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COUNTRY FOCUS POLONIA

Torino, 29 giugno 2020

CENTRO ESTERO INTERNAZIONALIZZAZIONE PIEMONTE Agency for Investments, Export and Tourism

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INIZIATIVA CO-FINANZIATA CON FESR

POR Piemonte FESR 2014/2020

FOOD & BEVERAGES MADE IN ITALY IN POLONIA

SITUAZIONE E PROSPETTIVE PRE E POST PANDEMIA E OPPORTUNITA' DI BUSINESS PER LE AZIENDE ITALIANE

DSP Consulting

Davide Stefanini – Varsavia 29.06.2020

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Sommario:

- situazione mercato Retail in Polonia pre-Covid19
- situazione mercato Ho.Re.Ca. in Polonia pre-Covid19
- cambiamenti indotti dalla pandemia
- prospettive e opportunità post pandemia

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Situazione mercato Retail in Polonia pre-Covid19

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Retail universe: food retail outlets

Food retailing
≈95 600 ▼ ≈3,6%

Large-format stores
≈8 094 ▲ ≈3,4%

- Hypermarkets
  490 ▲ ≈0,4%
- Supermarkets *
  ≈3 542 ▲ ≈6,0%
  (1 454 foreign; 2 088 Polish)
- Discount stores
  4 062 ▲ ≈1,5%

Small-format stores & specialty food
≈87 500 ▼ ≈4,2%

- Grocery large */ medium
  ≈25 720 ▼ ≈4,8%
- Grocery small
  ≈38 850 ▼ ≈4,3%
- Specialty food
  ≈22 930 ▼ ≈3,2%

▲▼ change vs. 2017

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: Report 2019 | March 2019

Foreign hypermarkets

Retail chain	Average selling area [m²]	Number of outlets									
		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Auchan (Auchan) 1)	12 000	25	26	26	27	28	41	52	77	77	**74**
Bi1 (Schiever Polska)	10 000	-	-	-	-	-	-	5	7	7	**7**
Carrefour (Carrefour)	7 000	82	82	84	83	96	99	84	86	89	**89**
E. Leclerc (E. Leclerc) 2)	6 000	13	13	13	13	14	16	16	17	18	**21**
Intermarche (ITM Polska)	2 500	1	2	2	2	2	2	2	2	2	**2**
Kaufland (Schwarz Group)	2 500	127	143	150	163	171	182	202	203	206	**208**
Real (Metro)	8 500	54	54	54	53	57	45	18	-	-	**-**
Tesco (Tesco)	7 000	62	68	80	85	85	89	89	90	89	**89**
TOTAL		**364**	**388**	**409**	**426**	**453**	**474**	**468**	**482**	**488**	**490**

1) *In 2014, Auchan Group acquired 49 Real hypermarkets which rebranding was finished in 2016*
2) *The E.Leclerc Polska Group strengthened its structure by commencing official cooperation with the Frac chain, which in July 2018 joined the Galec purchasing group. The partnership concerns, among others jointly negotiating business terms with suppliers of both networks. The Frac chain runs 17 stores in the Podkarpackie Voivodeship and 3 outlets in Warsaw. In 2017, its annual turnover reached approx. PLN 262 million.*

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Polish and foreign discount stores

Retail chain	Owner	Average selling area [m²]	Number of outlets									
			2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Aldi	Aldi	800	40	49	61	64	79	92	105	118	124	**132**
Biedronka	JMP	600	1466	1649	1873	2083	2393	2587	2667	2722	2823	**2900**
Dyskont Czerwona Torebka	Czerwona Torebka	700	-	-	-	-	5	31	-	-	-	-
Ledi	Eko Holding	500	-	-	-	-	14	16	16	16	16	-
Lidl[4)]	Schwarz Group	1 200	~360	~400	~400	~450	~500	520	~580	~600	~630	**~635**
Netto	Netto	700	184	212	241	276	314	334	354	360	368	**~370**
Społem „S”	Społem	190	45	47	45	47	47	47	~40	~40	~40	**~25**
		TOTAL	**2095**	**2357**	**2660**	**2920**	**3352**	**3627**	**3762**	**3856**	**4001**	**4062**

