



Internal market in 2020



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Preface

We would like to present you with the next edition of the annual "Internal market" study from the "Statistical analyses" series.

The study presents a comprehensive analysis of the activity of commercial entities prepared on the basis of research results concerning these enterprises as well as basic data on the phenomena and trends observed on the market, i.e. sales volume, development of a commercial network, international conditions. The information on market processes is complemented by the presentation of data on supplies and stocks of selected products and their consumption.

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

The study also contains detailed information on the size of retail and catering chains and their infrastructure by region.

Presenting you with the "Internal Market in 2020" publication, we would like to thank all the persons and institutions for providing information and comments which will contribute to shaping and enriching the content of the next editions of this publication.

Director
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Dominik Rozkrut, Ph. D.

Warsaw, November 2021

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Symbols

Symbol	Description	Symbol	Description
(-)	magnitude zero	(.)	data not available, classified data (statistical confidentiality) or providing data impossible or purposeless
(0)	magnitude not zero, but less than 0.5 of a unit	"Of which"	indicates that not all elements of the sum are given
(0.0)	magnitude not zero, but less than 0.05 of a unit		

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	mln	million
EU	European Union		

Accepted groupings:

- **EU 27** (27 countries-members of EU: Austria, Belgium, Bulgaria, Croatia, Cyprus, Denmark, Estonia, Finland, France, Greece, Spain, Ireland, Lithuania, Luxembourg, Latvia, Malta, Netherlands, Germany, Poland, Portugal, Czechia, Romania, Slovakia, Slovenia, Sweden, Hungary, 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).

Synthesis

In 2020 in Poland, according to preliminary data, the gross added value generated by entities conducting service activities accounted for 65.7% of the gross value added of the whole national economy. At the same time, 58.6% of all employed persons found a job in these units. The dominant activity among service entities in terms of added value was trade, the share of which constituted 17.4% of the gross added value generated in the whole national economy.

In 2020, due to the spread of the COVID-19 pandemic, the activities of many service entities including trade, and in particular accommodation and food service related entities were temporarily limited, which adversely affected the annual financial results of these entities.

Retail sales in current prices realized in 2020 by trade as well as non-trade enterprises amounted to PLN 890.6 billion and were by 2.9% lower than in the previous year, while wholesale in trade enterprises (in current prices) amounted to PLN 1,474.9 billion and were by 0.4% lower than in the previous year.

At the end of 2020, the estimated number of stores in Poland amounted to nearly 320 thousand and was by 4.0% (approximately 13.4 thousand) lower than in the previous year; at the same time, the sales area of stores decreased by 0.1% and amounted to approximately 37,185 thousand m². About 320 thousand stores were operated by about 255 thousand companies. The estimated number of petrol stations amounted to 8,120 and was by 6.3% lower than in the previous year. The highest density of petrol stations was recorded in Śląskie Voivodship with 73 facilities per 1000 km² of area.

Total revenues from catering in current prices in 2020 amounted to only PLN 37.6 billion and decreased by 26.0% compared to the previous year (in constant prices they were lower by 30.4%). The number of catering establishments (permanent and seasonal) in the country was estimated at about 64.4 thousand, of which 40.5% were catering outlets, 27.4% – restaurants, 26.6% – bars, and canteens – 5.5%. The total number of catering establishments was lower by 10.9% compared to 2019.

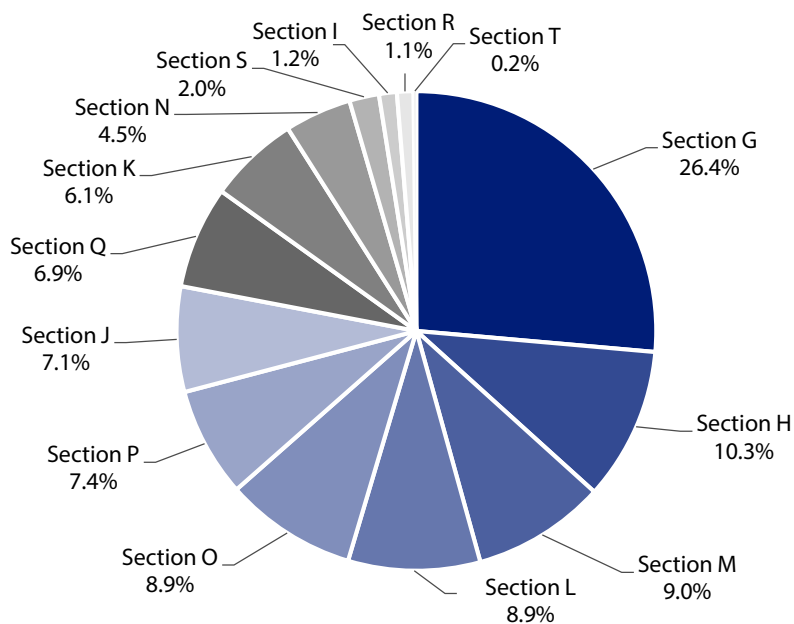
In 2020, the deliveries of most of the consumer goods surveyed was higher in internal market supply compared to the previous year. The increase was recorded mainly in food product.

Service activities in Poland and EU countries

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.

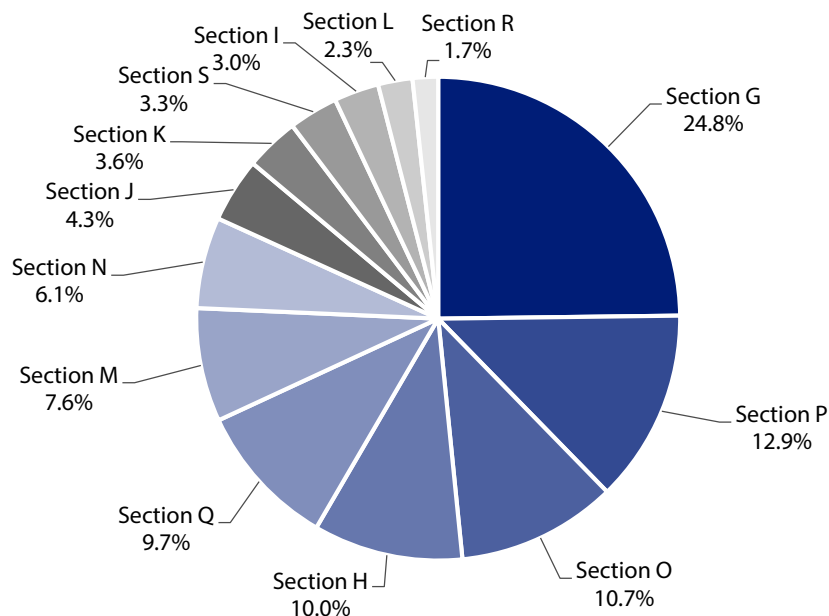
In 2020, in Poland, according to preliminary data, the gross value added generated by entities conducting service activities accounted for 65.7% of the gross value added of the entire national economy. At the same time, 58.6% of all employed persons found work in these units. The dominant activity among service entities in terms of value added was trade activity, the share of which constituted 26.4% of the value added generated by all entities conducting activities of a service nature (a decrease by 0.4 percentage point compared to the previous year). The share of the activity with the second largest rate of value added generation - transport and storage (according to NACE section H) was at the level of 10.3% (a decrease by 0.3 percentage point), while the share of professional, scientific and technical activities (according to NACE section M) amounted to 9.0% (an increase by 0.1 percentage point). Compared to the previous year, the share of activities related to accommodation and catering services decreased the most (by 0.9 percentage point) (section I according to NACE).

Chart 1. Structure of gross value added in services by NACE sections in 2020



At the end of 2020, the greatest number of people (24.8% of the total number of people working in service entities) worked in enterprises included in the section "Trade and repair of motor vehicles" (section G according to NACE). The second place in terms of the number of employed persons was taken by education (section P according to NACE) – 12.9%, and the next for the section "Public administration and national defense; compulsory social security" (section O according to NACE) – 10.7%.

Chart 2. Structure of persons employed in the services by NACE sections in 2020



In 2020, the dominant activity among service units in terms of average employment was also trade activity, in which 1,707.3 thousand were employed people (a decrease by 2.1% compared to 2019). Educational activity was ranked second (section P according to NACE) with an average employment of 1,113.6 thousand persons (a decrease of 0.2% compared to the previous year). The highest percentage increase in the average employment among service activities was recorded in section S "Other service activities" – by 2.4%, while the largest decrease was shown in activities related to accommodation and catering services (section I according to NACE) – by 8.4%, these services were most affected by the limitations related to the spread of the COVID-19 epidemic. The lowest average employment at the level of 128.1 thousand persons were recorded in section R "Arts, entertainment and recreation".

The highest average gross salary in 2020 was recorded in the sections: "Information and communication" (according to NACE section J) – PLN 9,015 and "Financial activity and insurance" (according to NACE section K) – PLN 8,277. On the other hand, the lowest average gross salary at the level of PLN 3,311 was recorded in entities included in section I "Accommodation and food service activities". In section G "Trade and repair of motor vehicles", the value of the average gross salary amounted to PLN 4,577 and increased by 5.0% compared to 2019. The highest increase in the average monthly salary by 9.7% was observed in section N "Administrative and support service activities" and also significant in section P "Education" (by 8.6%).

In 2020, the added value resulting from the activities of service enterprises accounted for the vast majority of the value added generated in the European Union countries. Among the EU Member States, the highest share of the value added generated by services was recorded in Luxembourg – 88.0%, Malta – 84.8% and Cyprus – 83.7%. Services had a large share in the added value of the entire economy in such countries as France (79.8%), Greece (79.5%) and the Netherlands (78.3%). In the countries of Central and Eastern Europe, this share ranged from 64.1% in the Czech Republic to 73.6% in Latvia, in Poland it was 65.7%.

