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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 2012, 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 –*** *(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

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 food-stuffs and often purchased non-foodstuff 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.

II. ANALYTICAL COMMENTARY

1. Services

For many years now, the services sector has had a dominant share in generating gross value added in the world's respective national economies. In most of the EU Member States, value added generated by enterprises conducting service activities has been showing a growing trend, with various rates of change in various countries.

In 2012, among the EU Member States, the highest share of value added generated by services was reported in Luxembourg – 86.1%, Cyprus – 82.3%, and Malta – 81.1%. Services comprised a substantial share of the value added of economies in total in such countries as Greece (80.2%), France (79.2%), the United Kingdom (78.7%) and Denmark (77.1%). As regards countries that have entered the European Union since 2004, this have ranged from 51.6% in Romania to 69.3% in Latvia.

In comparison with 2011, the most substantial growth in the share of services in the generation of value added was recorded in Malta (of 11.8 pp), Ireland (of 9.5 pp) and Finland (of 9.1 pp). At the same time, the share of services in the generation of gross value added dropped in some countries. These decreases were reported in Romania (of -2.9 pp), Estonia (of -0.8 pp), Latvia (of -0.7 pp) and in Poland (of -0.4 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	2000	66,7	Luxembourg	2000	80,1
	2012	69,8		2012	86,1
Belgium	2000	71,5	Latvia	2000	70,0
	2012	76,9		2012	69,3
Bulgaria	2000	61,1	Malta	2000	69,3
	2012	63,2		2012	81,1
Cyprus	2000	75,3	Germany	2000	68,4
	2012	82,3		2012	68,7
Czech Republic	2000	58,9	**Poland**	**2000**	**64,0**
	2012	60,1		**2012**	**63,6**[a]
Denmark	2000	70,9	Portugal	2000	67,9
	2012	77,1		2012	74,1
Estonia	2000	67,7	Romania	2000	54,5
	2012	66,9		2012	51,6
Finland	2000	62,1	Slovakia	2000	59,5
	2012	71,2		2012	60,4

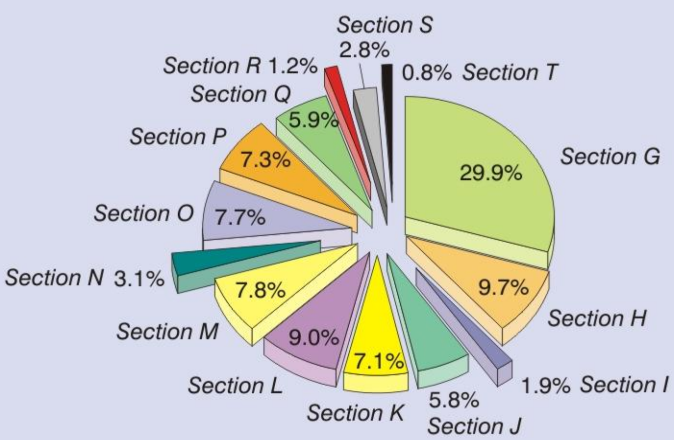
Countries	Years	Share in %	Countries	Years	Share in %
France..	2000 2012	74,7 79,2	Slovenia......................................	2000 2012	61,9 66,2
Greece	2000 2012	72,2 80,2	Sweden	2000 2012	69,5 73,2
Spain	2000 2012	64,7 71,6	Hungary......................................	2000 2012	61,7 65,1
Netherlands	2000 2012	72,7 74,0	United Kingdom.........................	2000 2012	72,3 78,7
Ireland	2000 2012	61,0 70,5	Italy	2000 2012	69,5 73,8
Lithuania	2000 2012	64,1 65,1			

Source: Eurostat,14.09.2013 r.;
a Data for Poland for the year 2012, a communique of the Central Statistical Office on a revised estimate of the nominal value of gross domestic product for the years 2011 and 2012 of 26.09.2013.

In 2012, in Poland, gross value added generated by entities conducting service activities comprised 63.6% of the gross value added of the national economy in total. The number of persons employed in these units comprised 56.8% of employed persons in total. Additionally, it should be emphasised that the changes observed in the area of services are connected with economy-wide phenomena and clients' needs, who are both individual consumers and enterprises.

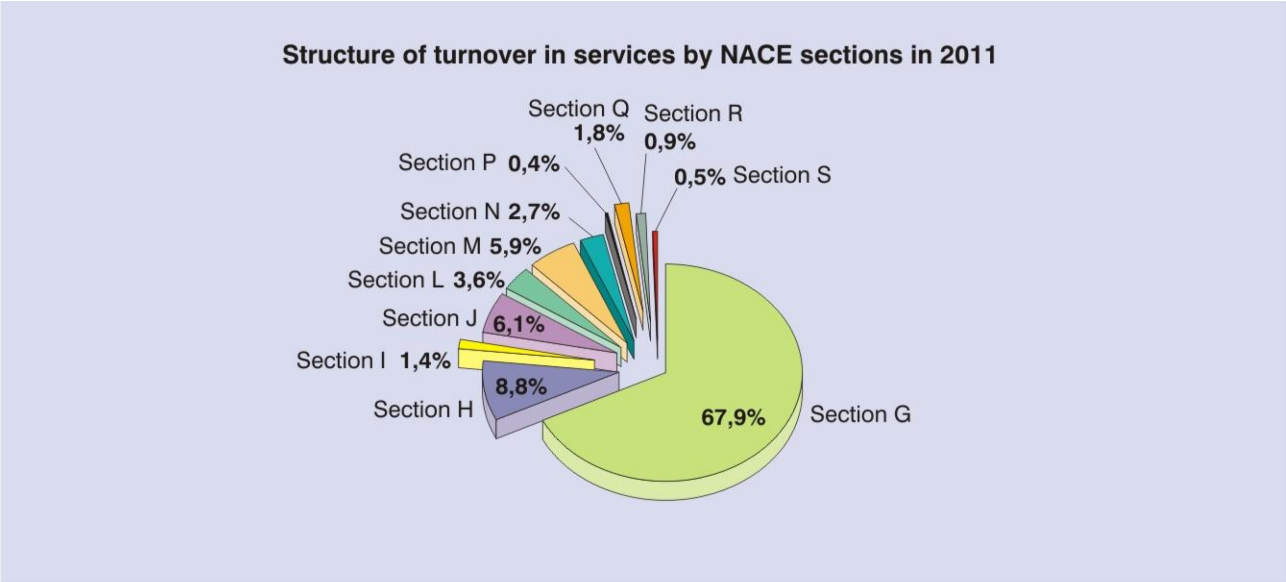
In 2012, the dominant type of activity among service entities in respect of value added was wholesale and retail trade, whose share amounted to nearly $^1/_3$ of the value added generated by all units conducting service activities. The share of activities in transportation and storage (Section H of NACE) amounted to 9.7%, whereas in professional, scientific and technical activities (Section M of NACE) the level was 7.8%.

Structure of gross value added in services by NACE sections in 2012



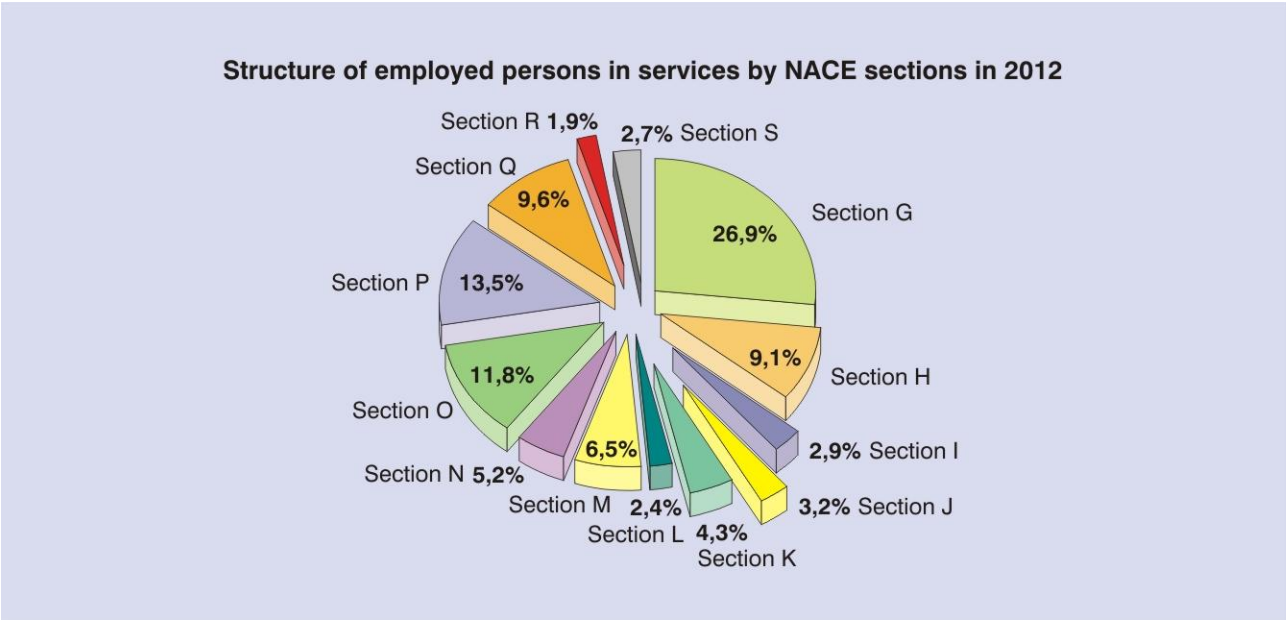
Source: A communique of the Central Statistical Office on a revised estimate of the nominal value of gross domestic product for the years 2011 and 2012 of 26.09.2013.
See Methodical Notes, p. 7

In 2011, the revenues of enterprises operating in wholesale and retail trade (Section G of NACE) comprised nearly 68% of the total revenues in the services sector. The share of revenues of enterprises providing services related to transportation and storage (Section H of NACE) was 8.8%, while the share of revenues of enterprises classified in Section J "Information and communication" was 6.1%, and in Section M "Professional, scientific and technical activities - 5.9%.



Source: Activity of the non-financial enterprises in 2011, CSO, Warsaw (section N [excl. 8130.Z], Section Q [excl. 86.10.Z], Section S (95 and 96 divisions).

In 2012, among service entities, most persons were employed in enterprises classified in Section G of NACE "Wholesale and retail trade; repair of motor vehicles and motorcycles" – 26.9% of all employed in service entities, next in section "Education" (Section P of NACE) – 13.5%, and in those in section "Public administration and defence; compulsory social security" (Section O of NACE) – 11.8%.



Source: Concise Statistical Yearbook of Poland 2012.

In 2012, the prevailing type of activity among service units in respect of average employment was wholesale and retail trade, in which 1,589.7 thous. persons were employed (an increase of 0.6% in comparison with 2011). In Section P "Education", there were 1,045.5 thous. persons employed in the same period. The lowest average employment was recorded in Section S "Other service activities" – 102.9 thous. persons.

The highest growth in average employment was recorded in Section J "Information and communication" – of 3.2%, while the most considerable fall was observed in real estate activities (Section L of NACE) – of 3.0%.

The highest average gross wage and salary in 2012 was recorded in the section "Financial and insurance activities" (Section K of NACE) – PLN 6,007, "Information and communication" (Section J of NACE) – PLN 5,925, and "Public administration and defence" (Section O of NACE) – PLN 4,395. The lowest average gross wage and salary was recorded in Section I "Accommodation and food service activities" and it amounted to PLN 2,148.

In 2012, in comparison with the previous year, the highest increase in average monthly wage and salary was observed in Section N "Administrative and support service activities" to PLN 2,429, i.e. of 5.1%, with a simultaneous fall in average employment of 1.1%.

Over the last few years, among service activities, a dynamic growth was observed in the market for services connected with business support activities, usually referred to as business services. Entities[2] providing business services should include enterprises conducting activities, among others, in the field of information technology, legal, accounting and bookkeeping, management, engineering and architectural, advertising, and employment services.

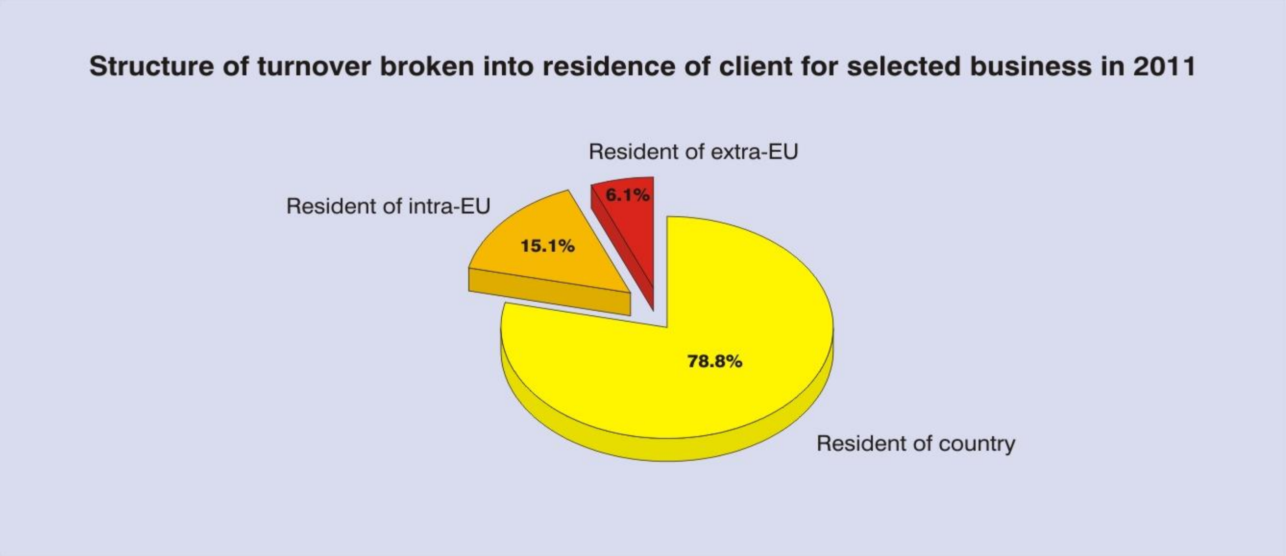
In 2011, among all non-financial entities, 11% were units providing business services[3]. In the same year, the population of entities providing business services increased by nearly 9.0% in comparison to the year before, against a growth of 3.4% in the number of all non-financial entities in the national economy in total. At the same time, in this period, in the segment of business services, a growth was recorded in the number of employed persons of more than 8.0%, while the total number of persons employed in non-financial enterprises in the country increased by nearly 2.0%.