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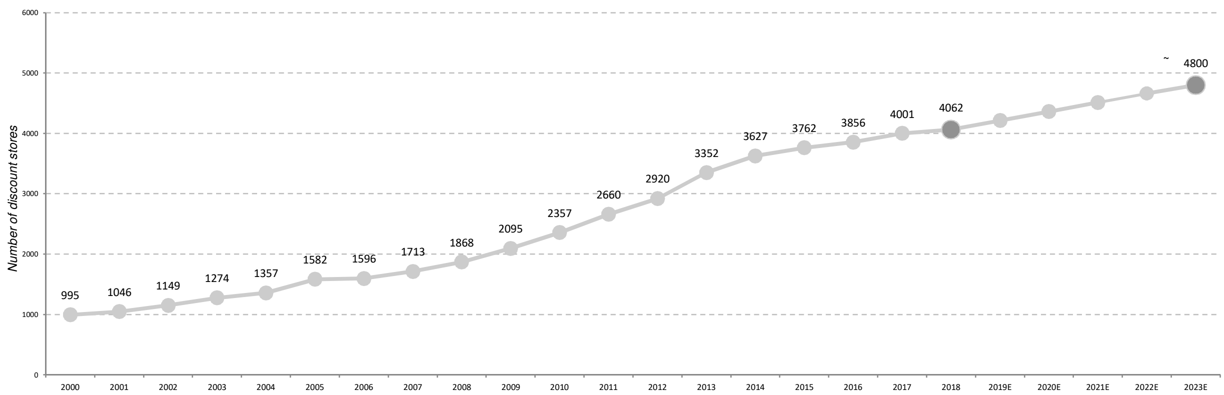
Development of discount stores in Poland from 2000 + estimation



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Situazione mercato Ho.Re.Ca. in Polonia pre-Covid19

Retail universe: HoReCa outlets

HoReCa
≈59 770 ▲≈2,2%

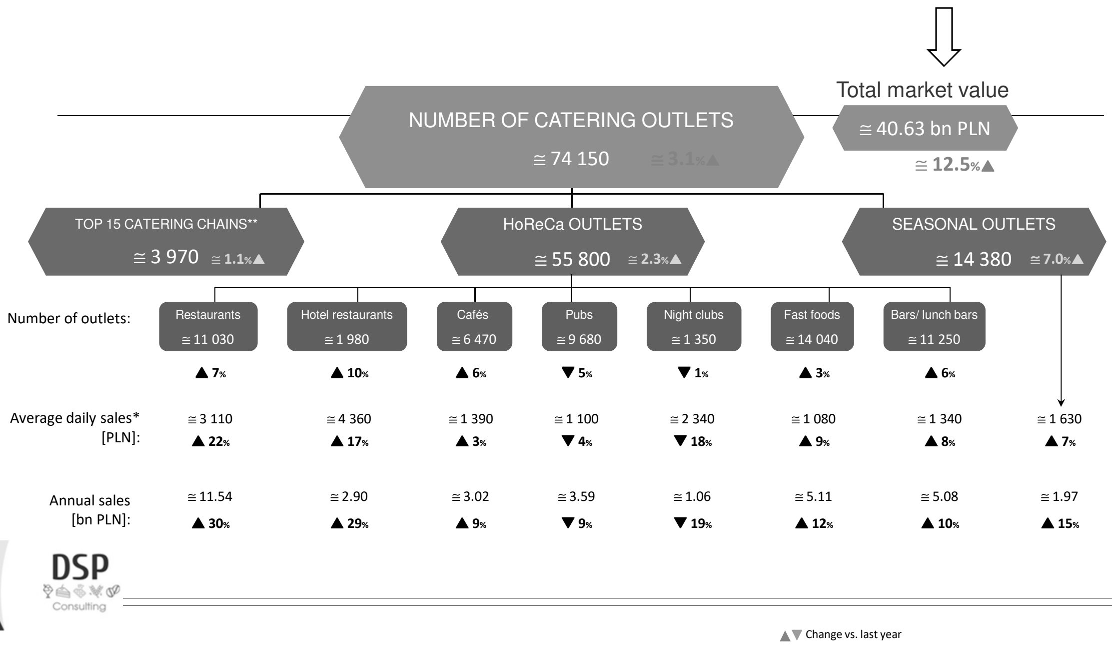
- Restaurants ≈11 030 ▲≈6,7%
- Cafes ≈6 470 ▲≈6,1%
- Night clubs ≈1 350 ▼≈1,5%
- Bars/ lunch bars ≈11 250 ▲≈2,0%
- Hotel restaurants ≈1 980 ▲≈10,0%
- Pubs ≈9 680 ▼≈5,2%
- Fast foods ≈14 040 ▲≈2,6%
- Top15 chains* ≈3 970 ▲≈1,1%