Compared to 2015, the most significant increase in the share of service activities in the creation of value added was shown in Romania (by 5.8 percentage points), Slovakia (by 4.9 percentage points) and the Czech Republic (by 4.1 percentage points). The largest decrease in the share of services compared to 2015 was recorded in Cyprus (by 2.5 percentage points), Denmark (by 1.7 percentage points) and Finland (by 1.0 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	2015	70.5	Lithuania	2015	66.5
	2020	70.4		2020	68.6
Belgium	2015	77.3	Luxembourg	2015	87.1
	2020	77.8		2020	87.5
Bulgaria	2015	67.9	Latvia	2015	74.3
	2020	69.5		2020	73.6
Croatia	2015	70.6	Malta	2015	85.1
	2020	70.4		2020	84.8
Cyprus	2015	86.2	Germany	2015	69.1
	2020	83.7		2020	69.9
Czechia	2015	60.0	Poland	2015	63.4
	2020	64.1		2020	65.7
Denmark	2015	75.9	Portugal	2015	75.2
	2020	74.2		2020	75.4
Estonia	2015	69.2	Romania	2015	61.0
	2020	71.6		2020	66.8
Finland	2015	70.4	Slovakia	2015	63.2
	2020	69.4		2020	68.1
France	2015	78.5	Slovenia	2015	65.2
	2020	79.8		2020	64.4
Greece	2015	79.2	Sweden	2015	73.4
	2020	79.5		2020	74.6
Spain	2015	74.9	Hungary	2015	64.2
	2020	74.2		2020	66.1
Netherlands	2015	77.9	Italy	2015	74.5
	2020	78.3		2020	73.9
Ireland	2015	57.7			
	2020	58.5			

Source: Eurostat 04.10.2021; 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.

THE 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.

In 2020, according to preliminary data, the share of trade in gross domestic product generation was 15.3%, and in gross value added – 17.4%.

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

Specification	2017	2018	2019	2020
Share of trade in creation GDP (%)	15.5	15.6	15.5	15.3
Share of trade in gross value added (%)	17.7	17.8	17.6	17.4

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.

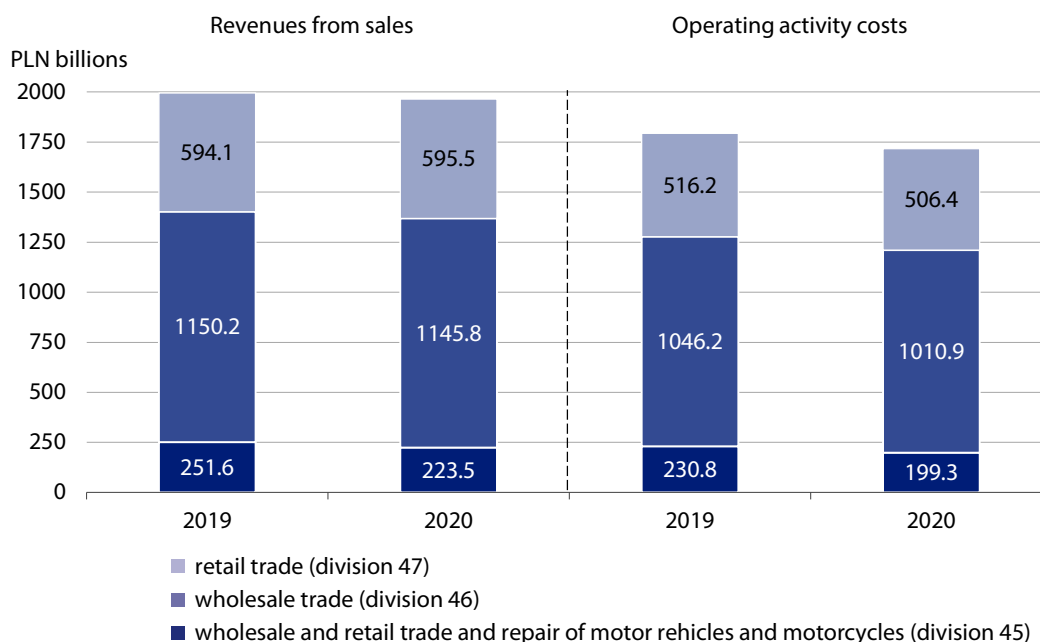
In 2020, according to preliminary data, the value of revenue from sales at current prices achieved by enterprises classified in section G "Wholesale and retail trade; repair of motor vehicles, including motorcycles" was at the level of PLN 1,964.8 billion (i.e. 1.6% lower than in the previous year). The largest part of these revenues was generated by enterprises conducting wholesale activity, 58.3%. The share of retail trade amounted to 30.3%, while the share of wholesale and retail trade in motor vehicles and their repair was 11.4%. Enterprises employing 10 or more persons achieved revenues at the level of PLN 1,424.0 billion, i.e. 72.5% of total revenues, and the revenues of enterprises employing 9 or less persons amounted to PLN 540.8 billion, which constitutes 27.5% 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 2020, according to preliminary data, the operating costs (excluding depreciation) incurred by trade entities amounted to PLN 1,716.6 billion and were by 4.3% lower than in the previous year. Operating costs incurred by entities employing 10 or more persons amounted to PLN 1,320.4 billion and accounted for 76.9% of total operating costs reported by trade entities. Entities employing 9 or fewer persons incurred costs in the amount of PLN 396.2 billion. Employment costs accounted for a significant share of the costs. The share of employment costs in operating costs for entities employing 10 or more persons was 4.8%.

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



The flow of trade goods

An important element enabling the assessment of distribution channels and circulation of goods is the analysis of the structure of revenues by types of customers and the division of purchases made in commercial enterprises by types of suppliers (Tables 18 and 19). Both the behavior of wholesalers and retailers in selecting their suppliers and the structure of their customers remained stable. In trading enterprises^a – wholesale and retail, the share of purchases directly from domestic producers and producers compared to the previous year – remained at a similar level (less than 51%). Similarly, the share of imported purchases remained at a similar level as in the previous year (almost 29%), while the share of purchases from wholesalers decreased to just over 19%.

Depending on the type of commercial activity (wholesale or retail), the structure of purchases was more diversified. In terms of wholesale, slightly more than 49% of enterprises obtained supplies from domestic producers and manufacturers, while almost 32% of them obtained direct imports. The share of wholesaler–wholesaler purchases remained at the same level as in the previous period and amounted to 18%. In retail, purchases of goods were made mainly directly from domestic producers and manufacturers (almost 57%), less often from wholesalers (slightly over 22%), while the share of purchases directly from import decreased from 23% to 20%.

Enterprises of foreign ownership most often made purchases directly from domestic producers and manufacturers (they constituted slightly over 45%), or directly from import (less than 44%), and less frequently from wholesalers (10%).

In the structure of revenues of wholesale enterprises, 45% of revenues came from sales to wholesale, almost 28% came from retail traders (compared to 27% in the previous period), and 17% from domestic producers. Almost 6% were direct receipts from individual consumers.

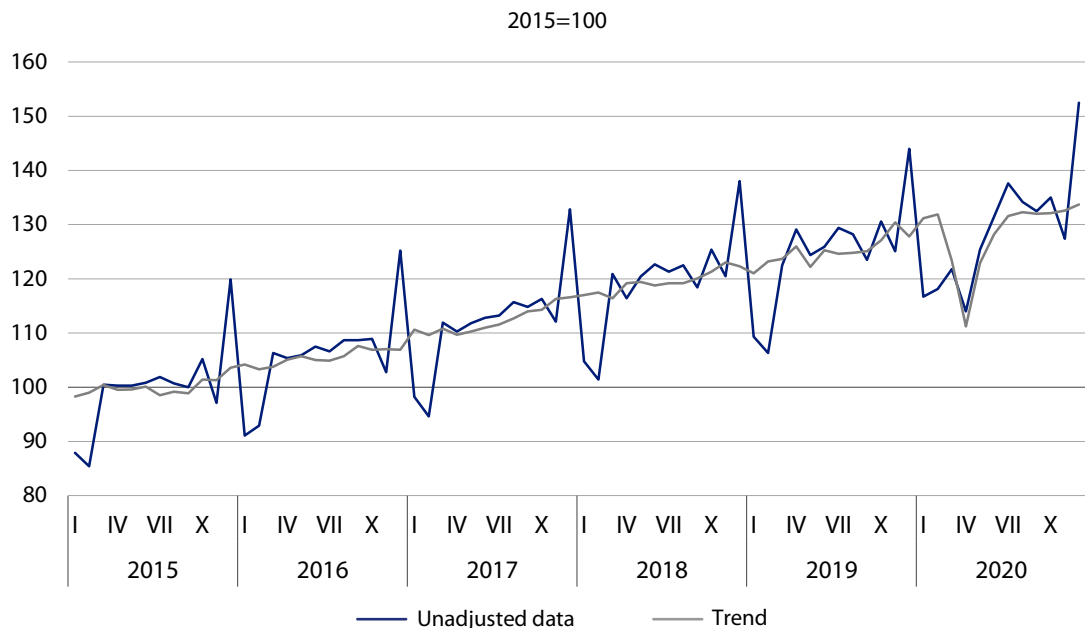
^a The data concerns enterprises employing more than 9 persons.

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).

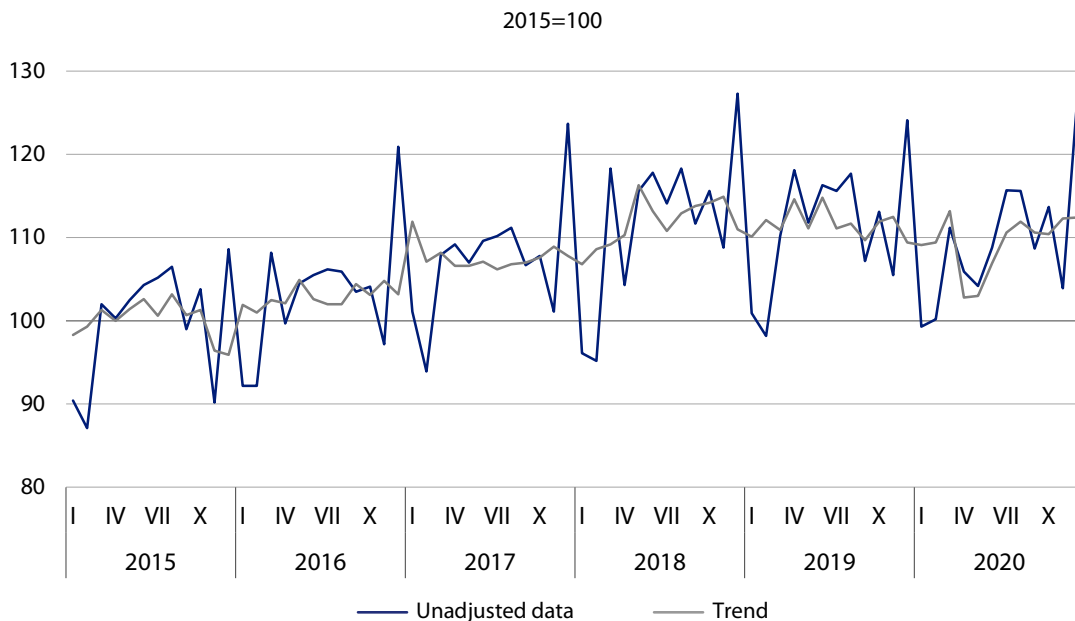
In 2020, retail trade turnover (at constant prices) was 3.2% higher than in the previous year. An increase in turnover was recorded in entities selling nonfood goods (by 5.4%). A decrease in turnover occurred in enterprises engaged in retail sales of fuels (by 6.9%) and in enterprises selling food, beverages, tobacco products (by 1.9%).