The enterprises classified in the business services segment focus their activities on the domestic market. In 2011, almost 79.0% of total revenues earned by these enterprises originated from providing services for entities with their registered offices in the Republic of Poland. The sources of 15.1% of revenues were clients with their registered offices in the European Union Member States, and for the

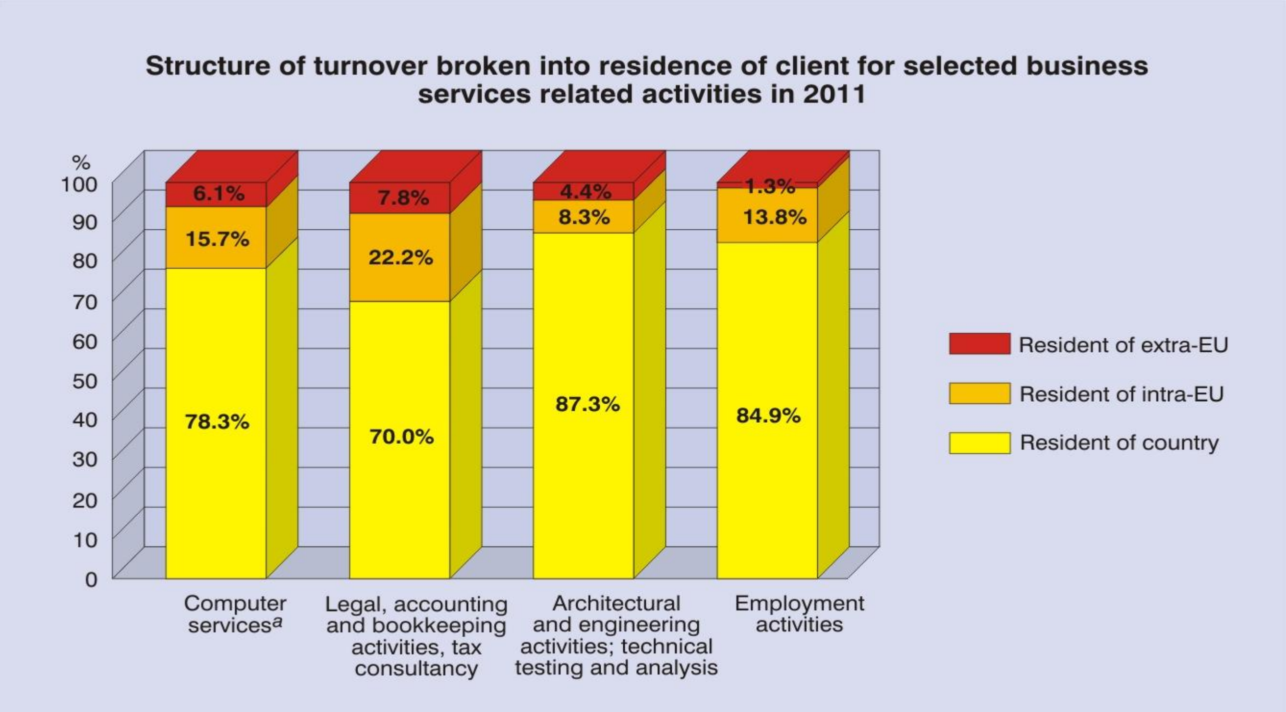
[2] Concerns mainly to entities employing more than 9 persons.

[3] Concerns the following classes/sections according to NACE: 58.2 - Software publishing, 62 - Computer programming, consultancy and related activities, 63.1 - Data processing, hosting and related activities; web portals, 69 - Legal, accounting and bookkeeping activities, tax consultancy, 70.2 - Business and other management consultancy activities, 71 - Architectural and engineering activities; technical testing and analysis, 73 – Advertising and market research 78 - Employment activities;

remaining 6.1% – entities with their registered offices located outside EU. In 2011, a rise of 2.7 pp was recorded in the share of revenues from business support service activities provided for entities with their registered offices abroad.



In 2011, among the activities connected with business support service activities, legal, accounting and bookkeeping activities, and tax consultancy were characterised by the highest share of revenues from the sales of services abroad – 30% of net revenues from sales. As compared to 2010, this share grew by 4.6 pp. The lowest rate of expansion into foreign markets was recorded in the case of enterprises conducting architectural and engineering activities; technical testing and analysis. In these enterprises, almost 13% of net revenues from sales originated from providing services for clients located abroad. In comparison to the year before, this share increased by 1.8 pp.



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 2011, the value of net revenues from total sales in enterprises providing services connected with business support service activities employing 10 or more persons, equalled just below PLN 74.6 billion (a rise of 6.4% in comparison with 2010).

In 2011, the highest increase in revenues was recorded in employment activities (Division 78, Section N of NACE) -of more than 23%. In entities dealing with software publishing, and computer programming, consultancy and related activities (Group 58.2, Division 62 and Group 63.1, Section J of NACE), a 21.4% growth was observed in revenues. Enterprises conducting architectural and engineering activities; technical testing and analysis (Division 71, Section M of NACE) in 2011 recorded an almost 15% drop in the value of revenues in comparison to the year before.

In enterprises providing information technology services, revenues from computer services (class 62.01 of the Polish Classification of Products and Services) amounted to nearly 32% of net revenues from total sales, and their value equalled PLN 7.8 billion. In comparison to 2010, a growth was recorded in the share of these services in total revenues by slightly more than 1 pp.

In enterprises conducting legal, accounting, bookkeeping and auditing activities; tax consultancy (Division 69, Section M of NACE), accounting and bookkeeping activities (69.20.2 of the Polish Classification of Products and Services) had the highest share in the sales revenue structure (36.7%). As compared to 2010, this share decreased by nearly 0.5 pp.

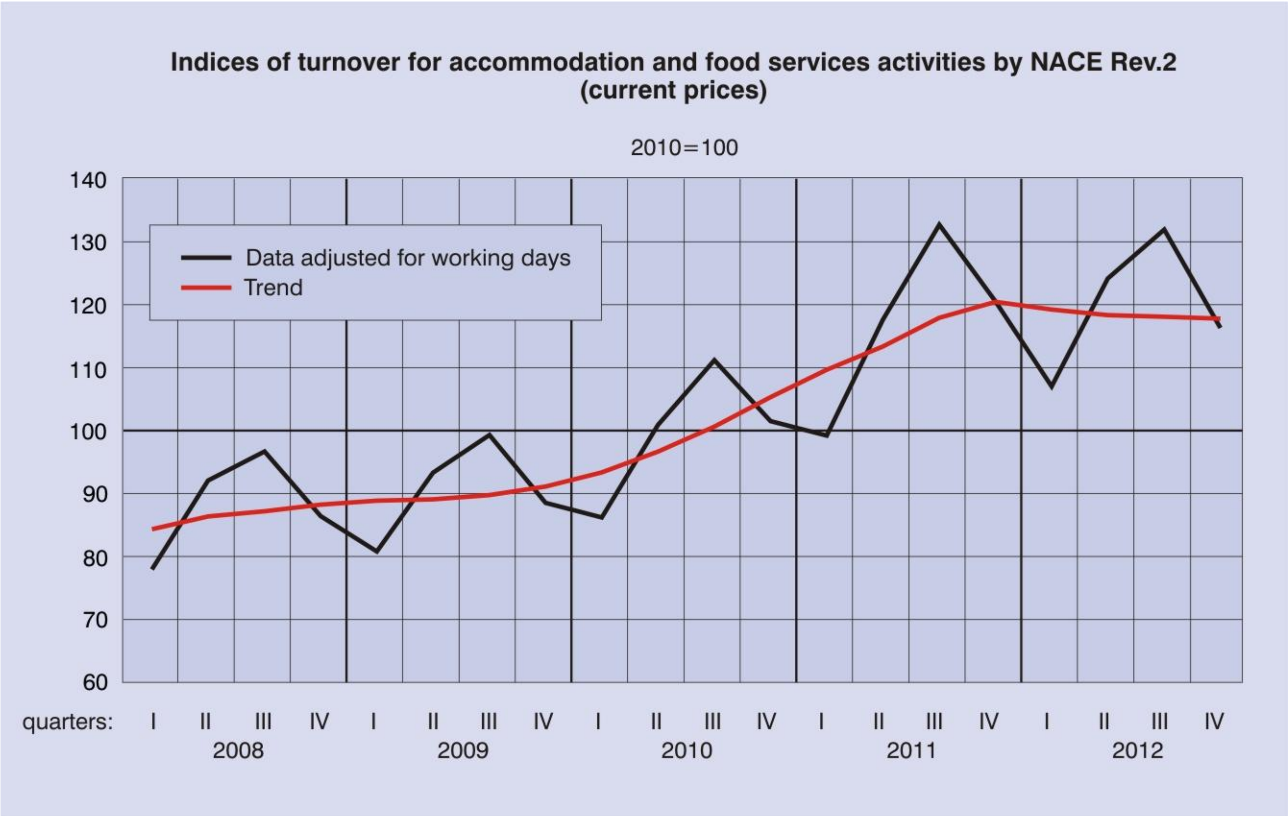
In 2011, in enterprises conducting architectural and engineering activities; technical testing and analysis (Division 71 Section M of NACE), other activities accounted for the highest share of net revenues from sales (31.1%), and their share, in comparison to 2010, dropped slightly by 0.2 pp. More than half of these revenues comes from civil engineering.

Over the last few years, a substantial increase has been observed in the proportion of employment activities (Division 78 Section N of NACE). In this type of activities, in 2011, services provided by temporary employment agencies (78.20 of NACE) had the highest share (54.5%), and their growth, in comparison to 2010, amounted to more than 13 pp. The value of such services equalled slightly more than PLN 3.0 billion.

An analysis of selected service activities

Among service activities it is possible to distinguish services whose significant share and development are connected with fulfilling the needs of the population or supporting other business entities. In order to observe changes in this regard, short-term surveys of selected service activities are conducted. The following output data concern enterprises employing more than 9 persons.

As regards entities conducting accommodation and food service activities (Section I of NACE), a slight increase in turnover (at current prices) was recorded in comparison to 2011 (of 0.9%). At the end of 2012, 7.5% less persons were employed in food service enterprises, in comparison to the previous year, and their number dropped by 5.5%. Moreover, a substantially lower cost level indicator was recorded (a fall from 95.4% in 2011 to 92.7% in 2012). The gross turnover profitability rate grew (from 4.7% in 2011 to 7.3% in 2012). Furthermore, the net turnover profitability rate amounted to 6.2%, in comparison to 3.8% in 2011.



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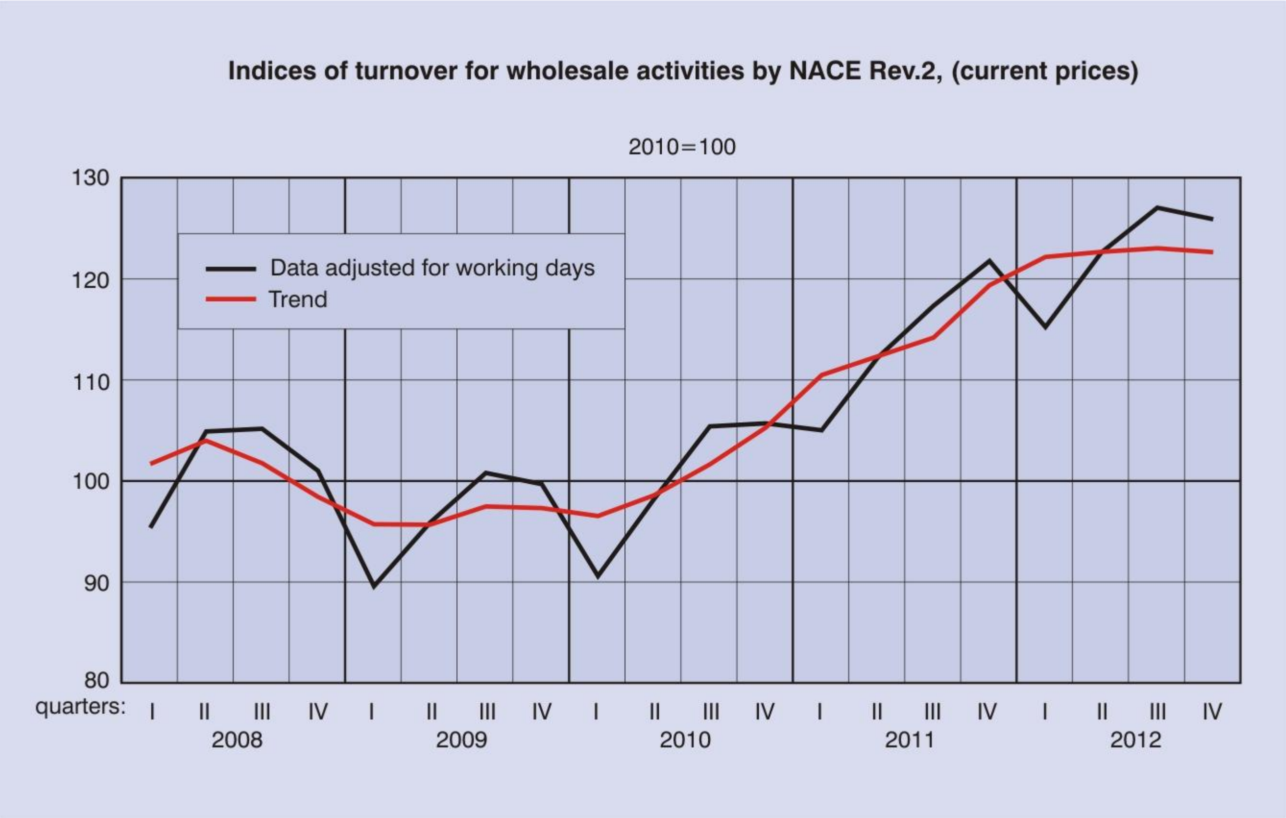
In the activities of wholesale trade enterprises (Division 46 of NACE), in 2012, a 7.8% increase in turnover was observed as compared to 2011. At the end of 2012, the number of wholesale trade enterprises was higher than in the previous year by 3.0%. Also, a slight growth was recorded in the number of employed persons (of 0.6%). The cost level indicator increased to the level of 97.8%, in comparison to 97.2% in the previous year. Moreover, in 2011 the gross (2.2% in 2012 against 2.8% in 2011) and net turnover profitability rates (1.8% against 2.3% in the previous year) decreased.



