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# INTERNAL MARKET IN 2013

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# PREFACE

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

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

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

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

Presenting you with The Internal Market in 2013, I would like to express our gratitude to all persons and institutions for information and suggestions, which provide a valuable contribution to the enrichment of its next editions.

Director
Trade and Services Departament

Ewa Adach-Stankiewicz

# List of abbreviations

## Classifications

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

## Major abbreviations

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

## Symbols

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

***Accepted groupings:***

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

- ***Euro-zone –*** *(18 countries-members of Economic and Monetary Union: Austria, Belgium, Cyprus, Estonia, Finland, France, Greece, Spain, Ireland, Luxembourg, Latvia, Malta, Netherlands, Germany, Portugal, Slovakia, Slovenia, Italy).*

# I. METHODOLOGICAL NOTES

## 1. Sources and scope of data

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

a) As regards entities employing 9 persons or less:
   SP-3 – Report on economic activity of enterprises
   H-01/k – Quarterly survey on revenues of trade enterprises

b) As regards entities employing 10 persons or more:
   BS – Report on turnover of business services
   H-01a – Report on the activity of retail sales outlets and petrol stations
   H-01g – Report on catering establishments
   H-01s – Report on retail sales and wholesales
   H-01w – Report on trade network
   DG-1 – Report on economic activity
   F01/I01 – Report on revenues, expenditures and financial result, and outlays on fixed assets
   F-02 – Statistical financial report
   SP – Annual enterprise survey
   P-01 – Production report

c) As regards entities employing more than 49 persons:
   P-02 – Report on product manufacturing and stocks

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

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

G – Wholesale and retail trade; repair of motor vehicles and motorcycles;

H – Transportation and storage;

I – Accommodation and food service activities;

J – Information and communication;

K – Financial and insurance activities;

L – Real estate activities;

M – Professional, scientific and technical activities;

N – Administrative and support service activities;

O – Public administration and defence; compulsory social security;

P – Education;

Q – Human health and social work activities;

R – Arts, entertainment and recreation;

S – Other service activities;

T – Activities of households as employers; undifferentiated goods- and services-producing activities of households for own use;

U – Activities of extraterritorial organizations and bodies

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

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

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

| | |
|---|---|
| **SECTION "G"** | **WHOLESALE AND RETAIL TRADE; REPAIR OF MOTOR VEHICLES AND MOTORCYCLES** |
| **DIVISION 45** | **WHOLESALE AND RETAIL TRADE AND REPAIR OF MOTOR VEHICLES AND MOTORCYCLES** |
| GROUP | |
| 45.1 | Sale of motor vehicles |
| 45.2 | Maintenance and repair of motor vehicles |
| 45.3 | Sale of motor vehicle parts and accessories |
| 45.4 | Sale, maintenance and repair of motorcycles and related parts and accessories |
| **DIVISION 46** | **WHOLESALE TRADE EXCEPT OF MOTOR VEHICLES AND MOTORCYCLES** |
| GROUP | |
| 46.1 | Wholesale on a fee or contract basis |
| 46.2 | Wholesale of agricultural raw materials and live animals |
| 46.3 | Wholesale of food, beverages and tobacco |
| 46.4 | Wholesale of household goods |
| 46.5 | Wholesale of information and communication equipment |
| 46.6 | Wholesale of other machinery, equipment and supplies |
| 46.7 | Other specialised wholesale |
| 46.9 | Non-specialised wholesale trade |
| **DIVISION 47** | **RETAIL TRADE, EXCEPT OF MOTOR VEHICLES AND MOTORCYCLES** |
| GROUP | |
| 47.1 | Retail sale in non-specialised stores |
| 47.2 | Retail sale of food, beverages and tobacco in specialised stores |
| 47.3 | Retail sale of automotive fuel in specialised stores |
| 47.4 | Retail sale of information and communication equipment in specialised stores |
| 47.5 | Retail sale of other household equipment in specialised stores |
| 47.6 | Retail sale of cultural and recreation goods in specialised stores |
| 47.7 | Retail sale of other goods in specialised stores |
| 47.8 | Retail sale via stalls and markets |
| 47.9 | Retail trade not in stores, stalls or markets |

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

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

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

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

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

**Retail sales grouping by the kind of activity**[a]:

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

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

## 2. Main definitions

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

**The gross margin** is:

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

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

**GROSS OUTPUT** in the non-financial corporations sector includes:

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

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

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

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

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

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

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

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

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

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

**SALE OF ALCOHOLIC BEVERAGES** covers:

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

**RETAIL SALES OUTLETS** include:

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

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

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

There are the following selected forms of stores:

- **department stores** are stores divided into separate departments, each selling a broad and universal assortment, particularly non-foodstuff goods, with a sales area of 2000 $m^2$ or more.

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

- **trade stores** are stores divided into separate departments (no less than two departments), each selling a broad and universal assortment similar to department stores, with a sales area between 600 and 1999 $m^2$,
- **supermarkets** are stores with a sales area between 400 and 2499 $m^2$, selling goods in a self-service system and offering a wide assortment of foodstuff goods and frequently bought non-foodstuff goods,
- **hypermarkets** are stores with a sales area of 2500 $m^2$ or more, selling goods in a self-service system while offering a wide assortment of foodstuff goods and frequently bought non-foodstuff goods, usually with a parking place,
- **petrol stations –** units conducting sale of petrol, oil, gas as well as the products used for car maintenance.

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

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

**PERMANENT SMALL RETAIL SALES OUTLETS**:

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

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

- mobile sale outlets,
- hawking sale outlets;

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

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

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

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

**TRADE WAREHOUSES**[1] - the organizational and functional units engaged in the turnover of commodities.

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

Trade warehouses occupying:

- storage area (in $m^2$) in secured warehouses, separated buildings, roofed warehouses, basements, storage sites as well as rooms with purposes other than storage;
- usage capacity (in $m^3$) containers to store liquids or gas, silos for storing grain, pulverized or fine-grained goods.

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

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

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

There are following catering establishments:

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

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

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

[1] From 2006 research has been conducting in three year cycle

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

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

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

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

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

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

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

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

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

**NOTES:**

1. Directed numbers (indices, percentages) were mainly calculated on the basis of absolute data expressed with greater accuracy than those provided in the tables.
2. The data included in the publication were collected according to:
   a/ The Polish Classification of Activities PKD 2007 introduced on 01.01.2008 by way of the decree of the Council of Ministers of 24 December 2007 (Journal of Laws No. 251, item 1885), which was prepared on the basis of the Statistical Classification of Economic Activities in the European Community – NACE Rev. 2.
   b/ The Polish Classification of Goods and Services (PKWiU) 2008 introduced on 01.01.2009 by way of the decree of the Council of Ministers of 29 October 2008 (Journal of Laws No. 207, item 1293), which was prepared on the basis of international classifications and nomenclatures.
3. The term "foreign property" applied in the publication describes the enterprises with foreign capital or the ones in which foreign capital constitutes a majority.
4. When computing data per capita within the field of the consumption of selected consumer goods (Table 23), population as of 30 VI was adopted. In the calculation of data concerning population per shop (Table 12), population as of 31 XII was applied.
5. Number of shops and petrol stations as December 31 by the branch specialisations and organisational forms have been established on the basis of outlets list prepared by units employing 10 and more persons, which realize retail sales (H-01w report) and for units employing up to 9 persons have been estimated on the basis of the results of a representative survey conducted on a 5% sample of these entities (SP-3). Data was prepared on the basis of register to 2003.

# II. ANALYTICAL COMMENTARY

## 1. Services

For many years the service sector has played an important role in domestic economies of particular countries. In the EU countries the value added being the result of service-oriented companies' operations constitutes the predominant part of added value generated in the entire economy.

In 2013, among Member States of the EU the highest share of value added generated by services was recorded in Luxembourg – 87.5%, Cyprus – 84.5% and Malta – 81.4%. A large share in value added of the whole economy was constituted by services in countries such as Greece (79.8%), France (79.4%), Great Britain (79.0 %) or Belgium (77.9%). In countries admitted to the European Union in the period from 2004 this share reached the level from 50.2% in Romania to 84.5% in Cyprus.

As compared with 2012 the most significant growth of share of service operations in creation of value added was demonstrated by Slovakia (by 2.4 pp), Cyprus (by 2.2 pp) and Luxembourg (by 1.4 pp). In the same period in some countries the share of services in creation of gross value added decreased – the largest decrease was recorded in Romania (by -1.4 pp), Greece (by -0.8 pp) as well as in Slovenia (by - 0.5 pp).

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

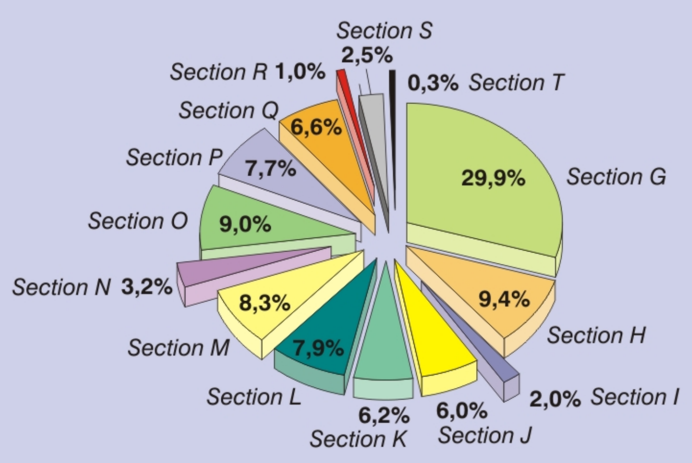
| Countries | Years | Share in % | Countries | Years | Share in % |
|---|---|---|---|---|---|
| Austria | 2005<br>2013 | 68,3<br>69,8 | Lithuania | 2005<br>2013 | 62,5<br>65,1 |
| Belgium | 2005<br>2013 | 74,9<br>77,9 | Luxembourg | 2005<br>2013 | 82,2<br>87,5 |
| Bulgaria | 2005<br>2013 | 62,3<br>64,3 | Latvia | 2005<br>2013 | 72,9<br>70,0 |
| Croatia | 2005<br>2013 | 65,8<br>69,3 | Malta | 2005<br>2013 | 75,7<br>81,4 |
| Cyprus | 2005<br>2013 | 74,9<br>84,5 | Germany | 2005<br>2013 | 69,9<br>69,0 |
| Czech Republic | 2005<br>2013 | 59,5<br>59,8 | **Poland** | 2005<br>2013 | 64,6<br>64,9 |
| Denmark | 2005<br>2013 | 73,2<br>77,2 | Portugal | 2005<br>2013 | 71,8<br>74,4 |
| Estonia | 2005<br>2013 | 66,8<br>67,3 | Romania | 2005<br>2013 | 54,6<br>50,2 |
| Finland | 2005<br>2013 | 65,1<br>71,6 | Slovakia | 2005<br>2013 | 60,0<br>62,8 |

| Countries | Years | Share in % | Countries | Years | Share in % |
|---|---|---|---|---|---|
| France | 2005 | 77,1 | Slovenia | 2005 | 63,6 |
| | 2013 | 79,4 | | 2013 | 65,7 |
| Greece | 2005 | 75,4 | Sweden | 2005 | 70,9 |
| | 2013 | 79,8 | | 2013 | 74,3 |
| Spain | 2005 | 65,1 | Hungary | 2005 | 64,1 |
| | 2013 | 72,1 | | 2013 | 65,1 |
| Netherlands | 2005 | 73,9 | United Kingdom | 2005 | 75,8 |
| | 2013 | 74,0 | | 2013 | 79,0 |
| Ireland | 2005 | 65,8 | Italy | 2005 | 71,3 |
| | 2013 | 70,1 | | 2013 | 74,0 |

Source: Eurostat,16.09.2014 r.; according to ESA 1995.

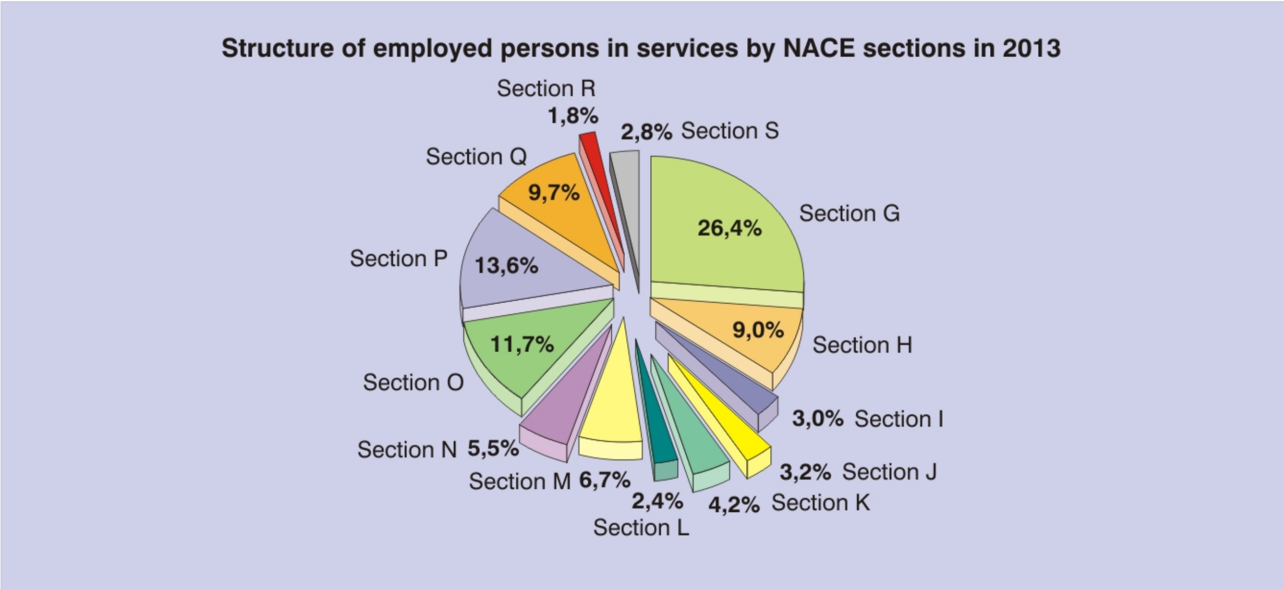
In 2013 in Poland, the gross value added generated by entities running service operations was 63.4% of gross value added of the whole domestic economy. The number of employees in these entities was 57.4% of all the working population (the growth as compared with the previous year by 0.5 pp). In 2013, the dominant operations among service-oriented entities in terms of added value were commercial operations, which was almost $^{1}/_{3}$ of the value added generated by all the entities running service-oriented operations. The share of operations with regard to transport and warehouse management (according to NACE section H) was at the level of 9.4%, while the share of operations within public administration and national defence (according to NACE section O) amounted to 9.0%. As compared with the previous year, the share of professional, scientific and technical operations increased (according to NACE section M) by 0.3 pp and amounted to 8.3%.

**Structure of gross value added in services by NACE sections in 2013**




Source: Information Memo "Implementation of the European System of National and Regional Accounts in the European Union (ESA 2010) into Polish national accounts. Methodological changes and their impact on the main macroeconomic aggregates" dated 29.09.2014.
See Methodical Notes, p. 7

In 2013, the majority of people were employed in companies classified under "Sale and repair of cars" section (according to NACE section G) – 26.4% of all the persons employed in service-oriented companies' entities, followed by "Education" section (according to NACE section P) – 13.6%, and "Public administration and defence activities; compulsory social security activities" section (according to NACE section O) – 11.7%.




