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SPIS TREŚCI

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 2011, 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
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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
zl = 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 27*** *(27 countries-members of EU: Austria, Belgium, Bulgaria, 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 – As of 31.12.2011*** *(17 countries-members of Economic and Monetary Union: Austria, Belgium, Cyprus, Estonia, Finland, France, Greece, Spain, Ireland, Luxembourg, 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
   PU – Demand for services

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	-
Other	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. it these cover sales conducted by the trade and non-trade establishments. Observation of a wide range of economic units enables to eliminate fluctuation of monitored occurrence, which is a result of changes in type of activity made by enterprises.

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 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,
- **grocery stores** are stores primarily selling foodstuff goods for daily consumption, with a sales area between 120 and 399 m^2,
- **specialised stores** are stores selling a wide assortment of articles to fully meet specific needs (e.g. clothing, home furnishing, car parts, furniture, sporting goods, etc),
- **other stores** are stores in which the sales area covers no more than 119 m^2 which conduct sales activity within the scope of common usage goods,
- **pharmacies –** retail sales outlets which conduct sales activity within the scope of pharmaceutical and herbal-products,
- **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);

1 From 2006 research has been conducting in three year cycle.

- **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;
- **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 (nominal) 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.

Data regarding wages and salaries are given in gross terms, i.e. including deductions for personal income taxes and since 1999 also employee's contributions to compulsory social security (retirement, pension, and illness).

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 24), population as of 30 VI was adopted. In the calculation of data concerning population per shop (Table 13), 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.
6. Data for 2010 and 2011 was compiled according to population balance on the basis of the results of the Population and Housing Census 2011.

II. ANALYTICAL COMMENTARY

1. Services

For many years, a growing significance of services has been observed, both in Poland and worldwide, which is reflected in the growing share of the gross value added generated by the entities running service activities in individual national economies. In the European Union (EU), the share of the service activities value added indicates an upward tendency with varying pace of change in individual countries.

In 2011, the highest share of the value added generated by the services among the EU member states was recorded in Cyprus - 80.6%, in Malta - 80.2% and in France - 79.5%. Services constitute a large share of the value added of the whole economy in countries such as the United Kingdom (76.1%), Italy (73.4%), Spain (70.6%) and Germany (68.3%). The most significant increase of service activities share in generating the value added in relation to 2000 was recorded in Malta (by 11.4 pp), followed by Ireland (by 10.3 pp), and then the following: Finland (by 7.3 pp), Portugal and Greece, where the growth was 6.7 pp, Spain with the increase of 5.8 pp, Belgium - 5.0 pp, the UK - 4.1 pp and Italy - 3.9 pp. The decline in the share of services in generating gross value added was observed, among others, in Slovakia (by - 4.3 pp), Romania (by -2.0 pp) and Germany (by -0.1 pp).

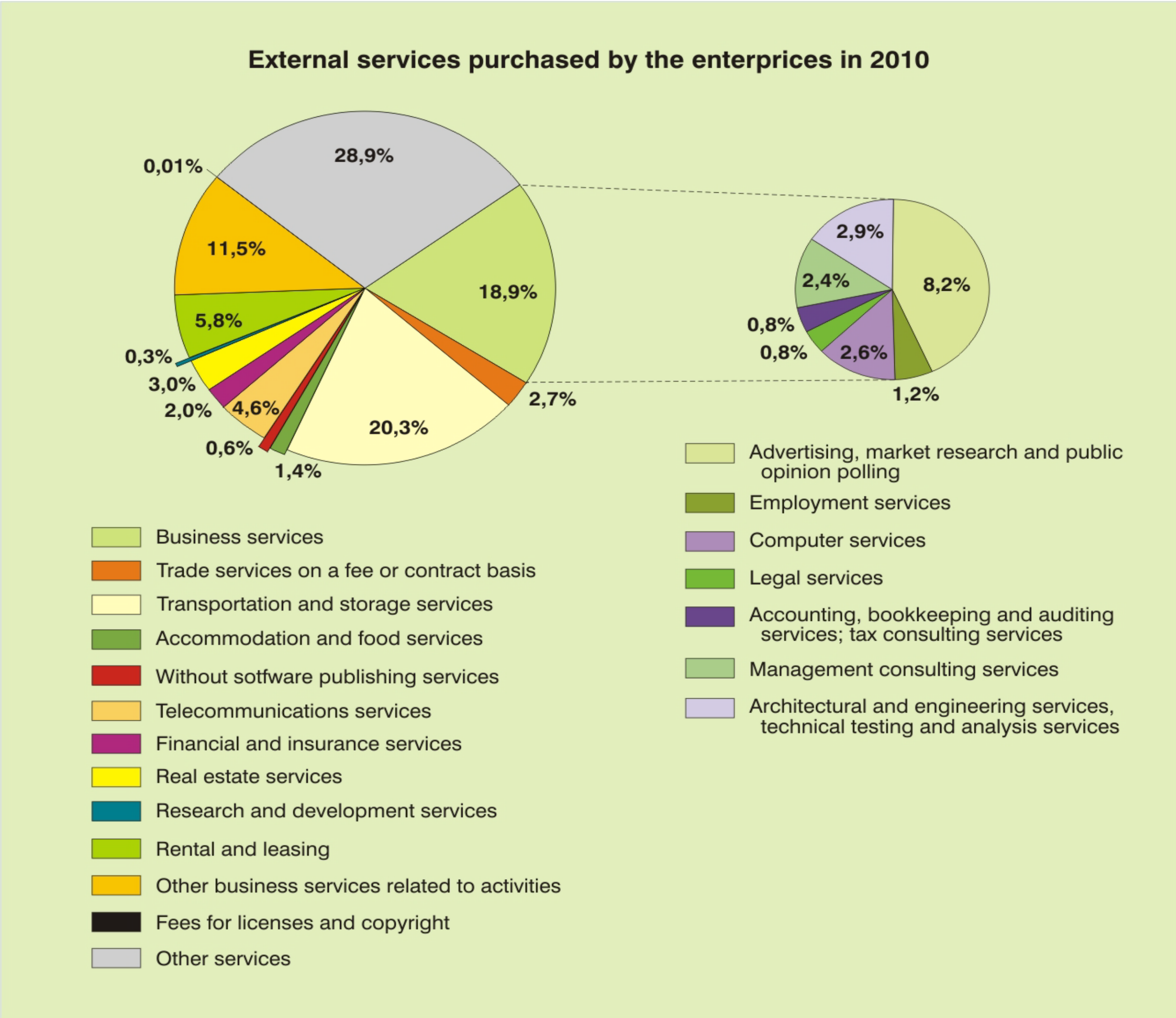
Table. 1. The share of gross value added generated by services in the gross value added generated by the national economy (in current prices) – NACE Rev. 2

Countries	Years	Share in %	Countries	Years	Share in %
Austria	2000	66,6	Malta	2000	68,8
	2011	69,0		2011	80,2
Belgium	2000	71,5	Netherlands	2000	72,8
	2011	76,5		2011	73,6
Bulgaria	2000	61,0	Germany	2000	68,4
	2011	63,3		2011	68,3
Cyprus	2000	75,2	**Poland**	**2000**	**64,0**
	2011	80,6		**2011**	**62,9***
Denmark	2000	70,9	Portugal	2000	67,9
	2011	76,3		2011	74,6
Estonia	2000	67,6	Czech Republic	2000	59,0
	2011	66,4		2011	60,2

Countries	Years	Share in %	Countries	Years	Share in %
Finland	2000	62,1	Romania	2000	53,5
	2011	69,4		2011	51,5
France...	2000	74,7	Slovakia.......................................	2000	59,3
	2011	79,5		2011	55,0
Greece	2000	72,3	Slovenia.......................................	2000	62,0
	2011	79,0		2011	66,9
Spain	2000	64,8	Sweden..	2000	69,6
	2011	70,6		2011	71,4
Ireland	2000	61,5	Hungary.......................................	2000	61,8
	2011	71,8		2011	62,1
Lithuania	2000	64,2	United Kingdom..........................	2000	72,0
	2011	65,4		2011	76,1
Latvia	2000	70,2	Italy	2000	69,5
	2011	70,1		2011	73,4

Source: Eurostat, 26.09.2012 r.; Lack of data for Luxembourg
* Data for Poland for the year 2011, A communique of the Central Statistical Office on a revised estimate of the nominal value of gross domestic product for the years 2010 and 2011 of 28.09.2012.

In 2010, the value of services purchased by enterprises[1] from other entities amounted to over PLN 261 billion.



Depending on the business activity, the enterprises acquire different type of services. Transport services and warehousing constituted the largest share of total purchases of services, especially in entities running the transportation and storage activities (Section H of NACE) - 57%, in enterprises dealing with manufacturing (Section C of NACE) - 26%.

In case of 91% of entities, a foreign enterprise was the main provider of services, in which 57% of entities acquired services under a fixed agreement - they were mostly telecommunication services. 34% of the entities purchased services based on a single order and they were mostly related to accommodation services and food services. The entities which acquired the services within the company accounted for 5% of the total and they were mainly accounting and bookkeeping services as well as auditing and tax consultancy. Outsourcing within a group of companies affected 4% of entities and they acquired IT services in most of the cases.

1 Data concern entities employing more than 49 persons.

The main service provider was most frequently located within the same voivodship (65% of entities). Almost 1/3 of the entities purchased services from domestic suppliers having their registered office in another voivodship. Business entities have shown much smaller interest in purchase of services from abroad - 4% of acquired services came from the countries of the European Union (EU), and only 1% from outside the European Union.

More than half of the surveyed entities (54%) indicated barriers associated with the purchase of services abroad. Location of service providers is the difficulty in services outsourcing for 14% of entities, while economic barriers for 10% of enterprises. Legal and regulatory barriers as well as other barriers represented 6% and 7% respectively. Other obstacles such as lack of confidence, information about suppliers, language barriers and barriers related to transparency of the market were less important for entrepreneurs.

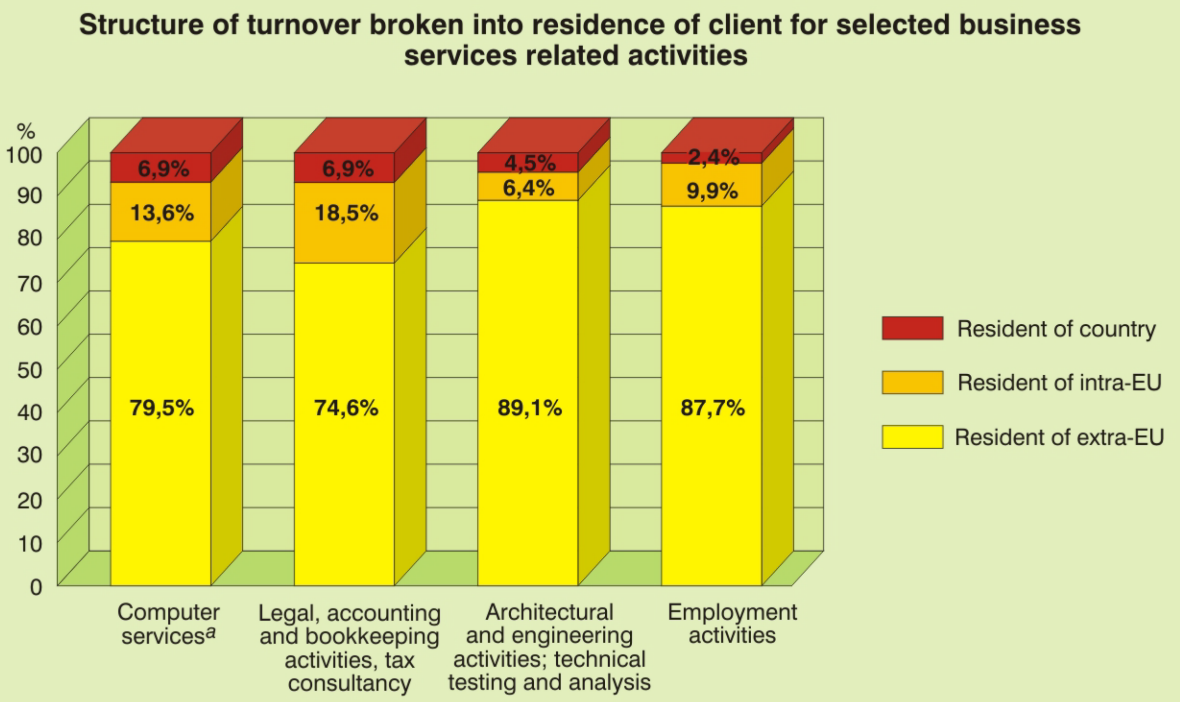
In 2010, 70% of the entities declared staying at the current level of purchase of services over the next two years. The increase of outsourcing of services was planned by 21% units, while their reduction by 9%.

Business services related activities, so-called business services, are a relatively new, however, dynamically developing segment of the services. The entities[2] providing business services shall include enterprises running, among others, the IT activities, legal, accounting and bookkeeping, management, engineering and architectural as well as advertising services, and employment services.