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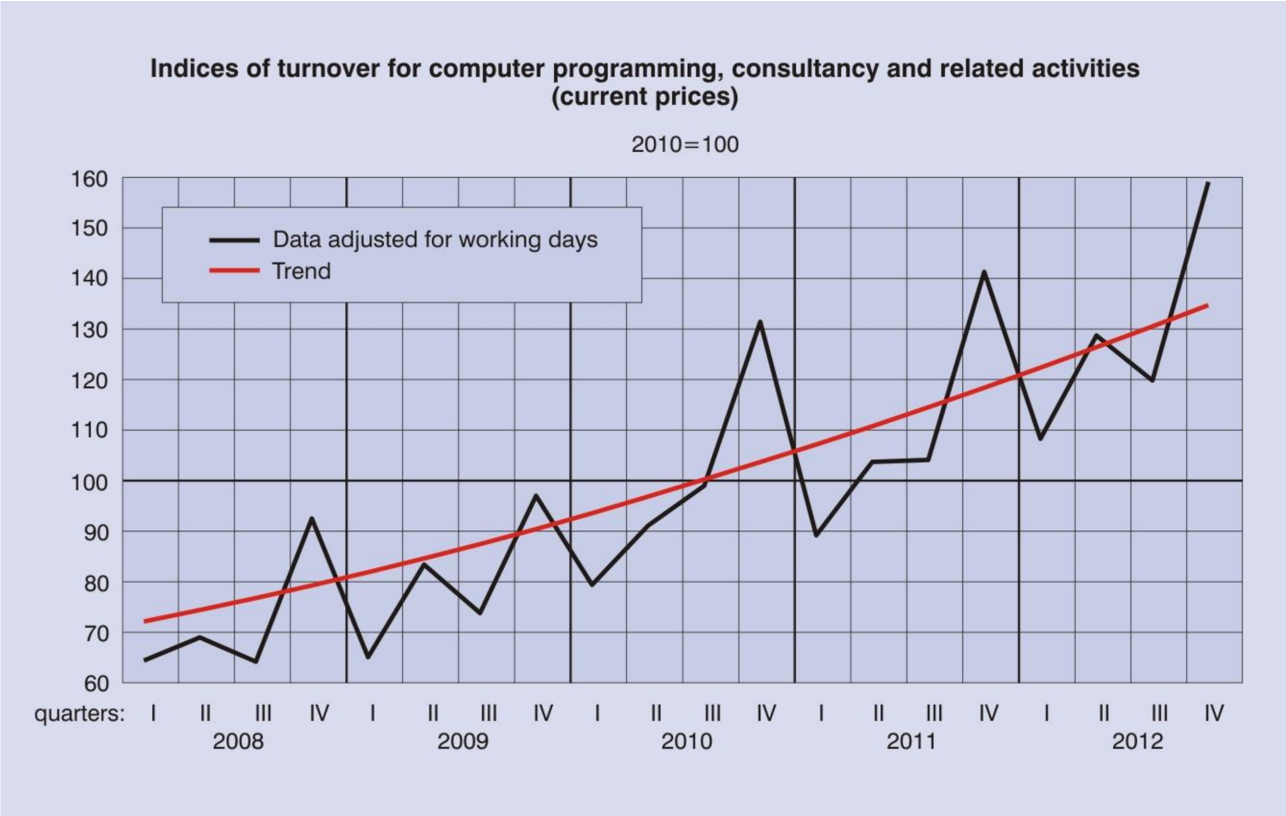
In 2012, in the information technology sector (Division 62 of NACE), an increase was recorded exceeding 17% of turnover value, in comparison to 2011, with a simultaneous 9.6% increase in the number of enterprises and a 16.2% increase in the number of employed persons. Also, a fall was observed in gross turnover profitability rate (from 9.3% in 2011 to 8.6% in 2012) and net turnover profitability rate (from 7.5% in 2011 to 6.9% in 2012). Furthermore, the cost level indicator from total activity slightly fell (91.4% in 2012 against 90.7% in 2011).



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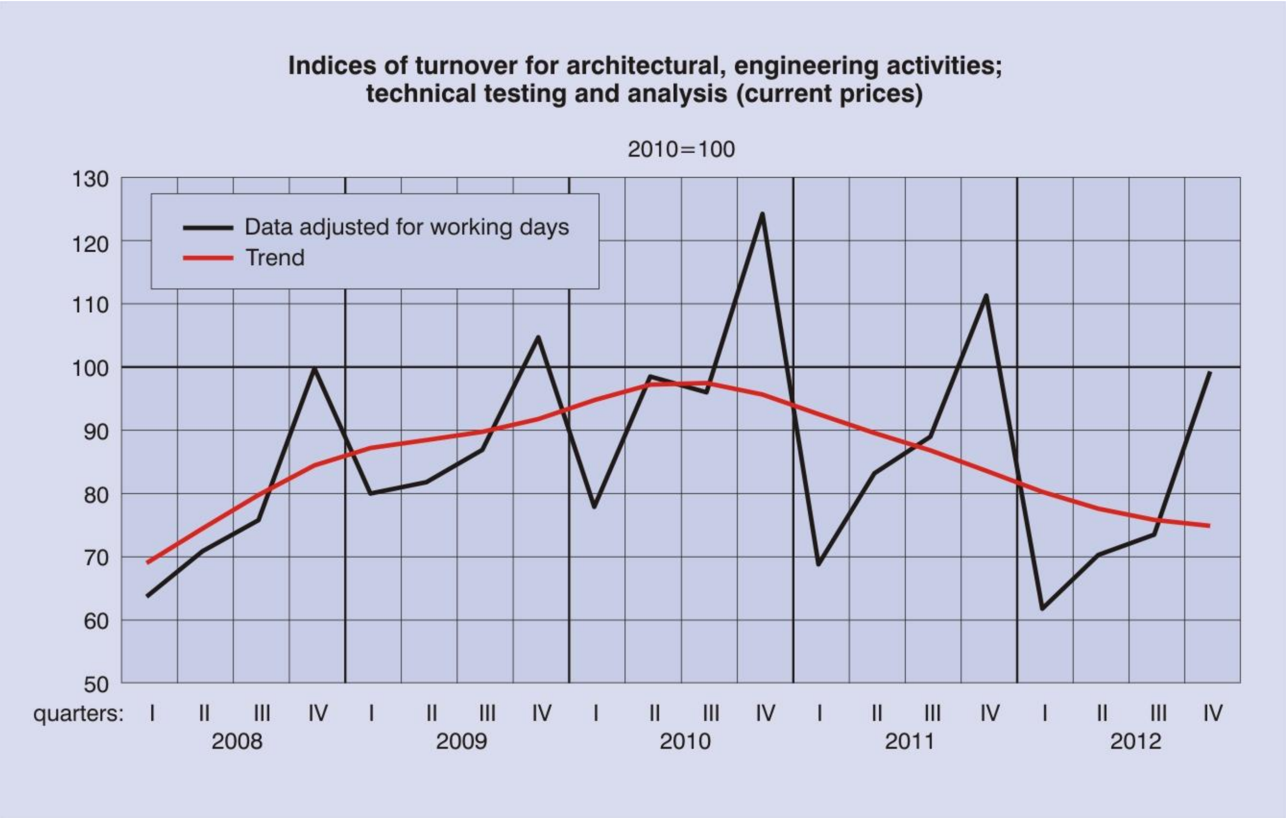
In 2012, in legal, accounting and bookkeeping, and management consultancy activities (Division 69 + Group 70.2 of NACE) a rise was recorded of nearly 11% in turnover value, in comparison to the previous year, with a simultaneous 7.2% increase in the number of enterprises and a 14.6% growth in the number of employed persons. Moreover, the gross (13.9% in 2012, against 10.9% in 2011) and net turnover profitability rates (12.9% in 2012, as compared to 9.8% in 2011) rose. The cost level indicator from total activity also improved and amounted to 86.1%, in comparison to 89.1% in the previous year.

* * *

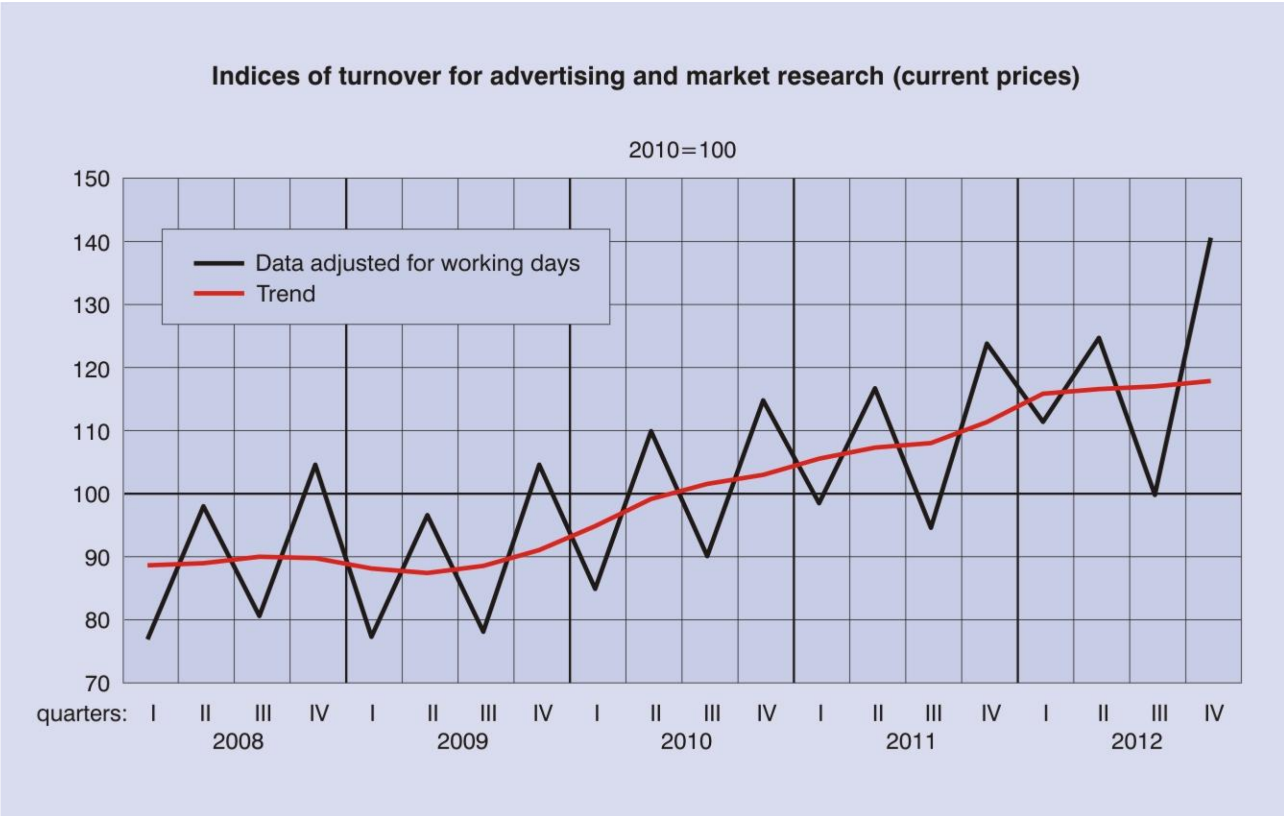
In 2012, in architectural and engineering activities (Division 71 of NACE) a decrease of 14% was recorded in turnover value, as compared to 2011, with a simultaneous 3.4% drop in employment. Moreover, the gross (-13.3% in 2012, in comparison to 6.8% in 2011) and net turnover profitability rates (-14.6% in 2012, as compared to 5.2% in 2011) dropped substantially. The cost level indicator from total activity also worsened and amounted to 113.3%, in comparison to 93.2% in the previous year[4].



[4] A very unfavourable result on financial operations caused a substantial drop in these basic economic and financial indicators regarding the analysed activities.

