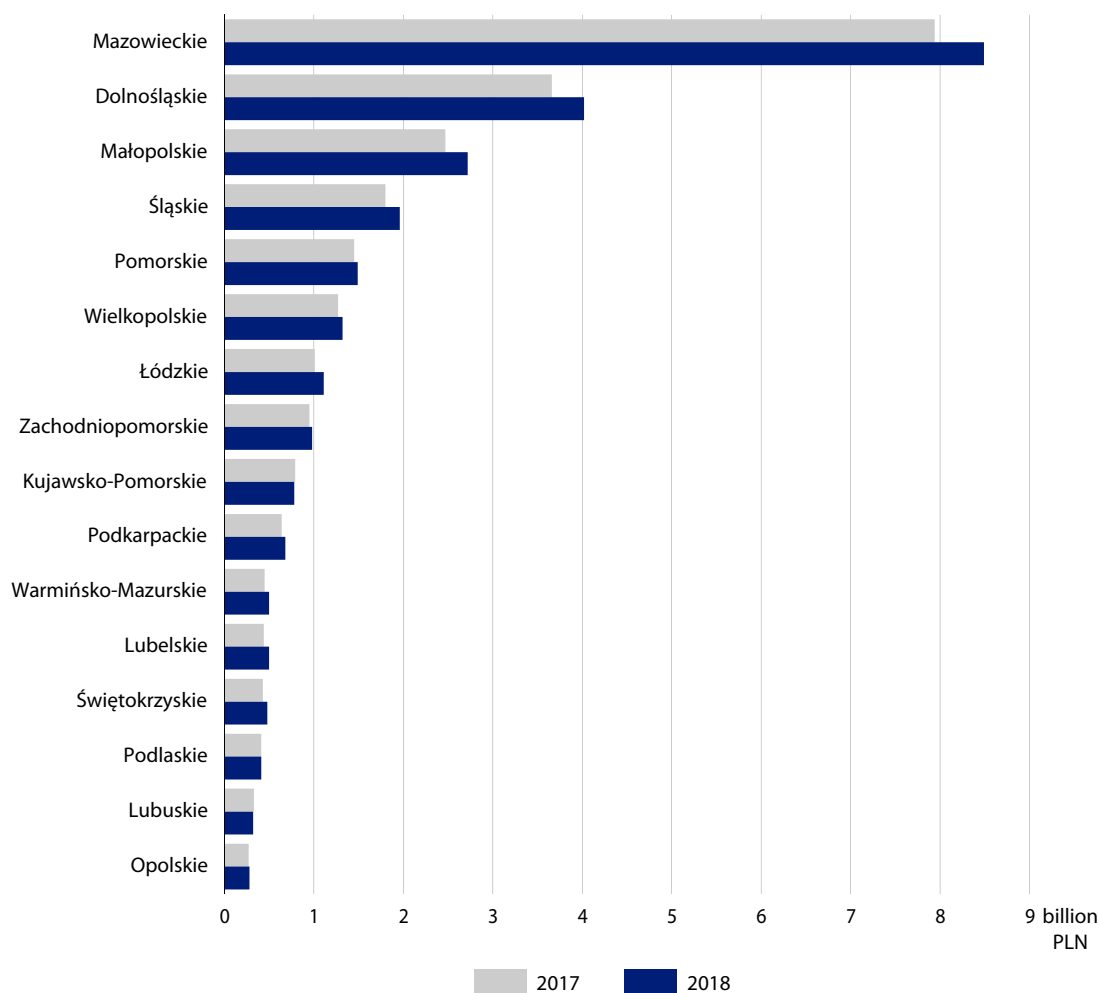
In 2018, the total revenues from catering activity at current prices amounted to almost PLN 43.2 billion and increased by 10.3 % in comparison with the previous year (at constant prices increased by 7.0 %). Similar as in the previous year, private sector generated 98.7 % of this value, while public sector – 1.3 %.

Catering production generated 83.4 % of the total value of revenues at current prices, 15.2 % came from sales of commodities (of which 10.8 % – sales of alcoholic beverages and tobacco) and 1.4 % from the other activity. All types of catering activity recorded growth in revenues as compared with the previous year, the largest was observed with regard to catering production (by 12.1 %).