** TOP 15 catering chains: Stop Café, McDonald's, Wild Bean Café, KFC, DaGrasso, Cukiernia Sowa, Grycan, Costa Coffee, TelePizza, Subway, Pizza Hut, Sphinx, Olimp, Gusto Dominium, Piwiarnia Warka*

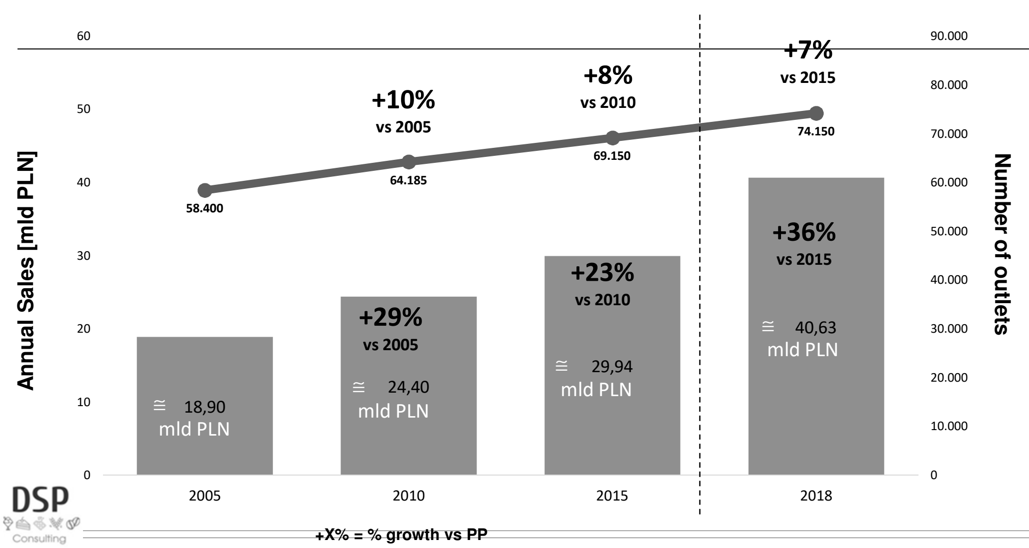
Source: GfK „store census", GUS, desk research, second half of 2018