* * *

In entities conducting advertising and market research activities (Division 73 of NACE), the increase in turnover in 2012, as compared to 2011, amounted to slightly more than 10%, with a simultaneous 1.2% growth in the number of enterprises, and a 2.4% drop in the number of employed persons. Moreover, the gross (5.4% in 2012, in comparison to 5.2% in 2011) and net turnover profitability rates (4.4% in 2012, as compared to 4.3% in 2011) grew slightly in comparison to the previous year. The cost level indicator from total activity also slightly improved, and in 2012 amounted to 94.6%, as compared to 94.8% in 2011.



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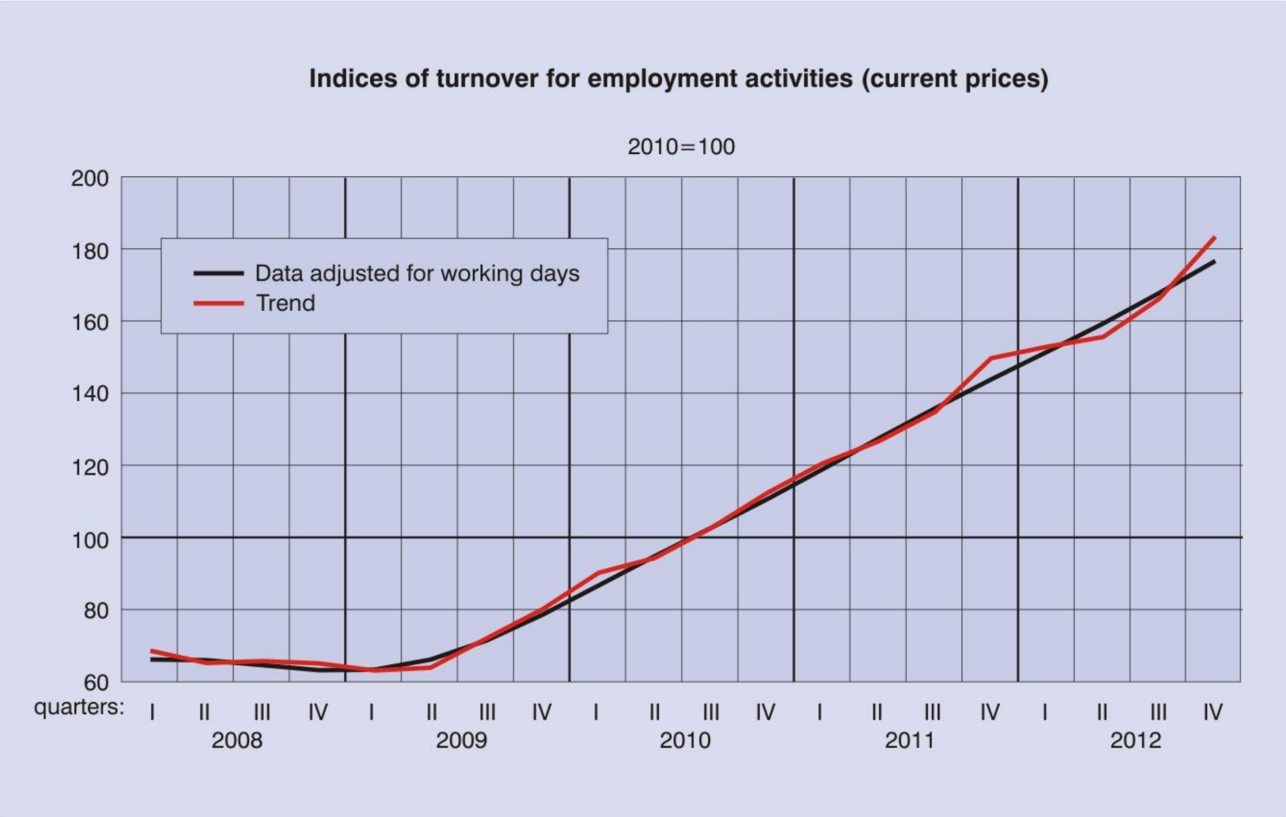
In 2012, in enterprises conducting employment activities (Division 78 of NACE) an increase of 23.4% was recorded in turnover value, in comparison to 2011. Also, a rise in the number of entities (of 25.4%) and employed persons (of nearly 14%) was recorded. However, the gross (1.6% in 2012, as compared to 2.2% in 2011) and net turnover profitability rates (0.9% in 2012, in comparison to 1.5% in 2011) decreased as compared to the previous year. The cost level indicator from total activity also worsened and amounted to 98.4%, in comparison to 97.8% in the previous year.



2. Domestic trade

According to preliminary data, in 2012, the share of trade in Gross Domestic Product amounted to 16.8% and was slightly higher than the year before. Gross value added (at constant prices) generated by commercial enterprises grew by 1.2% as compared to the previous year, and the share of trade in gross value added rose by 0.3 pp. In 2011, a fall of 2.1% was recorded in gross value added at constant prices.

Specification	2010	2011*	2012*
Share of trade in GDP %..	17,1	16,4	16,8
Share of trade in gross value added in %	19,4	18,7	19,0

* Source: Communique of the Central Statistical Office on a revised estimate of the nominal value of Gross domestic product for the years 2011 and 2012 of 26.09.2013.

In 2011, revenues from sales at current prices generated by commercial enterprises were 10% higher than in 2010. The majority of these revenues were generated by wholesale trade enterprises – 59.6% (a rise of 0.5 pp in comparison to the previous year), the share of retail trade amounted to 32.0% (a 0.1 pp increase), and wholesale and retail trade and repair of motor vehicles and motorcycles equalled 8.4% (a 0.06 pp drop). Enterprises employing more than 49 persons generated 48.8% of total revenues. Revenues from the sale of goods and materials amounted to 92.8% of the total value of commercial enterprises' revenues.

Average margin generated in 2011 by commercial units (classified in Section G – Wholesale and retail trade; repair of motor vehicles and motorcycles) amounted to 16.7% and was by 1.0 pp lower than in the previous year. The highest margins expressed in percentages were obtained by retail trade enterprises, and the diversification of the level of generated margins depended on the type of enterprises' activities.

Margins of trade enterprises in 2008 – 2010.

Specification	2009	2010	2011
	%		
WHOLESALE AND RETAIL TRADE AND REPAIR OF MOTOR VEHICLE S AND MOTORCYCLES	**14,5**	**14,4**	**15,0**
of which:			
Sale of motor vehicles	9,1	9,4	9,3
Sale of motor vehicle parts and accessories	22,2	21,2	21,4
Sale, maintenance and repair of motorcycles and related parts and accessories	24,2	24,2	23,1
WHOLESALE TRADE Δ	**15,9**	**16,2**	**14,7**
of which:			
Wholesale on a fee or contract basis[a]	18,4	19,4	17,6
Wholesale of agricultural raw materials and live animals	12,3	13,0	12,4
Wholesale of food, beverages and tobacco	16,6	17,9	16,1
Wholesale of household goods	17,5	17,9	16,8
Wholesale of information and communication equipment	12,8	13,4	11,8
Wholesale of other machinery, equipment and supplies	16,4	16,8	15,6
Other specialised wholesale	13,5	13,2	11,6
Non-specialised wholesale trade	17,7	18,1	17,6
RETAIL TRADE Δ	**21,8**	**21,3**	**20,7**
of which:			
Retail sale in non-specialised stores	18,8	18,9	18,2
Retail sale of food, beverages and tobacco in specialised stores	21,2	20,3	18,3
Retail sale of automotive fuel in specialised stores	9,9	9,4	9,8
Retail sale of information and communication equipment in specialised stores	17,0	16,4	15,7
Retail sale of other household equipment in specialised stores	23,2	23,1	24,1
Retail sale of cultural and recreation goods in specialised stores	32,9	30,5	29,5
Retail sale of other goods in specialised stores	29,5	28,9	29,0

a Provision.

The flow of commercial goods

One important element that makes it possible to assess commodities' distribution and circulation channels is the analysis of revenue structure by client type and the division of purchases made in wholesale enterprises by supplier type (tables 19 and 20). Over the last few years, similar behaviour of wholesale and retail enterprises could have been observed regarding the selection of their suppliers, and the revenues made by these enterprises has originated from the previously set groups of customers. In both wholesale and retail trade enterprises, including those owned by foreign entities, the share of purchases directly from domestic producers and manufacturers, as well as directly from imports, has remained at a similar level. Approx. 53% of trade enterprises[5] made their purchases directly from domestic producers and manufacturers, direct imports amounted to approx. 23% and purchases at wholesalers – slightly more than 23%. Depending on the specificity of a trading activity, the structure of purchases made was diversified. In respect of wholesale trade – approx. 52% of purchases were made by enterprises from domestic producers and manufacturers, and over 26% – directly from imports. The share of wholesaler-wholesaler purchases slightly grew, and amounted to approx. 21%.

In retail trade, commodities have been mainly purchased directly from domestic producers and manufacturers (58%), thus diminishing the role of wholesalers (27%). The share of purchases directly from imports has remained at a constant level, and amounted to 14%. Enterprises owned by foreign entities have made their purchases directly from domestic producers and manufacturers (these comprised nearly 48% of the total value), or from imports (approx. 40%), and less often from wholesalers (approx. 11%). In the structure of revenues of wholesale trade enterprises, approx. 45% of revenues originated from sales for wholesale, nearly 28% from retailers, and almost 17% from domestic producers. Approx. 6% of these revenues comprised direct receipts from individual consumers.

The turnover of trade enterprises

In 2012, turnover in retail trade (at constant prices) ran at a slightly lower level than in 2011 (a decrease of 1.1%). In enterprises selling non-food goods, a 1.6% decrease in turnover was recorded. Among the enterprises selling food, beverages and tobacco, the quantity of turnover remained at a similar level to the previous year. In enterprises conducting wholesale and retail trade of motor vehicles, there was recorded a small increase (of 0.5%).

[5]Data concerning enterprises in which the number of employees exceeded 9 persons.
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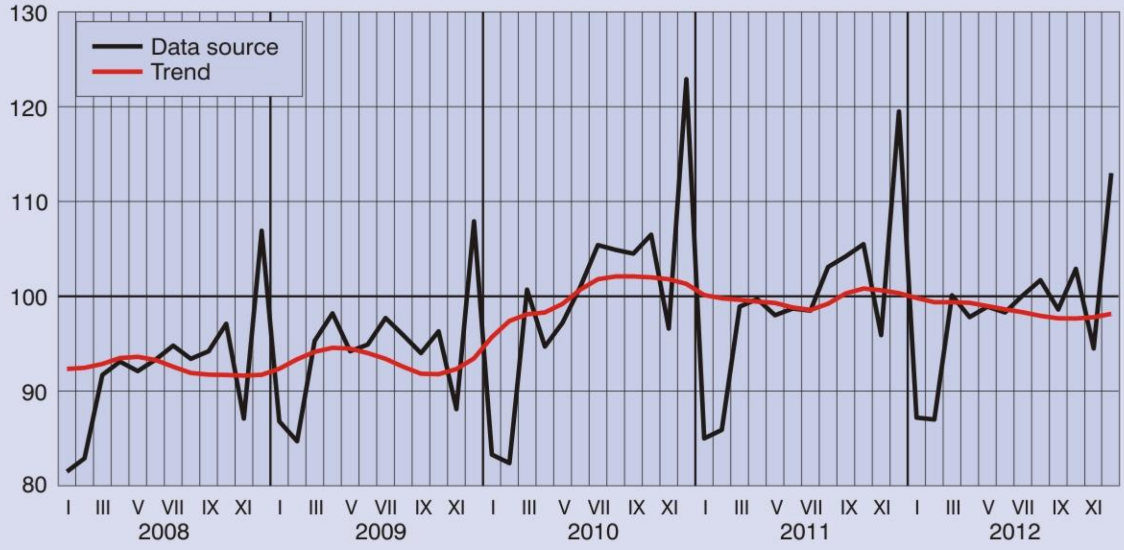
Deflated turnover of retail sale enterprises[a]