Source: Concise Statistical Yearbook of Poland 2014.

In 2013, the dominant operation among service-oriented entities in terms of average employment were commercial operations, in which 1,563.1 thous. people were employed (decrease in comparison with 2012 by 0.2%). In section P "Education" employment found 1,032.8 thous. people.

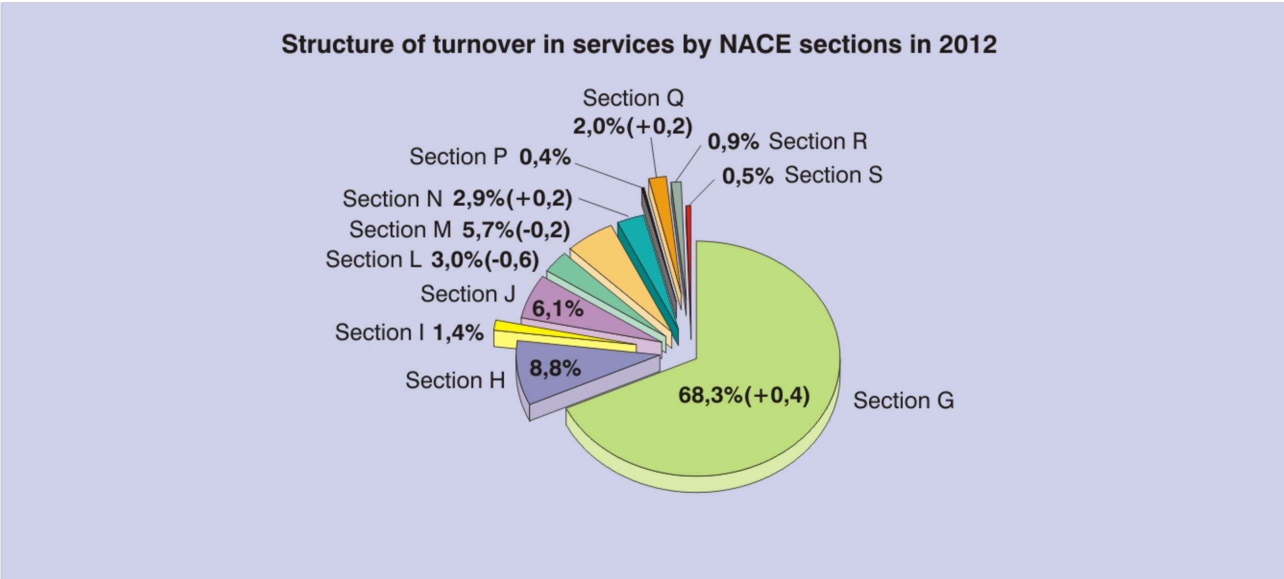
The highest growth in average employment was recorded in section N "Administrative service activities and supporting activities" – by 3.7%, while the largest decrease was indicated in operations related to the real property market services (according to NACE section L) – by 1.7%. Despite the lowest average employment, an increase was recorded in the number of employed persons by almost 1.0% in section S "Other personal service activities" (103.9 thous. people).

The highest average gross remuneration in 2013 was recorded in "Financial activities and insurance" section (according to NACE section K) – PLN 6 149, "Information and communication" (according to NACE section J) – PLN 6 141 and "Public administration and defence activities" (according to NACE section O) – PLN 4 523. In entities classified to section I "Activities related to accommodation and food services" the lowest average gross remuneration was recorded at the level of PLN 2 251.

The highest growth in the average monthly pay in 2013 (by 4.1%), as compared with the previous year, was recorded in section N "Administrative service activities and supporting activities" and in section J "Information and communication" with simultaneous growth in average employment respectively by 3.7% and 1.4%.

In section P "Education", a similar growth was observed in the average wage as in the aforementioned sections at simultaneous decrease in average employment by 1.1%.

In 2012, in total revenue of non-financial companies conducting service activities, the greatest share was revenue of companies running commercial activities (according to NACE section G) that constituted more than 68% of total revenue. The share of revenue of companies providing transport services and warehouse management (according to NACE section H) and companies running one activity classified to section J "Information and communication" have not been changed as compared with the previous year and amounted to 8.8% and 6.1% respectively. On the other hand, a decrease by 0.2 pp to the level of 5.7% was observed in the share of revenue of entities classified to section M "Professional, scientific and technical activities".




Source: Activity of the non-financial enterprises in 2012, CSO, Warsaw (section N [excl. 8130.Z], Section Q [excl. 86.10.Z], Section S (95 and 96 divisions).
(...) index of previous year

In recent years, among services-oriented operations, a dynamic growth in the market of services related to business operations, popularly referred to as business services is observed. The entities[2] providing business services should include companies running, among others, operations under IT, law, accounting and bookkeeping, management, engineering and architectonic services, advertising and services related to employment.

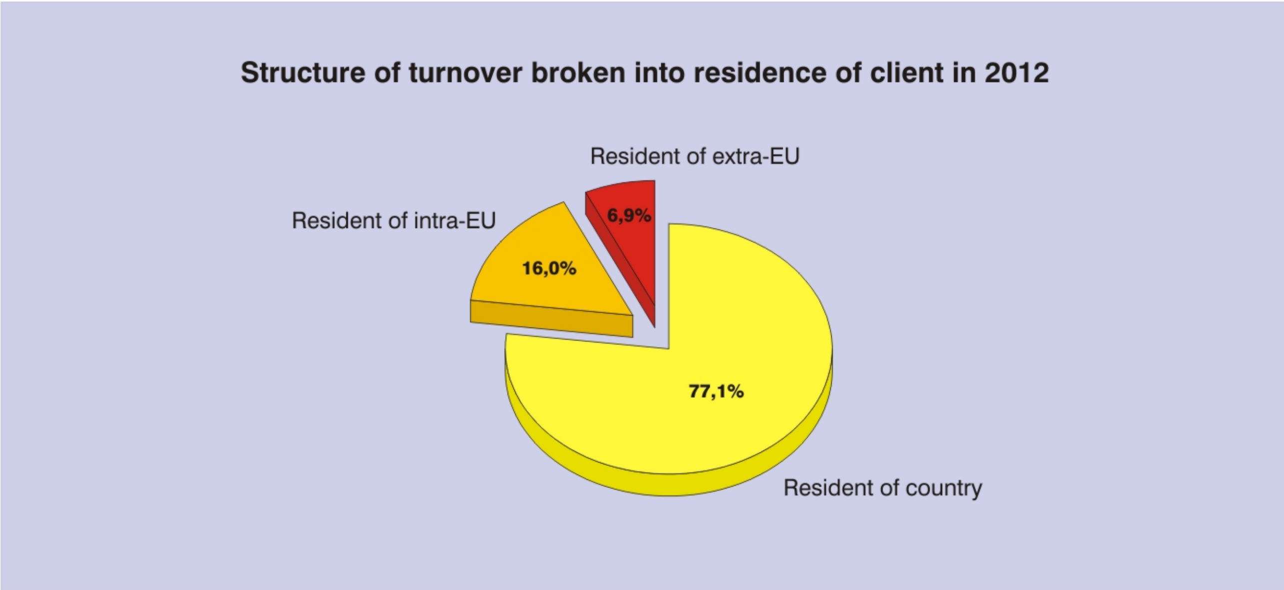
In 2012, among all non-financial companies, more than 12% were entities providing business services[3]. As compared with the previous year, the population of entities providing business services recorded increase by 7.5% as compared with 0.6% of the growth in the number of all non-financial companies in the whole national economy. At the same time, in the same period, in the segment

[2] Applies to entities with the number of employees above 9 people.

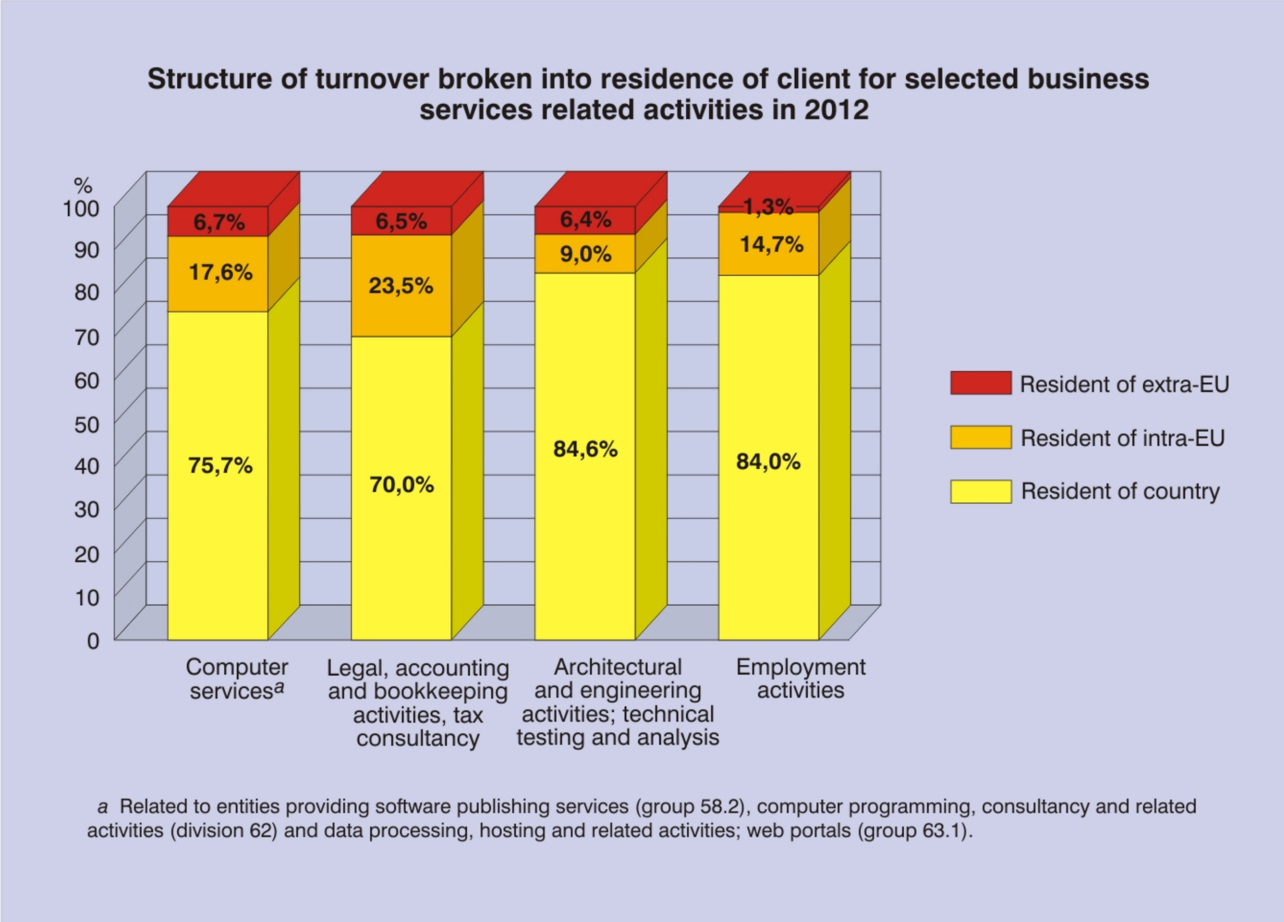
[3] Applies to the following classes/sections according to PKD: 58.2 -Software publishing 62 -Activities related to software and consulting in the field of computer science and related, 63.1 -Data processing; hosting and related activities; web portals, 69 - legal activities, accounting, bookkeeping and auditing activites and tax consultancy, 70.2 -Management consultancy, 71 -Architectural and engineering activities, technical tests and analyses, 73 -advertisement, market surveys and public opinion, 78 -Activities related to employment;

of business services, an increase was recorded in the number of employees by almost 6%, whereas the overall number of employees in non-financial companies in the country decreased slightly above 1%.

Companies classified in the segment of business services focus their operations mainly on the domestic market. In 2012, 77.1% of total revenue of these companies came from the provision of services to entities having registered office within the Republic of Poland. The source of 16.0% of revenue were clients having registered office in the EU countries and for other (6.9%) – entities with registered office located outside the EU. In 2012, an increase by 1.7 pp was recorded in the share of revenue from the provision of services within business operations for the entities having the registered office abroad.




In 2012, among operations related to business operations, the highest percentage of revenue from sales of services abroad was observed in the case of legal operations, accounting and bookkeeping as well as tax consulting (30% net revenue from sales in total). As compared with 2011, this share did not change. The smallest expansion to foreign markets was recorded in the case of companies running operations related to architecture, engineering, technical testing and analysis. Approx. 15.4% net revenue from sales of these companies came from the provision of services to clients located outside the borders of Poland. As compared with the previous year, this share increased by 2.4 pp.




In 2012, the value of total net revenue from sales of the companies providing services related to handling business operations along with the number of 10 employed people and more amounted slightly above PLN 74.6 billion (increase by 6.2% as compared with 2011).

The highest growth in revenue in 2012 was recorded by entities conducting publishing operations concerning software, related to software and consulting in the field of computer science and related operations and information service activities (according to NACE group 58.2, section 62 and group 63.1 section J) – by approx. 11.5%. Operations related to employment (according to NACE section 78 section N) observed a growth in revenue value by more than 10%. In 2012, a decrease in the revenue value by almost 13% as compared with the previous year was recorded by companies providing services with regard to architecture, engineering, technical testing and analysis (according to NACE section 71 section M).

In companies providing IT services, over 30% of total net revenue from sales was the revenue related to software services (according to CPA 62.01) and their value amounted to PLN 8.3 billion. As compared with 2011, a decrease was recorded in the share of these services in total by approx. 1.6 pp.