Chart 4. Turnover dynamics in fixed prices in retail companies (constant prices)^a



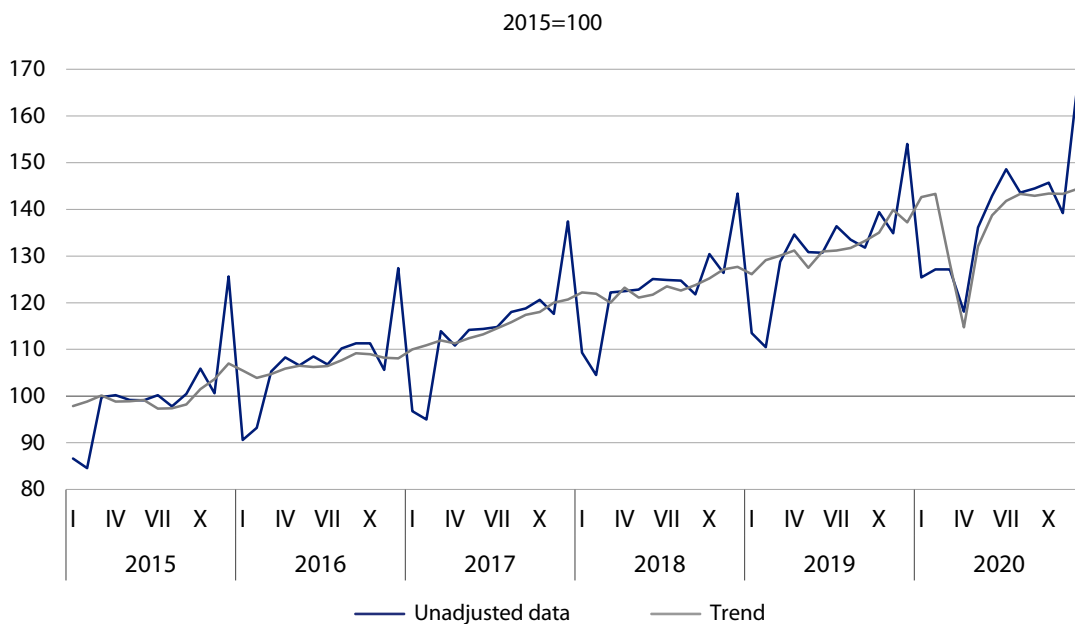
a Enterprises classified according to NACE Rev. 2 in the division 47.

Chart 5. Turnover dynamics in fixed prices in companies selling food, beverages, tobacco products (constant prices)^a



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

Chart 6. Turnover dynamics in fixed prices in companies selling non-food goods (constant prices)^a

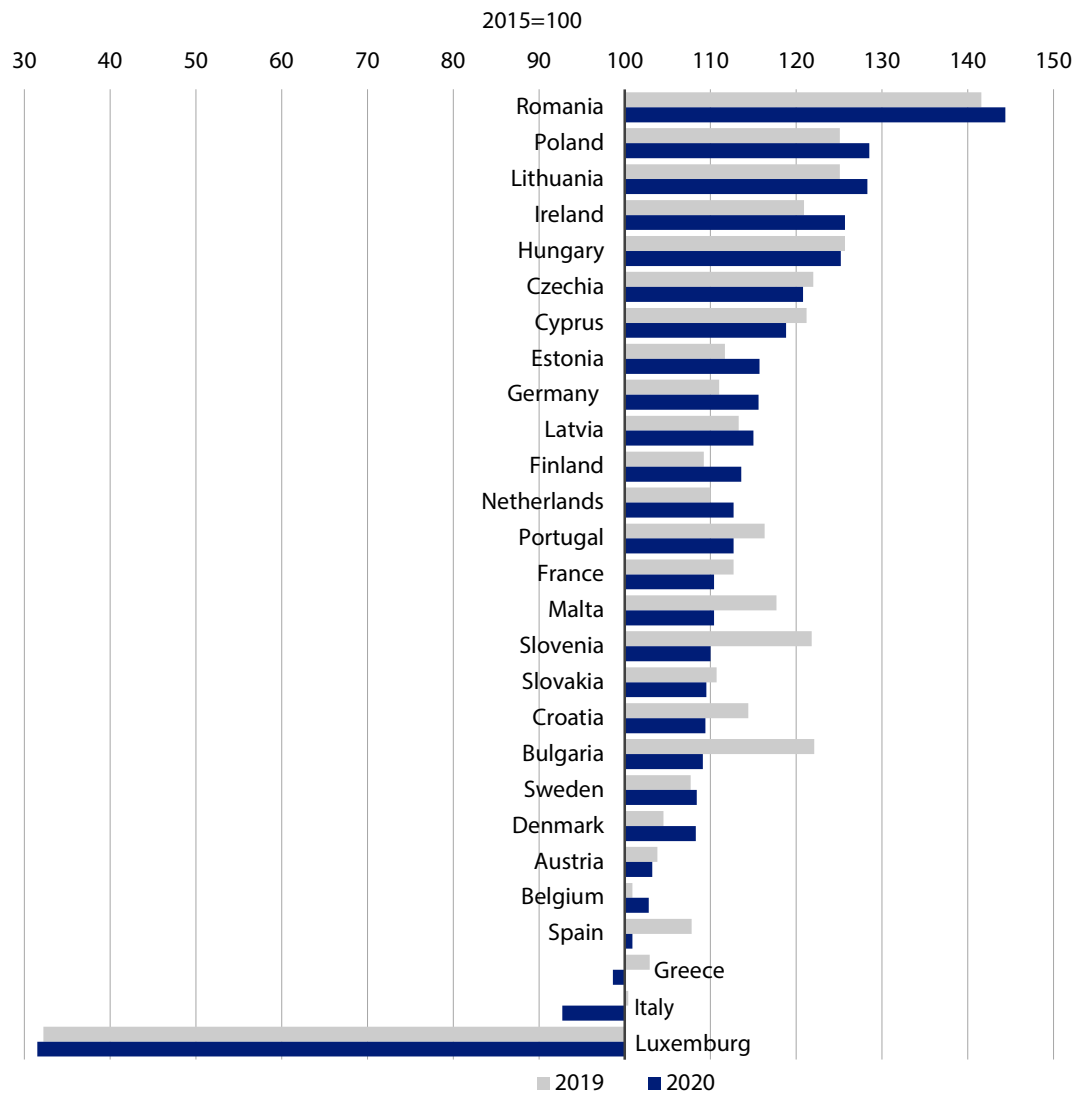


a Enterprises classified according to NACE Rev. 2 in the class 47.19 and group 47.3–47.9.

In 2020, retail trade turnover of EU countries was 9.5% higher compared to the base year (2015=100). The highest increase was recorded in Romania (44.4%), Poland (28.5%) and Lithuania (28.3%). Lower turnover compared to 2015 was observed in Luxembourg (68.5% decrease as a result of classification changes in significant trading units) and in Italy (by 7.3%) and Greece (by 1.4%).

Due to the pandemic and the periodic trade restrictions introduced in most European countries, turnover in 2020 was lower compared to the previous year. A significant decrease in turnover was recorded in Bulgaria (by 13.0%), Slovenia (by 11.8%) and Italy (by 7.7%) On the other hand, the following countries showed the highest increase in turnover compared to 2019: Ireland (by 4.8%), Germany (by 4.6%) and in Finland (by 4.4%).

Chart 7. Dynamics in the retail trade of EU countries (constant prices)^a



^a Data adjusted for working days.

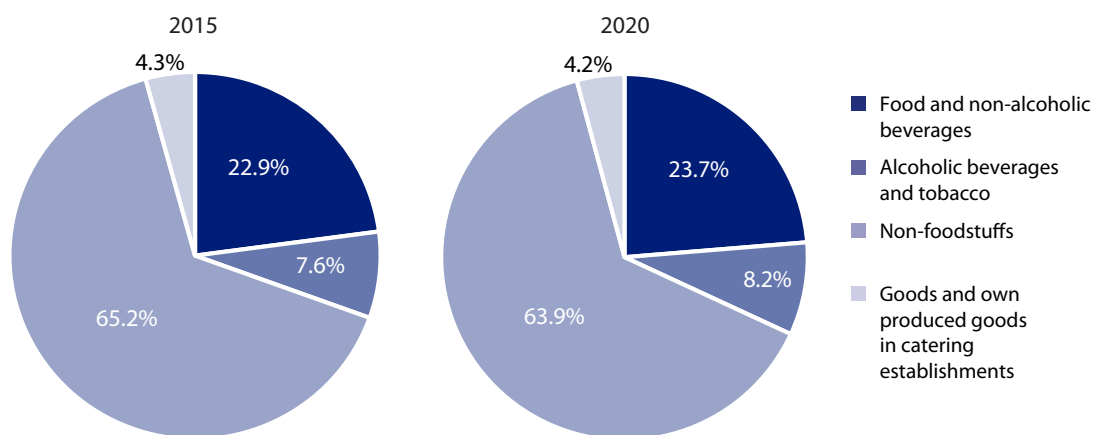
Source: Eurostat, short-term statistics (September 2021)

Retail sales

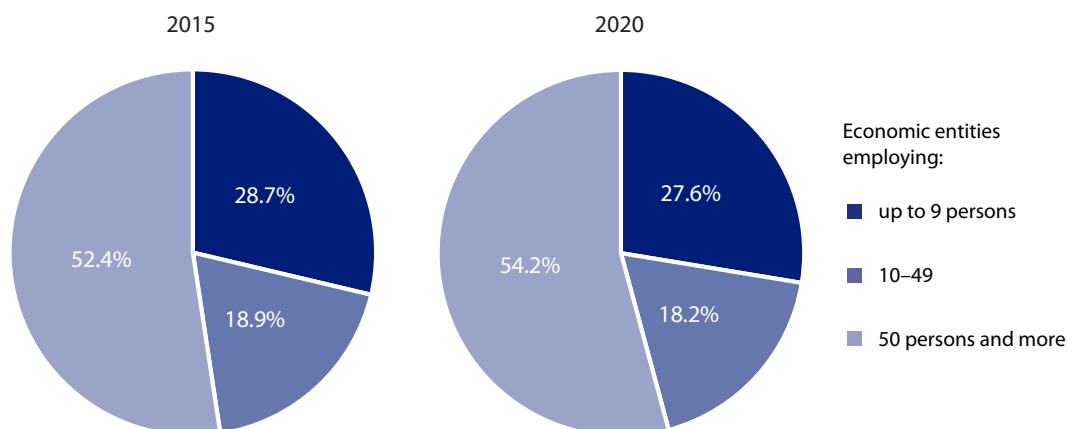
RETAIL SALES OF GOODS (including VAT) are sales of own goods and consignment (new and second-hand) in retail sales outlets, catering establishments and other sales outlets (e.g. stores, warehouses) in amounts satisfying individual needs of consumers.