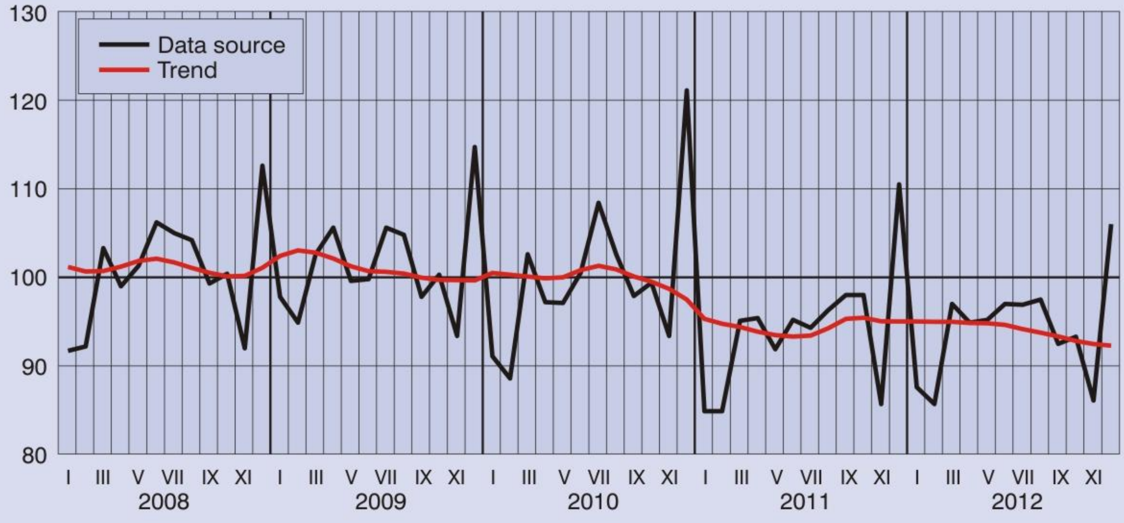
2010=100



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

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

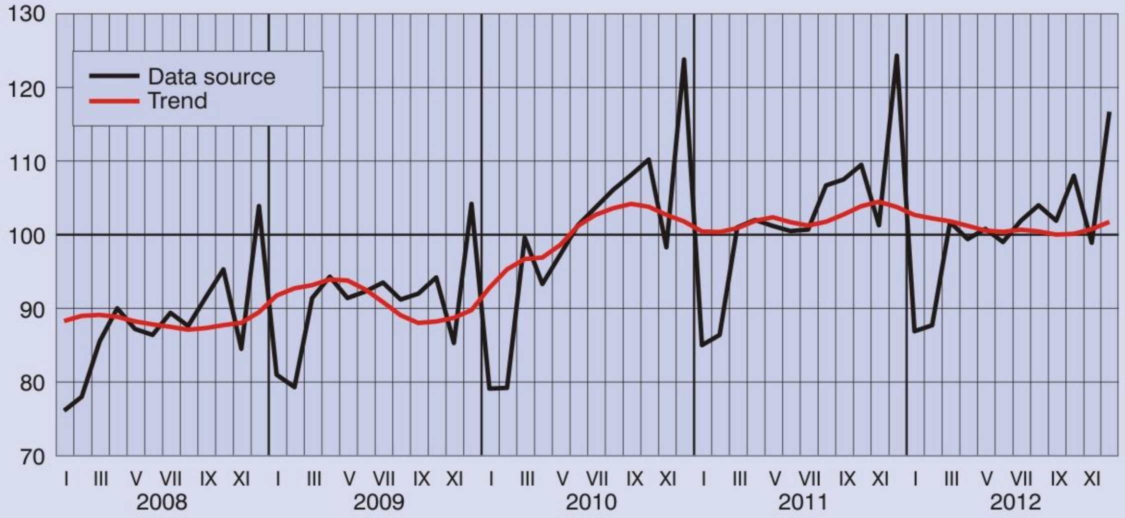
2010=100



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]

2010=100



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

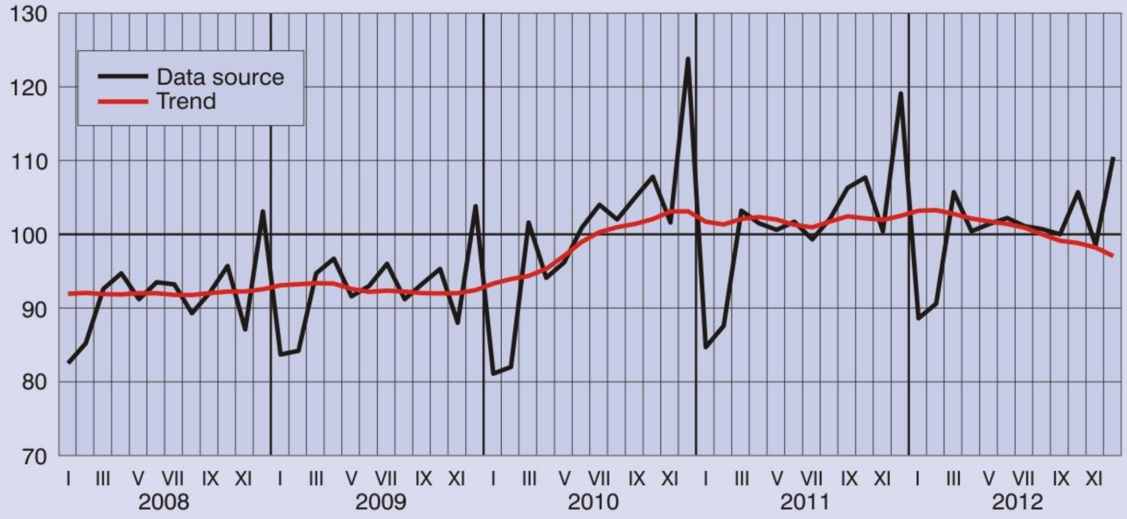
Deflated turnover of fuel supply enterprises[a]

2010=100

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

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

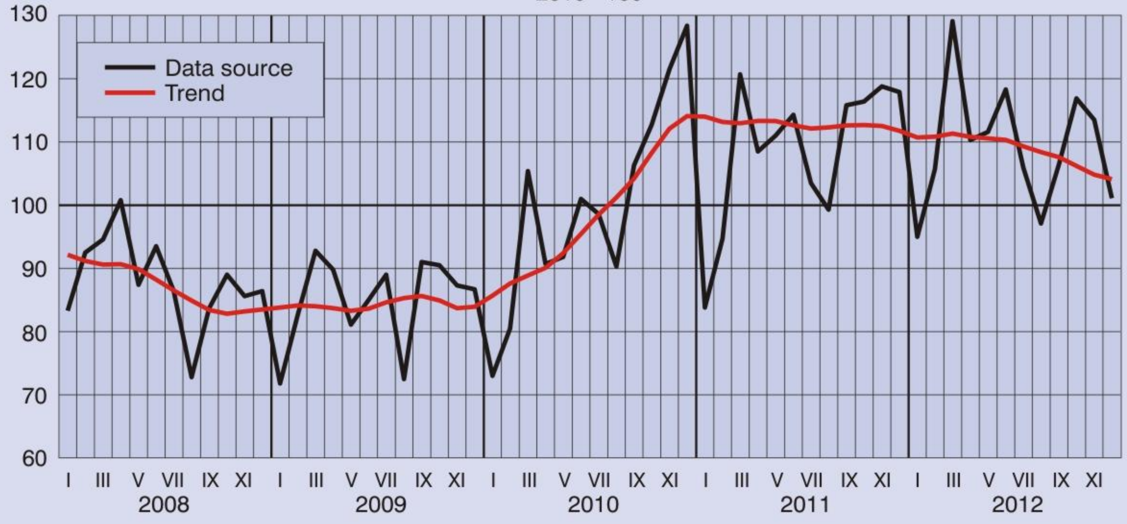
2010=100



a 45 Division – Wholesale and retail trade 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]

2010=100

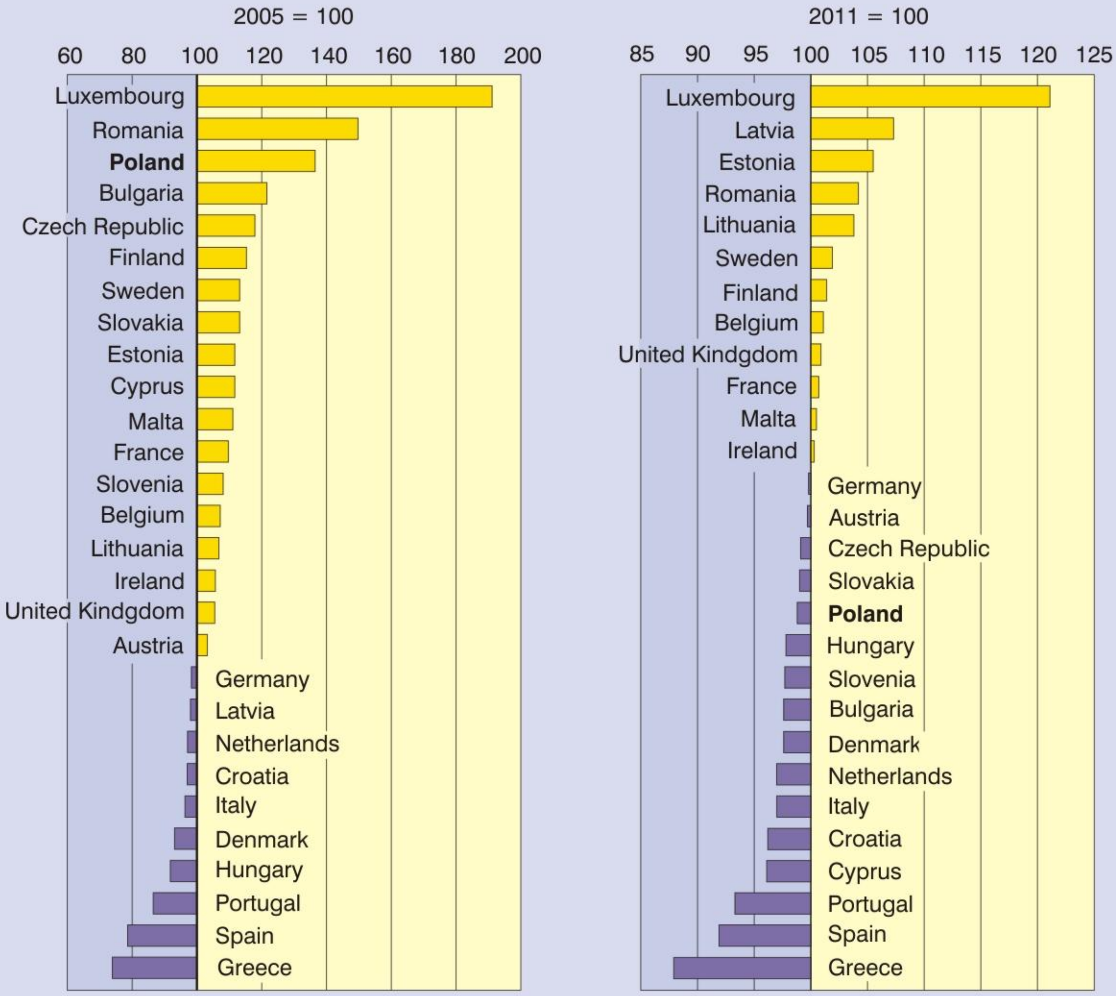


a Enterprises classified according to NACE Rev. 2 into the groups: 45.1, 45.3, 45.4.

In 2012, similarly to 2011, a drop in retail trade turnover was recorded in the EU Member States, when compared to the corresponding period in 2011 (of 0.9%). The steepest decrease was again recorded in Greece, Spain and Portugal. The highest increase in turnover was recorded in Luxembourg. A high growth was also recorded in Latvia, Estonia, Romania, and Lithuania. Among the countries that are the most crucial for the European economy, a decrease in turnover was recorded in Italy (of 3.7%), as well as a small drop in Germany (of 0.2%). In the United Kingdom and France, retail trade turnover increased by 0.9% and 0.7% respectively, when compared to the previous year.

Taking into account a longer period of time, assuming 2005 as the base year, the highest dynamics in turnover was reached in 2012 by countries such as Luxembourg, Romania and Poland.

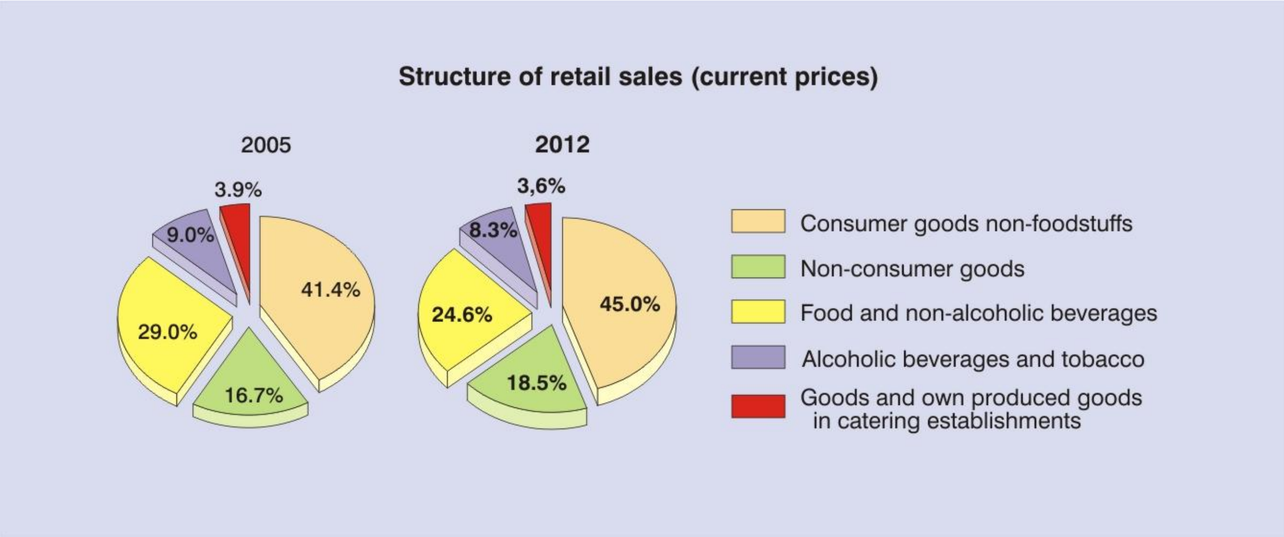
Annual indices of deflated turnover in retail trade for countries of EU in 2012 (constant price)[a]



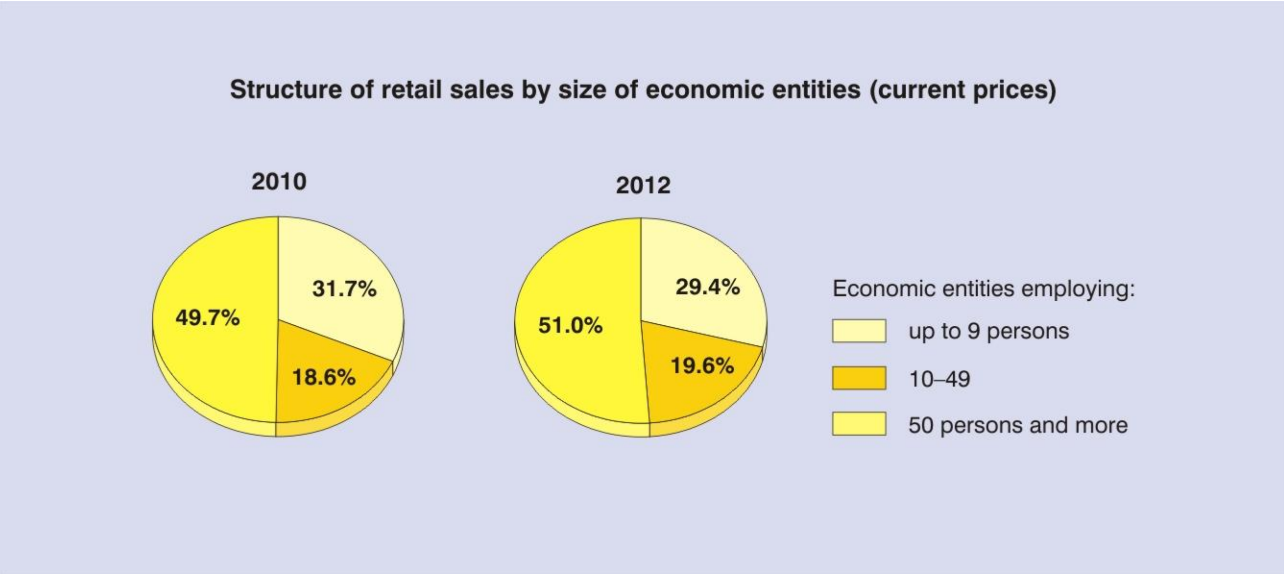
a Data adjusted for working days.
S o u r c e: Eurostat, short-term statistics.