In 2010, among all non-financial enterprises, about 11% covered the entities providing business services. In the same year, the population of the providers of business services recorded the increase at the level of almost 3.0% as compared with the previous year, towards 3.2% growth in the number of all non-financial entities throughout the whole national economy. Simultaneously, in the same period, the increase in the number of employees by more than 5% was reported in business services entities while the total number of employed persons in non-financial enterprises in the country increased by 0.3%.

2…Data concern entities employing more than 9 persons.

Enterprises included in the business services segment focus their activities on the domestic market. In 2010, 81.5% of the total revenues of these enterprises resulted from providing services related to supporting business entities established on the territory of the Republic of Poland (in comparison with the previous year, the increase in share of 1.8 pp was recorded). Customers having their headquaters in countries of the European Union were the source of revenue for 13.0% of entities, and for the remaining 5.5% - entities located outside the EU. In 2010, the decline by 1.8 pp was reported in revenue share in respect of the provision of business services to entities with their seat located abroad.



a Related to entities providing software publishing services (group 58.2), computer programming, consultancy and related activities (division 62) and data processing, hosting and related activities; web portals (group 63.1).

In 2010, the value of total net revenues from sale in respect to enterprises providing business services related activities amounted to PLN 70.1 billion (the increase by 10.5% as compared with 2009).

The largest revenue growth in 2010 was recorded in employment activities (Division 78, Section N of NACE) - by more than 47%. The increase in the value of revenues reported in entities running legal and accounting activities (Division 69, Section M of NACE) accounted for not quite 27%. Enterprises providing management consultancy services (Group 70.2, Section M of NACE) recorded the decrease in revenues of nearly 14% in relation to the previous year.

In enterprises providing IT services, the revenues from computer programming services (62.01 of CPA) accounted for the largest share (30.9%) in the structure of the net revenue from total sales, reaching a value of PLN 6.2 billion. As compared with 2009, the decrease in share of these services in total revenues by 4.3 pp was recorded.

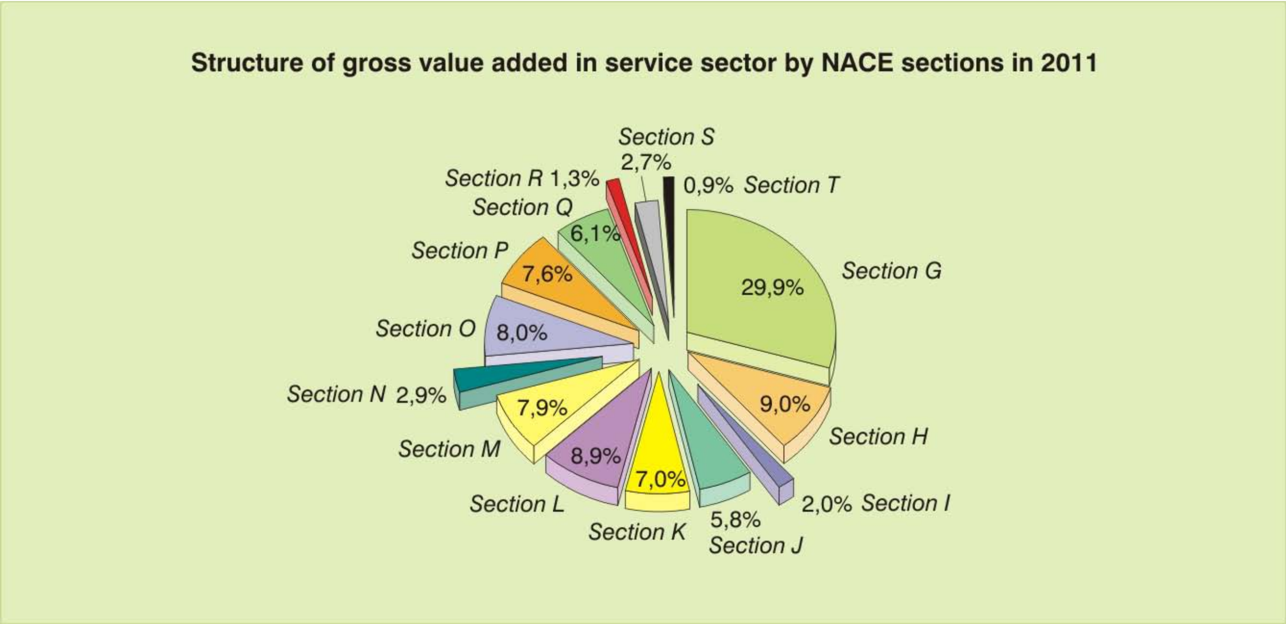
In enterprises related to legal and accounting services (Division 69, Section M of NACE), accounting services (69.20.2 of CPA) constituted the largest share in the structure of sales revenues (37.1%). As compared to 2009, the share increased by 3 pp. The value of such services amounted to PLN 2.7 billion.

In 2010, the largest share of net revenues (50.8%) of the enterprises operating in the field of architectural and engineering services, technical testing and analysis services (Division 71, Section M of NACE) accounted for engineering services and related technical consulting services (71.12 of CPA), and their share in comparison with 2009 grew by 16 pp. The value of these services amounted to PLN 7.4 billion.

Over the last few years there has been the significant increase in the importance of employment related services (Division 78, Section N of NACE). Under this activity, other human resources provision services (78.30 of CPA) constituted the largest share in 2010 (almost 42%), and their increase compared with 2009 was over 7 pp. The value of these services amounted to PLN 1.9 billion.

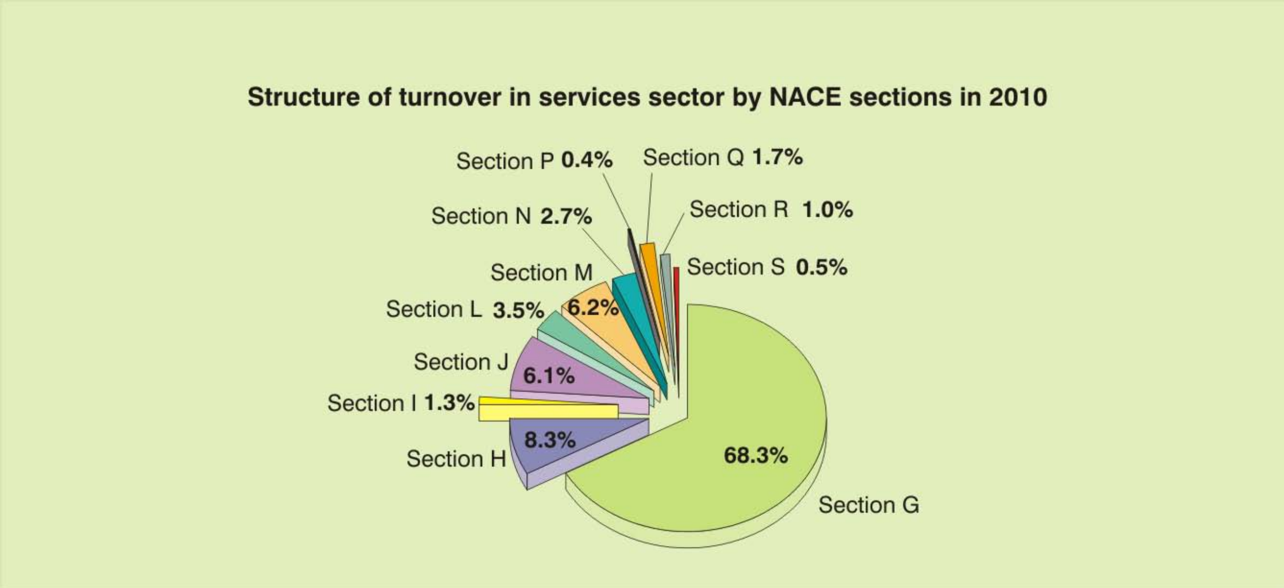
In 2011 in Poland, gross value added generated by entities running a business activity connected with services represented 62.9% of gross value added of the national economy as a whole. The number of persons employed in these units accounted for 56.3% of the total employed. It should be emphasised that the changes observed in the area of services are associated with phenomena of economy as a whole and customers' needs, which are both private consumers and companies.

In 2011, the dominant activity among service entities in terms of value added was commercial activity, whose share amounted to 29.9% of the value added produced by all service related activities units. The share of activities in the field of transportation and storage (Section H of NACE) was at the level of 9.0%, while the real estate activities (section L of NACE) - 8.9%.



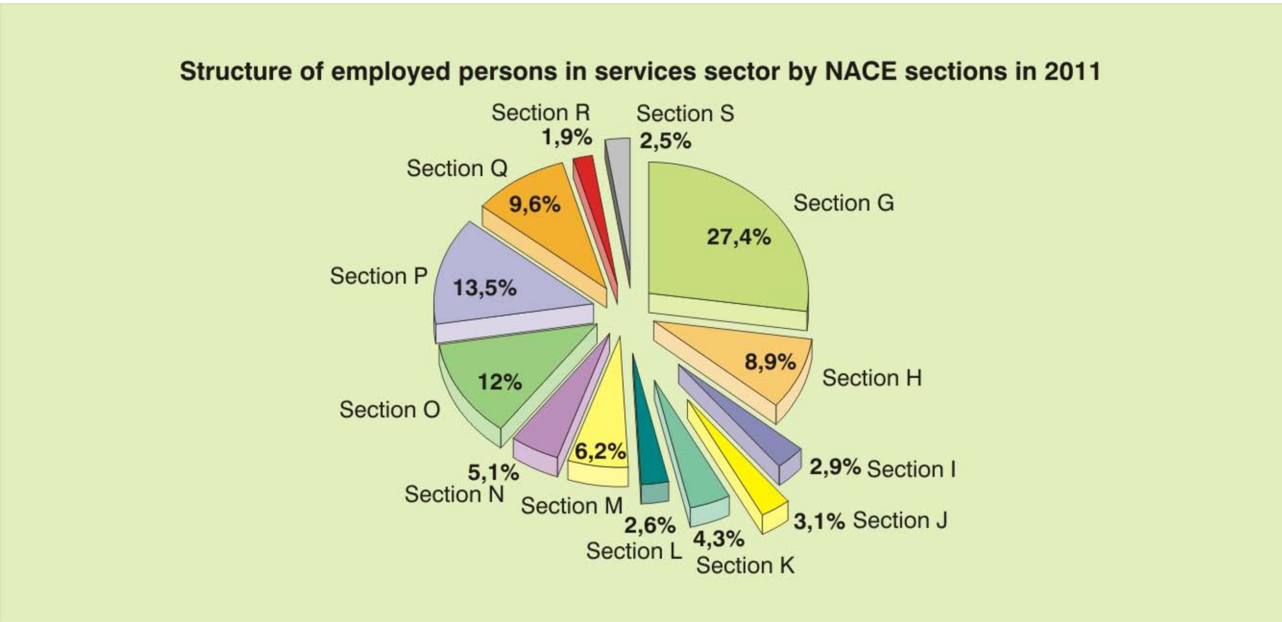
Source: A communique of the Central Statistical Office on a revised estimate of the nominal value of gross domestic product for the years 2010 and 2011 of 28.09.2012.
See Methodical Notes, p. 7

In 2010, the revenues of commercial enterprises accounted for the highest revenue share of services in total (Section G of NACE) – more than 68.3%, then enterprises providing transportation and storage services (Section H of NACE) - 8.3%. The shares of enterprises classified to section M "Professional, scientific and technical activities" and section J "Information and communication" were at the level of 6,2% and 6,1% respectively.



Source: Activity of the non-financial enterprises in 2010, CSO, Warsaw (section N [excl. 8130.Z], Section Q [excl. 86.10.Z], Section S (95 and 96 divisions).

In 2011, among service entities, the most people worked in enterprises classified to section ”Wholesale and retail trade; repair of motor vehicles and motorcycles" (Section G of NACE) - 27.4% of the total persons employed in service entities, then to section "Education" (Section P of NACE) - 13.5% and to section "Public administration and defence; compulsory social security" (Section O of NACE) - 12.0%.



Source: Concise Statistical Yearbook of Poland 2012.

In 2011, the highest average gross wages and salaries were recorded in the "Information and communication" section (Section J of NACE) – PLN 5 800, "Financial and insurance activities" (Section K of NACE) - PLN 5 739 and "Public administration and defence" (Section O of NACE) - PLN 4 320. In entities classified in section I "Accommodation and food service activities", the lowest average gross wages and salaries were recorded - at the level of PLN 2 106.

As compared with 2010, the largest increase in the average monthly wages and salaries in 2011 was observed in section N "Administrative and support service activities" - to PLN 2 309, which is approx. 8.7% in relation to the previous year, with the simultaneous the average employment growth by 2.1%. In all enterprises classified to the service sections, the increase of the average wage and salaries was recorded.