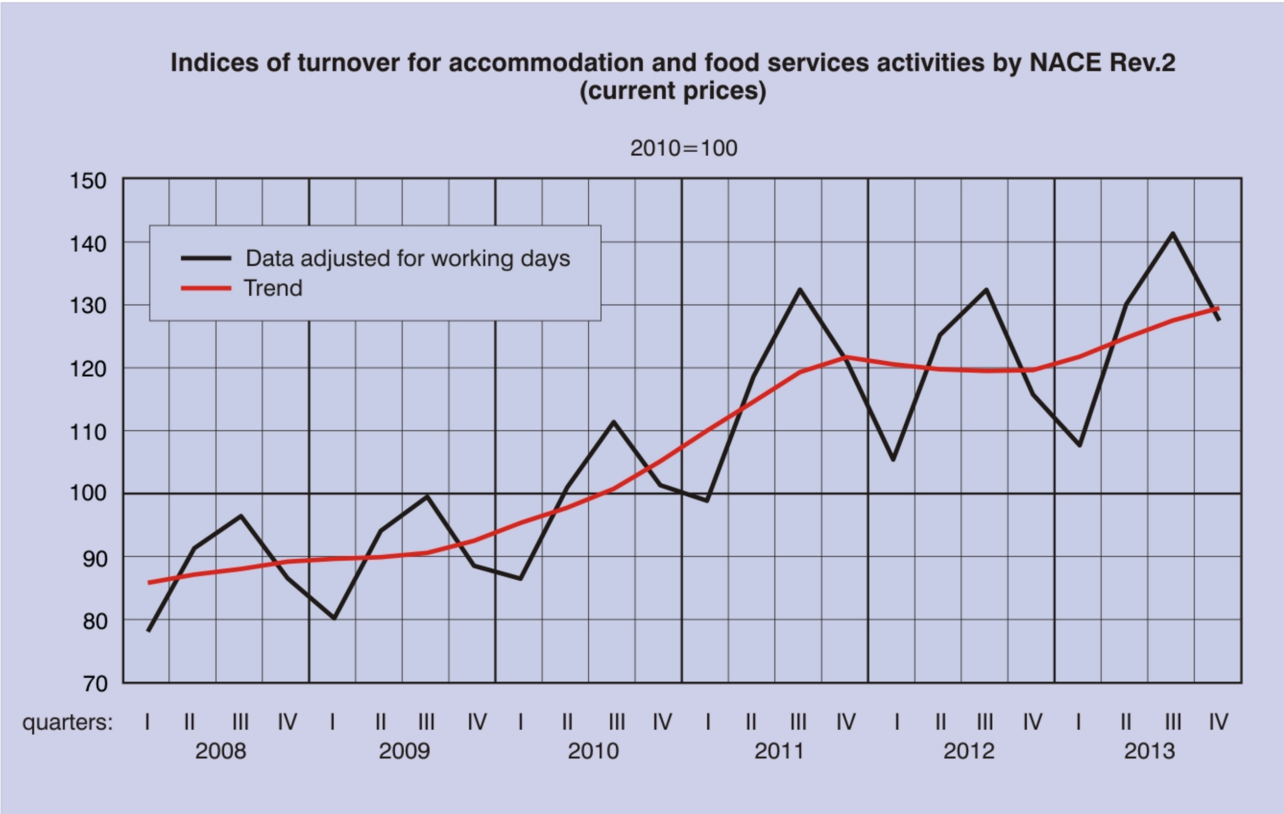
In 2012, the greatest share of net sales revenue (26.1%) in companies running activities with regard to architecture, engineering, technical testing and analysis (according to NACE section 71 section M) were services with regard to engineering (according to CPA 71.12.1) and its share as compared with 2011 increased by 4.7 pp. The value of these services amounted to PLN 2.8 billion.

Similarly as in the previous years, we can still observe a growth in importance of services related to employment (according to NACE section 78 section N). Within this operation, the greatest share in 2012 (58.5%) were services provided by temporary labour agencies (according to CPA 78.20) and their growth as compared with 2011 amounted to almost 4 pp. The value of these services amounted nearly to PLN 3.6 billion.

**Analysis of selected service-oriented operations.**

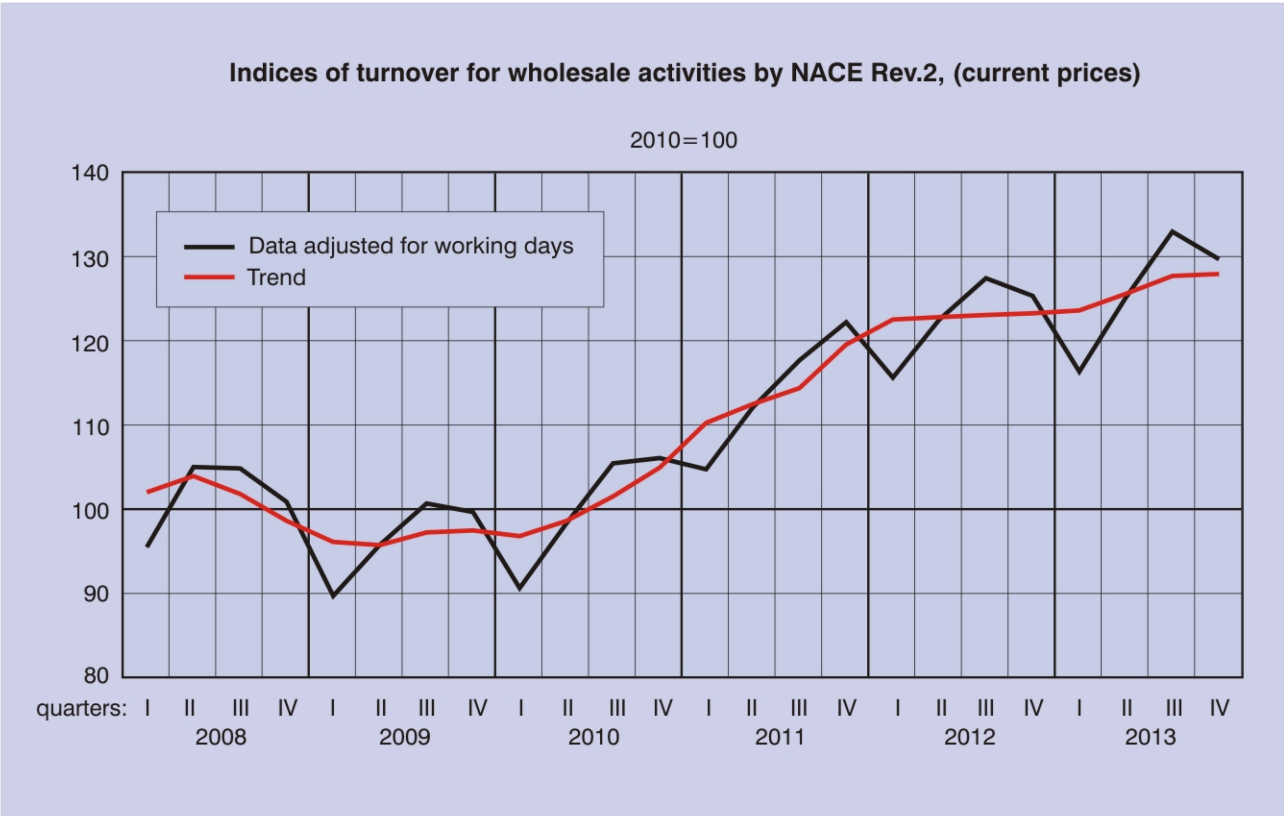
Among service-oriented operations, there can be distinguished services whose great importance and development is related to meeting the needs of population or their supporting attitude towards other economic entities. In order to observe changes in this respect, short-term researches of the selected service-oriented operations are conducted. The result data that are presented below relate to companies with the number of employees above 9 people.

In the companies running activity related to accommodation and food services (according to NACE section I), a significant growth in turnover was observed as compared with 2012 – (by 6.5%). At the end of 2013, the number of employees was slightly higher (by 0.8%) as compared with the previous year. Also, the number of gastronomic enterprises increased by 3.0%. As compared with the previous year, a higher level of total costs was observed (an increase from 92.7% in 2012 to 95.5% in 2013). Ratios also deteriorated: gross turnover profitability (a decrease from 7.3% in 2012 to 4.5 % in 2013) and net turnover profitability (a decrease from 6.2% in 2012 to 3.7% in 2013).



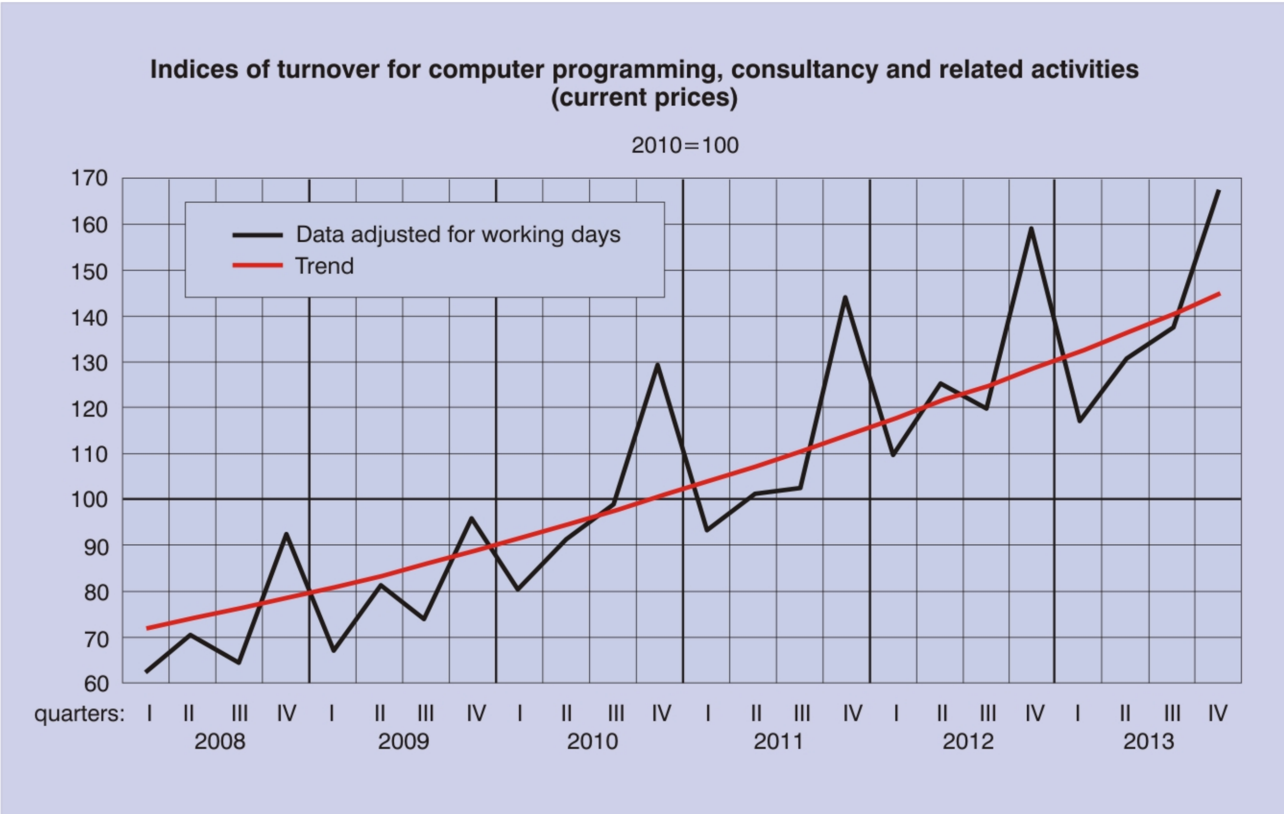
* * *

In the wholesale companies operations (according to NACE section 46), in 2013, a growth in turnover by 2.4% was observed as compared with 2012. At the end of 2013, the number of wholesale enterprises was higher by 2.1% as compared with the previous year. On the other hand, the number of employees decreased slightly (by 0.4%). Costs level ratio decreased to the level of 97.5% (against 97.8% the year before). Both the ratio of gross (2.5 % against 2.2% in 2012) and net (2.2% against 1.8% the year before) turnover were higher than in 2012.



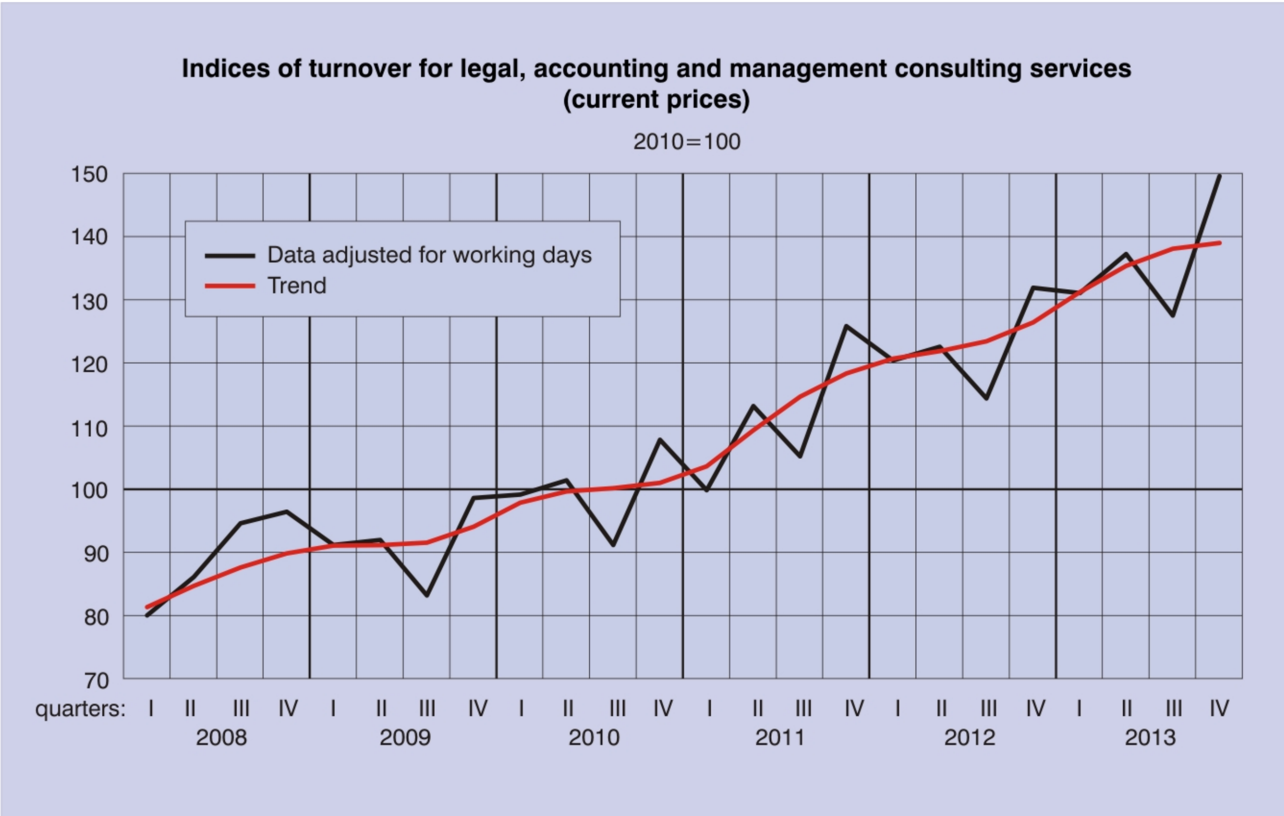
* * *

In the IT industry (according to NACE section 62) in 2013, an increase was recorded by more than 6% of the turnover value as compared with 2012. At the same time, an increase in the number of companies by 10.7% and in the number of employees by 13% was observed. The ratio of gross turnover profitability in 2013 has not changed as compared with the previous year and amounted to 8.6%. The net turnover profitability ratio increased from 6.9% in 2012 to 7.2% in 2013 . The costs level ratio from the whole activity remained on the same level as in 2012, amounting to 91.4%.