Retail sales

In 2012, retail sales in current prices achieved by trade and non-trade enterprises amounted to PLN 676.0 billion and were 4.6% higher than in the year before. In retail sales outlets, the value of sold goods amounted to PLN 651.7 billion (a 4.4% increase), including the value of food and non-alcoholic beverages – PLN 166.2 billion (a 3.2% increase), alcoholic beverages and tobacco – PLN 56.2 billion (a 2.7% increase), and non-foodstuff goods – PLN 429.4 billion (a 5.2% growth). In catering establishments retail sales amounted to PLN 24.3 billion (a 9.6% growth).



The share of retail sales generated in 2012 by economic entities employing 50 persons or more amounted to 51.0%, by entities employing up to 9 persons – 29.4%, and by enterprises employing from 10 to 49 persons – 19.6%.



Sales by trade enterprises (at current prices) amounted to 86.7% of the total value of retail sales, and their share was by 0.2 percentage points lower than in 2011. The remaining sales were generated by enterprises, whose basic activity was not trade, but e.g. production or catering.

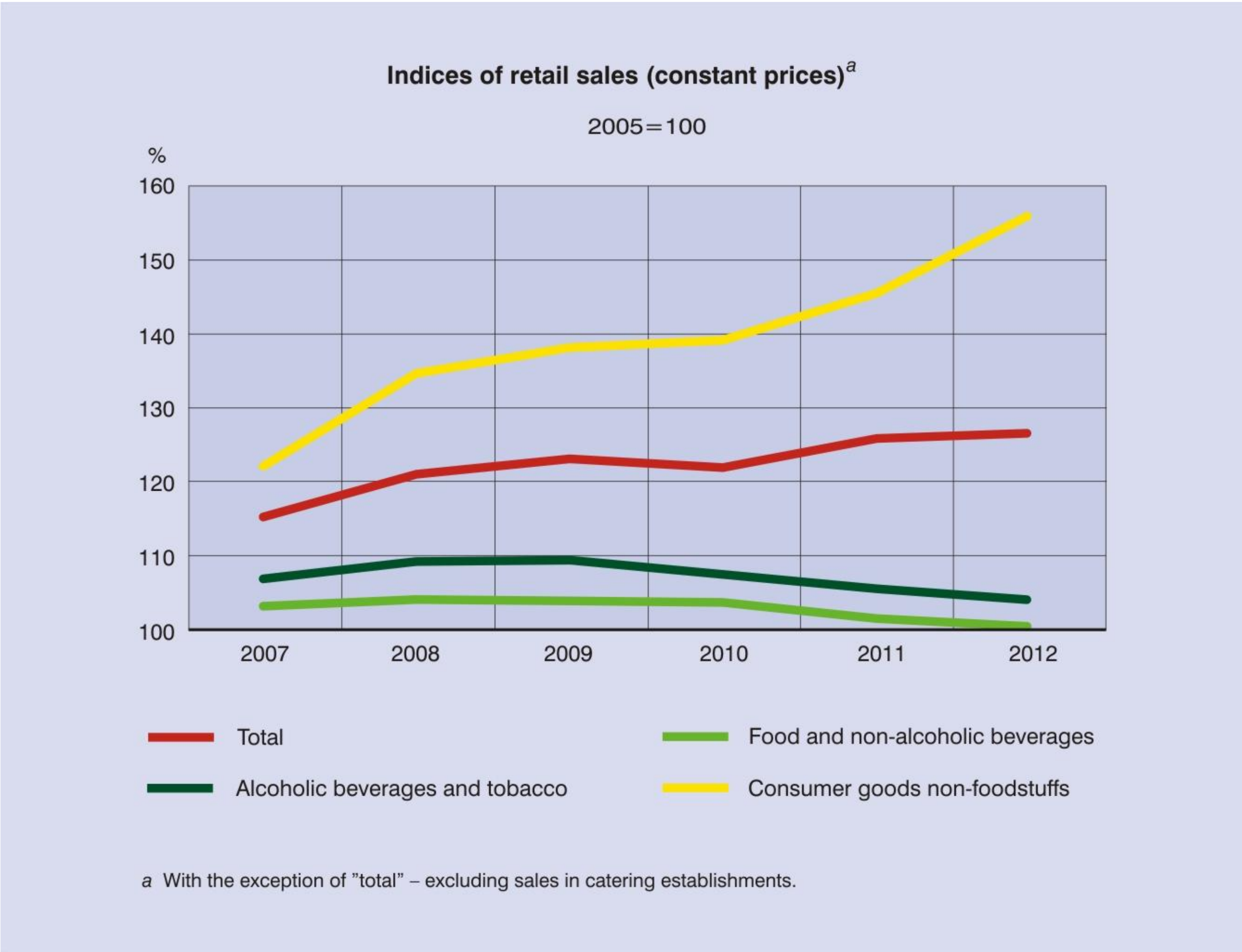
Retail sales in 2010 – 2012 (current prices)

Specification a – absolute numbers b – corresponding period of the previous year =100	2010	2011	2012
	PLN mln		
Total....a	592958,4	646127,1	675992,6
b	101,7	109,0	104,6
of which trade enterprises .... a	515350,1	561772,5	586190,9
b	101,3	109,0	104,3

Retail sales by groups of goods (current prices)

Specification	2010	2011	2012	
	PLN mln			2011=100
Total....	**592958,4**	**646127,1**	**675992,6**	**104,6**
food and non-alcoholic beverages....	172684,4	178593,7	185631,5	103,9
alcoholic beverages and tobacco	57962,8	59040,0	60755,1	102,9
non-foodstuffs (excluding tobacco)....	362311,2	408493,4	429606,0	105,2

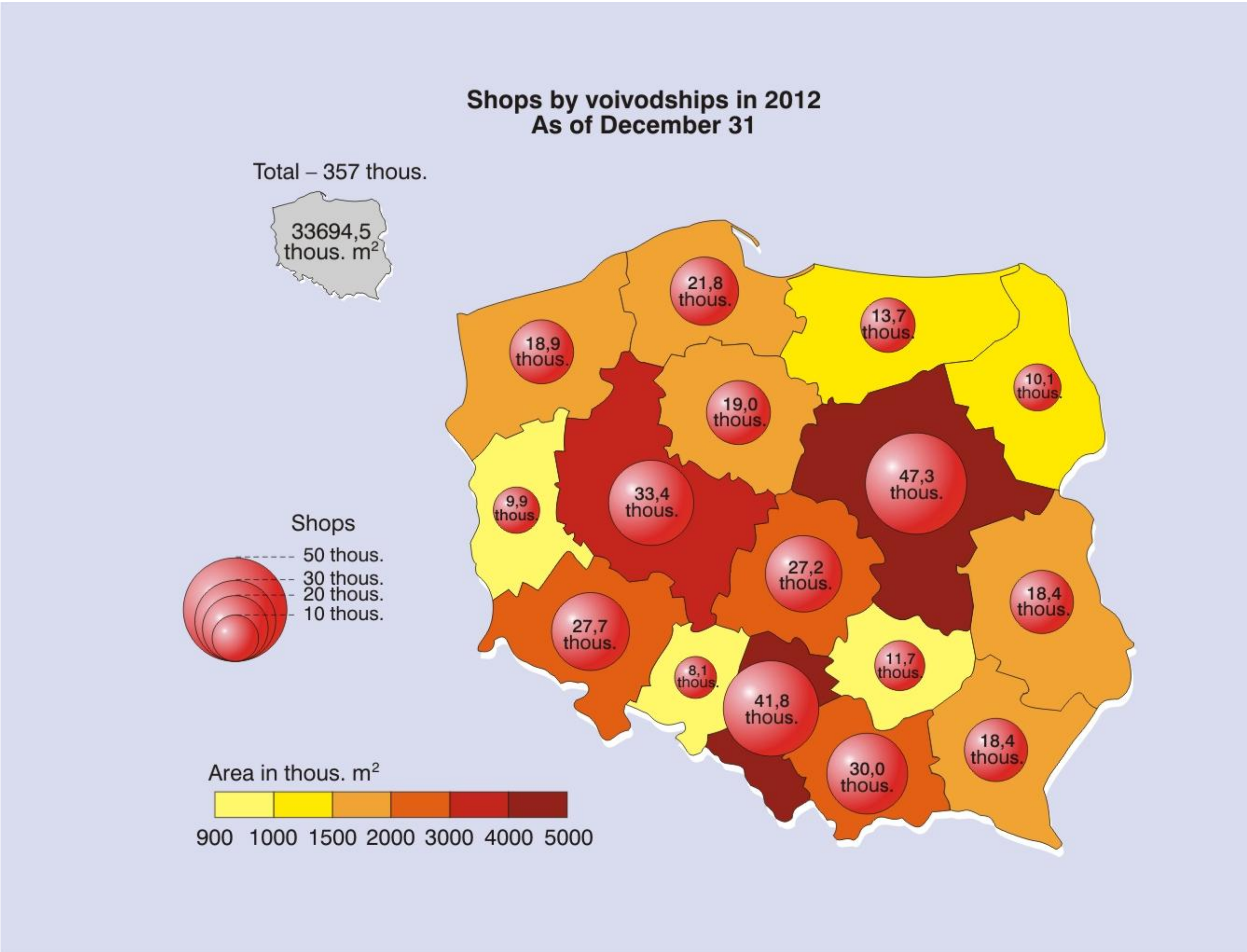
In 2012, retail sales at constant prices generated by commercial and non-commercial enterprises were 0.5% higher than in the year before. The increase in consumer goods non-foodstuffs was above average (of 7.0%). A substantial decrease in the sales of non-consumer goods was recorded (of 11.4%). The sales of food and non-alcoholic beverages dropped when compared to the previous year (by 1.1%). There also occurred a decrease in the sales of alcoholic beverages and tobacco (of 1.3%). On the other hand, the retail sales of own goods and products at catering establishments was 6.4% higher than in the previous year.