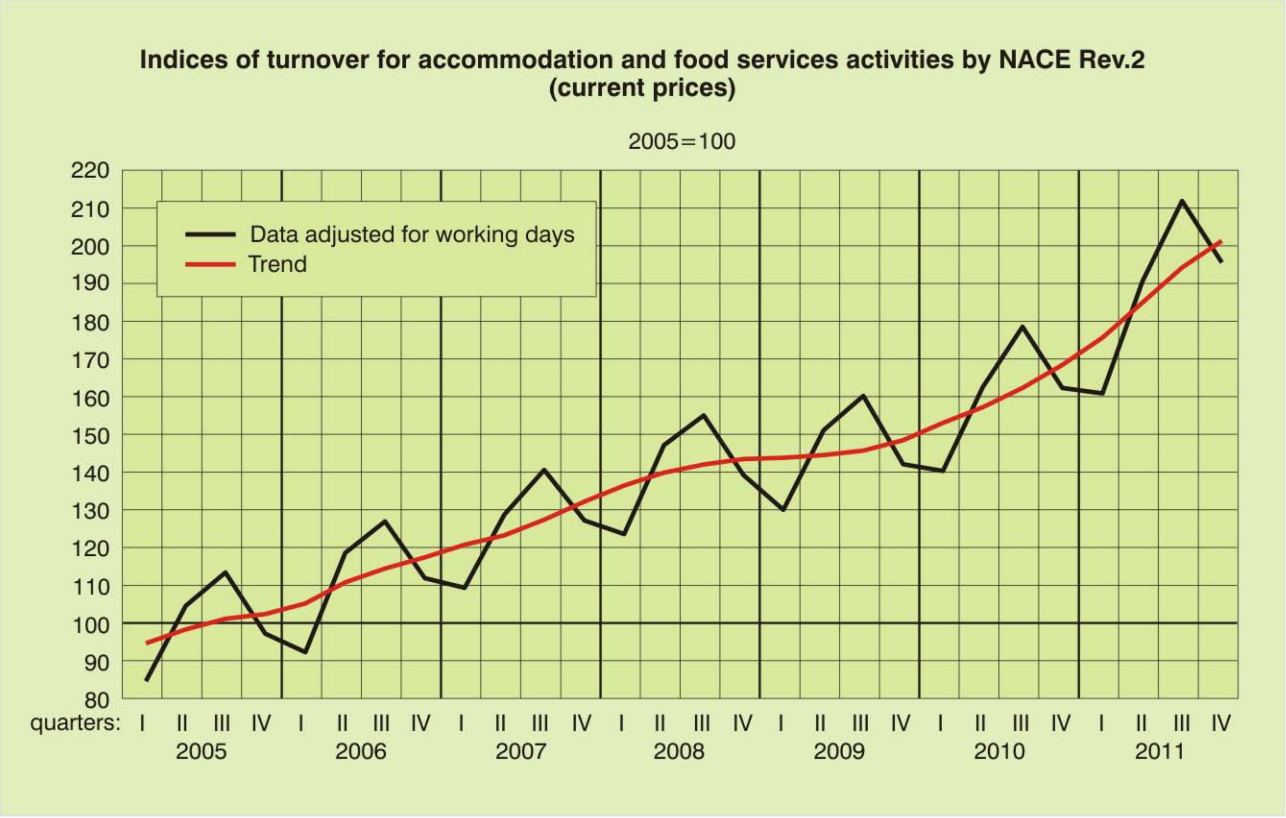
In 2011, the commercial activity was the dominant activity among service units in terms of the average number of persons employed, in which 1 599.7 thousand of people were employed (the increase by 0.1% in relation to 2010). In section P "Education", 1 037.1 people worked in the same year. The lowest average employment was observed in section S "Other service activities" – 97.3 thousand of people.

The largest increase in average paid employment was recorded in section L "Real estate activities" - by 4.1%. The largest decline in the average number of persons employed was in public administration and defence (Section O of NACE) - by 1.9%.

Analysis of selected service activities.

Among the service activities, the services whose high importance and development is associated with the role supporting other business entities might be distinguished. In order to observe changes in this area, short-term research of those service activities are carried out. The presented result data relate to enterprises with more than 9 persons employed.

For enterprises engaged in accommodation and food service activities **(**Section I of NACE), an increase in turnover by 18.0% was recorded as compared with 2010. At the end of the year 2011, there were about 8.5% more persons employed. There was a higher cost level indicator from total activity than a year before, from 94.0% in 2010 to 95.4% in 2011. The gross turnover profitability rate deteriorated (from 6.0% in 2010 to 4.7% in 2011), at simultaneous decrease of the net turnover profitability rate which amounted to 3.8%.



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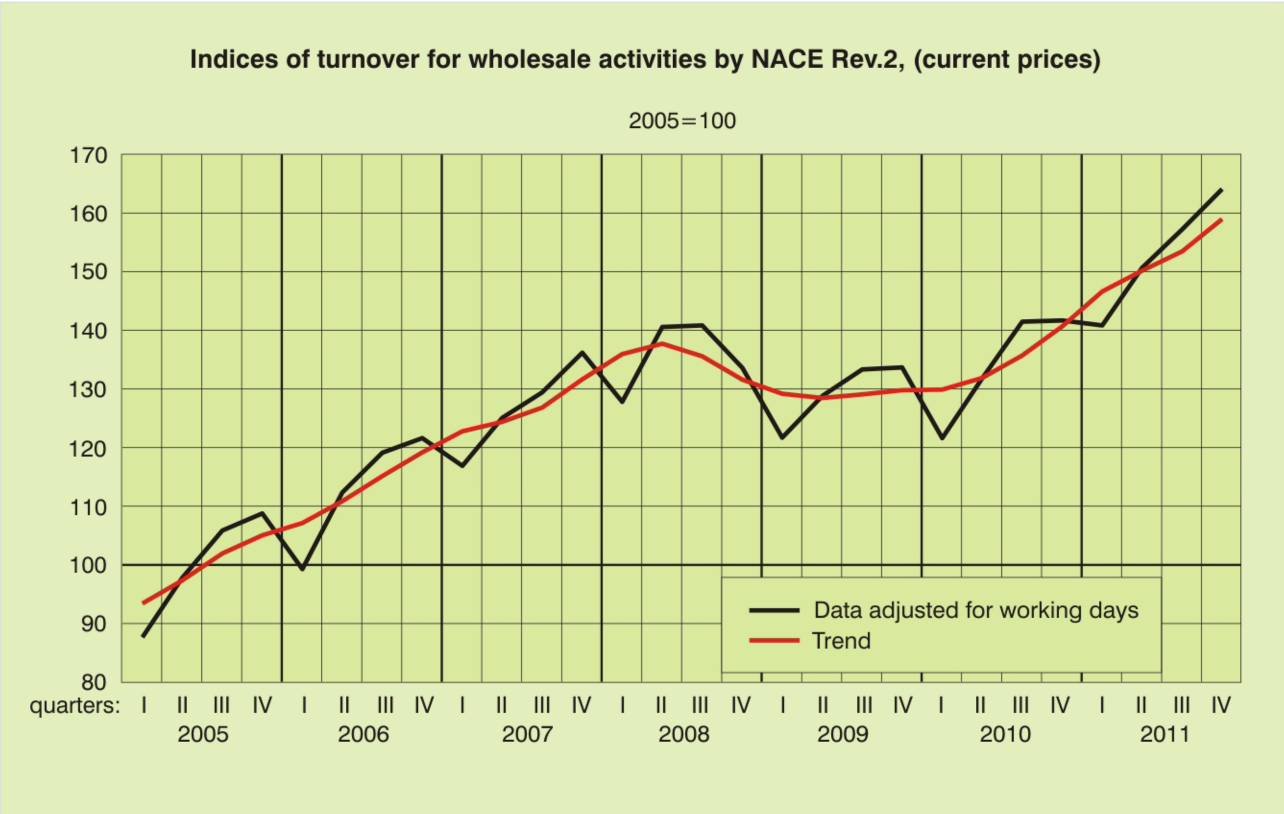
In the wholesale trade, except of motor vehicles and motorcycles, (Division 46 of NACE), an increase of turnover by 14.2% was observed, as compared with 2010. At the end of 2011 the number of wholesale enterprises was higher by 7.8% as compared with the previous year. At the same time the number of persons employed decreased (by 1.9%). The cost level indicator from total activity rose slightly, being still at a high level (97.2% as compared with 97.0% before a year). Both the gross turnover profitability rate (2.8% as compared to 3.0% in 2010) and the net turnover profitability rate (2.3% as compared with 2.5% the year before) deteriorated in 2011.



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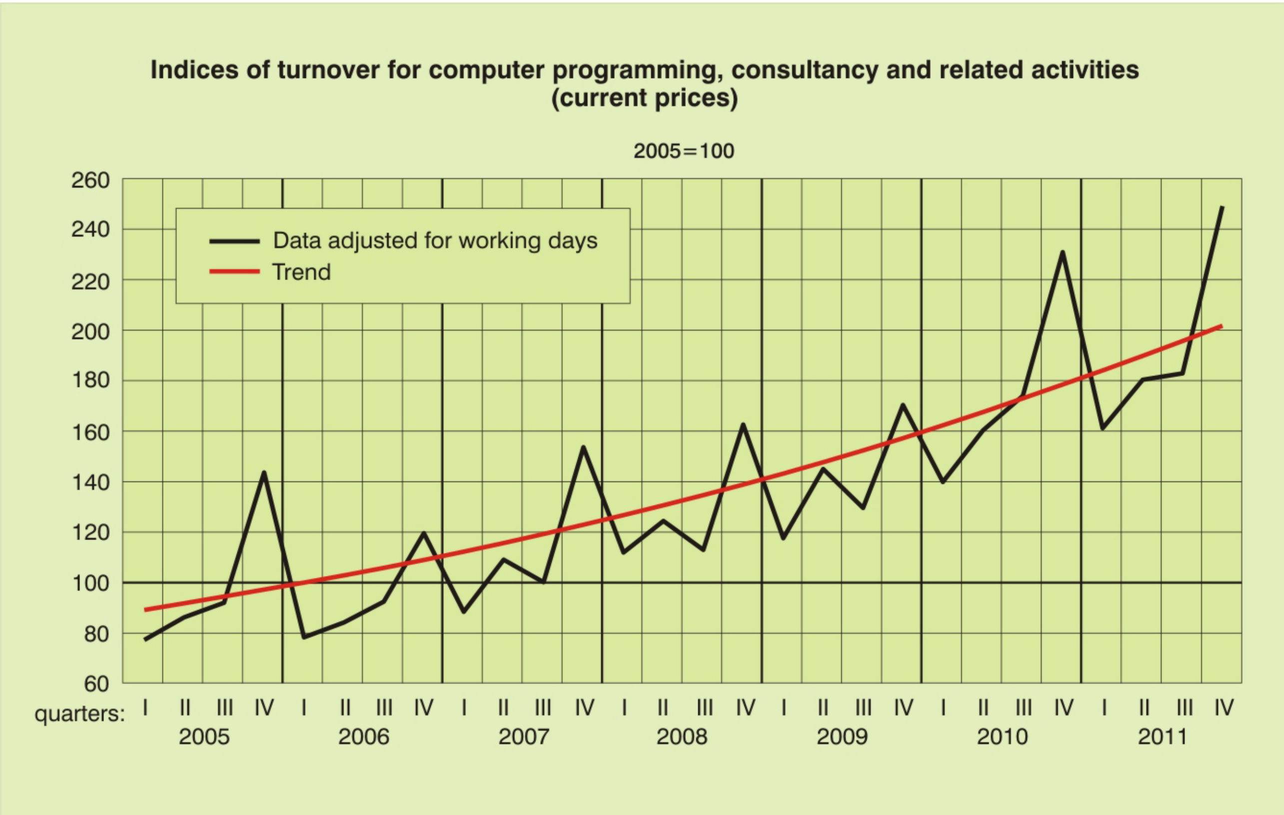
In 2011, in computer programming, consultancy and related activities (Division 62 of NACE), the increase of more than 10% of turnover in relation to 2010 was recorded, with the simultaneous increase of the number of enterprises by 19.5% and the number of persons employed by 15.2%. The decline of the gross turnover profitability rate was recorded (from the level of 11.3% in 2010 to 9.3% in 2011), as well as the net turnover profitability rate (from 9.9% to 7.5% in 2011) was recorded. The cost level indicator from total activity also worsened, reaching the level of 90.7% in 2011 against 88.7% in 2010.