In 2020, retail sales at current prices realized by trade and non-trade enterprises amounted to PLN 890.6 billion and were by 2.9% lower than in the previous year. In retail outlets, the value of goods sold amounted to PLN 853.4 billion (a decrease by 1.6%), of which the value of food and non-alcoholic beverages – PLN 211.3 billion (an increase by 6.5%), alcoholic beverages and tobacco products – PLN 72.7 billion (an increase by 9.7%) and non-foodstuffs – PLN 569.4 billion (a decrease by 5.5%). In catering establishments, retail sales amounted to PLN 37.2 billion (a drop by 26.1%).

Chart 8. Structure of retail sales (current prices)



The share of retail sales realized in 2020 by economic entities with 50 or more employees was 54.2%, by entities with up to 9 employees – 27.6%, and by enterprises with 10 to 49 employees – 18.2%.

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

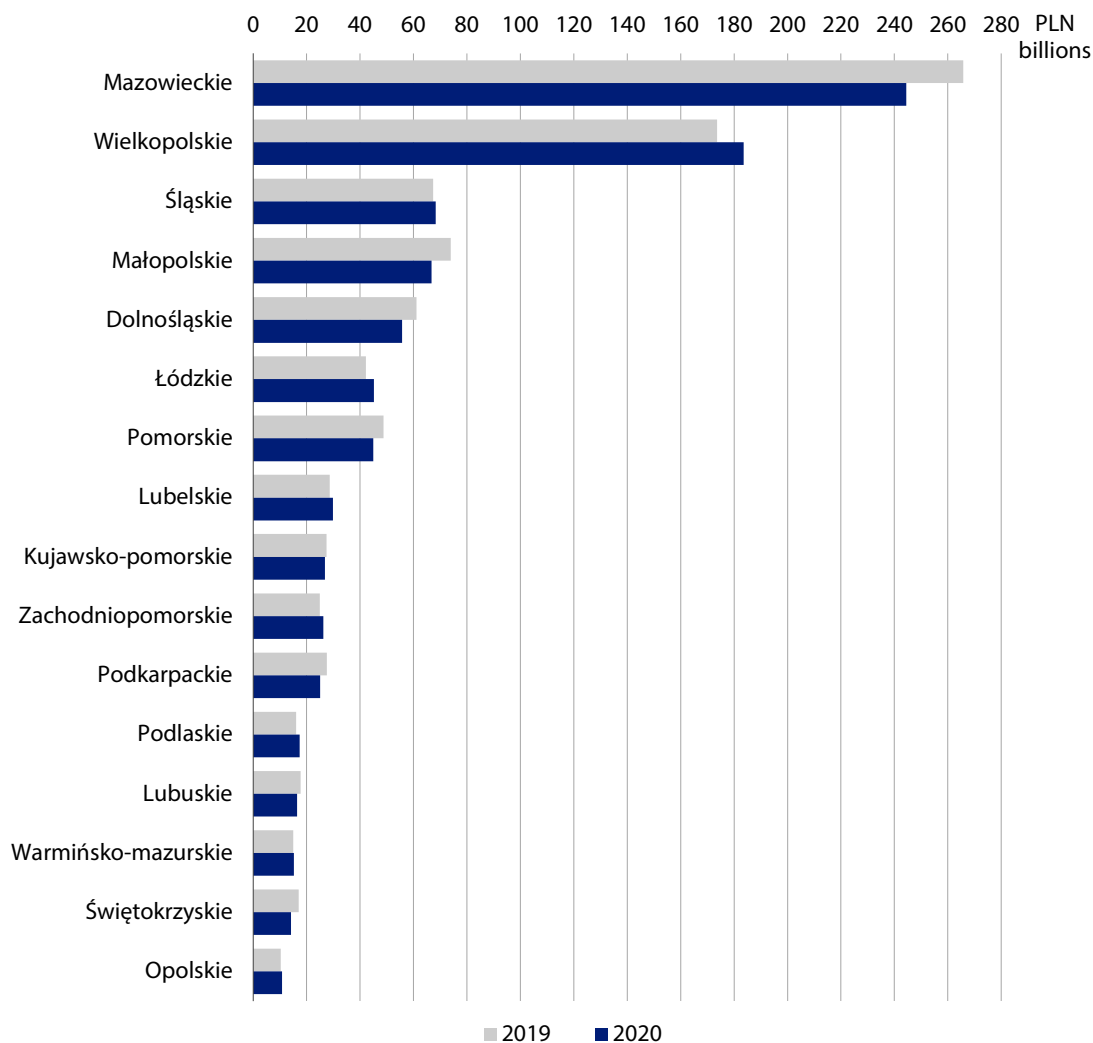
Sales in trade enterprises (in current prices) amounted to 86.7% of the total value of retail sales and its share was by 5.6 percentage points higher than a year ago. The remaining sales were carried out by enterprises whose basic activity was not trade, but e.g. production or catering.

Table 3. Retail sales of goods by groups (current prices)

Specification		2018	2019	2020
a – absolute numbers		PLN mln		
b – corresponding period of the previous year=100				
Total	a	862,066.3	917,671.3	890,637.1
	b	106.4	106.5	97.1
of which trade enterprises	a	745,846.6	744,115.1	772,257.1
	b	105.7	99.8	103.8
Food and non-alcoholic beverages	a	222,943.2	243,414.2	244,930.5
	b	104.2	109.2	100.6
Alcoholic beverages and tobacco	a	66,645.8	71,154.6	75,931.9
	b	105.0	106.8	106.7
Non-foodstuffs (excluding tobacco)	a	572,477.3	603,102.6	569,774.8
	b	107.5	105.3	94.5

In 2020, "total" retail sales at current prices were by 2.9% lower than in the previous year. The same number of voivodships recorded a decrease in sales last year as recorded an increase. In the Mazowieckie Voivodship, whose share in total sales was dominant and amounted to 27.4%, sales decreased by 8.1%. The second voivodship with a significant share in total sales (20.6%) was the Wielkopolskie Voivodship, and enterprises with their headquarters there reported an increase in sales by 5.8%. On the next positions were: Śląskie Voivodship – 7.7% share (an increase by 1.3%) and Małopolskie Voivodship – 7.5% share (a decrease by 9.9%).

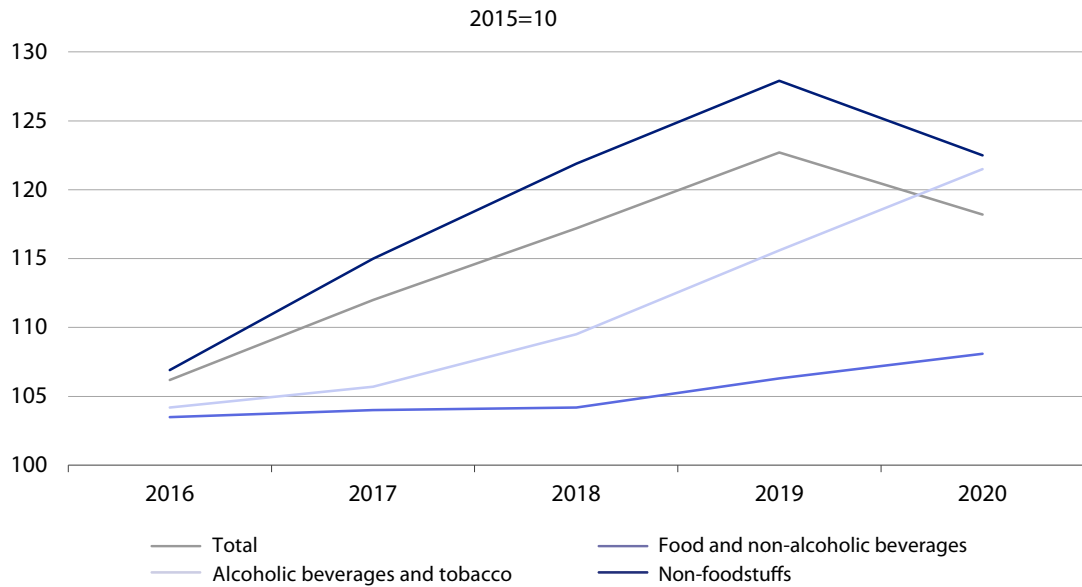
Chart 10. Retail sales by voivodeships (current prices)^a



^a According to the official residence of the enterprise.

In 2020, retail sales at constant prices realized by trade and non-trade enterprises were by 3.7% lower than a year ago (compared with an increase of 4.7% in 2019). The largest decrease was recorded in retail sales of goods and own produced goods in catering establishments (by 30.4%). Sales in the group "non-food-stuffs" also declined (by 4.2%). An increase in sales was observed in the groups: "alcoholic beverages and tobacco products" (by 5.1%) and "food and non-alcoholic beverages" (by 1.7%).