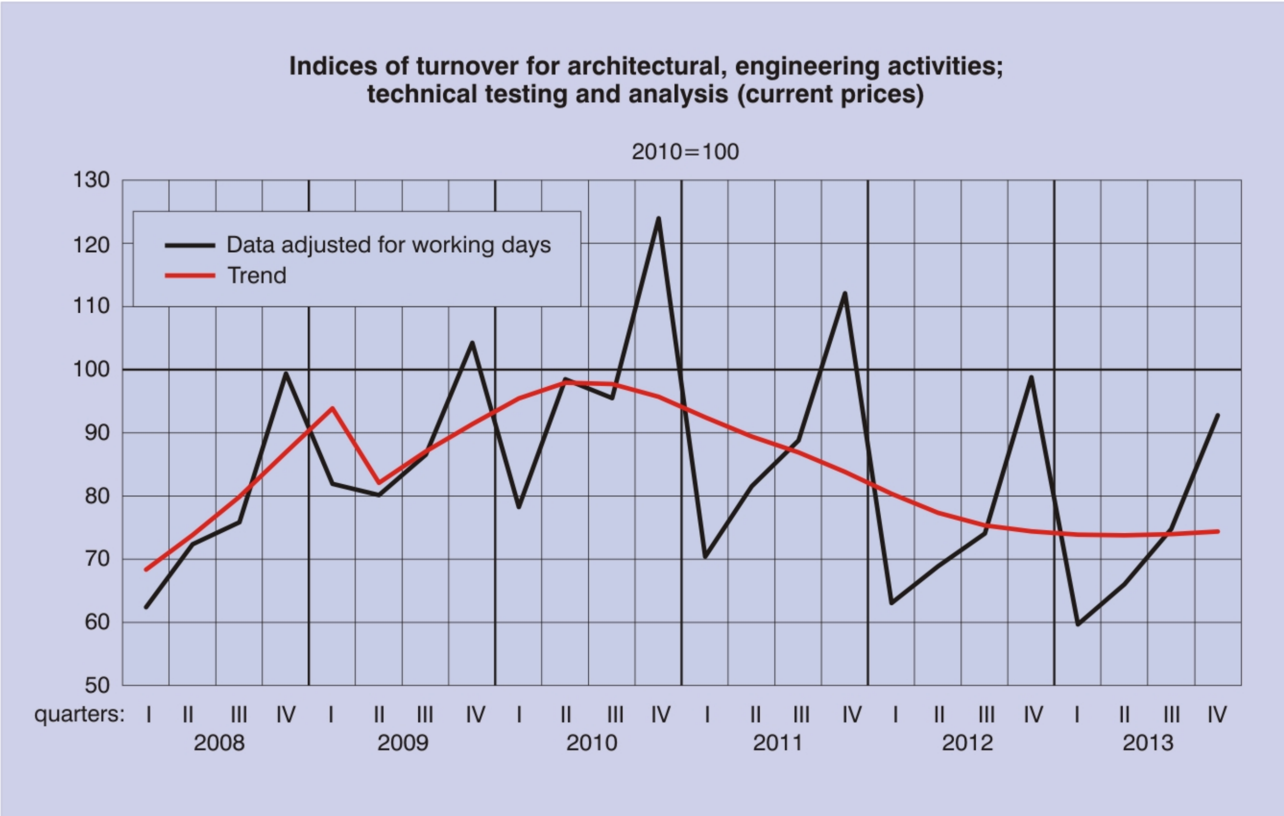
*     *     *

In legal activities, accounting and bookkeeping as well as related to management (according to NACE section 69 + group 70.2), the value of turnover in 2013 as compared with the year before, increased by 11.1% at simultaneous increase by 6.7% in the number of companies and in the number of employees by 16.2%. Both the high ratio of gross (from 13.9% in 2012 to 13.4% in 2013) turnover profitability and net (from 12.9% in 2012 to 12.4% in 2013) slightly deteriorated . The costs level ratio from the whole activity deteriorated and amounted to 86.6% in 2013. against 86.1% in the previous year.



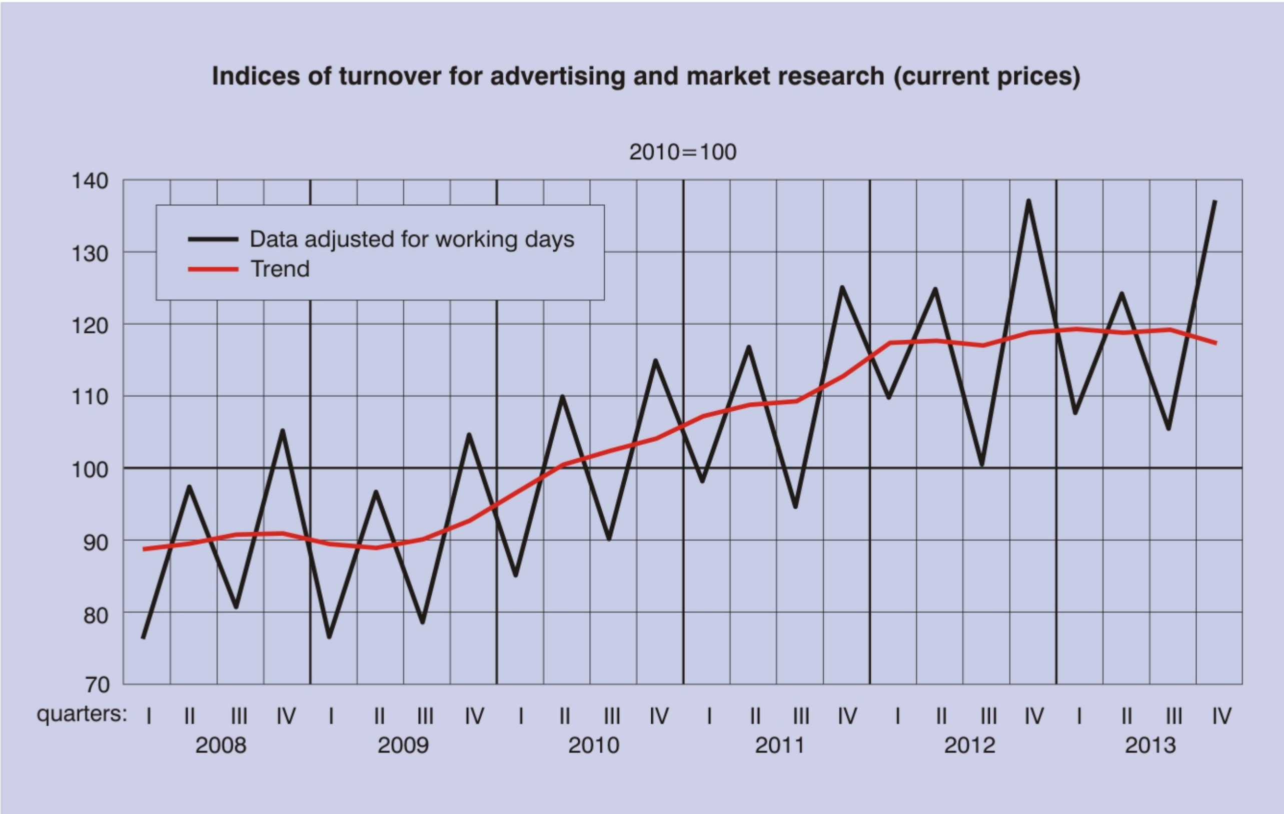
*    *    *

In 2013, in operations related to architecture and engineering (according to NACE section 71), a decrease by 4.4% in value of turnover was recorded as compared with 2012, at simultaneous decrease by 6.6% in employment. The ratio of gross turnover profitability amounted to 3.8%, while the net turnover profitability ratio was 2.8%.  An improvement in the cost level ratio from the whole activity was observed  in 2013 it amounted to 96.2% as compared with 113.3% in the previous year.



*        *        *

In the entities running operations related to advertising, market research and public opinion (according to NACE section 73), in 2013, the turnover decreased by 0.3% as compared with 2012, at simultaneous increase in the number of companies by 2.9% and a growth in the number of employees by 1.7% Both the ratio of gross turnover profitability (5.9% in 2013 against 5.4% in 2012) and net (5% in 2013 against 4.4% in 2012) were better than in the previous year. Also, a slight improvement in the cost level ratio from the whole operations was observed. In 2013, it amounted to 94.1% against 94.6% in 2012.



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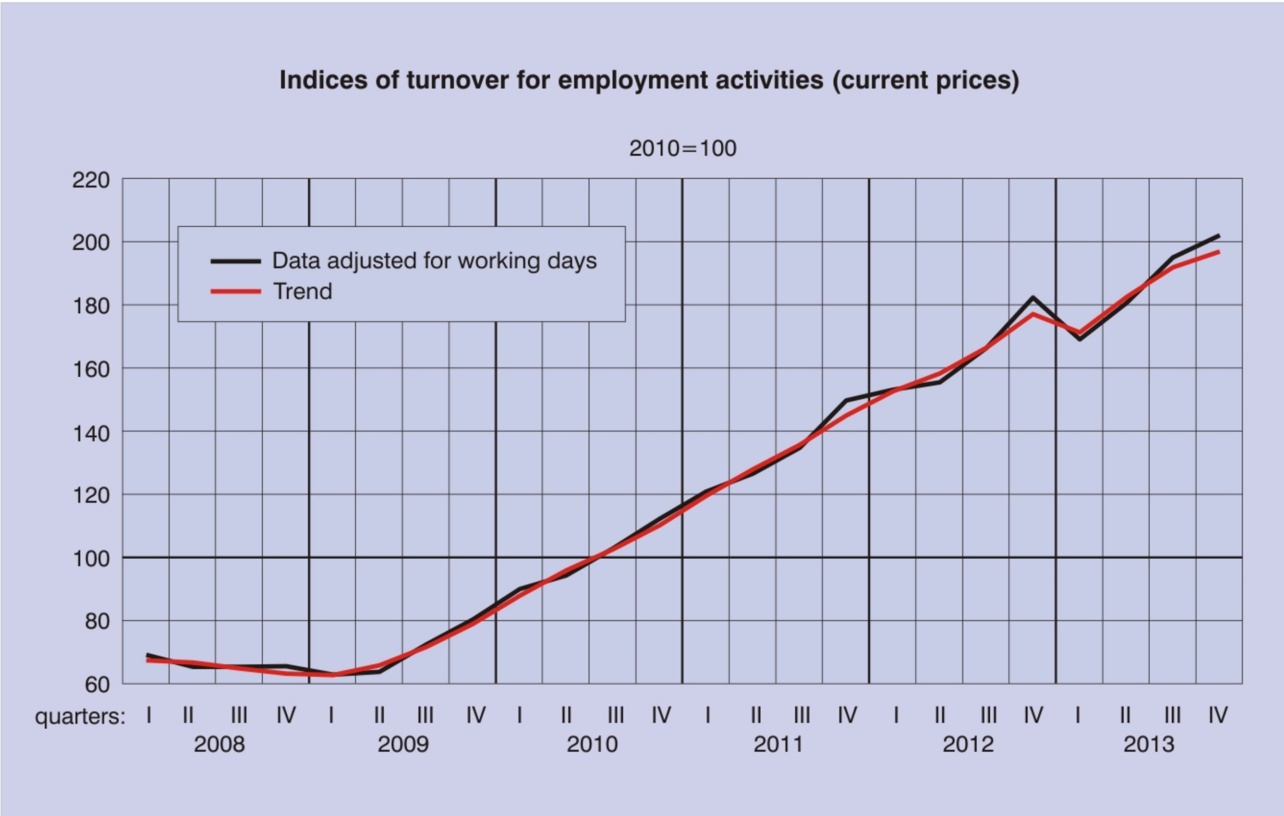
In 2013, an increase in the value of turnover of companies running operations related to employment (according to NACE section 78) as compared with 2012, amounted to 13.8%. An increase from 19.6% in the number of entities was observed and the in number of employees by 14.9%. An increase in the gross turnover profitability ratio was also observed (2.4% in 2013 against 1.6% in 2012) and in the net turnover profitability ratio (1.7% in 2013 against 0.9% in 2012). An improvement was observed in the costs level ratio from the whole operations to 97.6% in 2013 against 98.4% in the previous year.



## 2. Internal trade

In 2013, according to preliminary data, the share of trade in Gross Domestic Product amounted to 16.9% and was 0.1 pp lower than in the previous year. The gross value added (in constant prices) generated by trading companies decreased by 0.2% as compared with the previous year, and, at the same time, a decrease was recorded in the share of trade in the gross added value generated in the domestic economy by 0.2 pp.

| Specification | 2011 | 2012 | 2013 |
|---|---|---|---|
| Share of trade in GDP %........................................ | 16,3 | 17,0 | 16,9 |
| Share of trade in gross value added in % ................ | 18,5 | 19,2 | 19,0 |

Source: Information Memo "Implementation of the European System of National and Regional Accounts in the European Union (ESA 2010) into Polish national accounts. Methodological changes and their impact on the main macroeconomic aggregates" dated 29.09.2014.


In 2012, the sales revenue in current prices earned by trading companies were higher than in 2011 by 3.6%. The largest part of this revenue was earned by companies running wholesale activity 61.0% (increase by 1.4 pp as compared with the previous year). The share of retail trade amounted to 30.6% (decrease by 1.4 pp%), and the wholesale and retail trade and repair of motor vehicles 8.4% remained at the same level as in the previous year. Companies with the number of persons employed above 49 people achieved 48.4% of total revenue. The revenue from sale of goods and materials constituted 92.9% of the total value of trading companies revenue.

The average margin completed in 2012 by trade entities (classified to section G – "Trade, repair of motor vehicles") amounted to 16.7% and was maintained at the same level as in the previous year. The highest margins expressed in percentage were obtained by retail trade companies , and the diversity of the level of margins depended on the type of companies' activity.

**Margins of trade enterprises in 2010 – 2012.**

| Specification | 2010 | 2011 | 2012 |
|---|---|---|---|
| | % | | |
| **WHOLESALE AND RETAIL TRADE AND REPAIR OF MOTOR VEHICLE S AND MOTORCYCLES** | **14,4** | **15,0** | **14,4** |
| of which: | | | |
| Sale of motor vehicles | 9,4 | 9,3 | 8,8 |
| Sale of motor vehicle parts and accessories | 21,2 | 21,4 | 20,3 |
| Sale, maintenance and repair of motorcycles and related parts and accessories | 24,2 | 23,1 | 23,9 |
| **WHOLESALE TRADE** $^{\Delta}$ | **16,2** | **14,7** | **15,0** |
| of which: | | | |
| Wholesale on a fee or contract basis[a] | 19,4 | 17,6 | 19,3 |
| Wholesale of agricultural raw materials and live animals | 13,0 | 12,4 | 12,9 |
| Wholesale of food, beverages and tobacco | 17,9 | 16,1 | 17,7 |
| Wholesale of household goods | 17,9 | 16,8 | 17,6 |
| Wholesale of information and communication equipment | 13,4 | 11,8 | 11,3 |
| Wholesale of other machinery, equipment and supplies | 16,8 | 15,6 | 15,5 |
| Other specialised wholesale | 13,2 | 11,6 | 11,4 |
| Non-specialised wholesale trade | 18,1 | 17,6 | 17,5 |
| **RETAIL TRADE** $^{\Delta}$ | **21,3** | **20,7** | **20,7** |
| of which: | | | |
| Retail sale in non-specialised stores | 18,9 | 18,2 | 18,8 |
| Retail sale of food, beverages and tobacco in specialised stores | 20,3 | 18,3 | 20,2 |
| Retail sale of automotive fuel in specialised stores | 9,4 | 9,8 | 6,9 |
| Retail sale of information and communication equipment in specialised stores | 16,4 | 15,7 | 15,8 |
| Retail sale of other household equipment in specialised stores | 23,1 | 24,1 | 23,6 |
| Retail sale of cultural and recreation goods in specialised stores | 30,5 | 29,5 | 27,7 |
| Retail sale of other goods in specialised stores | 28,9 | 29,0 | 30,1 |

a Provision.