▲▼ change vs. 2017

c Report 2019 | March 2019

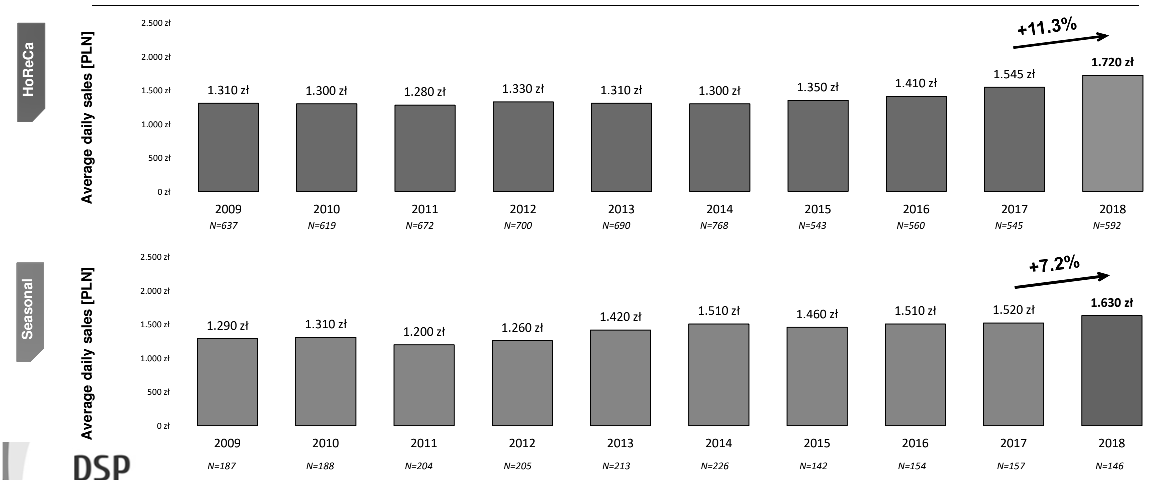


Long term dynamics



The **average daily turnover** in all-year and seasonal outlets have increased significantly, exceeding the level of 1 700 PLN in HoReCa outlets and 1 600 PLN in seasonal outlets.

Daily sales value* in HoReCa and seasonal outlets



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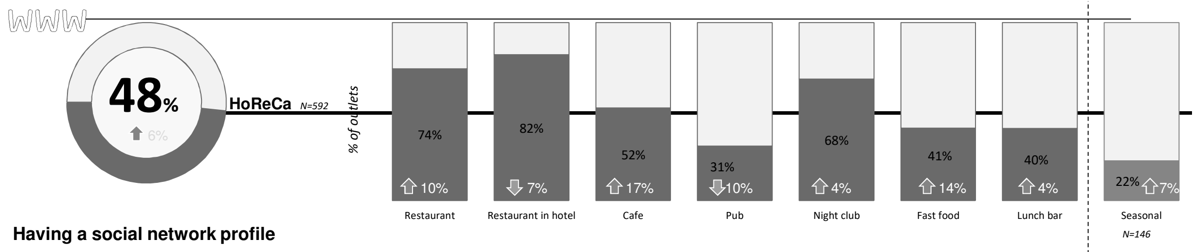
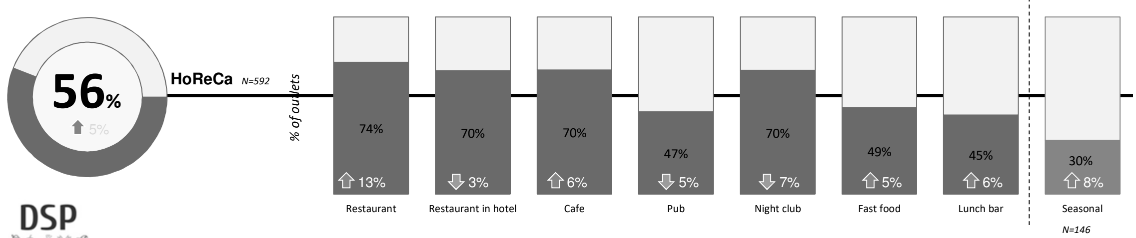
Almost the half of HoReCa outlets have their own **website** – these are mainly hotel restaurants, night clubs/ discos and restaurants. What's more, HoReCa outlets have increased their presence in **social media** – more than the half of them have a social network profile.

Having a website



Having a social network profile



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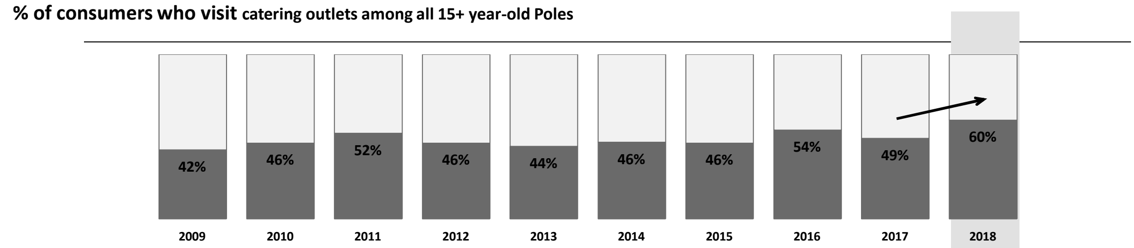
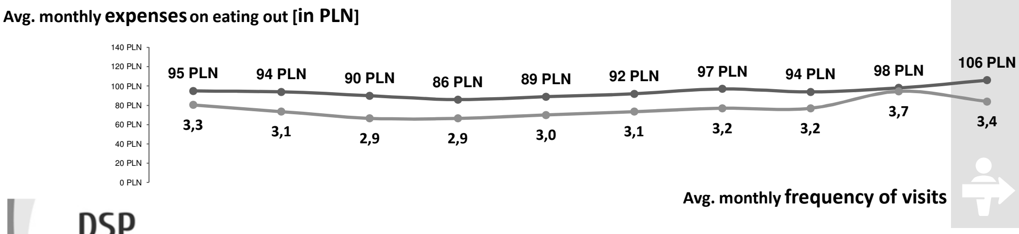
Change vs. last year (shown if 2% or more)