Trade infrastructure

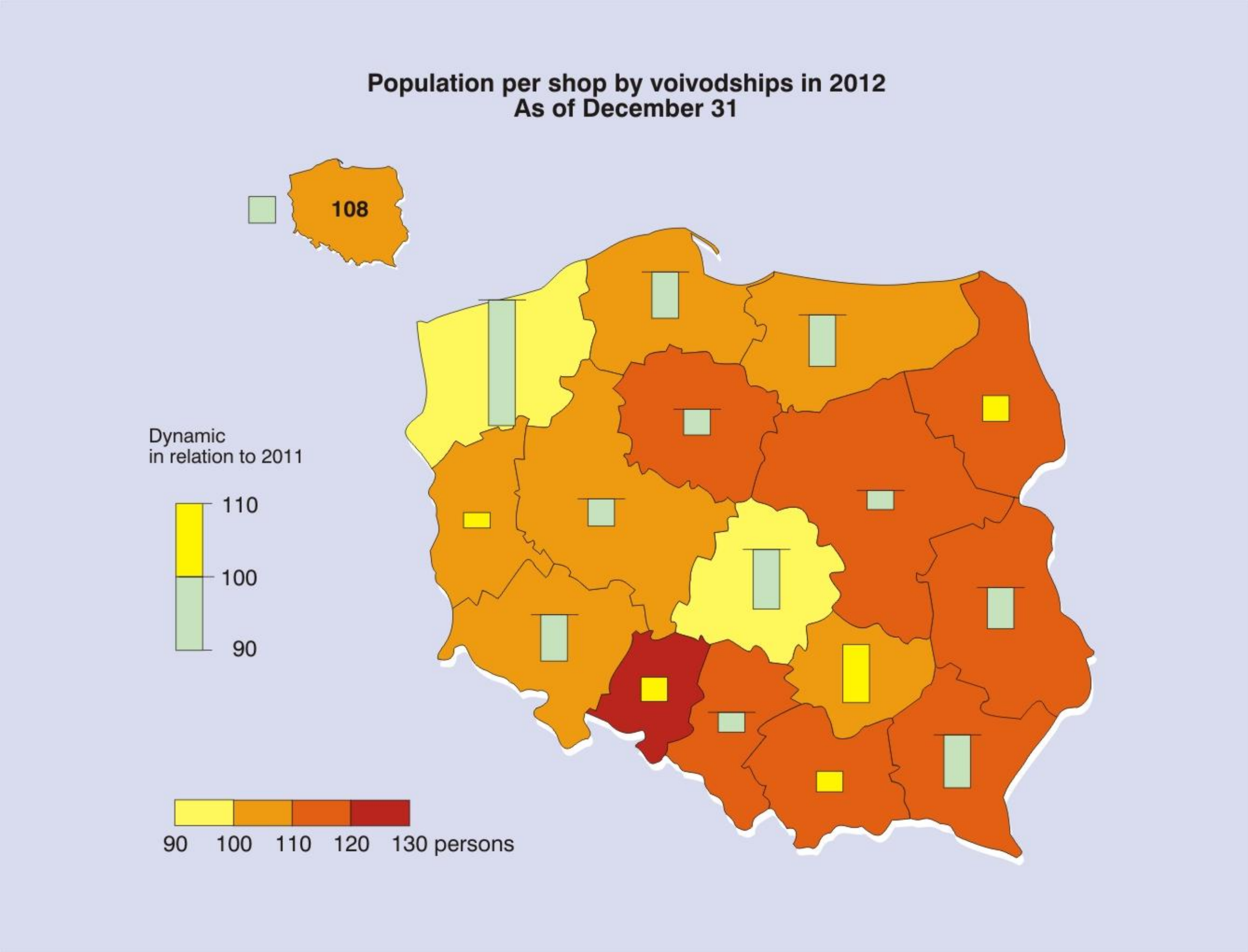
At the end of 2012, the estimated number of shops in Poland amounted to 357 thous., and was 3.6% higher than in the year before. The sales area of shops equalled approx. 33,695 thous. m^2, and was 2.2% larger than in 2011. An increase in area was recorded in shops in the 400-999 m^2 size range (of 6.0%), 1000 m^2 and larger (of 3.5%), and 99 m^2 and smaller (of 0.9%). On the other hand, a slight decrease in sales area (of 0.1%) was recorded in shops with an area of 100-399 m^2.

In the regional structure, the highest growth in the sales area in the 400-999 m² size range took place in Lubuskie (of 14.6%), Opolskie (of 12.5%) Warmińsko-Mazurskie, and Pomorskie (of 9.6%) Voivodships, while in the 1000 m² and larger range, in Świętokrzyskie (of 21.4%), Lubuskie (of 10.6%), and Podkarpackie (of 9.1%).



Among large-area outlets, similarly to the previous years, the highest percentage increase in the number of shops took place in the supermarket category (of 9.2%), mainly in the 1000-1999 m² area range. In 2012, the number of hypermarkets grew by 1.2% when compared to the previous year. The estimated share of the value of sales generated jointly by supermarkets and hypermarkets in retail sales at shops and petrol stations amounted, in 2012, to 22.4%, and was 0.6 pp higher than in the year before.

In 2012, there were 108 persons for one store on average, while in 2011 it amounted to 112 persons.



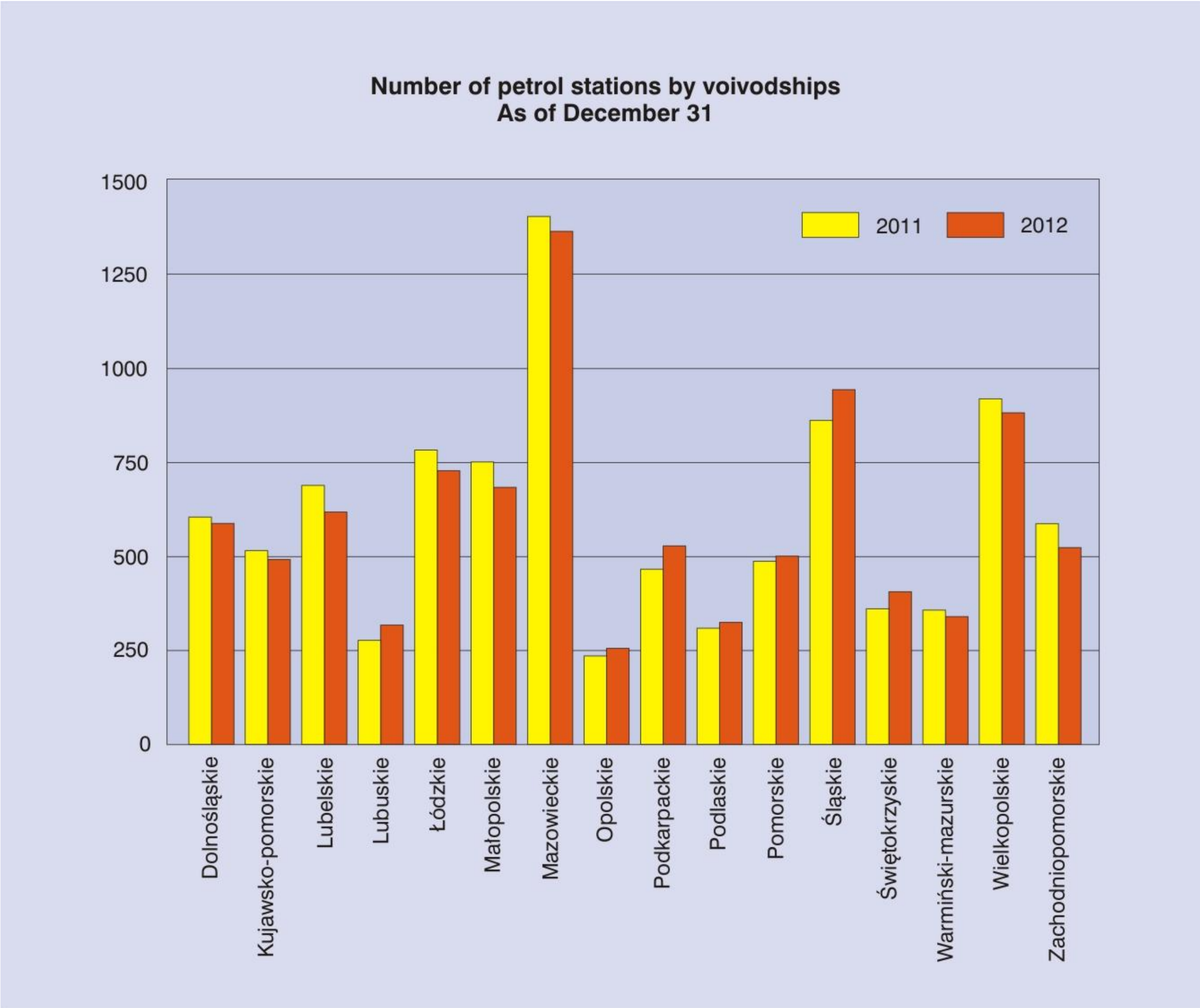
In 2012, in the group of enterprises employing more than 9 persons, the number of shops owned by companies with foreign capital fell by 0.9%, as well as their sales area – by 9.6%. The average sales area of the shops owned by foreign enterprises amounted to 654.6 m ^{2}, and correspondingly, of the shops owned by private, national enterprises – to 170.1 m². On the other hand, the share of the area of shops with foreign capital in the total area grew by 1.8 pp when compared to the previous year.

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

Specification	2011	2012
Number of shops	13596	13714
Share in total shops (%)	3,9	3,8
Sales area (thous. m^{2})	8191,9	8977,1
Share in total sales area (%)	24,8	26,6

a Data concerns entities employing more than 9 persons.

At the end of 2012, the estimated number of petrol stations equalled 9,481 and was 1.2% lower than in the year before. The steepest percentage decrease in the number of petrol station was recorded in the following voivodships: Lubelskie (of 12.7%), Małopolskie (of 8.9%) and Zachodniopomorskie (of 7.8%). However, an increase was observed in Świętokrzyskie (of 12.8%), Podkarpackie (of 13.1%) and Lubuskie (of 14.5%).



In 2012, gmina offices across the country registered 2,215 permanent marketplaces (including 2,110 with a predominance of small-retail sales outlets), that is 0.8% fewer than in the year before. The steepest decrease in the number of marketplaces was recorded in the following Voivodships: Pomorskie (of 4.3%), Opolskie (of 3.8%) and Lubelskie (of 3.1%). Similarly to the previous year, the marketplaces in the Mazowieckie, Łódzkie, and Wielkopolskie Voivodships were characterised by the largest areas, and their percentage amounted to 40.6% of the total area of marketplaces in the country.

At marketplaces, trade activities were taking place in approx. 103.4 thous. permanent, small-retail sales outlets, out of which 61.5 thous. were open every day. Seasonal marketplaces acted as a supplement to this regular marketplace network. In 2012, there were 6,506 such sites, which indicates a 0.9% drop when compared to the previous year. Annual revenues from market dues were 3.6% lower than in 2011.

At the end of 2012, wholesale enterprises (employing more than 9 persons) stored goods in 35.1 thous. warehouses (excluding silos and reservoirs). Closed warehouses comprised the most substantial part of the storage infrastructure (25.9 thous.). The remaining were storage sites (4.8 thous.) and roofed warehouses (4.4 thous.). The storage area of warehouses equalled in total 44,641.9 thous. m², and was 13.4% larger than in 2009.[6] Regarding storage area structure, closed warehouses comprised 58.7% of the total area (a 1.5 pp decrease when compared to 2009), roofed warehouses – 8.4% (a 4.0 pp growth), and storage sites – 32.9% (a 2.5 pp drop).

Among the closed warehouses of commercial enterprises (classified in NACE as wholesale and retail trade; repair of motor vehicles), the warehouses of wholesale units comprised 94.2% of the total number of warehouses and 95.9% of the total storage area. On the other hand, the warehouses of retail units comprised 5.3% of the number of warehouses and 3.9% of the storage area. There was observed an increase in the average area of all types of warehouses, which equalled, for closed warehouses – 1030 m² (against 763 m² in 2009), roofed warehouses – 878 m² (against 458 m²), and storage sites – 2839 m² (against 2605 m²).

In ownership structure, a growth in the number of warehouses owned by enterprises with foreign capital was still observed. In 2012, the share of the number of those warehouses amounted to 13.2% of the total number of warehouses (against 11.2% in 2009); however, the share of occupied area decreased and equalled 14.9% of the total storage area (against 17.0% in 2009).

Catering

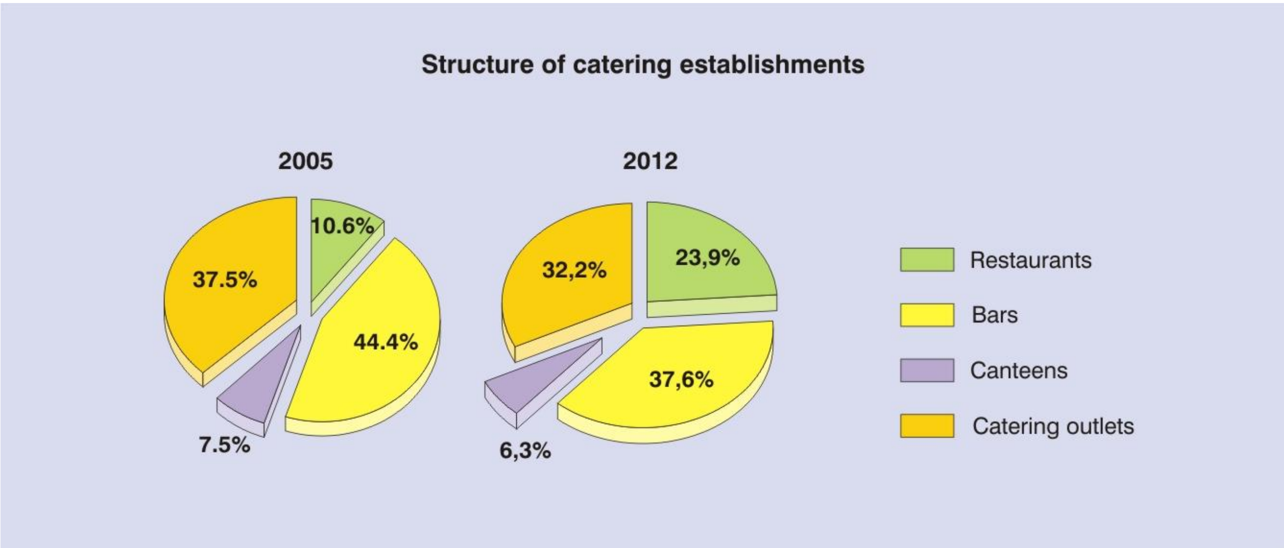
At the end of 2012, the estimated number of catering establishments (permanent and seasonal) in the country amounted to nearly 68.8 thous. and increased by 2.1% when compared to 2011. The highest increase was recorded in the number of restaurants – of 7.8%, while the number of other establishments also grew, but it took place at a much slower pace.

Bars comprised 37.6% of all establishments, catering outlets – 32.1%, restaurants – 24.0%, and canteens – 6.3%. In 2012, 97.9% of all catering establishments were included in the private sector.

[6] Warehouse surveys are conducted in three-year cycles.