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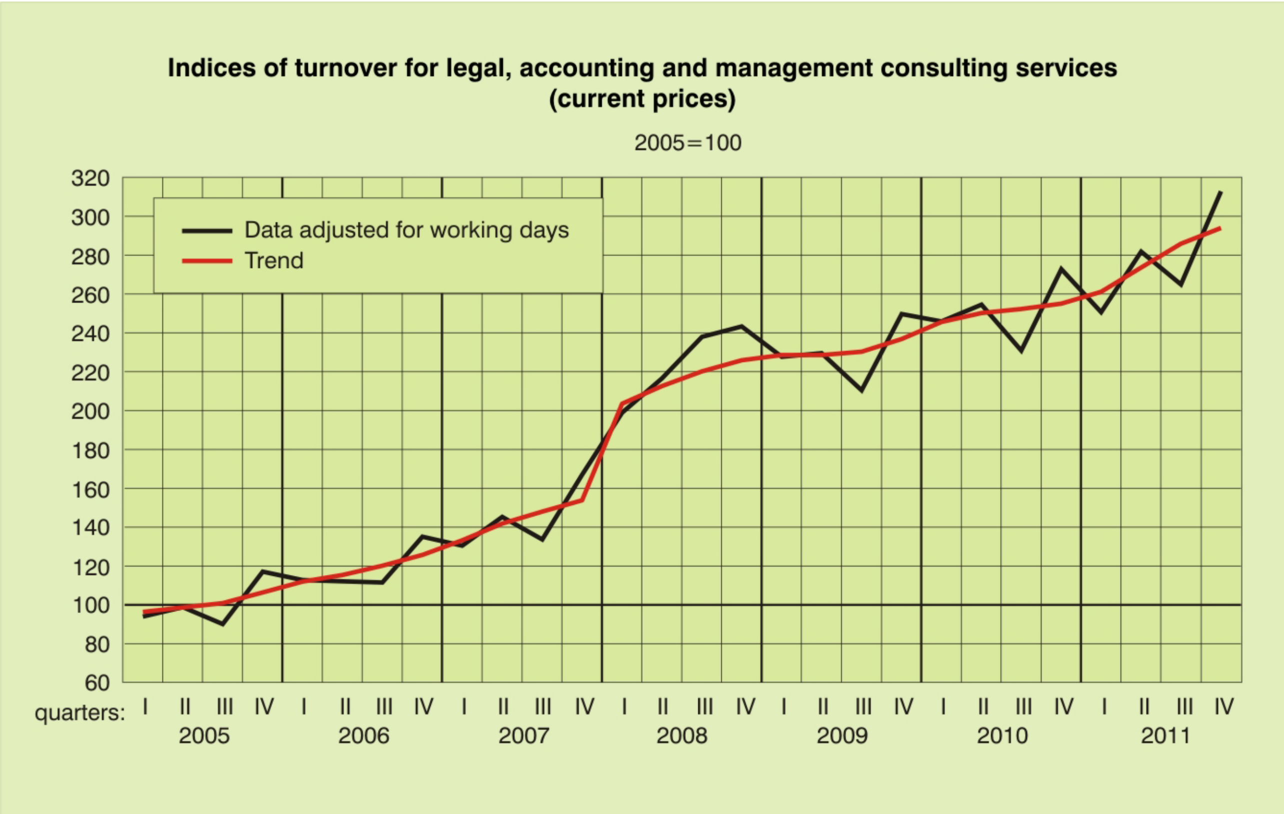
In legal and accounting activities and management consultancy activities (Division 69 + group 70.2 of NACE) the value of turnover in 2011, as compared with the previous year, increased by 10.6% with the simultaneous increase of the number of enterprises by 23.5%. The number of persons employed in enterprises running these activities increased by 7.9%. The gross turnover profitability rate worsened (10.9% in 2011 against 12.9% in 2010) and so did the net turnover profitability rate (9.8% in 2011 as compared with 11.5% in the previous year). The cost level indicator from total activity was also deteriorated - 89.1% in 2011 against 87.1% in the previous year.



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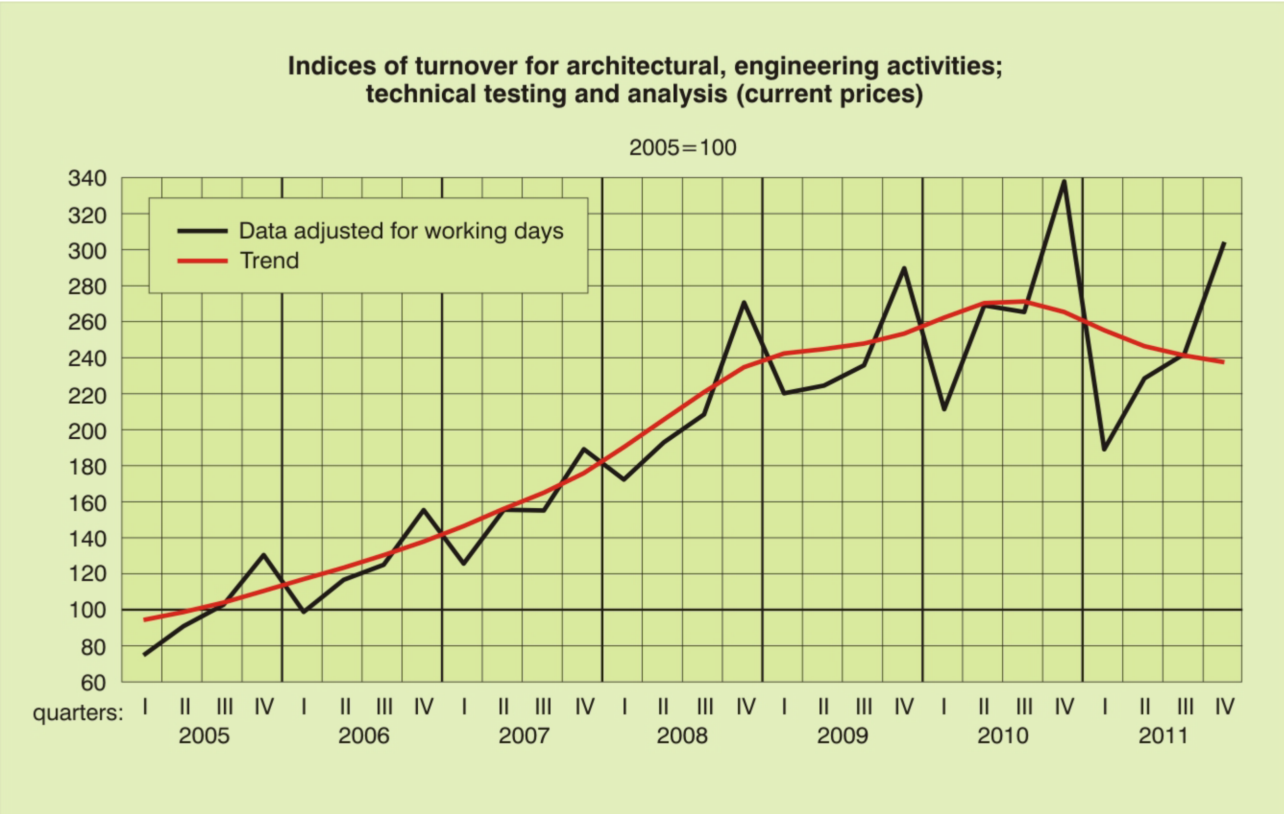
In 2011, architectural and engineering activities; technical testing and analysis (Division 71 of NACE) indicated the decrease by 11,6% in the value of turnover in relation to 2010 with the simultaneous growth of employed persons by 5.4%. The gross turnover profitability rate decreased (6.8% in 2011 against 8.9% in 2010) and so did the net turnover profitability rate (5.2% in 2011 as compared with 6.8% in 2010). The cost level indicator from total activity also deteriorated in 2011, 93.2% in 2011 against 91.1% in the previous year.



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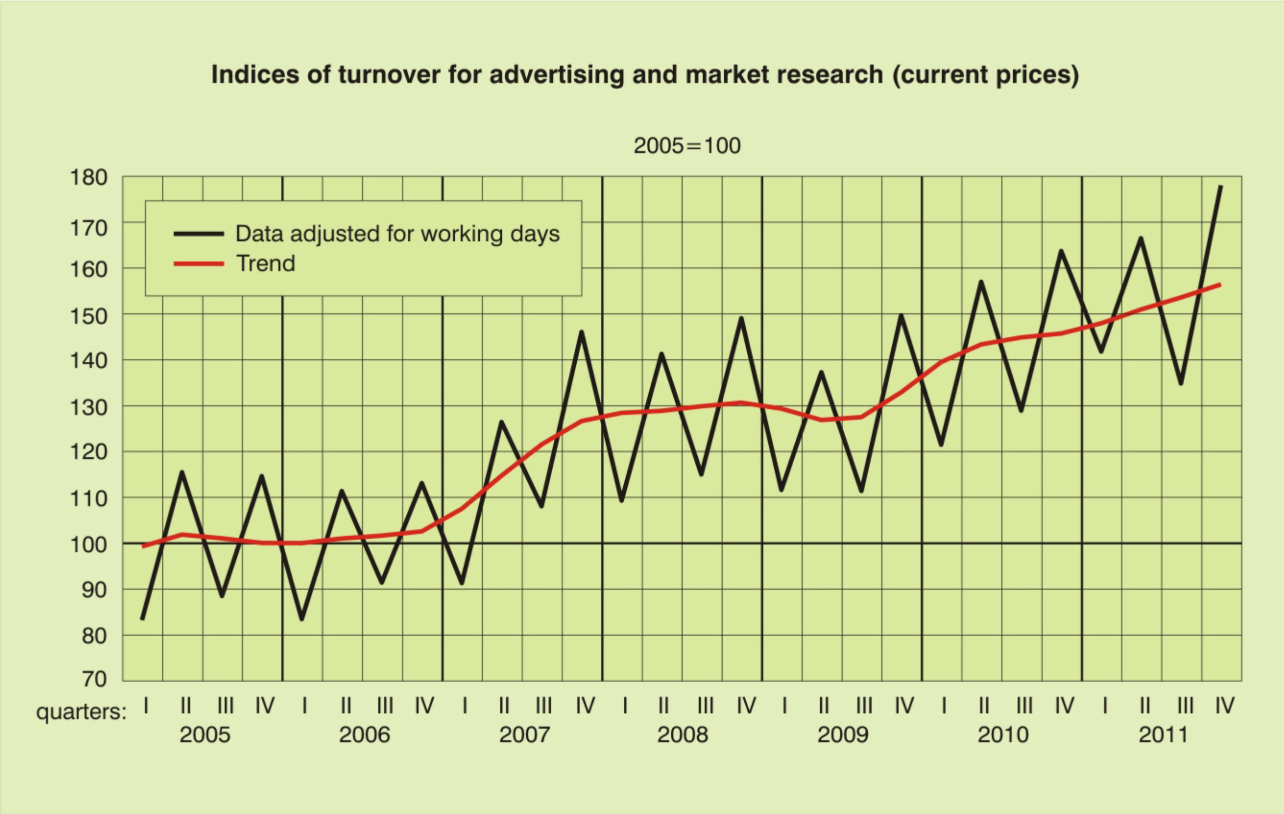
In entities dealing with advertising and market research activity (Division 73 of NACE), a recorded increase in turnover in 2011, in relation to 2010, exceeded 8%. An increase by 17.6% in the number of enterprises classified to division 73 was observed with a simultaneous growth in the number of persons employed by 7%. Both the gross turnover profitability rate (from the level of 4.7% in 2010 to 5.2% in 2011) and the net turnover profitability rate (from 3.8% in 2010 to 4.3% in 2011) were improved. The cost level indicator from total activity also improved from 95.3% in 2010 to 94.8% in 2011.



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In 2011, an increase in the value of turnover of enterprises dealing with employment activities (Division 78 of NACE), in relation to 2010, amounted to nearly 33% with a simultaneous increase in the number of entities (by almost 21%) and the number of persons employed - by 23%. Both the gross turnover profitability rate (2.2% in 2011 as compared with 2.9% in 2010) and the net turnover profitability rate (1.5% in 2011 as compared with 2.1% in 2010) worsened. The cost level indicator form total activity changed amounting to 97.8% in 2011 against 97.1% in the previous year.

2. Domestic trade

In the years 2009-2011, a significant position in trade in the national economy in creating the gross domestic product (GDP) was maintained. However, in 2011 the share in trade amounted to 16.5% and was slightly lower than a year before.

Specification	2009	2010*	2011*
Share of trade in GDP %..	16,7	17,1	16,5
Share of trade in gross value added in %	18,8	19,4	18,8

* Source: Communique of the Central Statistical Office on a revised estimate of the nominal value of Gross domestic product for the years 2010 and 2011 of 28.09.2012.

In 2011, a decrease of the gross value added by 1.8% (in constant prices) generated by commercial enterprises was observed. Mainly commercial margins influenced the level of the gross value added in trade. The average margin realized by commercial units in 2008-2010 was between 17.7% - 17.9%. The highest margins expressed as a percentage raised by retailers and differentiation level of realized margins depends on the type of the activities of the enterprises.

In 2010, revenues from sale at current prices achieved by commercial enterprises were higher than in 2009, by 3.5%. The largest part of these revenues was realized by wholesale enterprises - 59.1%, the share of retail trade amounted to 31.9%, and wholesale and retail trade; repair of motor vehicles and motorcycles - 9%. Almost half of the total revenue – 49.4% was achieved by enterprises with over 49 employees.

Revenues from sale of goods and materials accounted for 92.0% of the total value of revenue of commercial enterprises.

Margins of trade enterprises in 2008 – 2010.