Table 9. Revenues from food service activity (current prices)

| Specification | 2016 | 2017 | 2018 | |
|---|-----------------|-----------------|-----------------|--------------|
| | million PLN | | | 2017=100 |
| Revenues total | 35 666.1 | 39 140.5 | 43 166.7 | 110.3 |
| From sales of commodities | 6 387.2 | 6 452.9 | 6 566.2 | 101.8 |
| of which from the sale of alcoholic beverages and tobacco | 576.9 | 4 589.1 | 4 672.2 | 101.8 |
| From catering production | 28 756.4 | 32 126.3 | 36 001.8 | 112.1 |
| From other activity | 522.5 | 561.3 | 598.7 | 106.7 |

In enterprises employing more than 9 persons, revenues from catering activity at current prices amounted to about PLN 26.0 billion (growth of 7.2 % in comparison with the previous year), which was 60.3 % of the total revenues from catering activity in Poland. Percentage increase in revenues was recorded in almost all voivodships, and the largest was observed in Lubelskie (of 14.4 %), Warmińsko-Mazurskie (of 12.3 %), Świętokrzyskie (of 11.1 %), Małopolskie (of 10.2 %) and Łódzkie Voivodship (of 10.0 %). Only in two voivodships there was a decrease in revenues: in Lubuskie Voivodship (by 2.0 %) and Kujawsko-Pomorskie (of 1.1 %).

Chart 17. Revenues from catering activity by voivodships^a in enterprises employing more than 9 persons

^a According to the official residence of the enterprise.

Revenues from catering production constituted 86.2 % of revenues from catering activity of enterprises employing more than 9 people and amounted to PLN 22.4 billion.

The second in terms of size, group of revenues from catering activity constituted revenues from sale of alcoholic beverages and tobacco products (7.9 %) which amounted to PLN 2.1 billion.

The third group with the value of PLN 1.4 billion comprised revenues from sale of trade commodities (excluding alcoholic beverages), and their share in revenues from catering activity of surveyed enterprises amounted to 5.2 %.

Revenues from the other catering activity constituted only 0.7 % of total revenues and amounted below PLN 0.2 billion.

Market supply

STOCKS OF FINISHED GOODS MANUFACTURED IN INDUSTRY UNITS are the amount of finished products in warehouses of units engaged in production activity ready-to-sale.

In 2018, in producers' warehouses average stocks of surveyed articles were higher in comparison with the previous year.

In the group of foodstuffs there were much larger stocks of chocolate products; pasta; butter and dairy spreads; compotes and pasteurized fruit; edible animal fats melted and beef meat.

Stocks have also increased among others for: soups and broths and preparations thereof; chocolate (including white); poultry meat; coffee; milk and cream in solid form and rennet ripening cheese.

Significant decrease in stocks was recorded among others for: sugar; processed (melted) cheese, excluding grated and powdered and beer from malt.

Among non-foodstuffs a significant increase in stocks was observed for passenger cars; food grinders and mixers; juice extractors with built in electric engine; household vacuum cleaners; carpets, mats and textile floor coverings; TV receivers. Larger stocks were also observed among others for: fabric and knitwear outerwear and clothing, tableware, kitchenware of porcelain or china; household automatic washing machines including washer-dryers; footwear and household refrigerators and freezers, including combined refrigerators-freezers.

Lower than in 2017 were stocks among others for: bicycles; tyres for passenger cars and fabric underwear.

DELIVERIES TO THE NATIONAL MARKET are the quantity of products manufactured in the country (data refer to economic entities in which the number of employees exceeds 9 people) less their export and increased by import adjusted by the balance of changes in stocks of producers employing more than 49 employees.

In 2018 deliveries of the majority of surveyed consumer goods were higher than in the previous year. The increase in deliveries of mainly foodstuffs was related to the increase in production of those goods.