Catering establishments

Specification	2010	2011	2012	
	Number			2011=100
Total	**70483**	**67356**	**68787**	**102,1**
restaurants	14937	15287	16478	107,8
bars	27145	25866	25885	100,1
canteens	4509	4271	4304	100,7
catering outlets	23892	21932	22120	100,9



In 2012, the total revenues from catering activities at current prices equalled approx. PLN 24.9 billion, and, when compared to the previous year, grew by 9.2% (at constant prices, they were higher by approx. 6.0%). 71.6% of this value consisted of catering production, 26.1% of the sales of trade commodities (including 18.5% from the sales of alcoholic beverages and tobacco), and 2.3% in other activities. The highest increase in revenues was observed, similarly to the previous year, in respect of catering production (of 12.3%), while the revenues from other activities dropped by 7.8%.

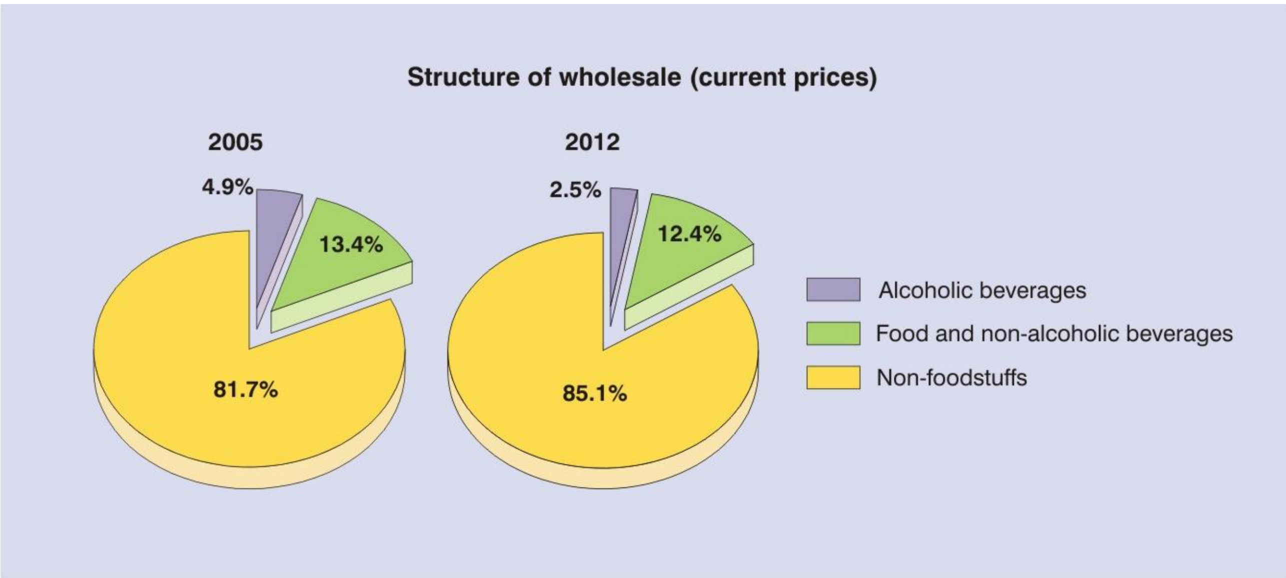
Revenues from catering activity in current prices

Specification	2010	2011	2012	
	PLN mln			2011=100
Revenues total	**21682,8**	**22782,6**	**24868,3**	**109,2**
from sales of commodities	6043,2	6319,1	6499,1	102,8
of which from the sale of alcoholic beverages and tobacco	4199,6	4362,7	4601,5	105,5
from catering production	15022,0	15833,2	17788,1	112,3
from other activity	617,6	630,3	581,1	92,2

Wholesale

In 2012, the estimated value of wholesale at current prices generated by trade enterprises amounted to PLN 980.5 billion and was 3.6% higher than in the year before. This growth was recorded in the group of non-foodstuffs – of 4.3%, and food and non-alcoholic beverages – of 1.4%. The wholesale of alcoholic beverages fell by 9.8%. In the structure of wholesale, the share of non-foodstuffs increased, when compared to the previous year, by 0.6 percentage points; however, both the shares of food and non-alcoholic beverages, and alcoholic beverages decreased (by 0.2 and 0.4 pp respectively).

Wholesale generated by enterprises employing 50 persons or more comprised 47.6% (a 0.1 pp drop when compared to the previous year).



Whosale in 2010 - 2012 (current prices)

Specification a – absolute numbers b – corresponding period of previous year=100		2010	2011	2012
		PLN mln		
Total	a	846490,2	946833,2	980452,1
	b	111,4	111,9	103,6
of which enterprises employing 50 persons and more	a	398672,6	452012,6	466589,9
	b	104,2	113,4	103,2

Wholesale by group of goods (current prices)

Specification	2010	2011	2012	
	PLN mln			2011=100
Total	**846490,2**	**946833,2**	**980452,1**	**103,6**
food and non-alcoholic beverages	108418,0	119730,9	121349,8	101,4
alcoholic beverages	25286,8	27481,8	24784,8	90,2
non-foodstuff goods	712785,4	799620,5	834317,5	104,3

Market supply

In 2012, the average supplies of the most surveyed consumer goods, located in producers' warehouses[7], were higher than in the year before.

In the group of foodstuffs, there was an increase in the stocks of, among other things, fruit jams, edible melted animal fats, butter, sugar, rennet ripening cheese, poultry, wheat flour, cheese, and curd. On the other hand, the stocks of milk and cream in solid state, processed cheese, meat and pluck products from animals for slaughter, margarine and spreads, pasta, raw meat from animals for slaughter, and pork – decreased.

Regarding non-foodstuffs, the stocks of, among other things, soap, dishwashing machines, bicycles, and vacuum cleaners grew when compared to the year before. The stocks of the following commodities dropped: pantyhose and tights, carpets, mats and textile floor coverings, refrigerators and freezers, passenger cars, TV sets, and automatic washing machines for household use.

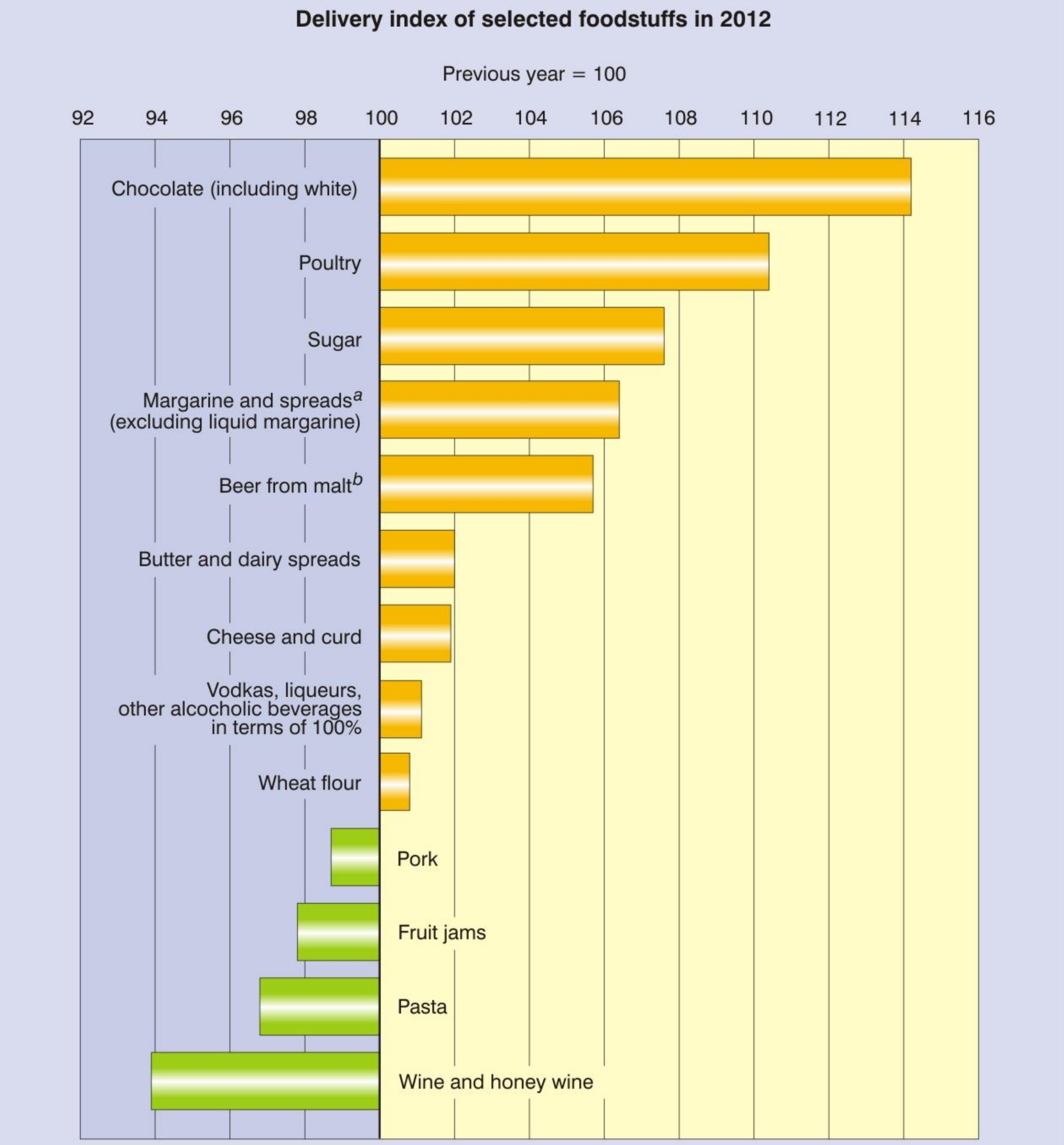
In the discussed year, the [8] supplies of over half the surveyed consumer goods was lower than in the year before, mainly non-foodstuffs such as TV sets, textile apparel and clothes, and footwear. Also a decrease both in the imports of almost all surveyed non-foodstuffs and their domestic production was recorded – in approx. 75% of these goods.

The supplies of non-foodstuffs such as refrigerators and freezers for household use and bicycles grew substantially. While domestic production rose by respectively almost 7% and nearly 14%, a decrease in the imports of these goods was observed, which resulted in a decrease in the share of imports in supplies. This translated into the market's being supplied largely from domestic production.

In 2012, among the surveyed foodstuffs, there were observed, when compared to the previous year, higher supplies of beef and veal, chocolate (including white), poultry, sugar, processed cheese, margarine and spreads, and beer from malt. An increase in the supplies of these products stemmed, among other things, from higher domestic production. The greatest increase in production took place when it came to chocolate (more than 14%) and poultry (nearly 13%).

On the other hand, the supplies of such foodstuffs as fruit jams, pasta (a decrease in domestic production), and wine and honey wine (a growth in exports) dropped.

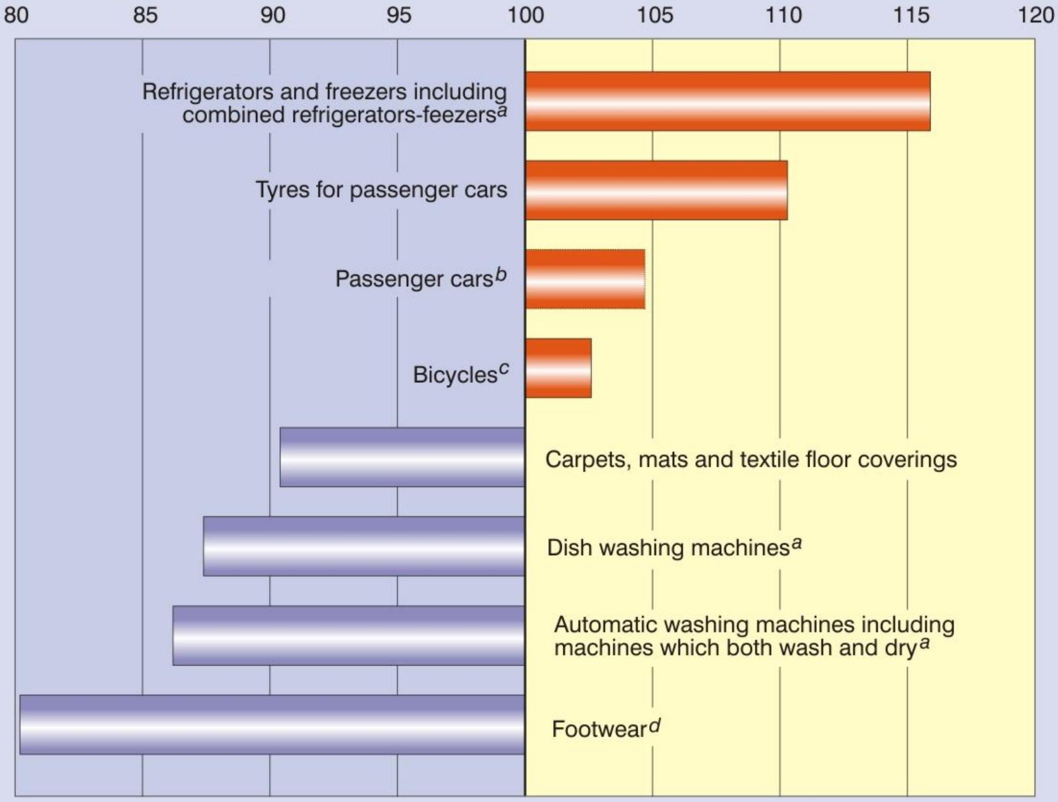
[7] In enterprises employing more than 49 persons.
[8]The amount of products produced domestically (data concern enterprises employing more than 9 persons), minus their exports and plus their imports corrected by the balance of changes in the stocks of producers employing more than 49 persons.



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

Delivery index of selected non-foodstuffs in 2012

Previous year = 100



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