Specification	2008	2009	2010
	in %		
Wholesale and retail trade and repair of motor vehicles and motorcycles of which:	**14,5**	**14,5**	**14,4**
Sale of motor vehicles	9,8	9,1	9,4
Sale of motor vehicle parts and accessories	22,2	22,5	21,2
Sale, maintenance and repair of motorcycles and related parts and accessories	26,5	24,2	24,2
WHOLESALE TRADE $^{\Delta}$ of which:	**15,5**	**15,9**	**16,2**
Wholesale on a fee or contract basis[a]	18,3	18,4	19,4
Wholesale of agricultural raw materials and live animals	12,7	12,3	13,0
Wholesale of food, beverages and tobacco	13,4	16,6	17,9
Wholesale of household goods	18,4	17,5	17,9
Wholesale of information and communication equipment	12,0	12,8	13,4
Wholesale of other machinery, equipment and supplies	15,6	16,4	16,8
Other specialised wholesale	13,4	13,5	13,2
Non-specialised wholesale trade	18,8	17,7	18,1
RETAIL TRADE $^{\Delta}$ of which:	**22,9**	**21,8**	**21,3**
Retail sale in non-specialised stores	20,2	18,8	18,9
Retail sale of food, beverages and tobacco in specialised stores	22,8	21,2	20,3
Retail sale of automotive fuel in specialised stores	9,2	9,9	9,4
Retail sale of information and communication equipment in specialised stores	18,5	17,0	16,4
Retail sale of other household equipment in specialised stores	24,5	23,2	23,1
Retail sale of cultural and recreation goods in specialised stores	35,2	32,9	30,5
Retail sale of other goods in specialised stores	31,5	29,5	28,9

a Provision.

Flow of commercial goods.

An essential element enabling the evaluation of distribution and circulation channels of goods is the analysis of the structure of revenues by type of customers and distribution of purchases made in the wholesale enterprises by types of providers (Tables No. 19 and 20). Observing the recent years' data, similar behaviour of wholesale enterprises and retail enterprises in selecting their suppliers might be noticed. Both in wholesale and retail commercial enterprises, including also foreign ownership, the share of purchases directly from domestic manufacturers and producers, as well as directly imported, was maintained at a similar level. Commercial enterprises[3] made approximately 53% of the purchases directly from domestic manufacturers and producers, while direct import and purchases from wholesalers accounted for 23%. Depending on its commercial activities (wholesale or retail), the structure of purchases made is different. In the scope of wholesale trade - approximately 53% of enterprises purchased from domestic manufacturers and producers, and over 26% made directly imported purchases. The share of purchases wholesaler-wholesaler has not changed much and amounted to 19%. As far as retail trade is concerned, the goods were mainly purchased directly from domestic manufacturers and producers (56%), decreasing the role of wholesalers (29%) at the same time. The share of purchases imported directly fell slightly and amounted to 14%. Foreign ownership enterprises made purchases directly from domestic manufacturers and producers (over 48%) or imported (approx. 41%), and less frequently from wholesalers (approx. 10%). The structure of revenues of wholesale enterprises included approximately 43% of revenues from the wholesale market, and about 28% from retail trade, with the share of domestic manufactures amounting to 17%. Approximately 7% was covered by direct receipt from individual consumers.

Turnover of commercial enterprises

In 2011, turnover in retail trade (constant prices) was at a similar level as in the previous year. The turnover higher than in 2010 was observed in enterprises selling non-food goods (by 2.3%) and among them in enterprises engaged in activities related to the sale of fuels (by 5.7%). Whereas, there was a decline in the group of companies selling food, beverages, tobacco products by 5.9%.

3 The data refer to enterprises employing more than 9 people.

Enterprises dealing with retail trade (Division 47 of NACE) as well as wholesale and retail trade of motor vehicles (Division 45 of NACE) recorded higher turnover, by 1.7%, as compared with the previous year. The whole turnover among such enterprises was achieved by companies dealing with the sale of motor vehicles (an increase by 8.8%).

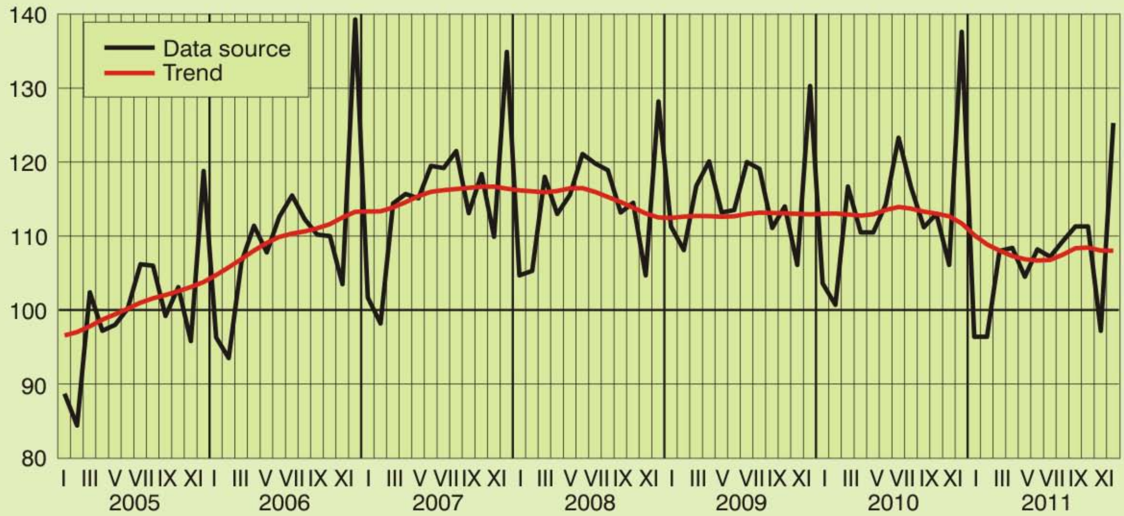
Deflated turnover of retail sale enterprises[a]

2005=100

a Enterprises classified according to NACE Rev. 2 into division 47.

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

2005=100



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]

2005=100

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

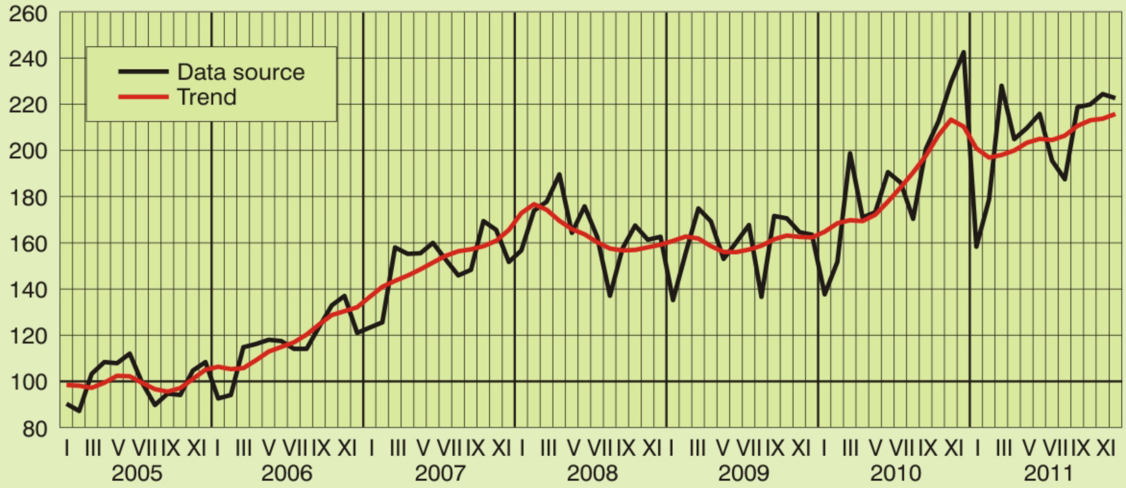
Deflated turnover of enterprises classified according to NACE Rev. 2 into divisions 45 and 47[a]

2005=100

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

Deflated turnover of enterprises selling motor vehicles[a]

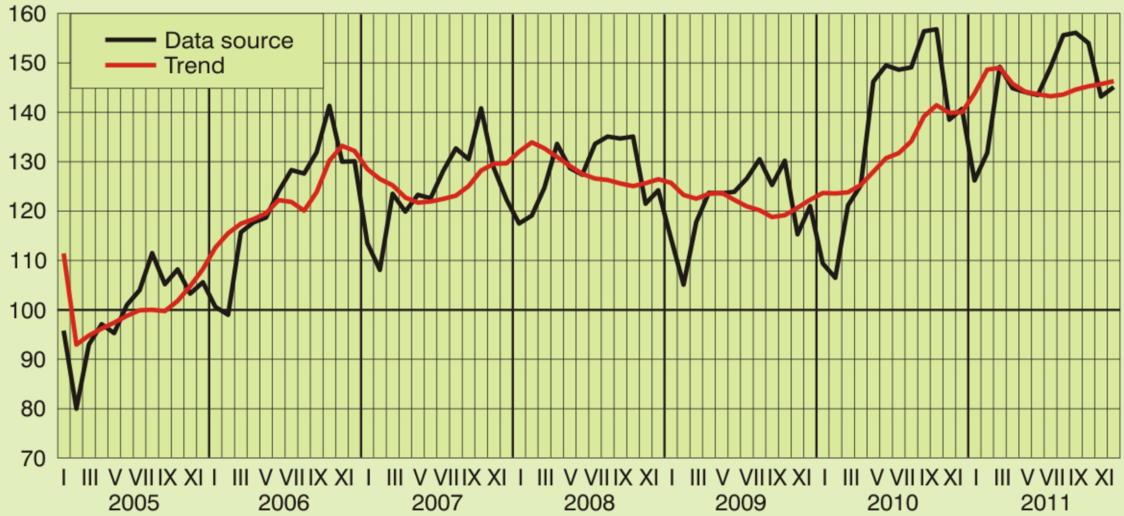
2005=100



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

Deflated turnover of fuel supply enterprises[a]

2005=100

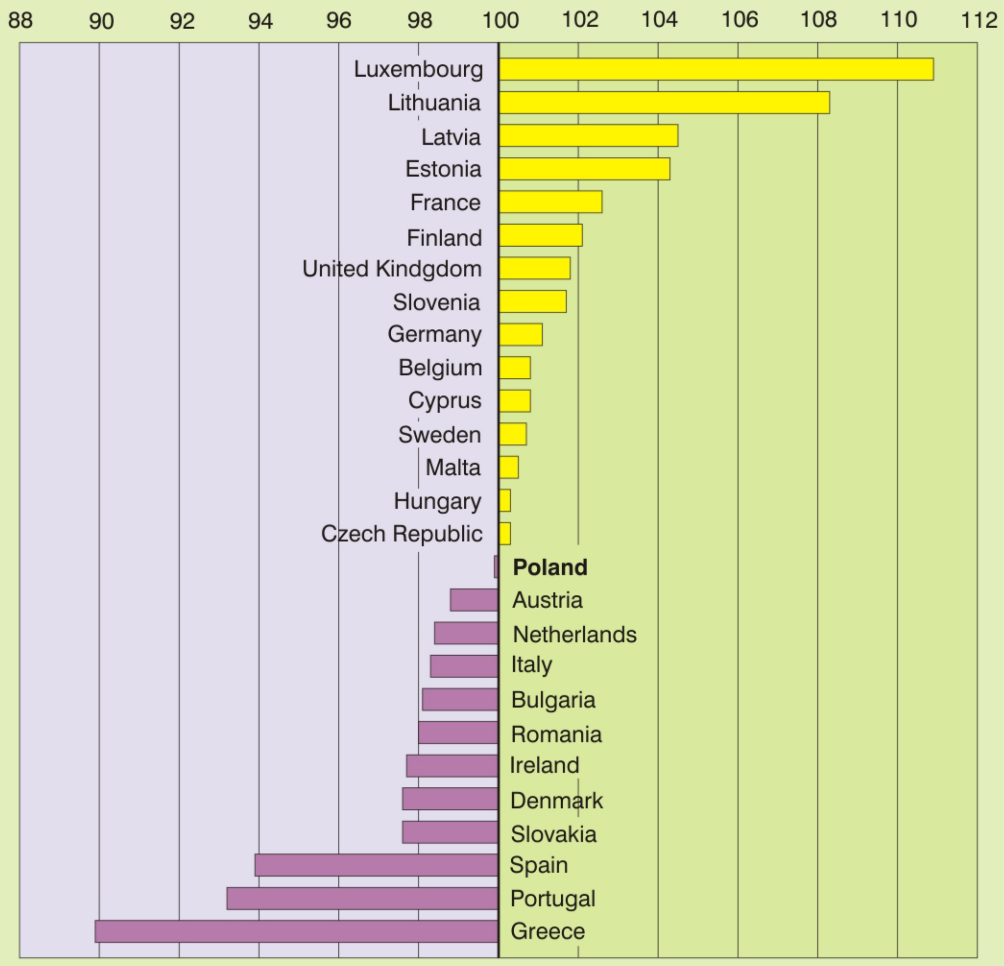


a Enterprises classified according to NACE Rev. 2 into the group 47.3.