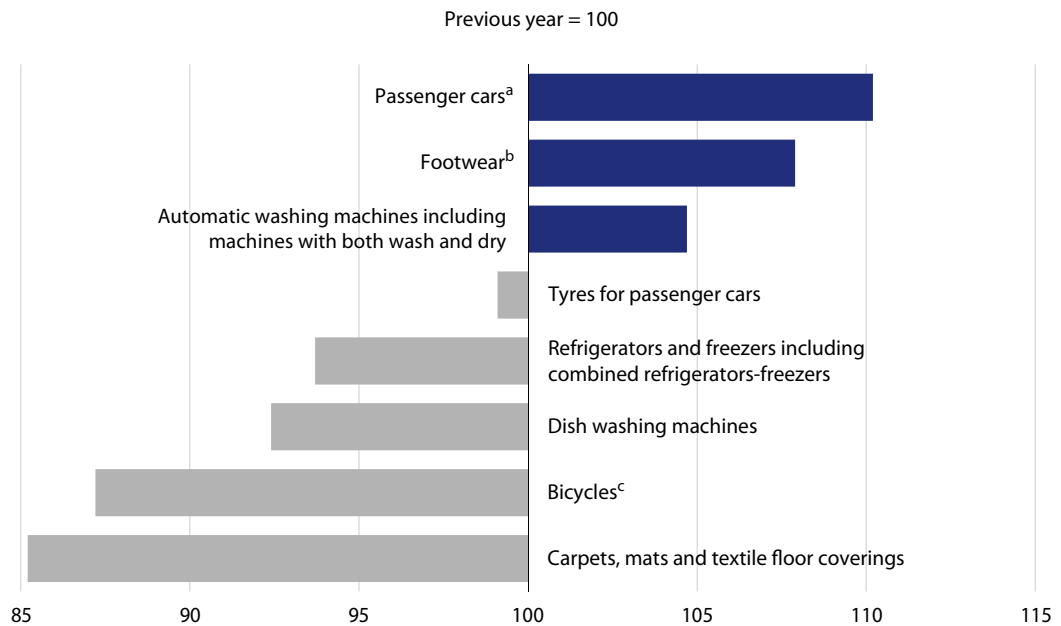
Among foodstuffs, much higher than in 2017 were deliveries of candies (excluding chocolate); canned and preserved fish; beef meat; mineral water; coffee; sugar; frozen sea fish and rye flour.

In turn, significantly lower were of deliveries of: soups and broths and preparations thereof; canned food, poultry cured meat products; margarine and spreads (excluding liquid margarine); milk and cream in solid form; poultry meat and meat and variety meet products from animals for slaughter.

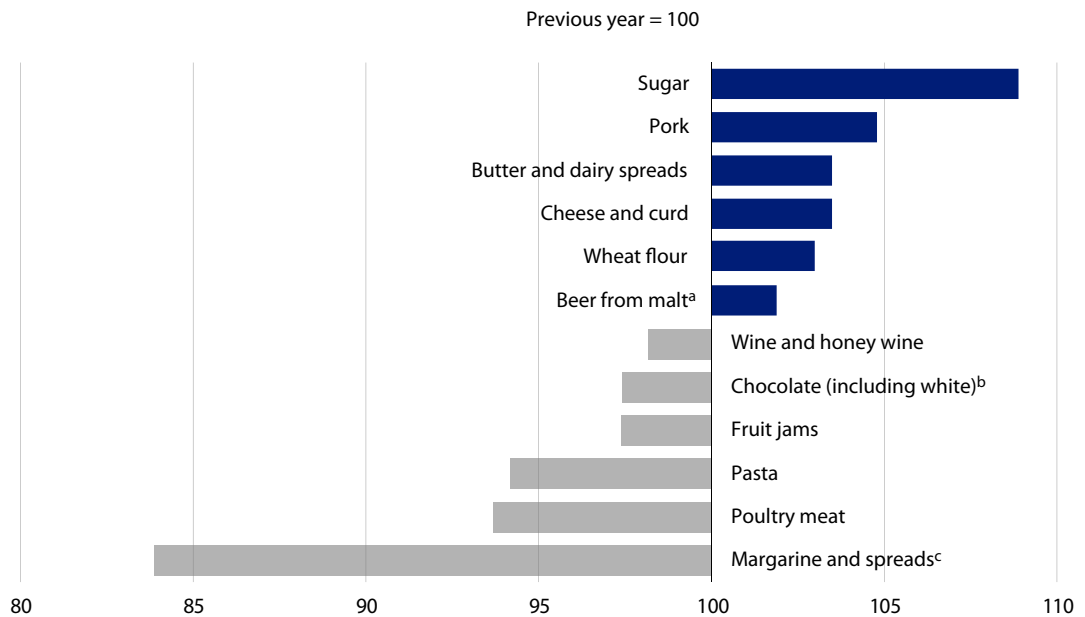
Among non-foodstuffs a significant increase in deliveries was observed for the following groupings: fabric underwear; cigarettes containing tobacco or mixtures of tobacco and tobacco substitutes; household vacuum cleaners; fabric outerwear and clothing; soap, detergents and washing preparations; passenger cars. Higher than last year were also deliveries of: footwear; tableware and kitchenware; household automatic washing machines including washer-dryers and knitted outerwear and clothing.