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



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

Stores

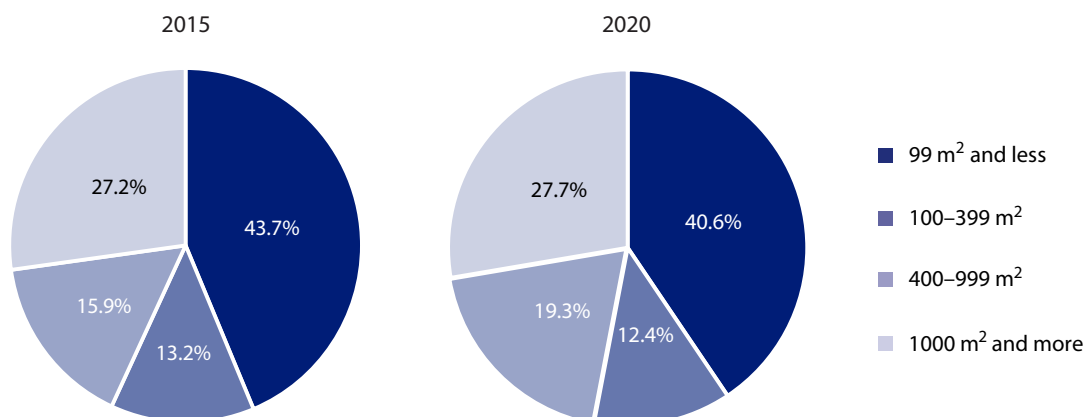
STORE is a permanent retail outlet having a special room (i.e. a store space) with a store window and an interior accessible to customers. If in large stores (e.g. in department stores, trade stores, mail order outlets) part of the sales area has been leased by another legal or natural person who on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

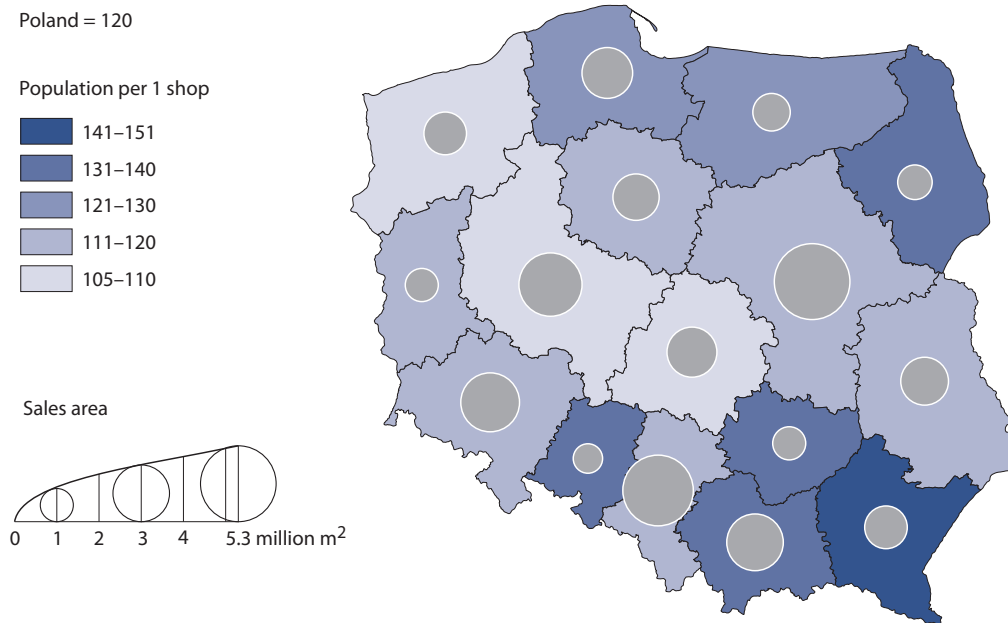
SALES AREA OF SHOPS is the part of shop used for goods display and sales (i.e. the part used for display of goods and service of customers) measured in square metres.

At the end of 2020, the estimated number of stores in Poland amounted to nearly 320 thousand and was by 4.0% (approximately 13.4 thousand) lower than in the previous year; at the same time, the sales area of stores decreased by 0.1% and amounted to approximately 37,185 thousand m².

Compared to the previous year, the stores in the size range of 100–299 m² have lost the most sales area by 7.2%, stores in the size range of 300–399 m² by 2.5%, stores with a sales area above 2,499 m² by 1.8%, and stores up to 99 m² by 1.7%. On the other hand, the highest percentage increase in sales area took place in the stores in the size range of 400–999 m² by 4.2%, and a slight increase in sales area also occurred in the stores in the range of 2,000–2,499 m² by 0.8%.

Chart 12. Structure of sales area of stores

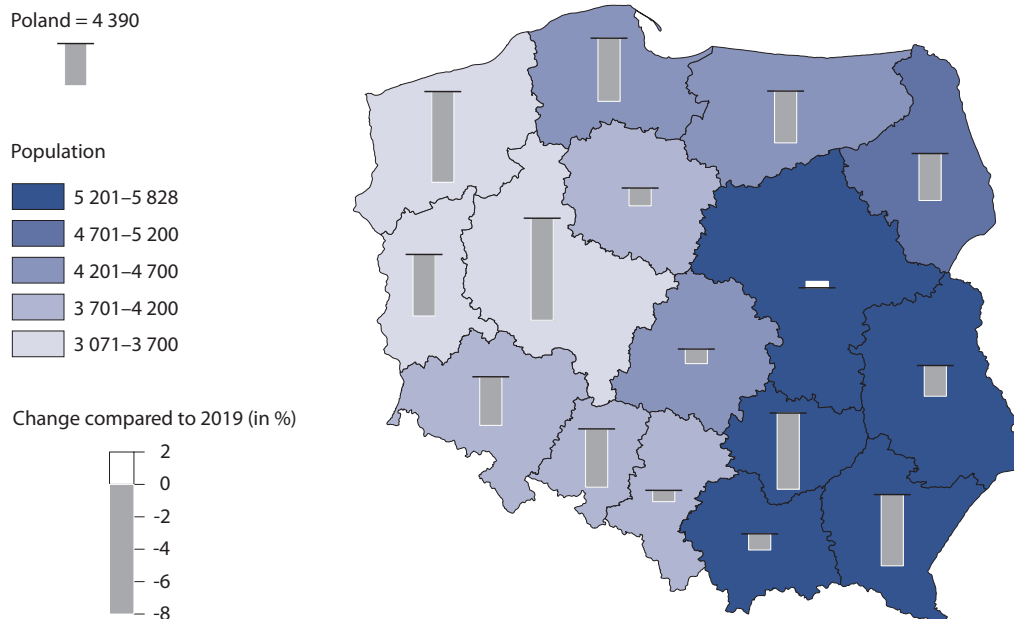


Map 1. Stores by voivodships (as of 31 December)

By region, the most retail space was lost in stores located in the following Voivodships: Podkarpackie, by approx. 312 thousand m² (by 15.4%), Mazowieckie 151 thousand m² (by 2.8%), Lubuskie 136 thousand m² (by 12.0%) and Opolskie 135 thousand m² (by 13.8%).

The highest increase in retail space was observed in stores located in the Dolnośląskie Voivodship by 278 thousand m² (by 9.5%) and in the Lubelskie Voivodship by 192 thousand m² (by 10.1%).

In 2020, there will be an average of 120 people per store, compared to 115 people respectively in 2019.

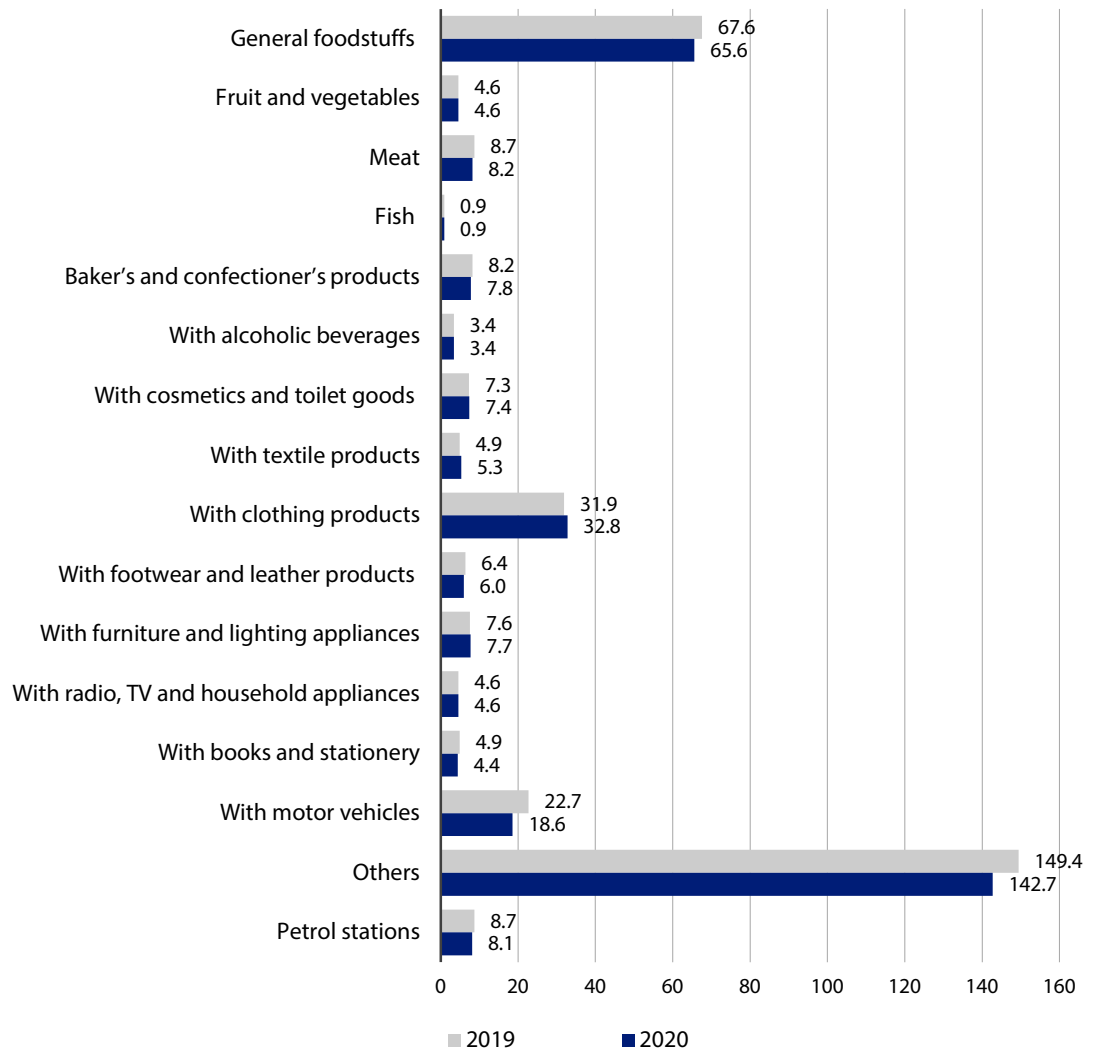
Map 2. Number of people per 1 supermarket and hypermarket by voivodships (as of 31 December)

There was an increase in the total number of supermarkets and hypermarkets in 2020 compared to the previous year (up 2.4%), resulting in an average of 4,390 people per store in these categories, compared to 4,509 in 2019.

By region, the highest number of people per 1 supermarket and hypermarket was recorded as last year in Podkarpackie Voivodship (5,828 people, compared to 6,095 people the previous year), while the lowest number of people – 3,071 – was recorded in Lubuskie Voivodship, where it was 3,191 people in 2019.

In 2020, the estimated share of the value of sales made jointly by supermarkets and hypermarkets in retail sales at shops and service stations accounted for 28.3% and it was by 2.4 percentage points higher than the previous year

Chart 13. Stores by specialization and petrol stations (as of 31 December)



The estimated number of about 320 thousand stores in 2020 was run by approx. 255 thousand enterprises. With regard to the ranges of economic entities according to the number of owned stores, the largest decrease was recorded in the number of enterprises operating up to 2 stores – by 9,798 (3.8%), compared to a decrease in the number of these enterprises by 4,544 (1.7%) in the previous year and in entities with 3 to 10 stores by 339 (by 7.2%).