The turnover ratio analysis allows to compare the market situation of EU countries. In 2011, the turnover of retail trade of EU countries was slightly lower as compared with 2010 (by 0.1%). The largest decrease was recorded in countries such as Greece, Portugal and Spain. The fastest growing turnover was recorded in Luxembourg and some of the Baltic countries (Estonia, Lithuania and Latvia) as compared with the previous year. Among the countries with the highest significance for the European economies (Germany, France, the United Kingdom) a slight increase in turnover was reported.

Annual indices of deflated turnover in retail trade for countries of EU in 2011 (constant price)[a]

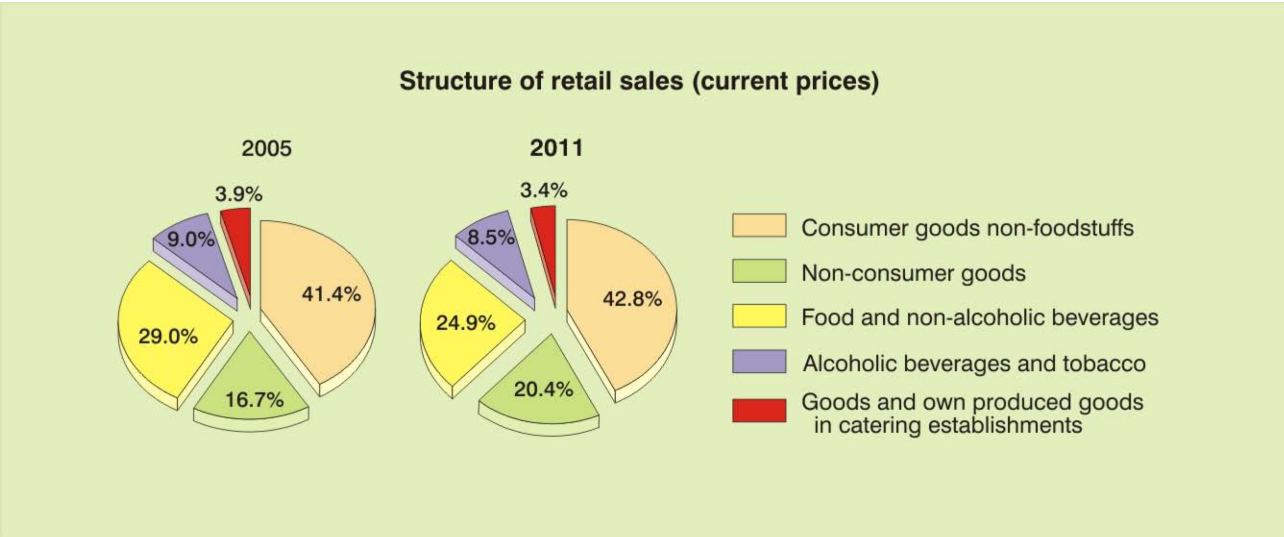
Corresponding perriod of the previous year = 100



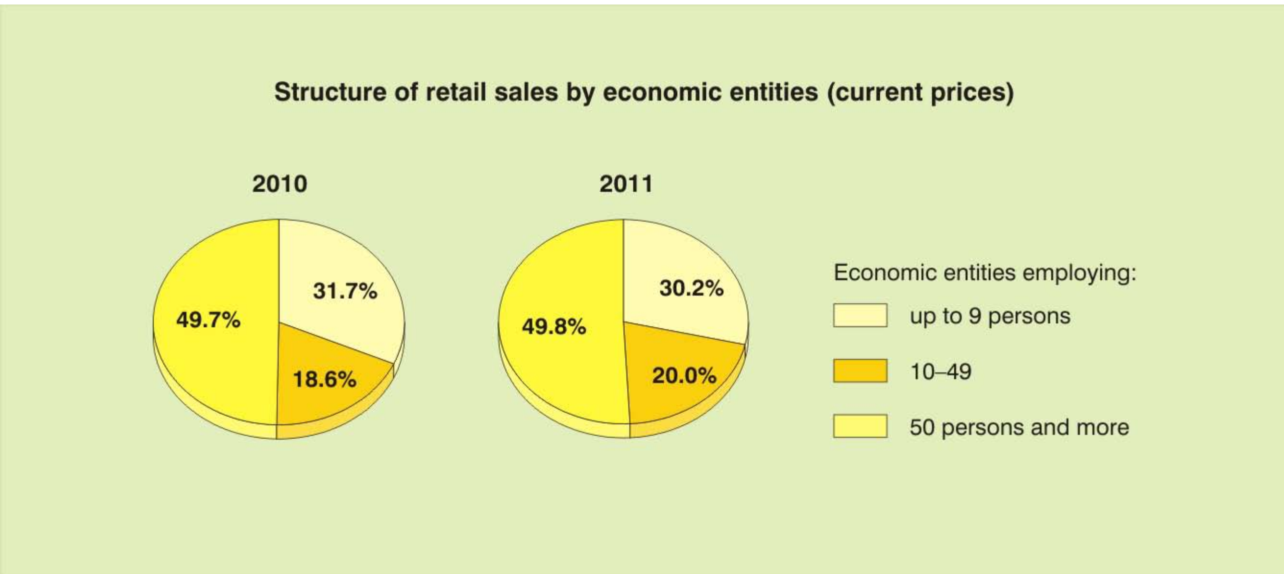
a Data adjusted for working days.
S o u r c e: Eurostat, short-term statistics (August 2012).

Retail sales

In 2011, retail sales in current prices carried out by commercial and non-commercial enterprises amounted to PLN 646.1 billion, and they were by 9.0% higher than in the previous year. In retail sales outlets the value of goods sold amounted to PLN 624.0 billion (an increase of 9.1%), of which the value of food and non-alcoholic beverages - PLN 161.0 billion (an increase of 3.2%), alcoholic beverages and tobacco products - PLN 54.7 billion (an increase of 1.7%) and non-foodstuff goods - PLN 408.3 billion (an increase of 12.8%). Retail sales in catering establishments amounted to PLN 22.2 billion (an increase of 5.2%).



In 2011, the sales carried out by economic entities employing 50 or more persons accounted for 49.8% of total sales, by economic entities employing up to 9 persons - 30.2%, while by medium-sized enterprises (10-49 persons) - 20.0%.



The sales of commercial enterprises (current prices) amounted to 86.9% of total retail sales and their share was the same as in 2010. The remaining sales were realised by enterprises whose main activity was not trade but, for instance, manufacturing or catering.

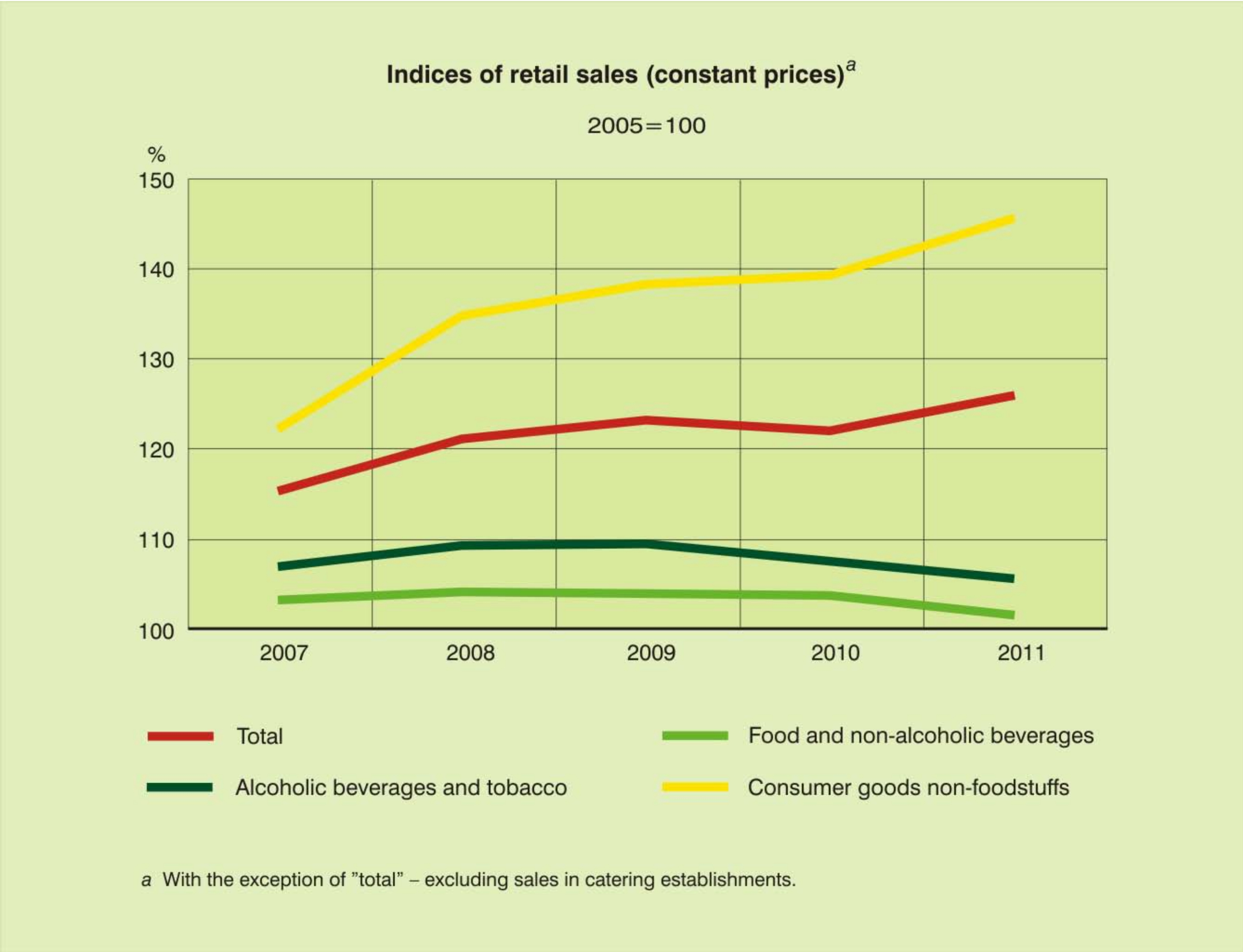
Retail sales by ownership sectors (current prices)

Specification a – 2011 b – 2010=100	Retail sales					
	total		sector			
			public		private	
	mln zl	%	mln zl	%	mln zl	%
Total.. a	**646127,1**	**100,0**	**3248,0**	**0,5**	**642879,1**	**99,5**
b	109,0	x	70,9	x	109,3	x
of which trade enterprises...............a	561772,5	100,0	407,5	0,1	561365,0	99,9
b	109,0	x	21,7	x	109,3	x

Retail sales in 2009 - 2011 (current prices)

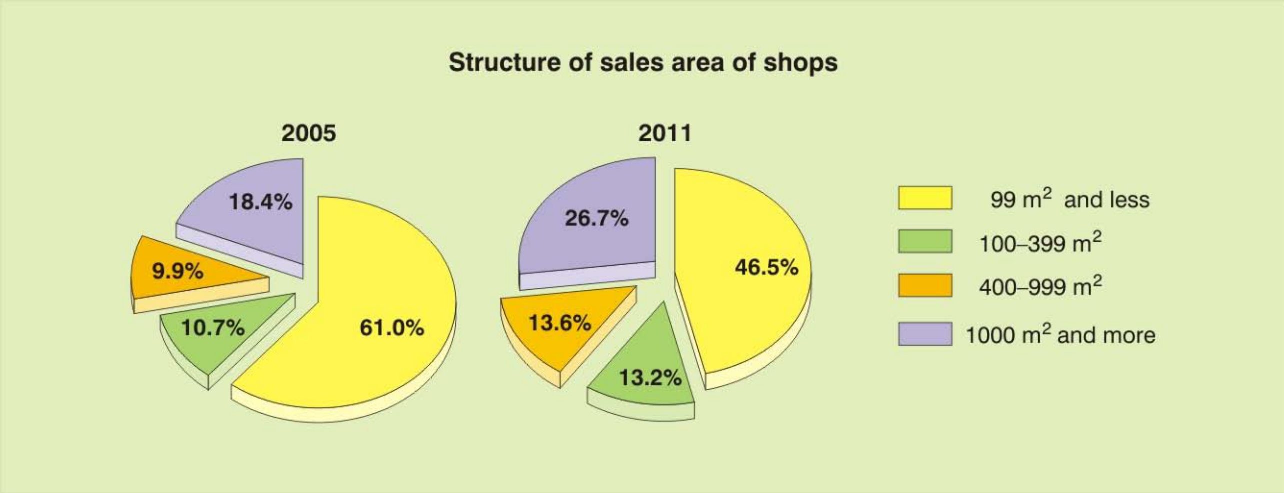
Specification	2009	2010	2011	
	in mln zl			2010=100
Total...	**582774,7**	**592958,4**	**646127,1**	**109,0**
food and non-alcoholic beverages......................	168489,3	172684,4	178593,7	103,4
alcoholic beverages and tobacco........................	56564,5	57962,8	59040,0	101,9
non-foodsuffs (excluding tobacco)	357720,9	362311,2	408493,4	112,7

In 2011, retail sales in constant prices carried out by commercial and non-commercial enterprises were higher than in the previous year by 3.2%. An increase in sales of non-consumer goods (10.5%) as well as consumer goods non-foodstuffs (4.6%) was higher than average. The sales of food and non-alcoholic beverages decreased as compared with the previous year (by 2.1%). There was also a decline in sales of alcoholic beverages and tobacco (by 1.9%). Whereas the retail sales of goods and own products in catering establishments were by 0.9% higher than in the previous year.