Percentage of Poles visiting catering outlets has increased vs. last year, reaching the highest level in ten years. Also **average monthly expenses on eating out** have increased up to 106 PLN. The average monthly frequency dropped slightly to 3.4 visits per month.





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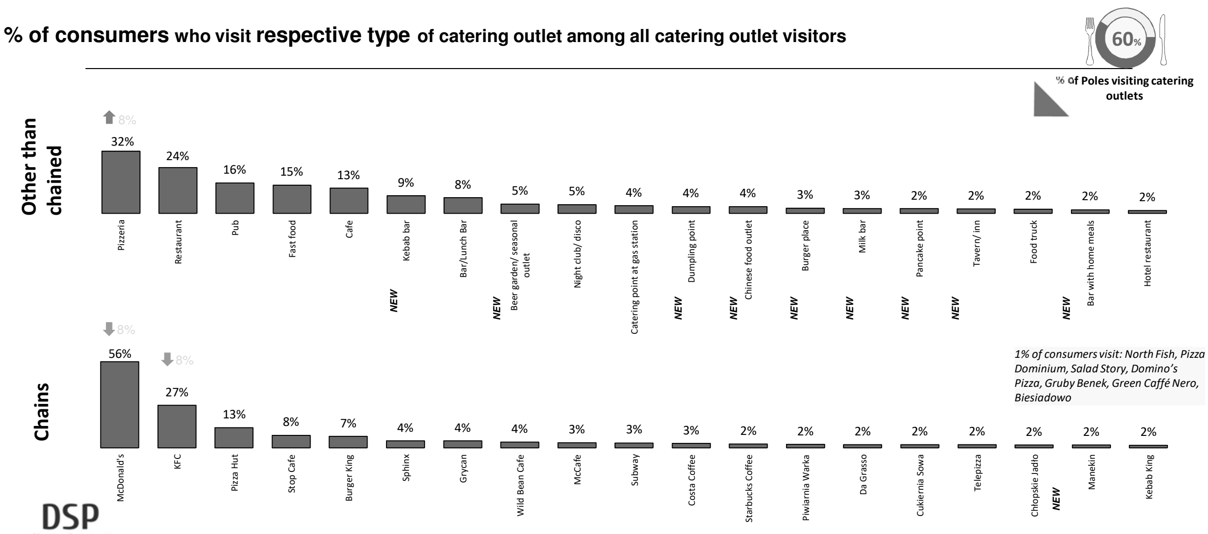
Source: GfK Omnibus 2018

Pizzerias and restaurants are the most popular type of outlets. Among them, the top positions belong to McDonald's and KFC (despite the decline vs. year 2017).



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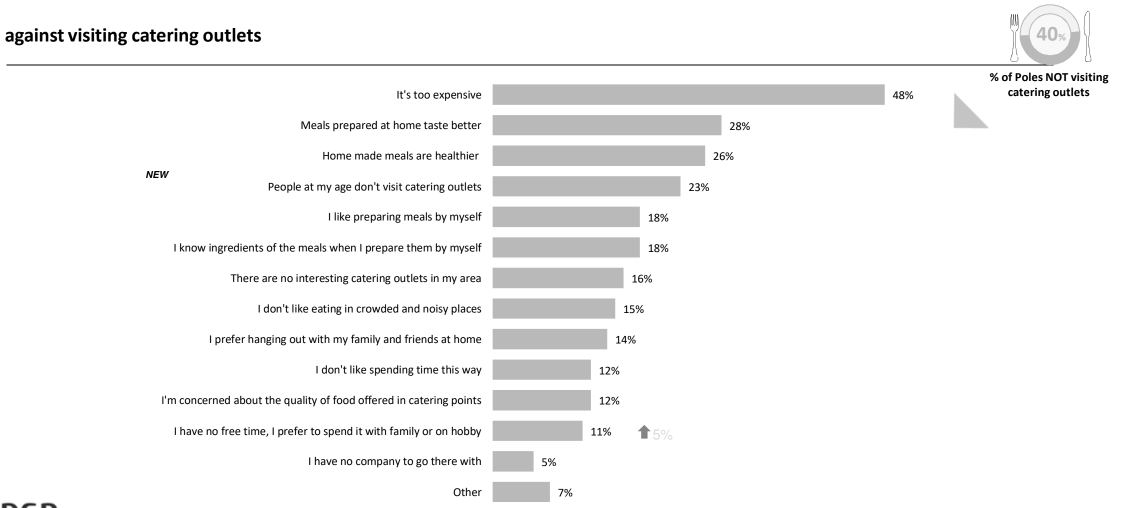
Change vs. last year (shown if 5% or more)