The share of enterprises running 2 stores in 2020 was 97.9% and increased by 0.1 percentage points compared to the previous year.

In a total of 320 thousand stores, as in previous years, the largest share was represented by other stores (44.6%), general food stores (20.5%) and clothing stores (10.3%). The least numerous were fish stores, which accounted for merely 0.3% of the total number of stores.

Compared to the previous year, the number of stores in most specializations decreased. The largest decrease took place in the other stores by 6.7 thousand stores (by 4.5%), in the motor vehicle industry by 4.1 thousand shops (by 18.2%) and in general foodstuff stores by 2 thousand stores (by 2.9%).

On the other hand, an increase in the number of stores was observed in four industries. The largest number of stores increased in the industry with clothing products by 916 stores (by 2.9%) and with textile products by 371 stores (by 7.6%). There was a slight increase in the number of stores with cosmetics and toilet goods by 84 (by 1.2%) and with furniture and lighting appliances by 26 (by 0.3%).

In the group of enterprises with more than 9 employees, the number of stores owned by entities with foreign capital was lower in 2020 by 6.7% compared to the previous year, the sales area of these stores decreased by 0.3%. The average area of shops of foreign enterprises amounted to 681.1 m² (respectively, in shops of domestic private property enterprises – 202.4 m²).

The share of foreign-owned store area in total area increased by 0.3 percentage points compared to 2019.

Table 4. Number of stores owned by enterprises with foreign capital^a

Specification	2019	2020
Number of stores	18,653	17,395
share in total stores (%)	5.6	5.4
sales area (thousand m ²)	11,878.0	11,847.4
share in total sales area (%)	31.6	31.9

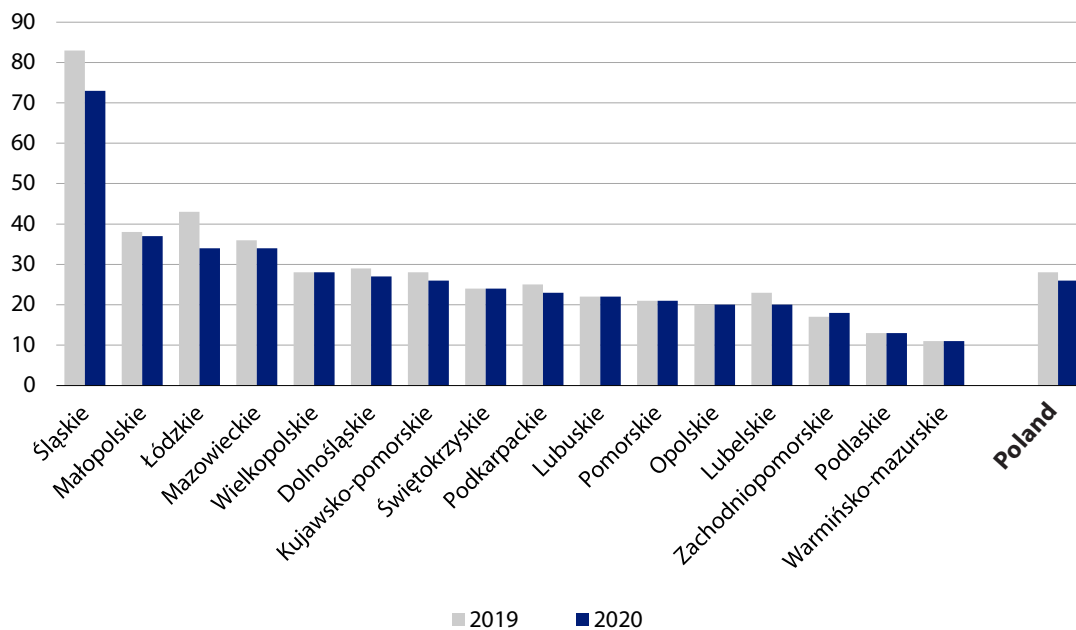
a Data concerns entities employing more than 9 persons.

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 2020, the estimated number of petrol stations was 8,120 and was by 6.3% lower than in the previous year. By region, the highest density of petrol stations is still found in Śląskie Voivodship – in 2020 there were 73 facilities per 1,000 km² of area. The lowest rate was recorded in Warmińsko-Mazurskie Voivodship where it was 11 facilities while average for Poland was 26 petrol stations per 1,000 km² of area, compared to 28 facilities in the previous year.

Chart 14. Distributions of petrol stations per 1000 km² of the area by voivodeships (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.

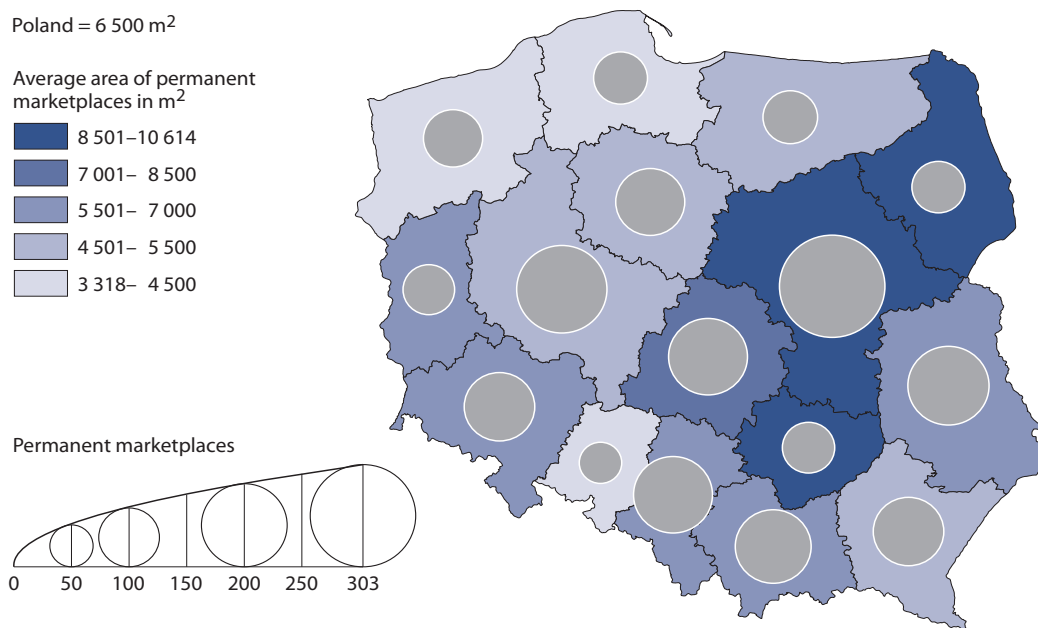
In 2020, 2,122 permanent markets (including 2,047 markets with predominantly small-retail sales) were registered in the national register kept by municipal self-government units. The total number of permanent markets was down by 37 facilities compared to the previous year. The largest number of market places was lost in Mazowieckie Voivodship – 6 facilities and 5 facilities each in Łódzkie, Pomorskie and Wielkopolskie Voivodships.

Compared to the previous year, the total area of permanent markets decreased by 1.8%. The largest decrease in market area took place in the Mazowieckie Voivodship (by 69.1 thousand m²), the Łódzkie Voivodship (by 54.1 thousand m²), the Świętokrzyskie Voivodship (by 38.5 thousand m²) and the Pomorskie Voivodship (by 37 thousand m²).

In the area of permanent markets, transactions were made in about 86.6 thousand permanent small-retail outlets, among which 45.7 thousand operated daily. The permanent market network was complemented by seasonal markets, the number of which decreased by 842 facilities in 2020.

A significantly lower annual market fee revenue (by 20.5%) compared to 2019 was registered.

Map 3. Permanent marketplaces by voivodeships in 2019 (as of 31 December)



Wholesale

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.

It is estimated that the value of wholesale in 2020 in trading companies (in current prices) amounted to PLN 1,474.9 billion and was 0.4% lower than the year before.

Among the presented groups of goods the decrease of wholesale value was observed in the group of food and non-alcoholic beverages by 1.0% and in the group of non-food goods by 0.4%. An increase in the wholesale value was recorded only in the group of alcoholic beverages by 3.8%.

In the sales structure, the share of food and non-alcoholic beverages decreased by 0.1 percentage points, while the share of alcoholic beverages increased by 0.1 percentage points, and the share of non-food goods in the sales structure did not change.

Wholesale realized by companies with 50 or more employees accounted for 47.6% and was 0.5 percentage points lower compared to the previous year.

Chart 15. Structure of wholesale (current prices)

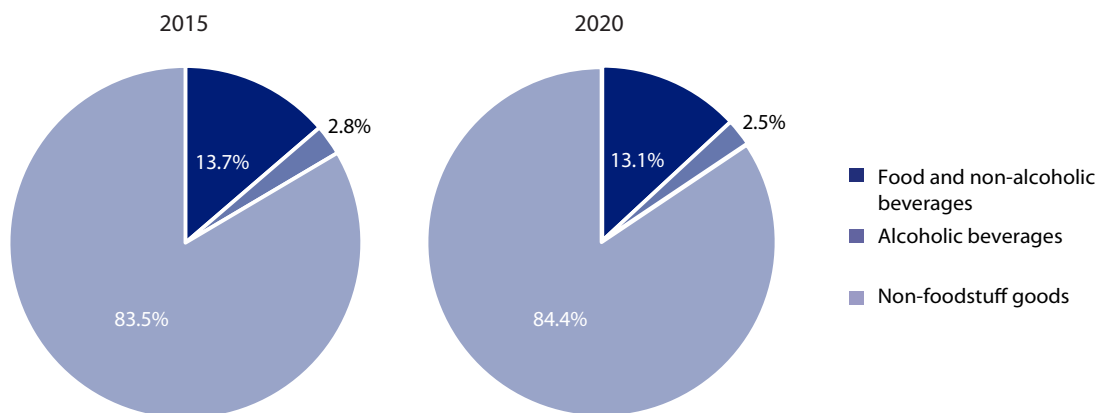


Table 5. Wholesale by groups of goods (current prices)