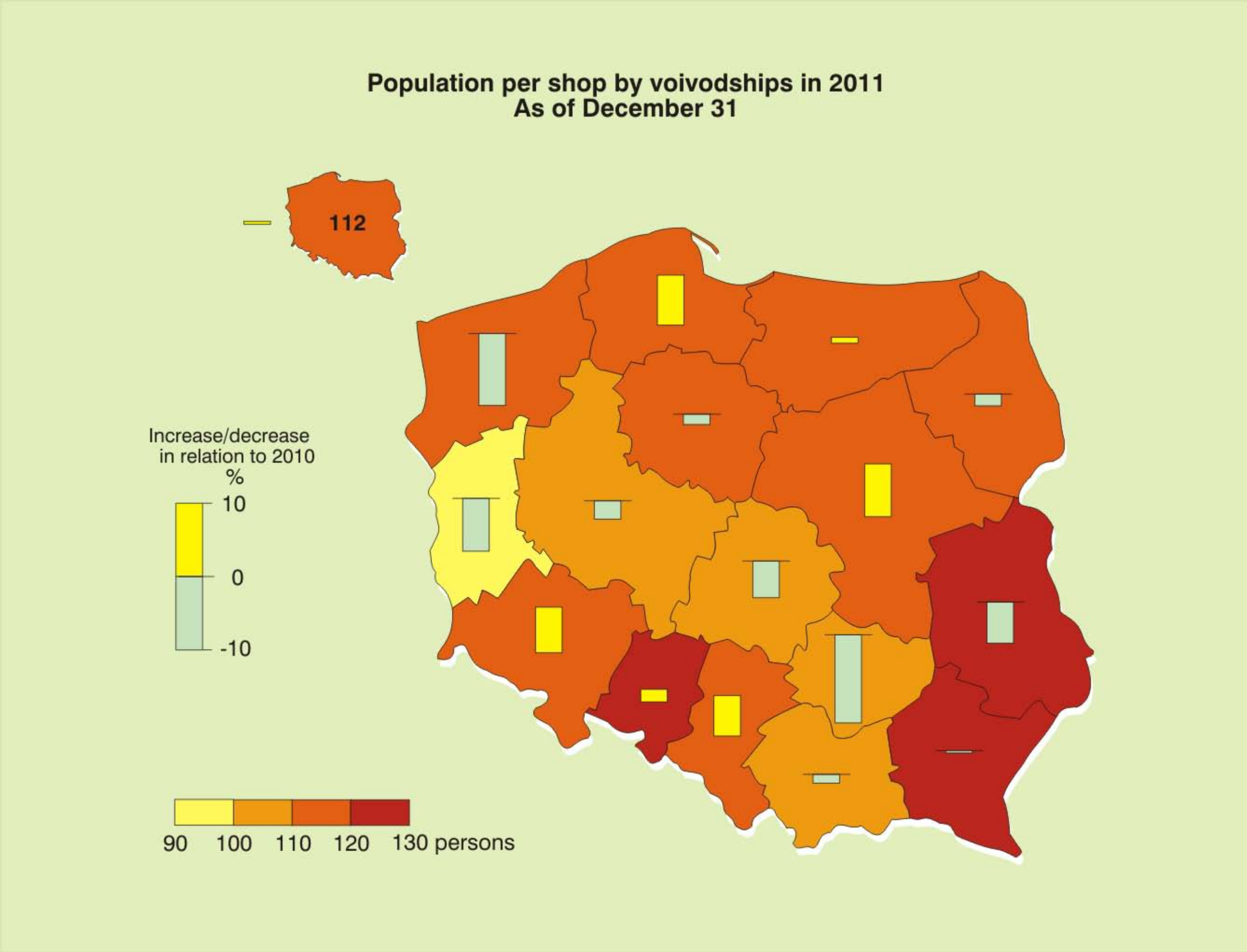
Retail sales outlets

At the end of 2011, the estimated number of stores in Poland amounted to 345 thousand and was lower than in the previous year by 0.3%. The sales area of stores at the end of 2011 amounted to approx. 32 984 thousand m^2 and was larger than in the previous year, by 3.8%. The increase in the sales area was observed in stores in all ranges of sales areas. The largest increase was recorded in the area between 400 - 999 m^2 (by 6.1%) and 1000 m^2 and more (by 5.7%). A slower growth was observed in the area of shops ranging from 100 - 399 m^2 (by 3.2%), and 99 m^2 and less (by 2.3%).



By regions, the highest increase of sales area between 400 - 999 m² was in Świętokrzyskie (by 13.1%), Warmińsko-Mazurskie (by 10.6%) and Wielkopolskie voivodships (by 10.1%), while in the range from 1000 m² and more in Podlaskie (by 18.5%), Świętokrzyskie (by 15.7%) andWielkopolskie voivodships (by 13.5%).

Among large commercial retail constructions, as in previous years, most stores were created within the category of supermarkets (by 12.2%), mainly in the area size from 400 - 999 m². The number of hypermarkets in 2011 remained at the same level as in the previous year. An estimated share of sale realized by supermarkets and hypermarkets in retail stores and petrol stations in 2011 was 21.8% andwas lower than the year before by 0.3 pp.



In 2011, there were 112 people for one store on average, while in 2010 it amounted to 111 people[4].

Within the group of enterprises employing more than 9 people, the number of stores with full foreign capital share was still growing. The number of stores belonging to these enterprises increased by 16.3%, and the sales area by 6.8%. The average size of stores belonging to these enterprises amounted to 602.5 m^2 (respectively in case of stores of domestic private ownership - 171.8 m^2). Whereas the share of the number of stores belonging to these companies in the total number of stores increased by 0.5 pp, as compared with the previous year.

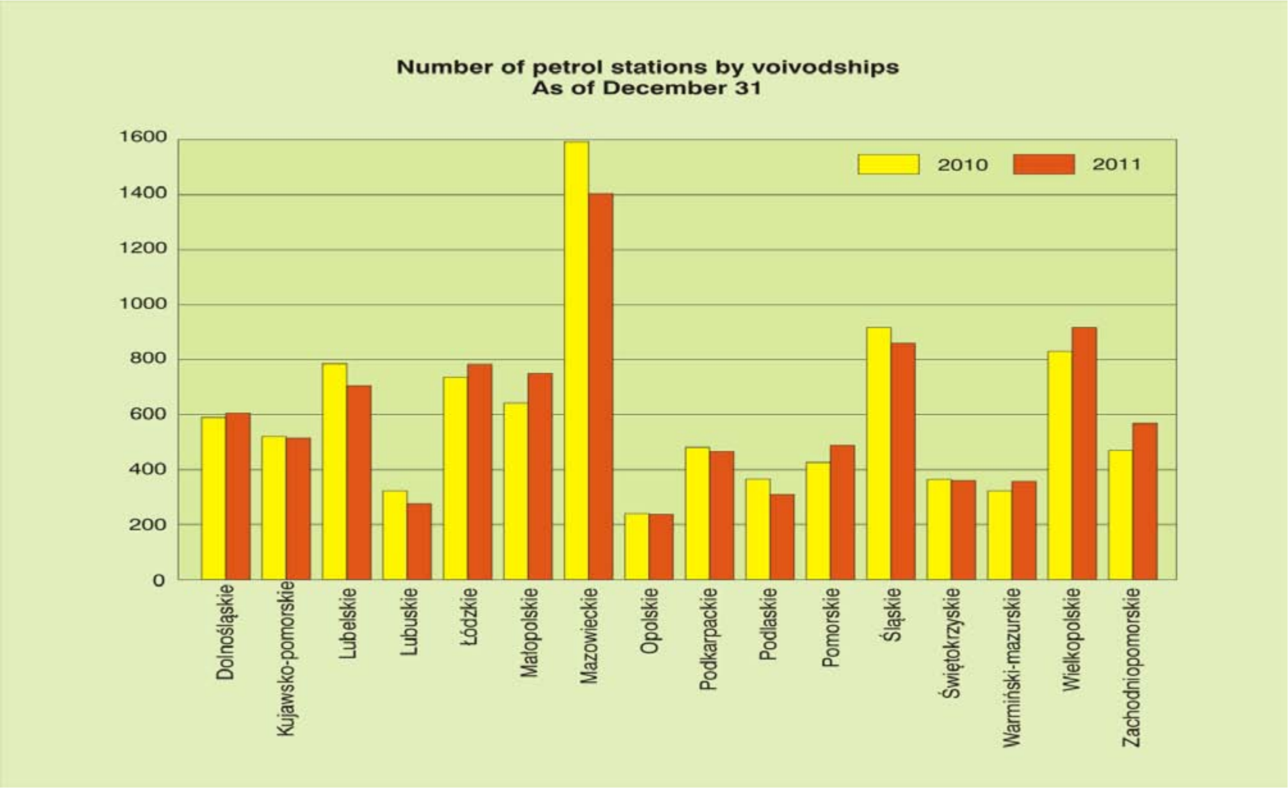
4 See Methodical Notes, p. 17

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

Specification	2010	2011
Number of shops	11686	13596
Share in total shops in %	3,4	3,9
Sales area in thous. m^2	7668,6	8191,9
Share in total sales area in %	24,1	24,8

a Data concerns entities employing more than 9 persons.

An estimated number of petrol stations at the end of 2011 amounted to 9 596, and was slightly lower than in 2010. The largest percentage decline in the number of petrol stations was recorded in Podlaskie, Lubuskie and Mazowieckie voivodships. Whereas the highest increase was observed in the regions of Zachodniopomorskie, Małopolskie and Pomorskie voivodships.



At the end of 2011, the municipal offices across the country registered 2232 permanent marketplaces, a little less than a year ago, including 2015 with a predominance of small-retail sales outlets. The largest decrease in the number of regular marketplaces was reported in Zachodniopomorskie voivodship, which had the influence on reducing the area of marketplaces in this voivodship by 12.3%. The largest area was reported in case of marketplaces in Mazowieckie, Łódzkie and Wielkopolskie voivodships, and their share accounted for 40.4% of the total area of marketplaces in the country.

In case of marketplaces, the sale was carried out in approx. 104.7 thousand permanent small-retail sales outlets, among which 63.4 thousand was opened daily. Seasonal marketplaces were the complement of regular network of marketplaces. In 2011, there were 6564 of them, which means a decrease as compared with the previous year by 5.0%. Annual revenues from market dues were higher than in 2010 by 3.2%.

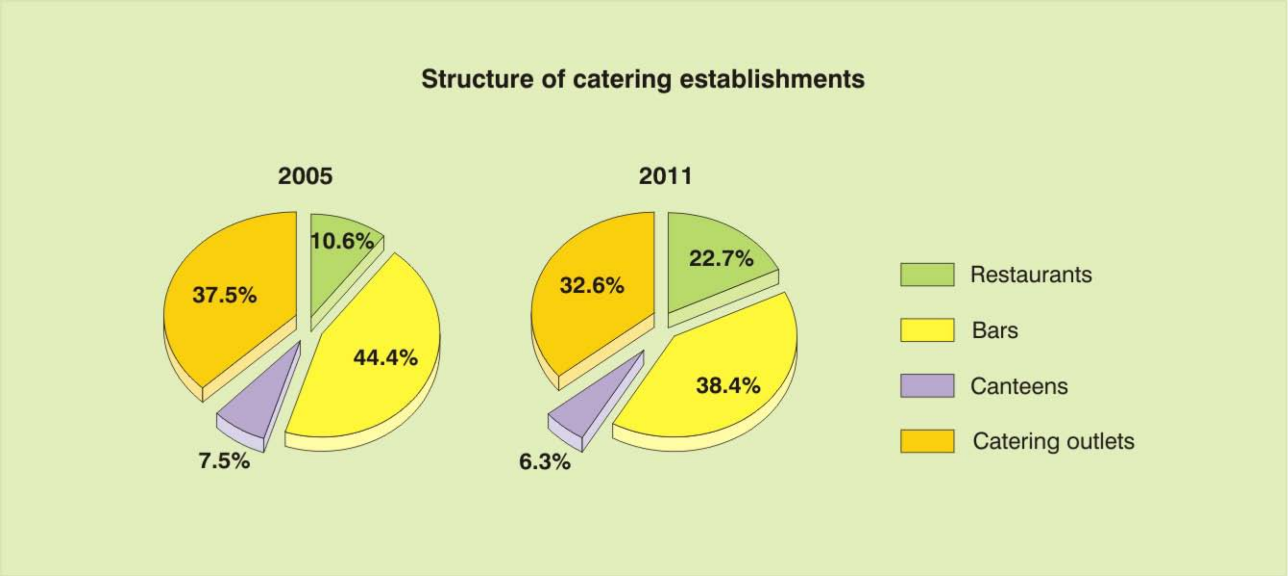
Catering

At the end of 2011, the number of catering establishments (permanent and seasonal) in the country was estimated at nearly 67.4 thousand. Bars amounted to 38.4% of all units, catering outlets 32.6%, restaurants 22.7% and canteens 6.3%. Total number of catering establishments in 2011 decreased by 4.4% as compared with 2010, and a decrease was observed in all types of establishments with the exception of restaurant, whose share in recent years has been growing steadily.