Source: GfK Omnibus 2018

The most often indicated barrier against visiting catering outlets is lack of money in household's budget on such activities. Every fourth consumer thinks that home-made meals are healthier and tastier.

Barriers against visiting catering outlets



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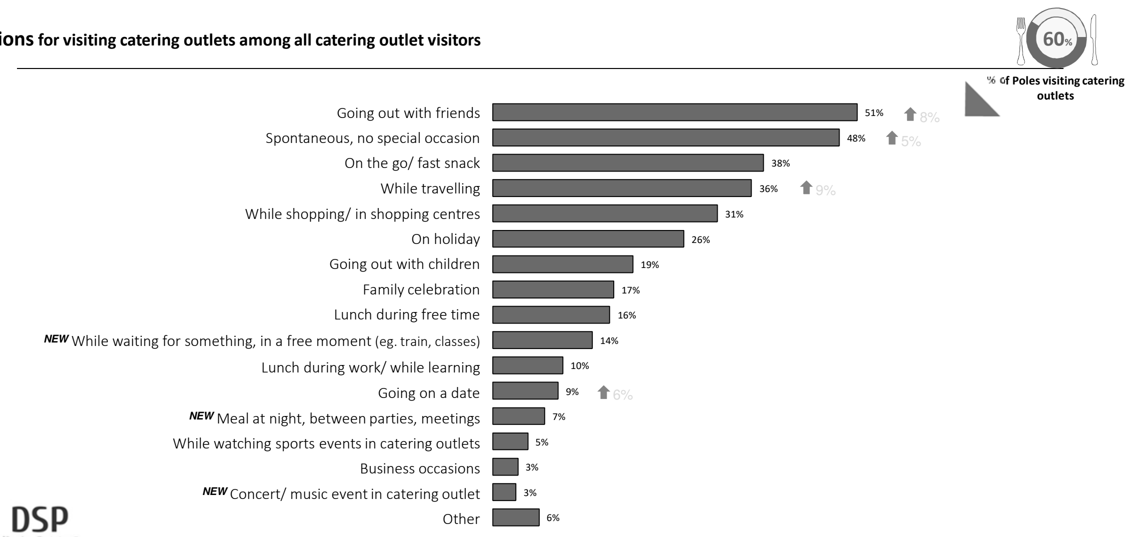
Change vs. last year (shown if 5% or more)

Source: GfK Omnibus 2018

Going out with friends and spontaneous visits are still the most common occasions for visiting catering outlets and their popularity has even increased vs. last year. The next fairly popular occasions are visiting outlets 'on the go'/ to grab some snack or while travelling.