**Flow of commercial goods.**

An important element enabling an assessment of distribution channels and circulation of goods is the analysis of revenue structure according to the types of clients as well as the division of purchases performed in wholesale companies according to the types of suppliers (tables No 18 and 19). Both the conduct of wholesale and retail companies in the selection of their suppliers as well as the structure of their clients remained stable. In trading companies, both wholesale and retail, the share of purchases directly from national manufacturers and producers and directly from import was maintained on an unchanged level as compared with the previous period. Trading companies [4] made purchases in approximately 53% cases directly from national manufacturers and producers, direct import was slightly above 23%, and purchases at wholesalers approximately 23%. Depending on the type of conducted trading operations (wholesale or retail) the structure of purchases is more diverse. Regarding the wholesale trade – approximately 52% of companies supplies at national producers and manufacturers, and almost 27% of them supplies directly from import. The share of purchases wholesaler – wholesaler slightly decreased and amounted to less than 20%.

In retail trade, the purchase of goods was performed directly from the national producers and manufacturers (58%), less frequently at wholesalers (28%), a slight decrease was also observed in the share of purchases performed directly from import to 13%. Foreign companies most often performed purchases directly from the national producers and manufacturers (they constituted slightly above 49% of the total value) or directly from import (approx. 40%), and less frequently at wholesalers (approx. 10%).

Within the revenue structure of wholesale companies, approximately 44% of revenue came from sale to wholesale, approximately 27% came from retailers, and almost 18% from domestic producers. Direct inflows from individual consumers constituted nearly 8%.

**Turnover of trade enterprises**

In 2013, a turnover in retail trade (in constant prices) increased by 4.5% as compared with the previous year. A high turnover was recorded in companies selling non-food goods (an increase by 7.2%). On the other hand, among entities selling food, beverages, tobacco, the height of turnover decreased slightly (by 1.0%).

In entities selling cars, motorcycles and spare parts, a growth by 8.7% was recorded in one year.

[4] The data relate to companies where the number of employees exceeds 9 people.
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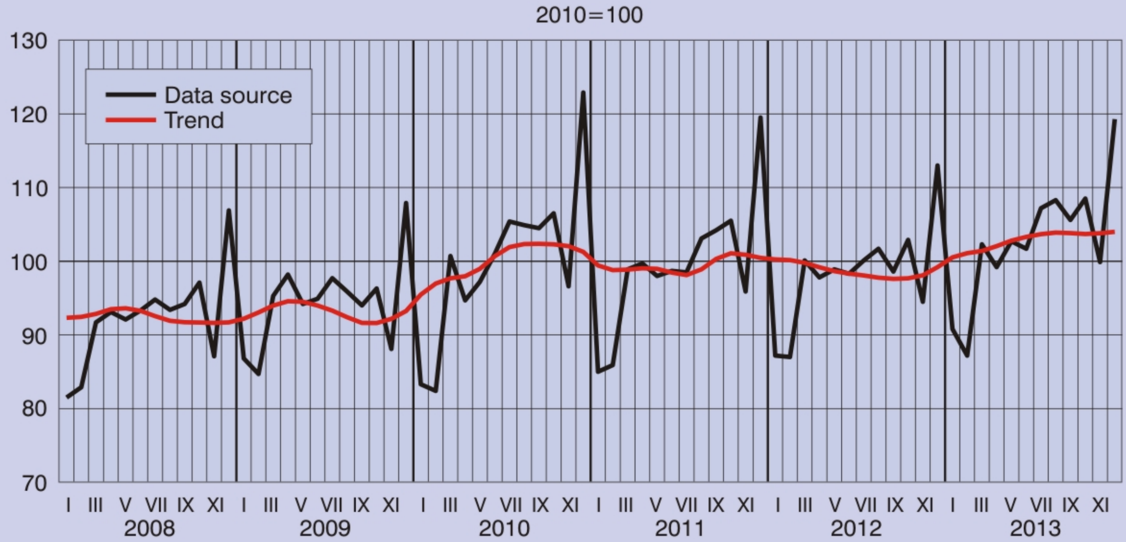
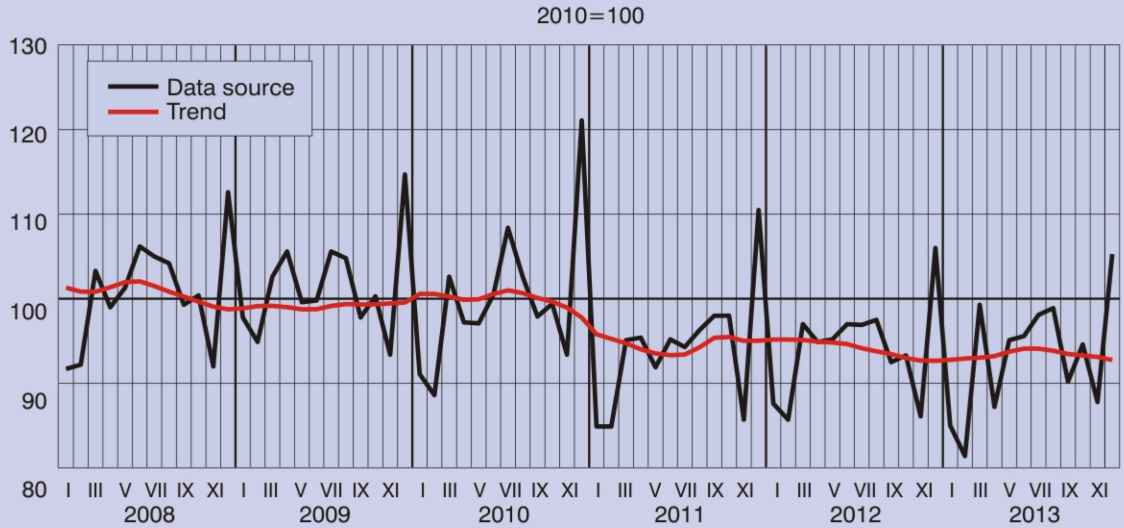
**Deflated turnover of retail sale enterprises**[a]




a *Enterprises classied according to NACE Rev.2 in the devision 47.*

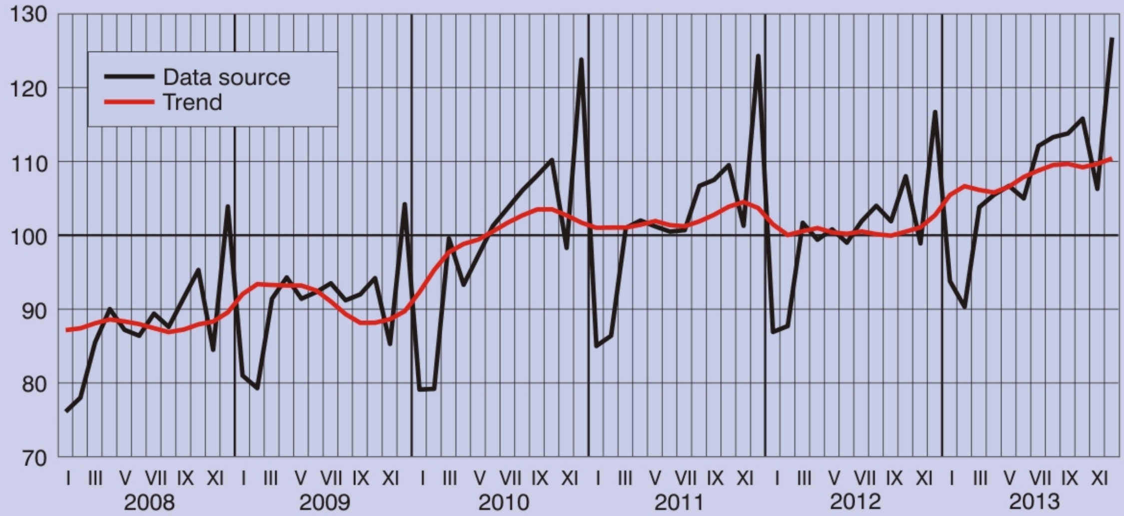
**Deflated turnover of enterprises selling food, beverages, and tobacco**[a]




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

## Deflated turnover of enterprises selling non-food goods[a]

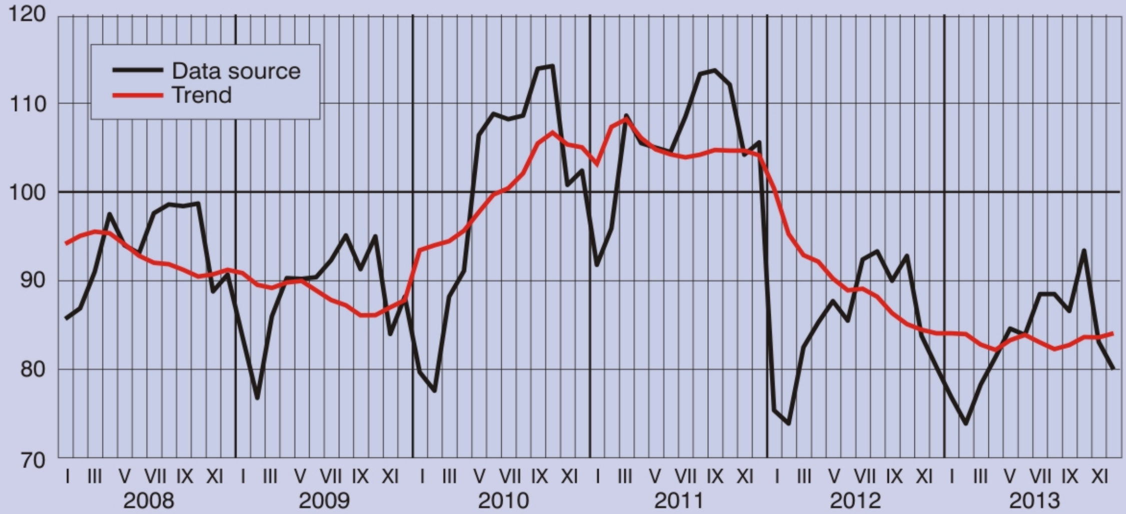
2010=100




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

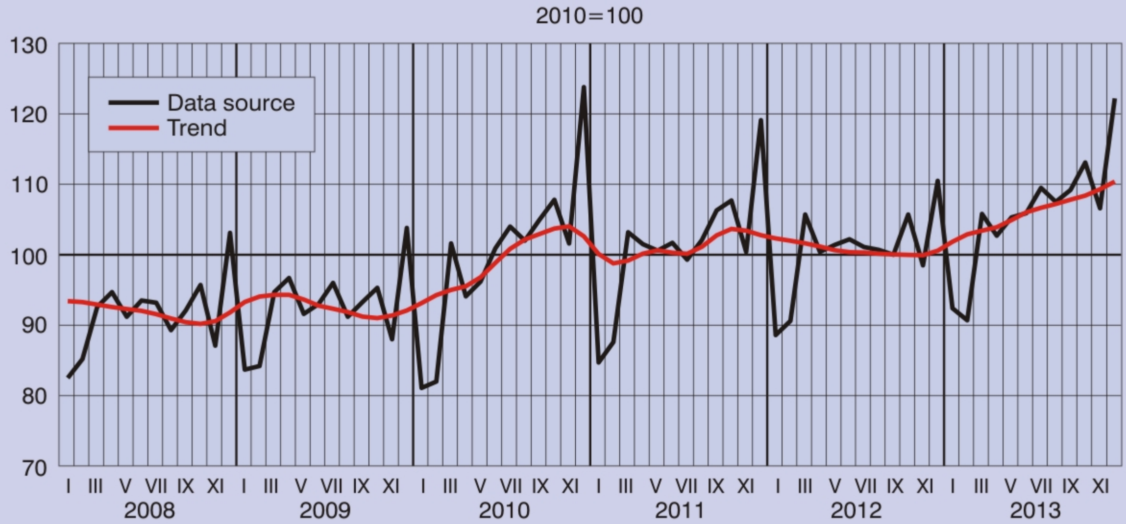
## Deflated turnover of fuel supply enterprises[a]

2010=100



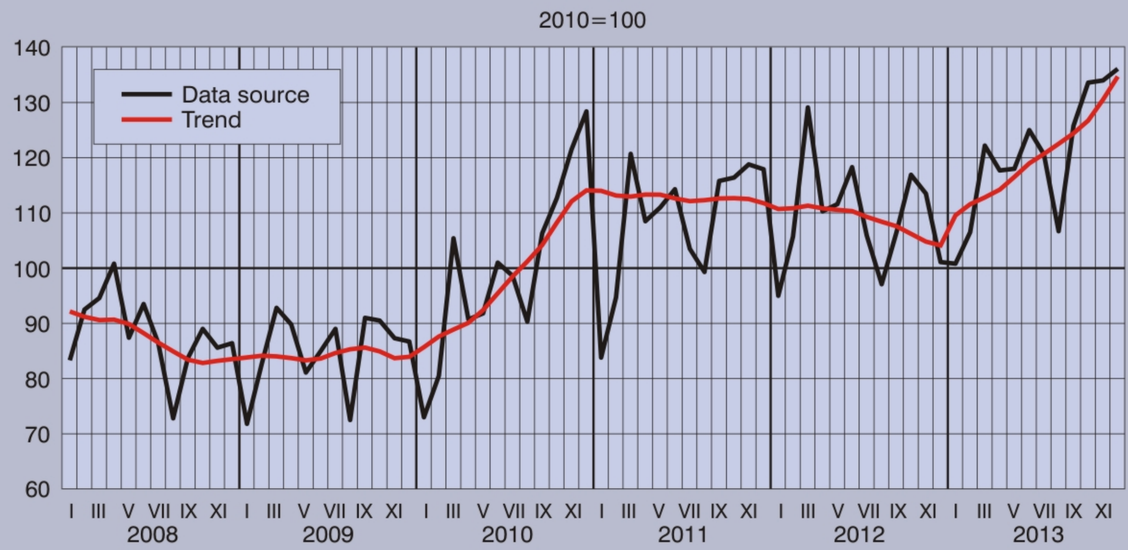

a Enterprises classified according to NACE Rev. 2 in the groups 47.3.