Specification		2018	2019	2020
a – absolute numbers		PLN mln		
b – corresponding period of the previous year=100		PLN mln		
Total	a	1,417,614.9	1,480,972.7	1,474,888.5
	b	110.2	104.5	99.6
of which enterprises employing 50 persons and more	a	664,476.3	712,182.3	702,309.6
	b	111.1	107.2	98.6
Food and non-alcoholic beverages	a	175,604.1	195,292.8	193,298.3
	b	96.7	111.2	99.0
Alcoholic beverages	a	32,334.3	35,367.6	36,695.5
	b	103.9	109.4	103.8
Non-foodstuffs goods	a	1,209,676.5	1,250,312.3	1,244,894.7
	b	112.6	103.4	99.6

Catering establishments

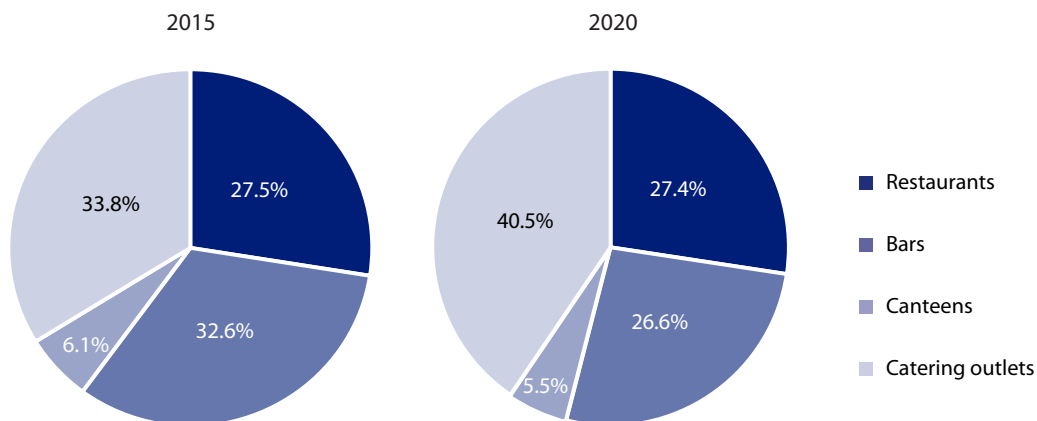
CATERING ESTABLISHMENTS include permanent and seasonal catering establishments and outlets, the scope of activity of which is the preparation and sale of meals and beverages for on-site and take-out consumption. Seasonal catering establishments are open for a certain period of time and operate not longer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

In 2020, the number of catering establishments (permanent and seasonal) in the country was estimated at approx. 64.4 thousand, of which 40.5% were catering outlets, 27.4% – restaurants, 26.6% – bars, and canteens – 5.5%. The total number of catering establishments was lower by 10.9% compared to 2019, all types of establishments decreased; canteens by 23.3%, bars by 12.3%, restaurants by 11.7% and food outlets by 7.4%. The decrease in the number of catering establishments was mainly due to the introduction of long-term restrictions on the operation of these establishments related to the spread of the COVID-19 epidemic.

Table 6. Catering establishments

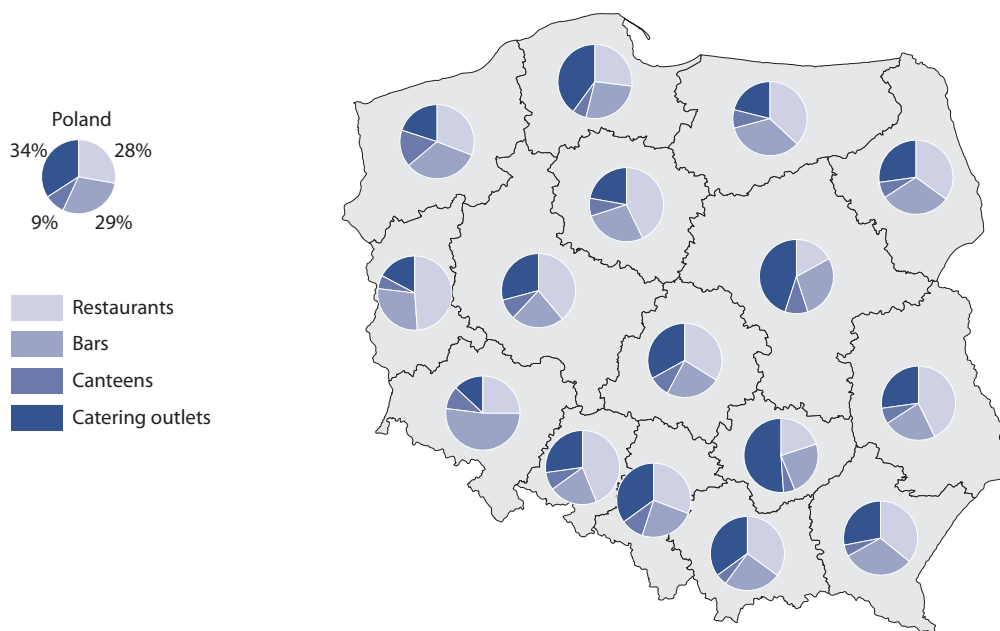
Specification	2018	2019	2020	
	number			2019=100
Total	69,829	72,355	64,449	89.1
Restaurants	19,675	20,015	17,676	88.3
Bars	19,317	19,588	17,170	87.7
Canteens	4,174	4,585	3,517	76.7
Catering outlets	26,663	28,167	26,086	92.6

The private sector in gastronomy covered 98.7% of all catering establishments, including: 99.4% of restaurants, 99.1% of bars, 99.0% of food outlets and 91.2% of canteens.

Chart 16. Structure of catering establishments

The number of catering establishments in enterprises employing more than 9 persons decreased by 12.3% compared to the previous year and amounted to 17,778, which constituted 27.6% of total catering establishments in Poland. A decrease was recorded in all types of catering establishments: in the number of canteens – by 23.3%, restaurants – by 14.9%, bars – by 10.2%, and catering outlets – by 8.4%.

The structure of catering establishments by voivodship, according to the seat of the enterprise, is presented in 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 activities

REVENUES FROM CATERING ACTIVITY (including VAT) cover revenues obtained 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;
- 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.

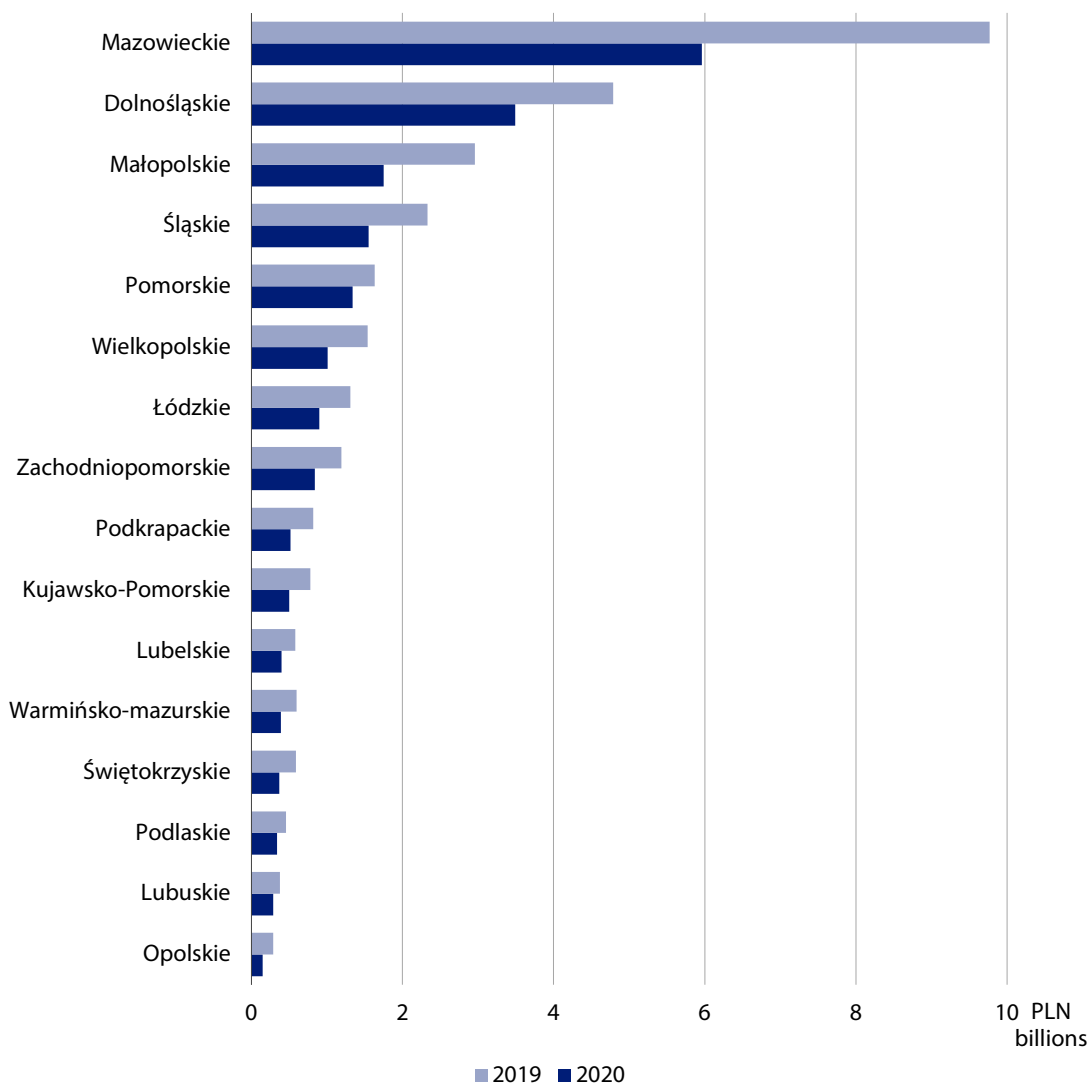
In 2020, total revenues from catering activities at current prices amounted to only PLN 37.6 billion and decreased by 26.0% compared to the previous year due to the introduced restrictions on activities related to the COVID-19 epidemic (in constant prices they were lower by 30, 4%). 99.2% of this value came from the private sector, and 0.8% from the public sector.

86.6% of revenues in total current prices came from gastronomic production, 12.2% – from the sale of trade commodities (including 8.5% – from the sale of alcohol and tobacco products) and 1.2% – from other activities. In all types of catering activities, a decrease in revenues was recorded compared to the previous year, the largest decrease in the sale of trade commodities (by 34.3%).