The private sector in catering covered 98.1% of all catering establishments, (an increase of 0.3 pp) including 99.2% of restaurants, 99.2% of bars, 83.3% of canteens and 98.9% of catering outlets.

Number of catering establishments

Specification a – 2011 b – 2010=100		Total	Sector	
			public	private
Number of catering establishments	a	67356	1299	66057
	b	95,6	85,1	95,8
restaurants	a	15287	120	15167
	b	102,3	100,0	102,4
bars	a	25866	219	25647
	b	95,3	80,8	95,4
canteens	a	4271	714	3557
	b	94,7	88,9	96,0
catering outlets	a	21932	246	21686
	b	91,8	73,9	92,0



In 2011, the total revenues from catering services at current prices amounted to approximately PLN 22.8 billion, and as compared with the previous year, they increased by 5.1% (they were higher at constant prices by approx. 0.7%). 69.5% of this value was derived from catering production, 27.7 % from the sales of commercial goods (including 19.1% from the sales of alcohol and tobacco), and 2.8% from other activities. The revenue growth was observed in all of these categories, the highest in the scope of catering production (by 5.4%).

Revenues from catering activity in current prices

Specification a – 2011 b – 2010=100		Total	Sector: public	Sector: private
		in mln zl		
Revenues total	a b	22782,6 105,1	398,1 83,4	22384,5 105,6
from sales of commodities	a b	6319,1 104,6	57,0 66,1	6262,1 105,1
of which from the sale of alcoholic beverages and tobacco	a b	4362,7 103,9	32,1 82,5	4330,6 104,1
from catering production	a b	15833,2 105,4	331,4 87,8	15501,8 105,9
from other activity	a b	630,3 102,1	9,7 68,8	620,6 102,8

Wholesale

Wholesale in 2011 in commercial enterprises amounted to (at current prices) approx. PLN 946.8 billion and was 11.9% higher than last year. The increase in wholesale was recorded in the group of non-food goods, by 12.2%, and by 10.4% in the scope of food sale, as well as by 8.7% in case of alcoholic beverages sale. This influenced in a small extent on the structure of the wholesale, where the share of sale of food and non-alcoholic beverages fell by 0.2 pp, alcoholic beverages by 0.1 pp, whereas non-food goods increased by 0.3 pp.

Wholesale carried out by companies employing 50 people or more, accounted for 47.7% of total sales (an increase of 0.6 pp as compared with the previous year).

Wholesale in trade enterprises, by commodity groups, was as follows (current prices):

Specification a – 2011 b – 2010=100	Wholesale			
	total	food and non-alcoholic beverages	alcoholic beverages	non-foodstuffs
	in mln zl			
Total....................a	946833,2	119730,9	27481,8	799620,5
b	111,9	110,4	108,7	112,2
of which enterprises employing				
more than 49 persons..............a	452012,6	53791,8	16884,1	381336,8
b	113,4	113,3	104,0	113,8

Market supply

In 2011, average stocks in the manufacturers' warehouses[5], in case of most studied consumer goods, were higher than in the previous year.

In case of food group, there was an increase of the stocks of, among others, milk and cream in solid forms, coffee, wine and honey wine, pasta, fruit jams, beer made from malt (from 0.5% of alcohol), meat and variety meat products from animals for slaughter. There was a decrease of, among others, groats and meals, frozen sea fish, wheat flour, poultry, margarine and spreads.

Among non-food products, the supplies higher than before a year were in stocks such as refrigerators and freezers, dish washing machines, automatic washing machines. The stocks of TV receivers, bicycles, China table-ware and kitchen utensils declined.

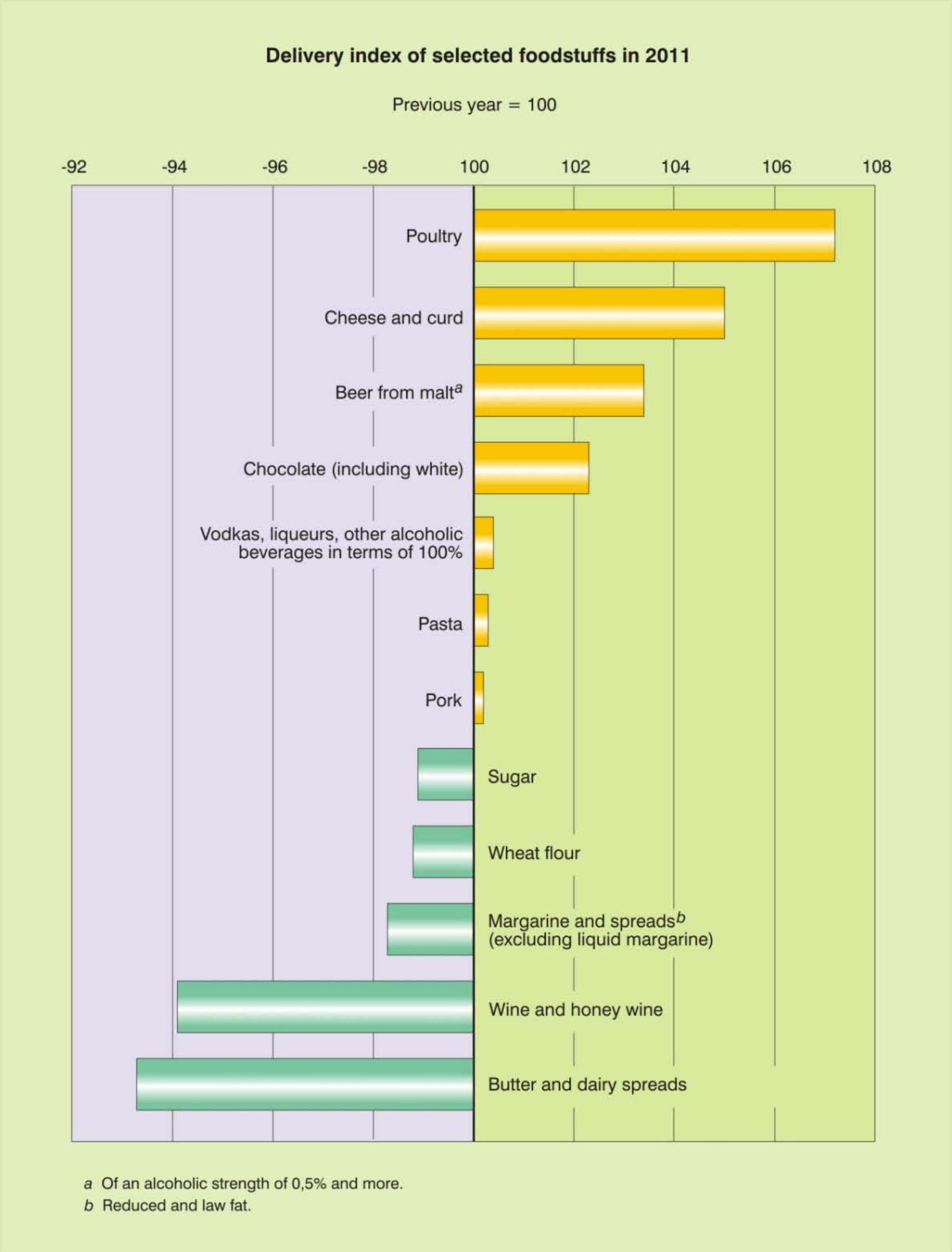
In a discussed year delivery[6], over a half of studied consumer goods was higher than before a year. In the group of food consumer goods, the deliveries were significantly higher in case of chocolate coated products, beef and veal, edible animal fats melted, poultry and fruit jams. The increase in the deliveries of these products was balanced by a growth of domestic production. Manufacturing of chocolate coated products was increased by over 26%, and edible animal fats melted by nearly 15%. The deliveries of mainly such food articles as butter and dairy spreads, wine and honey wine, coffee, margarine and spreads were decreased.

In 2011, among the studied non-food consumer goods, higher deliveries were observed as compared with the previous year, in the field of, among others, tires for passenger cars, dish washing machines and footwear. A rise in deliveries of passenger cars and footwear was due to an increase in import, 23% and 17% respectively. A high share of import in case of deliveries, despite the products listed, was recorded also for the following non-food articles: outerwear and clothing, carpets, mats and textile floor coverings, automatic washing machines, passenger cars and TV receivers.

In the group of non-food articles, due to an increase in exports, the deliveries of automatic washing machines and carpets, mats and textile floor coverings were smaller.

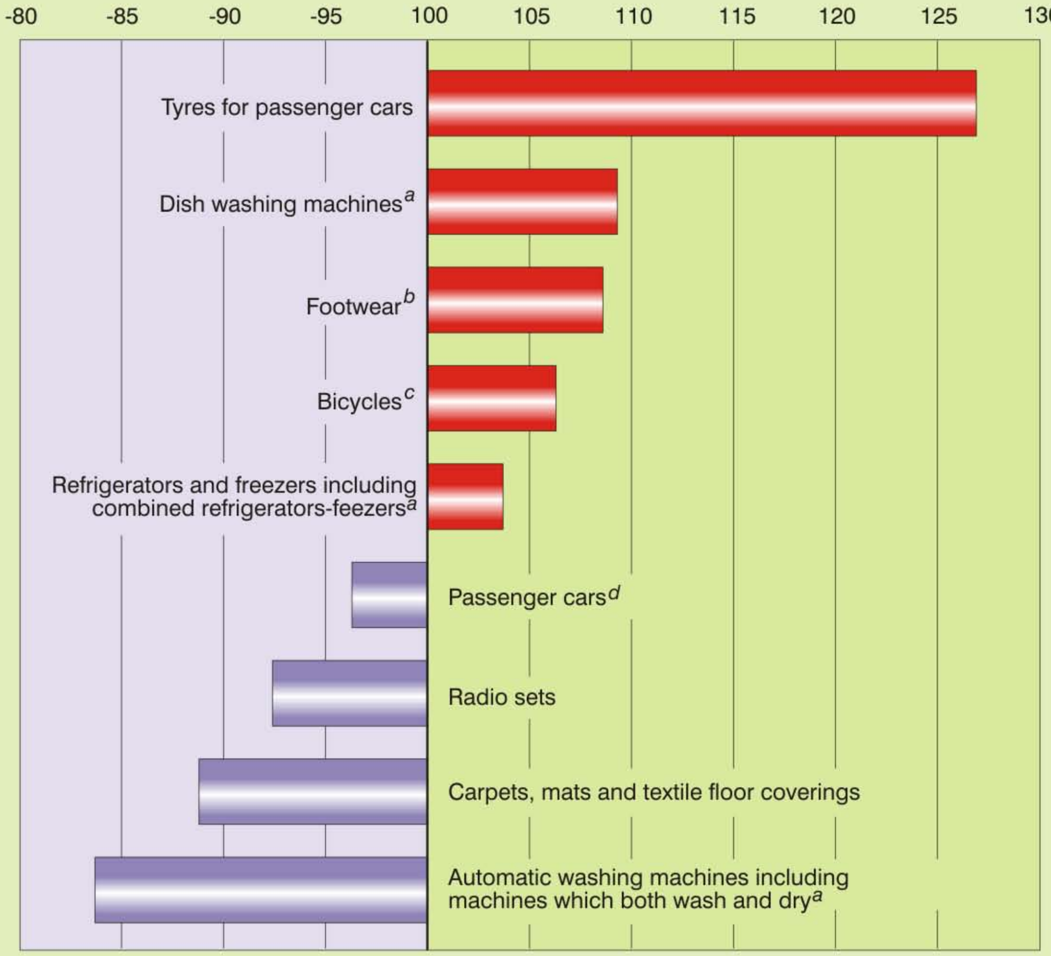
5 It applies to enterprises employing more than 49 people.

6 The number of products manufactured in the country (based on enterprises employing more than 9 people) decreased by exports and increased by imports, adjusted for balance of changes in supplies at manufacturers employing more than 49 people.


Delivery index of selected foodstuffs in 2011
Previous year = 100
-92
-94
-96
-98
100
102
104
106
108
Poultry
Cheese and curd
Beer from malt[a]
Chocolate (including white)
Vodkas, liqueurs, other alcoholic beverages in terms of 100%
Pasta
Pork
Sugar
Wheat flour
Margarine and spreads[b] (excluding liquid margarine)
Wine and honey wine
Butter and dairy spreads
a Of an alcoholic strength of 0,5% and more.
b Reduced and law fat.

Delivery index of selected non-foodstuffs in 2011

Previous year = 100



a Of the household type.
b Including rubber footwear.
c Including children's.
d Excluding motors caravans, snowmobiles, golf car similar wehicles.