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




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

**Deflated turnover of enterprises selling motor vehicles**[a]

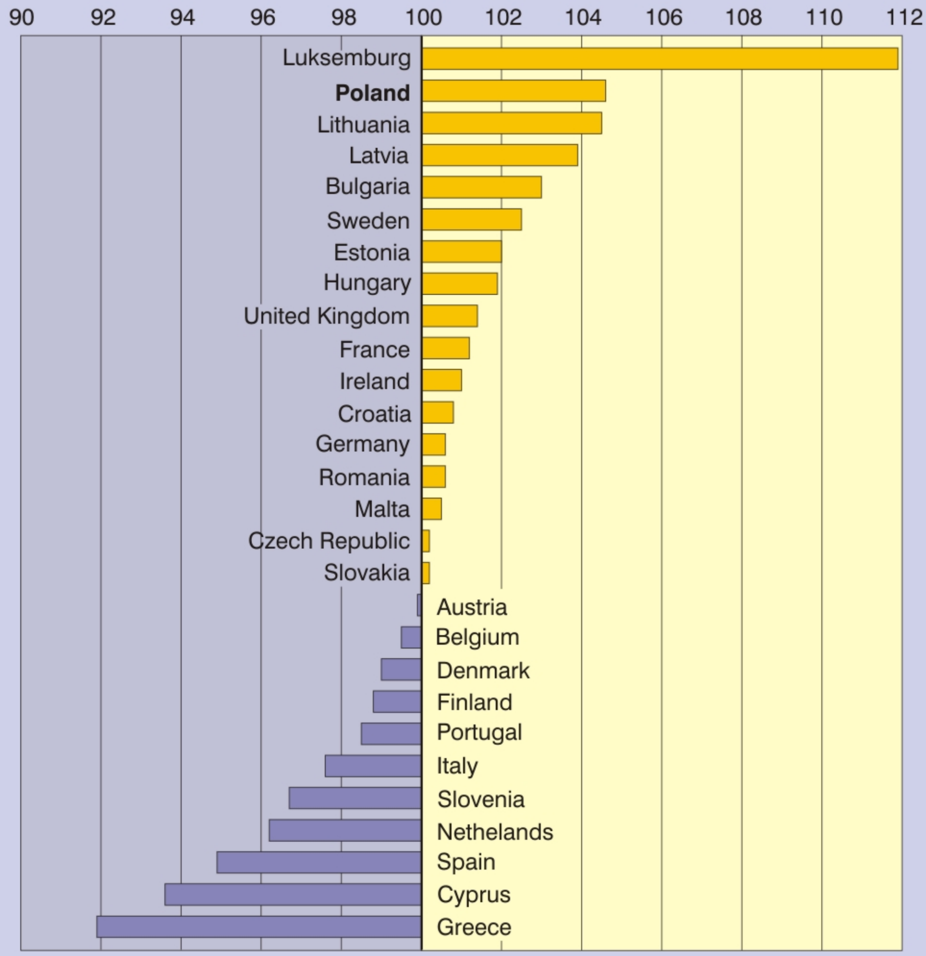



*a* Enterprises classified according to NACE Rev. 2 into the groups: 45.1, 45.3, 45.4.

In 2013, a turnover in retail trade of the EU countries was 0.1% lower as compared with the previous year. The greatest decrease was recorded once more in Greece. Significant drops were recorded in Cyprus, Spain and the Netherlands. The highest growth in turnover was observed, as in the two previous years, in Luxembourg and also in Poland. Subsequent places belonged to Lithuania, Latvia and Bulgaria. In The United Kingdom, France and in Germany, a turnover in retail trade increased by 1.4%, 1.2% and 0.6% respectively as compared with the previous year.

**Annual indices of turnover in retail trade for countries of EU in 2013 (constant price)[a]**

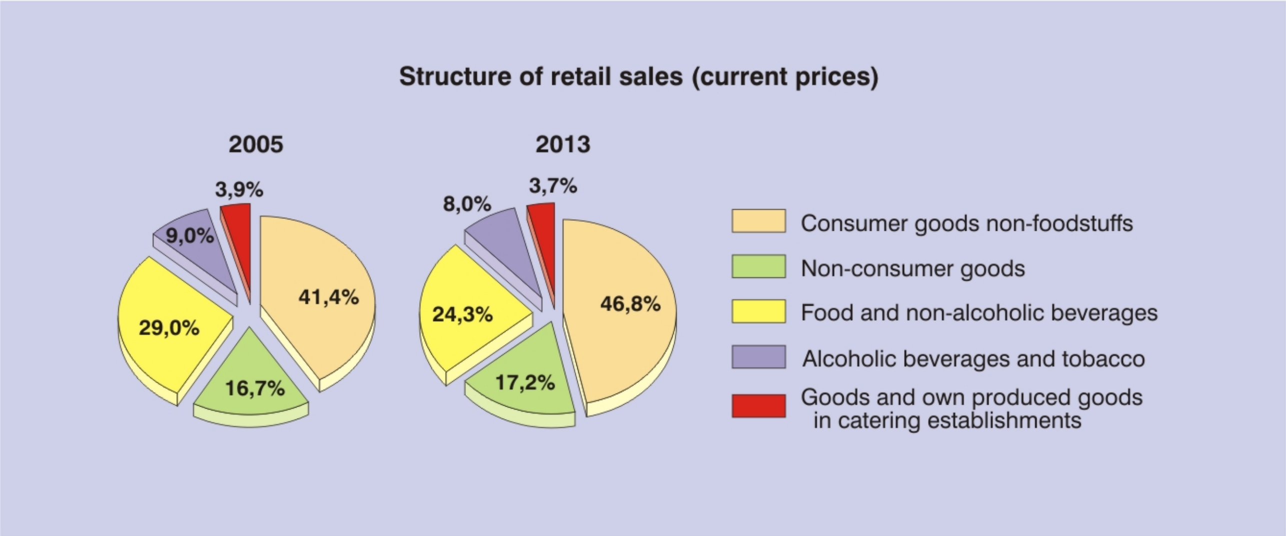
2012 = 100



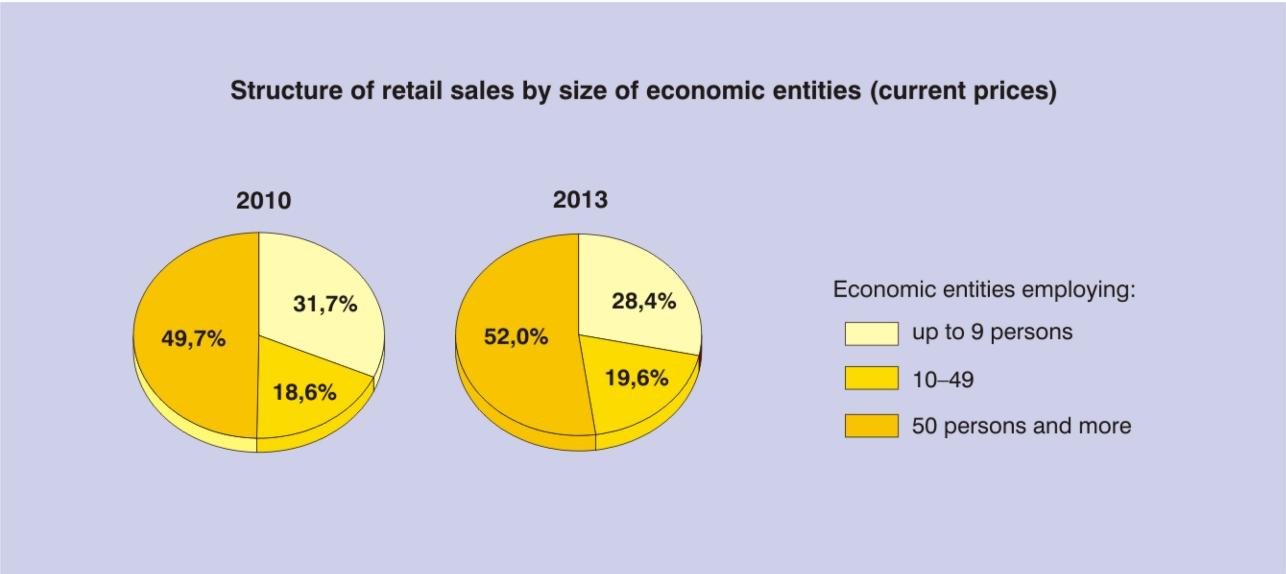

*a* Data adjusted for working days.
S o u r c e: Eurostat, short-term statistics (August 2014)

## Retail sales

In 2013, retail sales in current prices performed by trading companies and non-trading companies amounted to PLN 685.7 billion and were 1.4% higher than in the previous year. In retail sales outlets, the value of the sold goods amounted to PLN 660.0 billion (increase by 1.3%) of which the value of food and non-alcoholic beverages – PLN 166.5 billion (increase by 0.2%), alcoholic beverages and tobacco products – PLN 54.6 billion (decrease by 2.7%) and non-foodstuff goods – PLN 438.9 billion (an increase by 2.2%). In catering establishments, the retail sales amounted to PLN 25.7 billion (increase by 5.7%).




The share of retail sales performed in 2013 by economic entities with the number of employees 50 and more people was 52.0%, by entities with the number of employees to 9 people – 28.4%, and by enterprises with the number of employed people 10-49 people –19.6%.



The sales of trading companies (in current prices) amounted to 86.7% of total value of retail sales like in 2012. The remaining sales were performed by companies whose basic activity was not trade, but e.g. production or food services.

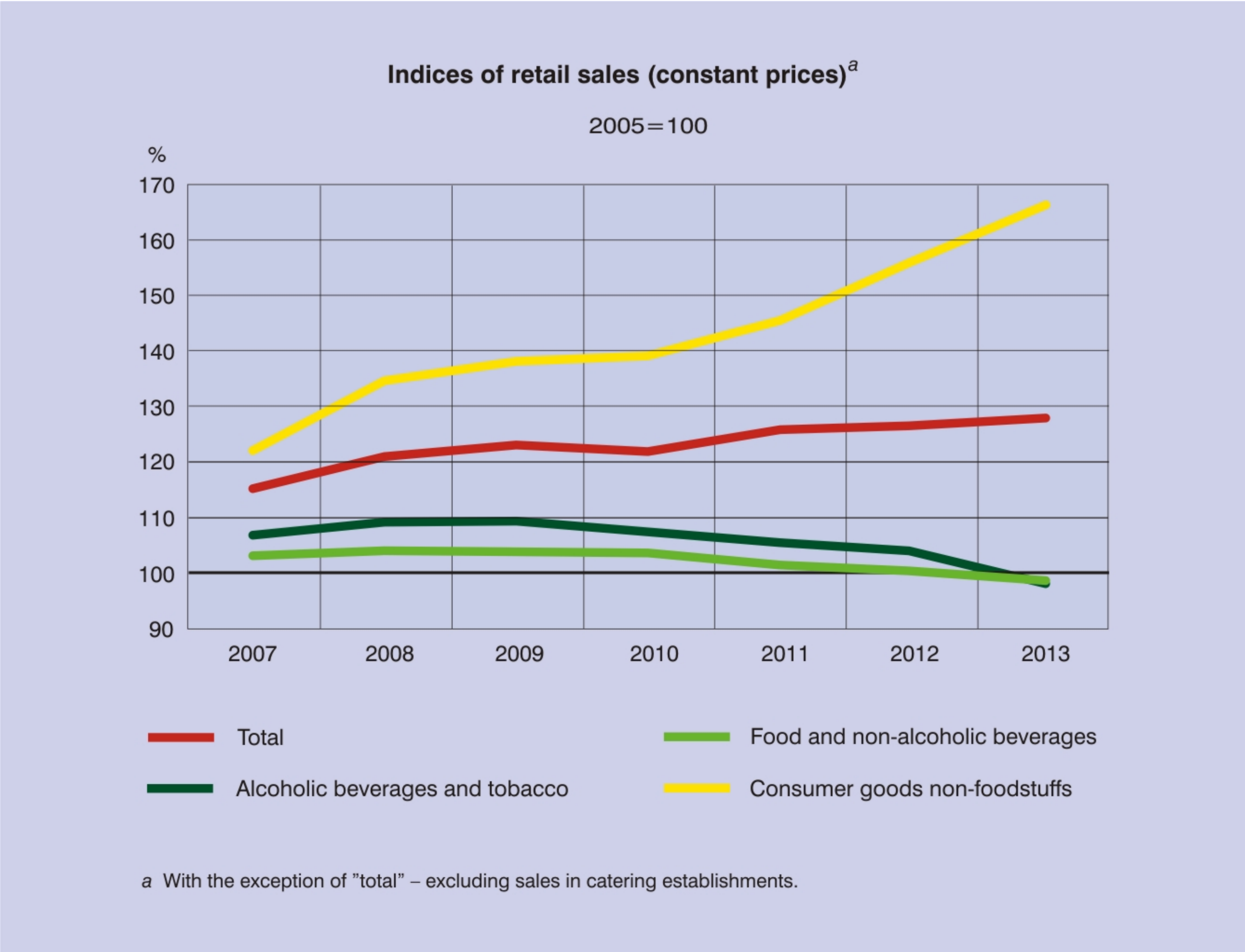
**Retail sales in 2011 – 2013 (current prices)**

| Specification<br>a – absolute numbers<br>b – corresponding period of the previous year =100 | 2011 | 2012 | 2013 |
|---|---|---|---|
| | PLN mln | | |
| Total ........ a | 646127,1 | 675992,6 | 685658,7 |
| b | 109,0 | 104,6 | 101,4 |
| of which trade enterprises ........ a | 561772,5 | 586190,9 | 594454,9 |
| b | 109,0 | 104,3 | 101,4 |

**Retail sales by groups of goods (current prices)**

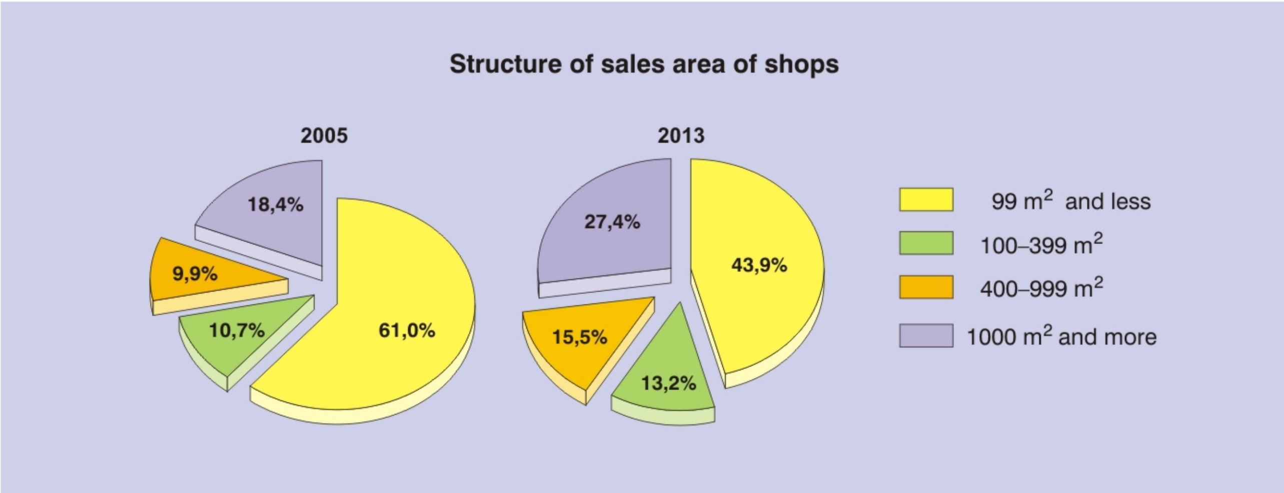
| Specification | 2011 | 2012 | 2013 | |
|---|---|---|---|---|
| | PLN mln | | | 2012=100 |
| **Total ........** | **646127,1** | **675992,6** | **685658,7** | **101,4** |
| food and non-alcoholic beverages ........ | 178593,7 | 185631,5 | 187541,1 | 101,0 |
| alcoholic beverages and tobacco ........ | 59040,0 | 60755,1 | 59039,9 | 97,2 |
| non-foodstuffs (excluding tobacco)........ | 408493,4 | 429606,0 | 439077,7 | 102,2 |

In 2013, the retail sales in constant prices performed by trading and non-trading companies were 1.3% higher than in the previous year (towards rise about by 0.5% in 2012). Greater than an average growth was the growth in sales of consumer goods - non-foodstuffs (6.7%). As compared with the previous year, a decrease was recorded in the sale of food and non-alcoholic beverages (by 1.8%) and non-consumer goods (by 4.8%). Also, a decrease was observed in the sale of alcoholic beverages and tobacco products (by 6.0%). The retail sales of goods and own products in catering establishments were higher by 3.4% than in 2012.