Lower than a year before were deliveries of electric, gas and gas-electric cookers; carpets, mats and textile floor coverings; bicycles; food grinders and mixers, juice extractors with built in electric engine; household dishwashers; TV and radio receivers; household refrigerators and freezers and tyres for passenger motor vehicles.

Chart 18. Delivery index of selected non-foodstuffs in 2018



a Excluding motor caravans, snowmobiles, golf carts and similar vehicles.
 b Including rubber footwear.
 c Including children's.

Chart 19. Delivery index of selected foodstuffs in 2018

a On an alcoholic strength of 0.5 % and more.

b With sweet and chocolate goods.

c Reduced and low fat, excluding liquid margarine.

Methodological notes

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, costs and financial result and on 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

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, excluding motorcycles |
| 45.2 | Maintenance and repair of motor vehicles, excluding motorcycles |
| 45.3 | Sale of motor vehicle parts and accessories, excluding motorcycles |
| 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 and retail trade; repair of motor vehicles | Wholesale and retail trade; repair of motor vehicles |
| 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^a:

| Specification | Producing (non-trade) units | G Section | | I Section |
|--|--|------------------------|--|----------------|
| | | Trade units | | Catering units |
| | | wholesale | retail | |
| 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, division 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, division 31 | 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.

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).

Main definitions

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.

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).

BARS are catering establishment that has similar activity as restaurant but its assortment is limited to popular meals and commodities. Usually, it is self-service outlet, such as: eating place, bar: universal, fastfood outlet, snack bar, milk bar and bistro. In this group, we include also cafes and pubs.

BASIC PRICE is defined as the amount of money received by the producer (including the trading unit) from the buyer per unit of product (product or service) less taxes on the product and any discounts and rebates plus subsidies on product.

CANTEENS are collective nourishment establishments offering meals for a particular groups of the consumers (especially dinners, but also suppers and breakfasts).

CATERING OUTLETS are catering establishments conducting limited catering activity, i.e. fry houses, drink bars, ice-cream parlours, snack-bars.

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

CONSUMPTION OF 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. 4 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.

DELIVERIES TO THE DOMESTIC MARKET are the quantity of products manufactured in the country (data refer to economic entities in which the number of employees exceeds 9 people) less their export and increased by import adjusted by the balance of changes in stocks of producers employing more than 49 employees.

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;

GLOBAL PRODUCTION in the enterprise sector includes:

- revenues from the sale of products (non-financial products and services) of one's own production;
- margin realized on the sale of goods purchased for resale;
- value of products in the form of settlements in kind;
- products intended to increase the value of one's own fixed assets;
- increase in inventories of finished goods and work in progress.

GROSS DOMESTIC PRODUCT (GDP) presents the final result of the activity of all entities of the national economy. Gross domestic product is equal to the sum of gross value added generated by all national institutional units increased by taxes on products and decreased by subsidies on products. Gross domestic product is calculated at market prices.

GROSS VALUE ADDED (GVA) measures the newly generated value as a result of the production activity of national institutional units. Gross value added is the difference between gross output and intermediate consumption and is presented at basic prices.

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.

INTERMEDIATE CONSUMPTION is the net value of used materials (including fuels), raw materials (including packaging), energy, technical gases, and external services (external processing, transport services, rental of equipment, telecommunications and computing services, commissions paid for banking services, business travel costs without allowance) and other costs (e.g. costs of advertising, representation, lease and rental costs, business tickets costs, lump sum costs for using one's own vehicles for business purposes, exchange fees).

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.

MARKETPLACES are 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.

NET REVENUES FROM SALES AND EQUAL THEREWITH (excluding VAT) include revenues from the sale of products (i.e. amounts obtained or receivable from the sale of: finished products in generating entities, works and services in entities providing service activities), goods and materials. Revenues from sales are determined in the value expressed in real sales prices including reduction in prices, discounts and rebates

– excluding value added tax.

OPERATING ACTIVITY COSTS include intermediate consumption, costs related to employment, value of goods and materials sold. Depreciation costs have not been taken into account.