Occasions for visiting catering outlets among all catering outlet visitors



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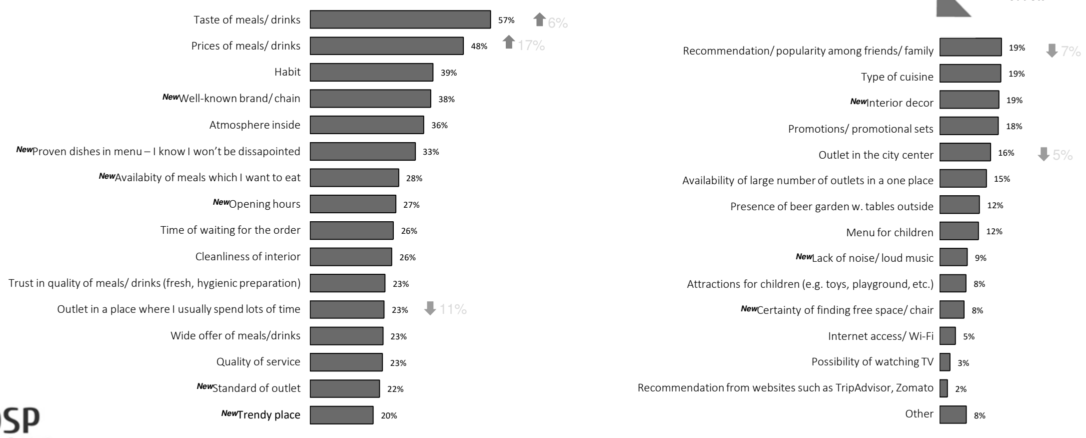
Change vs. last year (shown if 5% or more)

Source: GfK Omnibus 2018

Taste of meals/ drinks is clearly the top criterion for choice of a catering outlet. Second position holds prices of meals/ dishes (significant increase in importance vs. last year) and next in line are: habit, brand's/ chain's recognizability and the atmosphere in the outlet.

Criteria which determine the choice of catering outlets among all catering outlet visitors

60%
% of Poles visiting catering outlets



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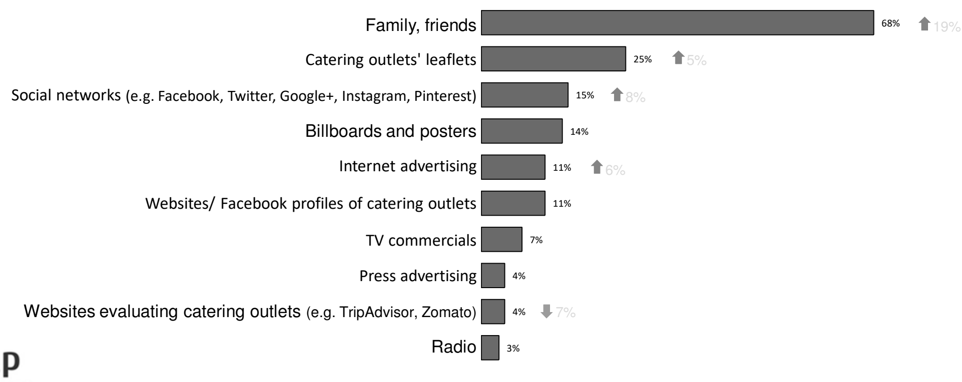
Change vs. last year (shown if 5% or more)

Source: GfK Omnibus 2018

Recommendations of family members or friends are still the key source of information about catering outlets. What's more this source has visibly gained on importance vs. last year.

Sources of information about catering outlets among all catering outlet visitors

60%
% of Poles visiting catering outlets



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Change vs. last year (shown if 5% or more)

Source: GfK Omnibus 2018

Cambiamenti indotti dalla pandemia

- Distanziamento sociale, comportamenti prudenziali
- Aumento propensione acquisto cibo da asporto
- Aumento propensione acquisti via internet (anche per il food)
- Maggiore attenzione al rapporto qualità-prezzo

Prospettive e opportunità post pandemia

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Aspetti positivi

- capacità di recupero economia polacca, in un contesto pre crisi in forte e costante crescita e con sempre maggiore capacità di spesa dei consumatori e sempre maggiore attenzione alla qualità
- buon appeal del made in Italy e della cucina italiana (considerata adatta alle mutate esigenze)
- buon feeling storicamente tra Italia e Polonia
- possibili provvedimenti governo italiano per promuovere il made in Italy all'estero

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…ma attenzione a:

- mercato ancora piuttosto price-sensitive (anche se meno che in passato)
- presenza di numerosi produttori locali, con qualità inferiore a quella italiana ma prezzi molto competitivi; importante distinguersi (per qualità, originalità, altre caratteristiche del prodotto, ecc.)
- presenza della maggior parte dei players internazionali (la maggior parte dei quali ben radicati da tempo), favoriti da assenza barriere all'importazione
- cliente polacco attento a qualità servizio, tempestività, procedure, affidabilità ecc.

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Grazie per l'attenzione!

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