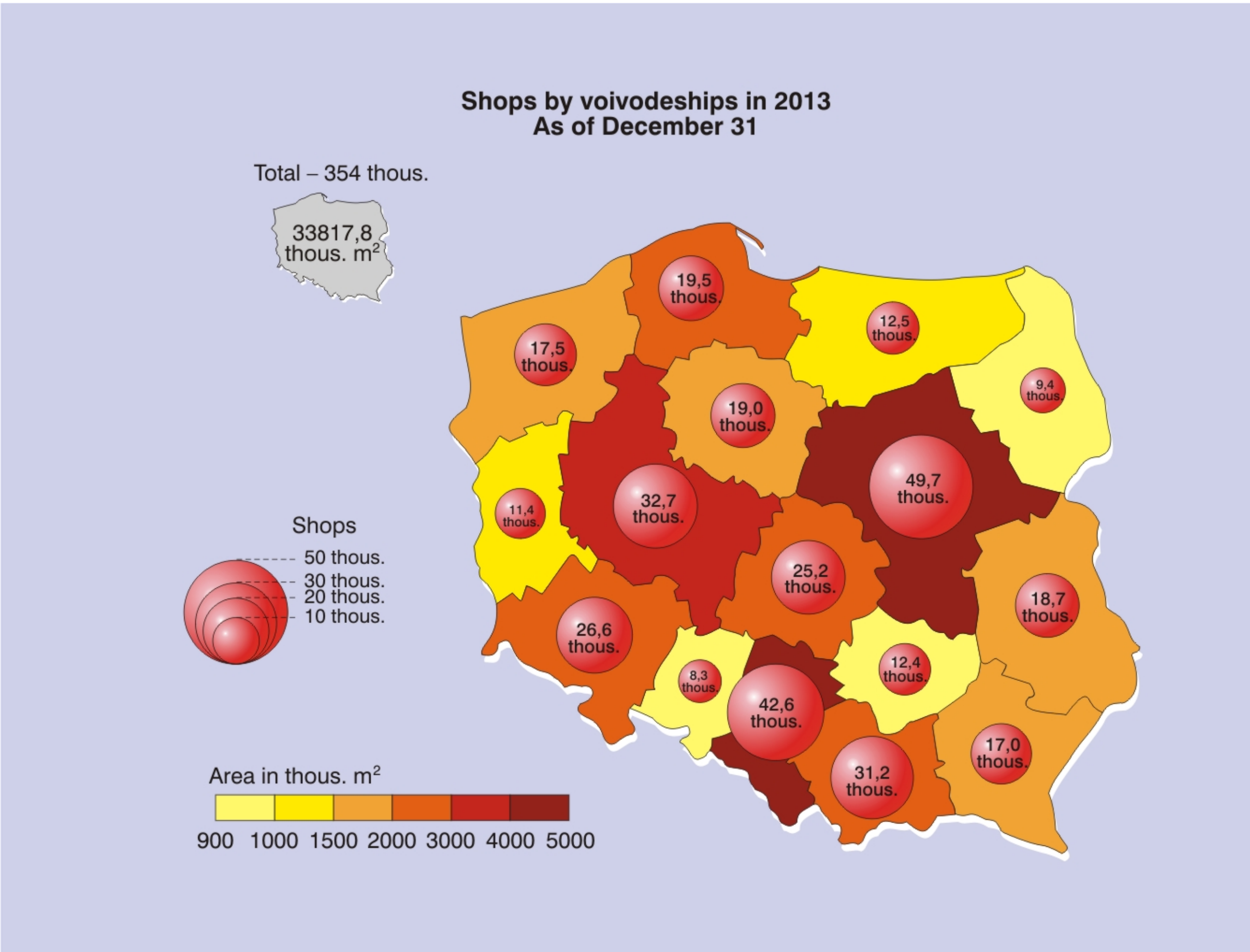



**Commercial infrastructure**

At the end of 2013, the estimated number of shops in Poland amounted to 354 thousand and was lower by 1.0% than in the previous year. The sales area of shops amounted to 33 818 thousand $m^2$ and was bigger by 0.4% than in 2012. A growth was recorded in shops with total sales area ranging from 400-999 $m^2$ (by 10.1%), 100-399 $m^2$ (by 3.1%) as well as 1000 $m^2$ and more (by 1.5 %). The area of the smallest shops (99 $m^2$ and less) decreased by 4.1%.

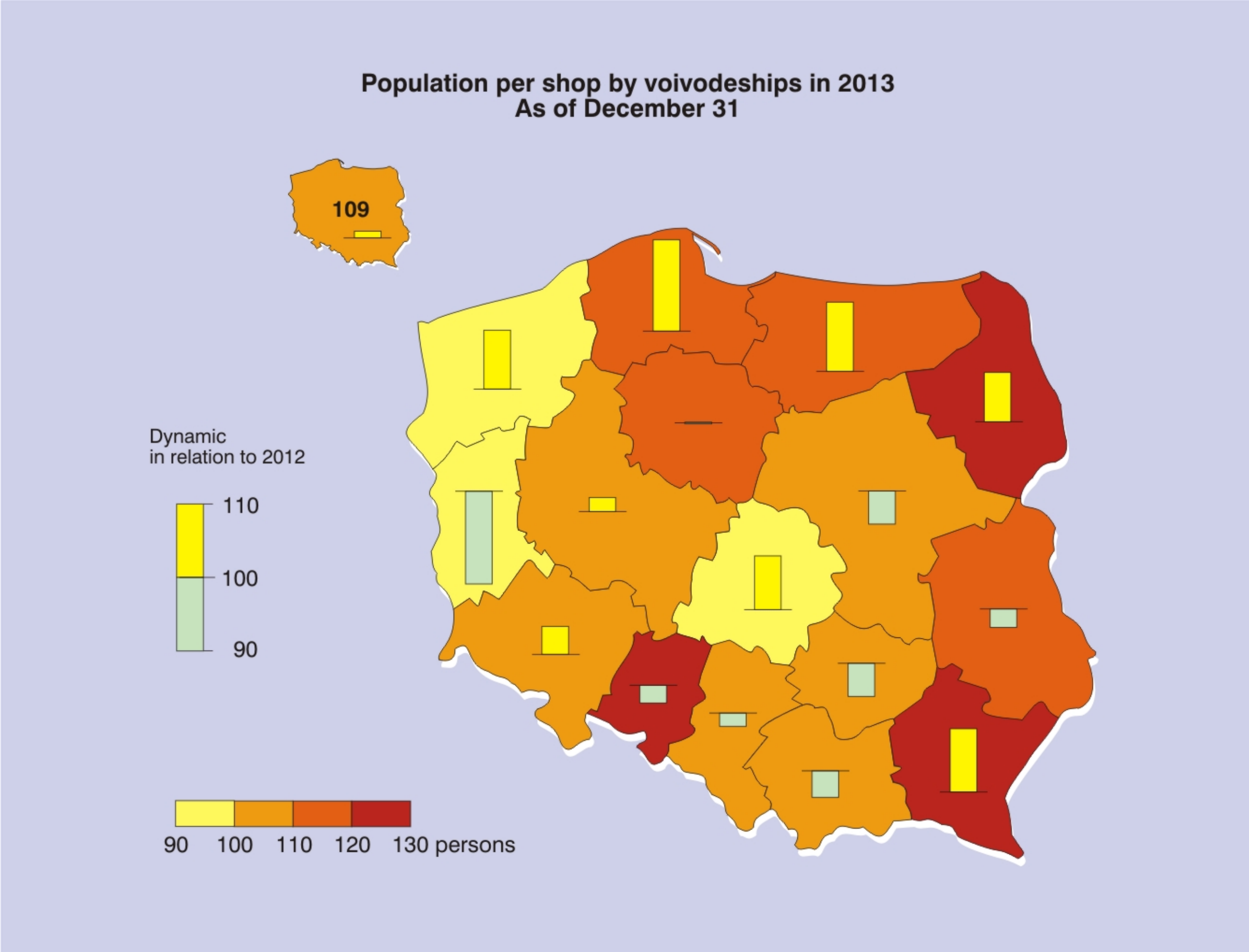



In the regional system, the highest growth in sales area in the range of 400-999 m$^2$ occurred in the following voivodeships: Małopolskie (by 16.2%), Pomorskie (by 13.0%) and Mazowieckie (by 13.0 %), and in the range of 100-399 m$^2$ in the following voivodeships: Mazowieckie (by 8.8%), Małopolskie (by 6.4%) and Podkarpackie (by 5.9%).



Among large-area outlets, the greatest increase in the number of shops was recorded in the category of supermarkets (by 13.6%,), differently however, than in the previous year, the most numerous growth was observed in the category of facilities with the area ranging from 400-999 $m^2$. The number of hypermarkets as compared with 2012 increased by 3.5%. The estimated share of sales value performed together by supermarkets and hypermarkets in retail sales at shops and on petrol stations constituted 23.6% in 2013 and was by 1.2 pp higher than in the previous year.

In 2013, a smaller number of shops was recorded as compared with the previous year, as a result of which an average of 109 people fell per one shop, whereas in 2012 it was accordingly 108 people.



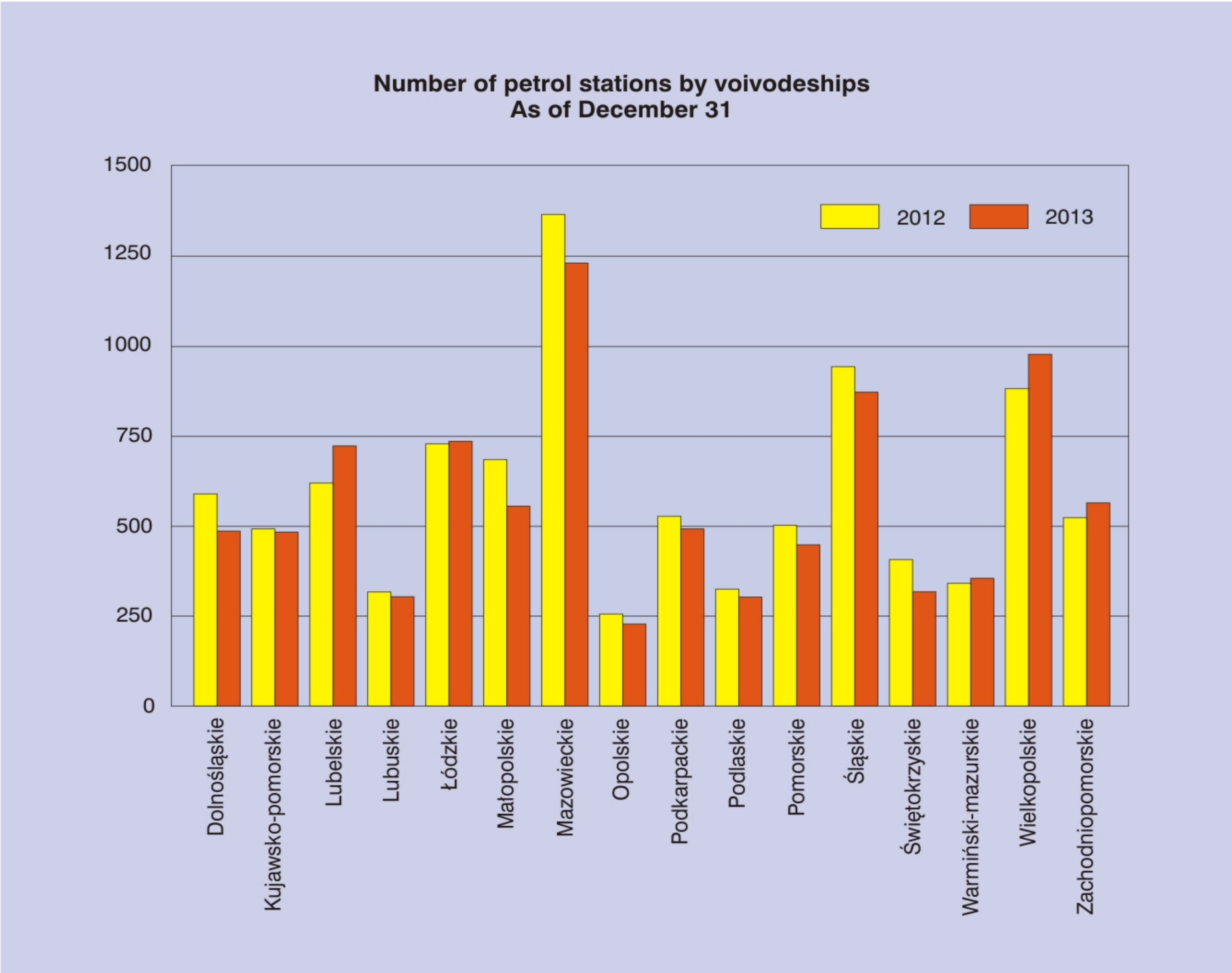

In 2013, in the group of companies with the number of employees above 9 people, the number of shops of companies with foreign capital increased by 4.0%, and sales area by 4.5%. The average area of shops of foreign companies amounted to 657.7 m$^2$ (accordingly in national private shops – 174.2 m$^2$). On the other hand, the share of the area of shops with foreign capital in the total area increased by 1.2 pp as compared with the previous year.

**Number of shops owned by enterprises with foreign capital[a]**

| Specification | 2012 | 2013 |
|---|---|---|
| Number of shops | 13714 | 14268 |
| Share in total shops (%) | 3,8 | 4,0 |
| Sales area (thous. m$^2$) | 8977,1 | 9384,3 |
| Share in total sales area (%) | 26,6 | 27,8 |

a Data concerns entities employing more than 9 persons.

At the end of 2013, the estimated number of petrol stations amounted to 9053 and was 4.5% lower than in the previous year. The greatest percentage decrease in the number of petrol stations was recorded in the following voivodeships: Świętokrzyskie (by 21.7%), Małopolskie (by 18.9%) and Dolnośląskie (by 17.5%). A growth was observed in: Lubelskie (by 16.7%), Wielkopolskie (by 10.8%) and Zachodniopomorskie (by 7.9%).




In 2013, in national records kept by the communal local government units, 2207 permanent marketplaces were shown (including 2105 marketplaces with predominance of small retail sales), which is a decrease by 0.4% as compared with the previous year. A significantly smaller number of marketplaces was shown in the Łódzkie voivodeship (by 3.3%). By analogy to the previous years, the area of marketplaces in voivodeships: Mazowieckie, Łódzkie and Wielkopolskie was the highest and the share of their total sum constituted 40.3% of the total area of marketplaces in the country.

Within the area of marketplaces, transactions were performed in approx. 100. 6 thousand permanent small-retail sales outlets, among which 58.7 thousand operated every day. A supplement to the permanent marketplaces network were seasonal marketplaces with the number of 6460 in 2013, which is a decrease by 0.7% as compared with the previous year. Also, lower annual inflows were observed from market fee by 5.9% as compared with 2012.