OTHER SMALL RETAIL SALES OUTLETS (the mobile outlet type: mobile sale outlets, hawking sale outlets) are 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. Offered selection of products is primarily comprised of articles that do not require a special purchase and selection decision.

PERMANENT SMALL RETAIL SALE OUTLETS include:

- 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.

PETROL STATIONS are outlets conducting retail sale of gasoline, diesel oil, LPG gas, other fuels, cooling liquids, cleaning agents, etc.

RESTAURANTS are catering establishments with a wait' staff accessible to consumers and offering a wide assortment of foodstuffs and dishes according to the menu.

RETAIL SALES OF GOODS (including VAT) are sales of own goods and consignment (new and second-hand) in retail sales outlets, catering establishments and other sales outlets (e.g. stores, warehouses) in amounts satisfying individual needs of consumers. In addition retail sales include sales made by mail order houses or via Internet.

RETAIL SALE OUTLETS include:

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

REVENUES FROM CATERING ACTIVITY (including VAT) cover revenues obtained from the sale of:

- trade commodities – 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;
- other activity – offered services e.g. charges for parking-places, cloak-rooms and left-luggage offices, as well as the revenues from the amusement activity, organization of parties or hiring restaurant rooms.

SALES AREA OF SHOPS is 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.

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.

SALE OF FOOD is sale of 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 is sale of goods covering 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 production and construction purposes.

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.

SPECIALIZED STORES are stores that sell a wide range of articles to comprehensively meet specific needs, such as clothing, home furnishings, automotive, furniture, sports, herbal stores, etc.

STOCKS OF FINISHED GOODS MANUFACTURED IN INDUSTRY UNITS are the amount of finished products in warehouses of units engaged in production activity ready-to-sale.

STORAGE AREA OF WAREHOUSES is part of the surface of warehouse buildings (so-called closed warehouses), roofed rooms (so-called sheds), storage yards and other rooms adapted for storage purposes (e.g. leased or rented premises from production companies, public utilities, natural persons, etc.) which serves to store goods for longer or shorter periods of time.

STORE is a permanent retail outlet having a special room (i.e. a store space) with a store window and an interior accessible to customers. If in large stores (e.g. in department stores, trade stores, mail order outlets) part of the sales area has been leased by another legal or natural person who on this part of the area conducts retail sales on its own account – this part is a separate store.

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.

TRADE MARGIN is 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.

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.

TRADE WAREHOUSES are warehouses of units dealing in trade in goods, organizational and functional units occupying separate storage space equipped with equipment and technical devices enabling storing goods in accordance with the requirements of storage and having personnel for its proper handling.

Trade warehouses occupy:

- storage area (in m²) in closed warehouse buildings, roofed storage buildings (sheds), independent basements, storage yards, non-warehouse rooms, i.e. intended for purposes other than storage of goods, e.g. industrial, office, residential, social;
- usable capacity (in m³): tanks intended for storage of liquid, semi-liquid and gas products; silos (elevators) for storing loose, powdered, fine-grained goods, etc.

TURNOVER, otherwise net sales revenues include the value of products sold outside the enterprise (finished goods and services), goods and materials, expressed in real sales prices taking into account reduction in prices, discounts and rebates – excluding value added tax (VAT). However the sale of fixed assets components, subsidies, other operating income, and revenues from financial operations is not taken into account (dividends from these shares, gained interest).

UNIVERSAL STORES are stores with a sales floor area ranging from 120 m² to 399 m² selling mainly foodstuff products for everyday use and additionally often purchased non-foodstuff goods.

WHOLESALE (including VAT) is an activity consisting in the resale of purchased goods on its own behalf usually to non-final recipients (other wholesalers, retailers, producers). It includes the sale of goods from commercial, one's own or leased warehouses in which stored goods are the property of a commercial enterprise. The wholesale value also includes the value of sales realized on the basis of a direct payment or contract (agents, auctioneers), as well as the value of sales performed by cleared transit consisting in the transfer of goods directly from the supplier to the consignee omitting the warehouses that carry out the delivery.

WHOLESALE WAREHOUSES are the main units of the wholesale trade; they can be organized as separated buildings (secured warehouses), roofed magazines (sheds), silos, reservoirs and storage sites.

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

WORKING PEOPLE include full-time and part-time employees in the main workplace.