Table 7. Revenues from catering activities (current prices)

Specification	2018	2019	2020	
	PLN mln			2019=100
Revenues total	43,166.7	50,904.0	37,645.6	74.0
from sales of commodities	6,566.2	6,985.8	4,592.1	65.7
of which from the sale of alcoholic beverages and tobacco	4,672.2	4,842.7	3,187.8	65.8
from catering production	36,001.8	43,310.7	32,596.4	75.3
from other activity	598.7	607.5	457.1	75.3

In enterprises employing more than 9 people, revenues from catering activities in current prices amounted to PLN 19.8 billion (a decrease by 34.0% compared to the previous year), which accounted for 52.6% of total revenues from catering activities in Poland. The decrease in revenues was recorded in all voivodships, the largest in percentage terms in the following voivodships: Opolskie (by 47.3%), Małopolskie (by 41.0%) and Mazowieckie (by 39.0%). The smallest drop in revenues was observed in Pomorskie (by 18.0%), Lubuskie (by 23.2%) and Podlaskie (by 25.7%).

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

^a According to the official residence of the enterprise.

Revenues from catering production accounted for 89.8% of revenues from gastronomy activities of enterprises employing more than 9 people and amounted to PLN 17.8 billion.

The second largest group of revenues from catering activities (5.3%) were revenues from the sale of alcoholic beverages and tobacco products, which amounted to over PLN 1.0 billion.

The third group with a value of approximately PLN 0.9 billion was constituted by revenues from the sale of trade commodities (excluding alcoholic beverages), and their share in the revenues from catering activity of the surveyed enterprises amounted to 4.6%.

Revenues from other activities constituted only 0.4% of total revenues and amounted to less than PLN 0.1 billion.

Market supply

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

In 2020, average stocks of most of the surveyed articles were higher in producers' warehouses compared to the previous year.

In the group of foodstuffs, the stock of natural mineral waters (table and therapeutic waters, etc.); fruit jams; candies (excluding chocolate); frozen sea fish; chocolate products; canned and preserved fish; soups and broths as well as their preparations; mineral waters and soft drinks and grape wine with vermouth were definitely higher.

Stocks of, among others, chocolate (including white chocolate); milk and cream in solid form; sugar; rye flour; pasta and beef also increased.

Stocks of butter and other dairy spreads; meat and variety meats products from animals for slaughter; tea; wheat flour; tinned food, cured poultry meat products; cold cuts and sausages without poultry decreased significantly.

Among non-food products, there was a substantial increase in the stock of radio sets; fabric underwear and tableware and kitchenware of porcelain or china. Stocks of such items as household dish washing machines and cigarettes were also higher.

Stocks of carpets, mats and textile floor coverings; TV receivers; pantyhose and tights; bicycles; knitted underwear; household vacuum cleaners; household refrigerators and freezers, including combined refrigerator-freezers; grinders and food mixers, juice extractors with built in electric engine; and knitted outerwear and clothing were significantly lower than in 2019.

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.

The deliveries of most consumer goods surveyed were higher in 2020 compared to the previous year. The increase in deliveries was recorded mainly in food products.

The deliveries of fruits and nuts frozen, cooked or uncooked; edible animal fats melted; fruit jams; milk and cream in solid form; coffee; tea and soups and broths as well as their preparations were much higher than in 2019.

The deliveries of butter and dairy spreads; processed cheese (processed cheese), not grated or powdered; chocolate products; pasta; compotes and pasteurized fruit; variety meat products from poultry and pork meat also increased significantly.

The deliveries of candies (excluding chocolate), natural mineral waters (table, therapeutic, etc.) canned and preserved fish; rye flour were significantly lower.

The deliveries of rennet ripened cheese, sausages; frozen sea fish; meat and variety meats products from animals for slaughter; vodka, liqueurs, other spirit beverages in terms of 100% alcohol were also much lower than in 2019.

Among non-food products, an increase in deliveries was observed for the following household items: electric, gas and mixed cookers; dish washing machines; grinders and food mixers, juice extractors with built in electric engine; automatic washing machines, as well as refrigerators and freezers. The deliveries of fabric and knitted outerwear and clothing, as well as carpets, mats and textile floor coverings also increased.

Among other things, deliveries of TV receivers; passenger cars; cigarettes containing tobacco or mixtures of tobacco and tobacco substitutes; tableware and kitchenware of porcelain or china; household vacuum cleaners; bicycles and tyres for passenger cars were lower than in the previous year.

Chart 18. Delivery index of selected foodstuffs in 2020

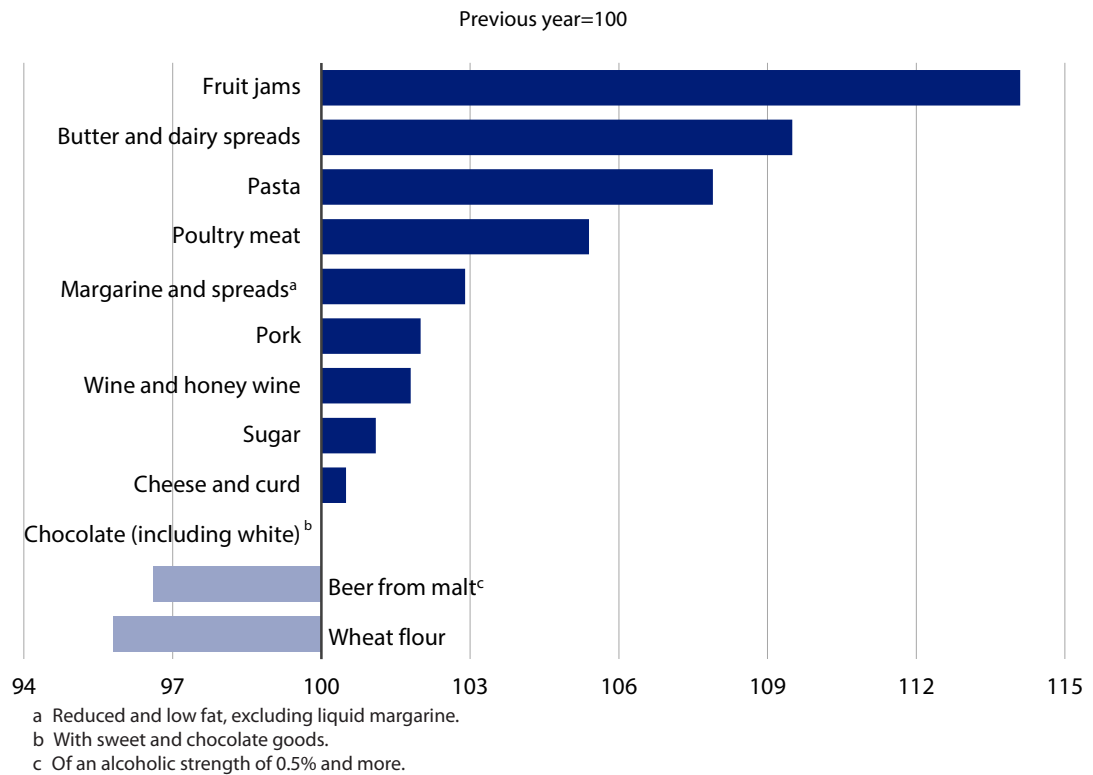
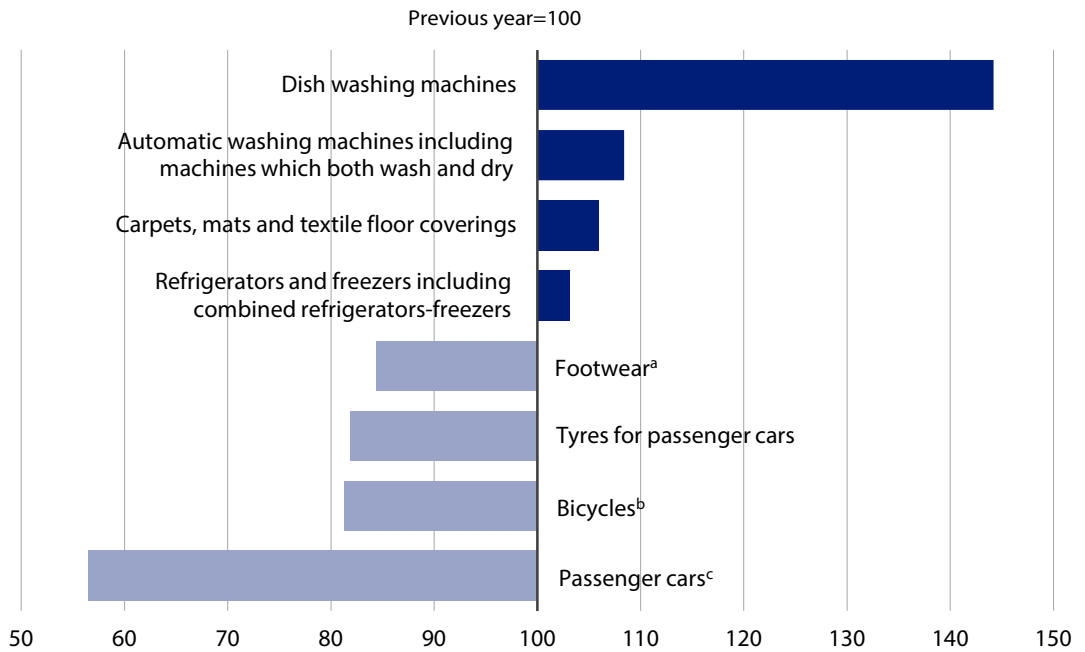


Chart 19. Delivery index of selected non-foodstuffs in 2020



a Including rubber footwear.

b Including children's.

c Excluding motor caravans, snowmobiles, golf carts and similar vehicles.

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 Business activity report of enterprises

H-01/k Quarterly survey of revenues in commercial enterprises

b) As regards entities employing 10 persons or more:

H-01a Report on the activities of shops, pharmacies and petrol stations

H-01g Report on the network of catering establishments

H-01s Report on retail sales and wholesales

H-01w Commercial network report

DG-1 Business activity report

F01/I01 Report on revenues, costs and financial result as well as on expenditure on fixed assets

SP Annual enterprise survey

P-01 Production report

c) As regards entities employing more than 49 persons:

P-02 Report on the production of goods and inventories

The use was also made of the SG-01 report – Commune statistics: housing and communal 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

As regards short-term statistics for turnover of retail enterprises, the following groupings of activity kinds are 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:

- Directed numbers (indices, percentages) were mainly calculated on the basis of absolute data expressed with greater accuracy than those provided in the tables.
- The data included in the publication were collected according to:
 - 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.
 - 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.
- The presented information on retail sales, shops and petrol stations, catering activities relate to all units of the national economy conducting trade or catering activities, regardless of whether it is a predominant or subsequent activity, while data on wholesale refer to trade units, i.e. entities classified to section G according to predominant type of activity.
- The term "foreign property" applied in the publication describes the enterprises with foreign capital or the ones in which foreign capital constitutes a majority.

5. 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.
6. 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.