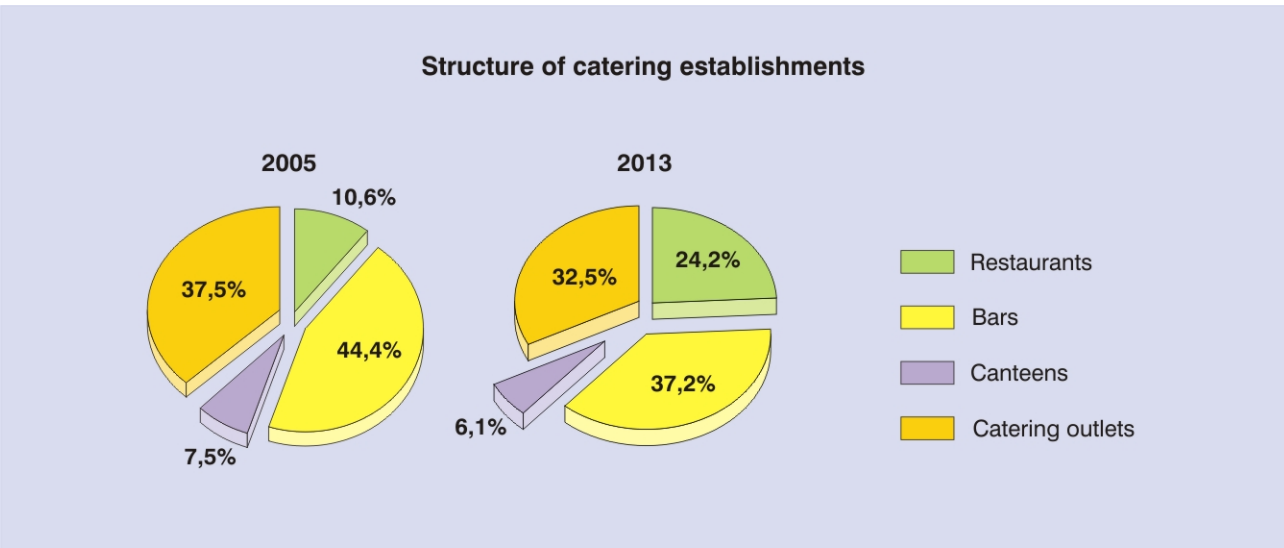
**Food services**

In 2013, the number of catering establishments (permanent and seasonal) in the country was estimated at almost 67.0 thousand, of which 37.2% were bars, 32.5% – catering outlets, 24.2% – restaurants and 6.1% – canteens. The total number of catering establishments in 2013 was reduced by 2.6% as compared with 2012, and a decrease was recorded in all the types of points.

The private sector in food services covered 98.2% of all the catering establishments, (an increase in comparison to the last year by 0.3 pp), including: 99.2% restaurants, 99.0% bars, 98.7% catering outlets and 86.4% canteens.

**Catering establishments**

| Specification | 2011 | 2012 | 2013 | |
|---|---|---|---|---|
| | Number | | | 2012=100 |
| **Total** | **67356** | **68787** | **66966** | **97,4** |
| restaurants | 15287 | 16478 | 16202 | 98,3 |
| bars | 25866 | 25885 | 24931 | 96,3 |
| canteens | 4271 | 4304 | 4072 | 94,6 |
| catering outlets | 21932 | 22120 | 21761 | 98,4 |



In 2013, the total revenue from food service activity in current prices amounted to approx. PLN 26.2 billion and as compared with the previous year increased by 5.3% (in constant prices they were higher by approx. 3.0%). The share of private sector in total revenue constituted 98.5%, the share of public sector decreased to 1.5 % (decrease by 0.3 pp as compared with 2012).

75.1% of the value of total revenue originated from food service production, 23.0% – from sale of commodities (including 16.8% – from sales of alcohol and tobacco products) and 1.9% – from the other activity. The revenue increased in the field of food service production (by 10.4%), while in other types of food service activity a decrease was recorded in revenue as compared with the previous year.

**Revenues from food service activity in current prices**

| Specification | 2011 | 2012 | 2013 | |
|---|---|---|---|---|
| | PLN mln | | | 2012=100 |
| **Revenues total** | **22782,6** | **24868,3** | **26174,2** | **105,2** |
| from sales of commodities | 6319,1 | 6499,1 | 6033,1 | 92,8 |
| of which from the sale of alcoholic beverages and tobacco | 4362,7 | 4601,5 | 4402,5 | 95,7 |
| from food service production | 15833,2 | 17788,1 | 19643,7 | 110,4 |
| from other activity | 630,3 | 581,1 | 497,3 | 85,6 |

**Wholesale**

In 2013, the wholesale value estimated in trading companies (in current prices) amounted to PLN 1 010.6 billion and was 3.1% higher than in the previous year . A growth in sale was recorded in the group of food and non-alcoholic beverages – by 11.1% and in the group of non-foodstuffs – by 2.1%. The wholesale of alcoholic beverages was reduced by 3.0%. Within the structure of wholesale, the share of food and non-alcoholic beverages increased by 0.9 pp as compared with the previous year , while the share of non-foodstuffs decreased (by 0.8 pp) and alcoholic beverages (by 0.1 pp)

The wholesale performed by companies with 50 employees and more constituted 47.1% (a decrease by 0.5 pp as compared with the previous year).


**Wholesale in 2011 - 2013 (current prices)**

| Specification<br>a – absolute numbers<br>b – corresponding period of previous year=100 | | 2011 | 2012 | 2013 |
|---|---|---|---|---|
| | | PLN mln | | |
| Total | a | **946833,2** | **980452,1** | **1010623,7** |
| | b | 111,9 | 103,6 | 103,1 |
| of which enterprises employing 50 persons and more | a | 452012,6 | 466589,9 | 476415,8 |
| | b | 113,4 | 103,2 | 102,1 |

**Wholesale by group of goods (current prices)**

| Specification | 2011 | 2012 | 2013 | |
|---|---|---|---|---|
| | PLN mln | | | 2012=100 |
| **Total** | **946833,2** | **980452,1** | **1010623,7** | **103,1** |
| food and non-alcoholic beverages | 119730,9 | 121349,8 | 134828,7 | 111,1 |
| alcoholic beverages | 27481,8 | 24784,8 | 24051,2 | 97,0 |
| non-foodstuff goods | 799620,5 | 834317,5 | 851743,8 | 102,1 |

**Supplying the market**

In 2013, in producers' warehouses[5] average stocks of the majority of surveyed products were higher than in the previous year.

In the group of food products stocks increased, among others, of beef and veal, canned ham and shoulders, other pork products, frozen sea fish, juices and fruit and vegetable beverages and chocolate (including white) with sweet and chocolate goods. Stocks decreased, among others, of edible animal fats melted, fruit jams, butter and other fats from milk.

Among non-food products stocks, among others, of bed linen, pastes, powders and other preparations for cleaning, gas stoves, electrical and mixed, clocks and watches were greater than in the previous year. Stocks decreased: cotton fabrics, synthetic fabrics, fabric and knitted outerwear and clothing, tyres for cars.

In 2013, **deliveries**[6] of the majority of surveyed food and non-food consumer goods were lower as compared with 2012. The decrease in deliveries was caused by a greater growth of export than import. A significant growth in export as compared with the previous year was observed for the following items: refrigerators and freezers of the household type, animal fats melted, mineral water, chocolate-icing products, cured meats and pork.

A smaller import and its effect on lower deliveries was recorded for: melted animal fats, tableware and porcelain kitchen dishes, coffee, radios (along with sets) and tea.

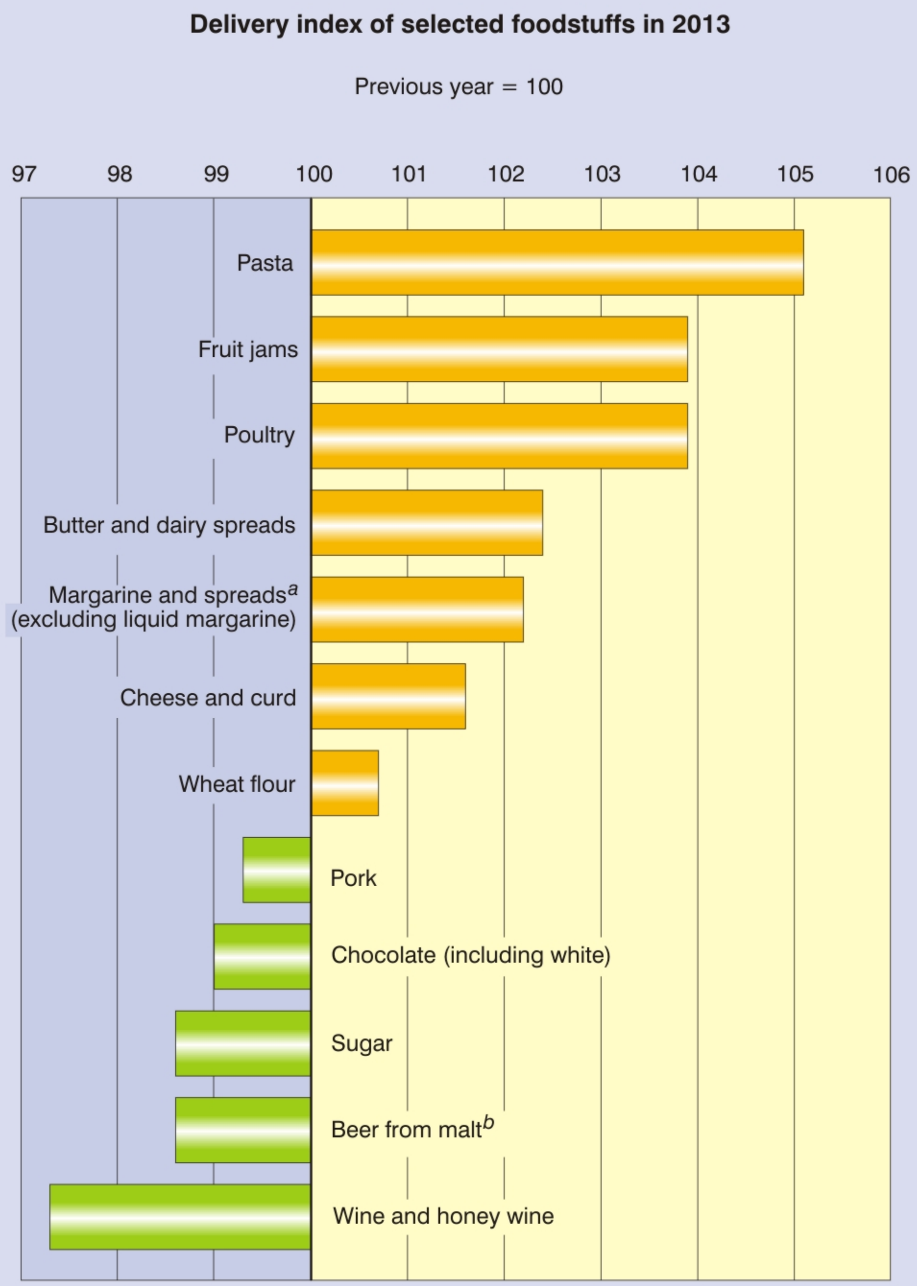
Among the surveyed **food products,** the deliveries, among others, of products with chocolate icing, coffee, animal fats melted, mineral water, tea were significantly lower than in the year before. The deliveries, among others, of frozen sea fish and vodka, liqueurs, other alcoholic beverages (the growth caused by higher production at the end of the year related to change in the excise rates in 2014), as well as soups and broth were significantly higher than in the previous year were.

In the group of tested **non-food products**, the deliveries, among others, of tyres for cars, soap, surface active organic products and preparations used as soap and passenger cars were significantly lower than in 2012.

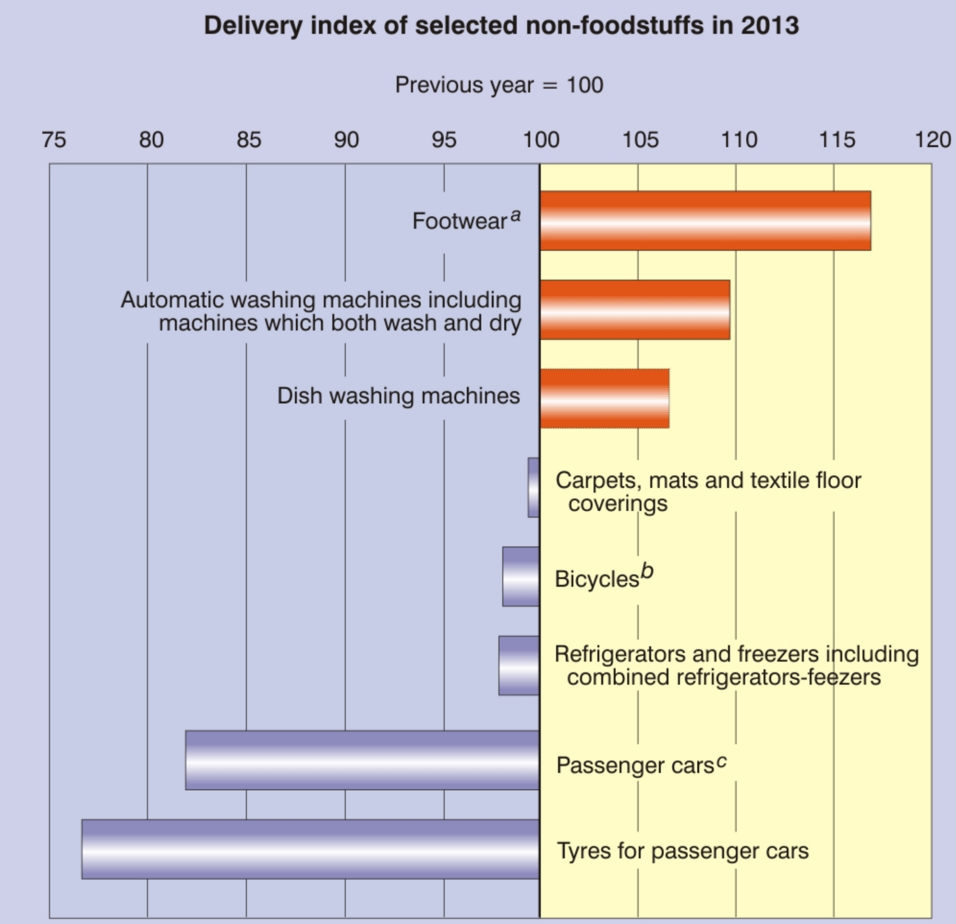
As compared with 2012, a high growth was observed in deliveries, among others, of television receivers, knitted outerwear and clothing, footwear, household vacuum cleaners.

[5] In companies with the number of employees above 49 people.

[6] The quantity of goods manufactured in the country (data relate to business entities where the number of employees exceeds 9 people) reduced by their export plus import, corrected by the balance of changes in inventory at manufacturers with the number of employees above 49 people.




*a* Reduced and law fat.
*b* Of an alcoholic strength of 0,5% and more.




*a* Including rubber footwear.
*b* Including children's.
*c* Excluding motors caravans, snowmobiles, golf car similar vehicles.