



## ROLE OF LARGE-FORMAT SHOPS IN THE FOOD RETAIL MARKET IN POLAND DURING THE COVID-19 PANDEMIC

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### Abstract

Crisis events in the past few years, including the COVID-19 pandemic, have in many cases laid bare insufficient resilience to changes in demand among businesses operating in Poland, particularly those in the service sector. Many have had to modify their way of distributing goods and to adjust to the new circumstances. As for the food retail sector in Poland, despite numerous restrictions and difficulties that consumers faced when visiting grocery shops, fluctuations in levels of food sales were relatively small. Large-format shops proved relatively adaptable, as they had already been using various distribution channels before the pandemic, and to a large extent this experience granted them quite a smooth passage through the pandemic. An important characteristic of supermarkets and hypermarkets is that their owners tend to have a large capital at their disposal, which additionally strengthens the resilience of such retail outlets to periodic crises, in contrast to smaller shops, whose financial cushion is much smaller, rendering them far more exposed to negative consequences of crises.

## ROLA SKLEPÓW WIELKOPOWIERZCHNIOWYCH W RYNKU HANDLU SPOŻYWCZEGO W POLSCE W CZASIE PANDEMII COVID-19

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### Abstrakt

Zdarzenia kryzysowe ostatnich lat, w tym pandemia COVID-19, obnażyły niedostateczną odporność na zmiany popytu wielu podmiotów gospodarczych funkcjonujących w Polsce, w tym w największej mierze z branży usługowej. Wiele z nich musiało przeprofilować swój sposób dystrybucji towarów i dostosować go do nowych okoliczności. W przypadku handlu spożywczego w Polsce, mimo wielu obostrzeń i utrudnień z korzystania z placówek oferujących towary tego typu, nie zauważono jednak dużych wahań sprzedaży. Stosunkowo dużą elastycznością wykazały się sklepy wielkopowierzchniowe, które w wielu przypadkach jeszcze przed wystąpieniem pandemii korzystały z różnorodnych kanałów dystrybucji swoich towarów, co w dużej mierze pozwoliło im na łagodne przetrwanie okresu pandemii. W przypadku tego typu placówek istotny jest fakt dysponowania dużym kapitałem przez jego właścicieli, co dodatkowo wzmacnia odporność na czasowe sytuacje kryzysowe, w odróżnieniu od mniejszych placówek, których poduszka finansowa jest dużo mniejsza, co naraża je w dużo większym stopniu na negatywne skutki tego typu zdarzeń.

## Introduction

Sale should be understood as a set of organisational, technical, legal and financial activities involved in the transfer of goods or services after they have been paid for. Sale can also be defined as a process of persuading someone to buy certain products or services. Sales planning is one of the most important responsibilities of any sales department in a company. Identification of the basic goals of a given company's unit for a set period of time is a task included in the sales forecasts and targets. How these goals are to be achieved is specified in a sales plan. The sales plan defines sale goals and communicates them to the company's employees, in addition to which it formulates the method of cooperation with subordinate sales personnel (Chęć *et al.*, 2021, p. 20).

Traditional forms of selling are based on face-to-face contact between a buyer and a seller. The contact with goods being sold is mediated by the seller. Within this form, it is worth distinguishing the type of sales with well-developed customer service, where the contact with the client is closer. The person who sells goods identifies the buyer's needs, presents available products, suggests the choice, accepts and finalises the order. Another traditional form envisages reduced

customer services and is employed in outlets where contact between the seller and buyer is not essential. Such form of sales can be seen in newsagents, grocery shops, and other small retail outlets. In this form, the seller hands over the ordered goods and collects the payment.

More modern forms of sales limit or sometimes completely eliminate the role of a seller, and therefore the contact between the customer and the goods becomes direct. Quick customer service and close contact with the goods are most important in this form of sales. This enables earning higher profits from the enterprise owing to a more rapid pace of sales and closer contact with products, the latter being conducive to impulse buying. The implementation of such forms of sales necessitated some changes in the design of shops, as now customers move around the whole sales floor and look at goods. An example is self-service sales, where the buyer picks products themselves, read out the total payment due and then makes the payment. In this form, too, the customer has full access to goods, which are logically laid out on shelves along the shop aisles, which accelerates shopping. The buyer decides how much time they will spend shopping, and make choices in the shop while avoiding any awkward situations. Such form of sales is suited for simple and relatively inexpensive products, which do not demand any assistance of the shop staff. Another form of selling products is preselection sales, where goods are laid out in such a way that customers can easily and independently make their buying choices. They can freely compare any product with others, can try on or look at products for example, and the contact with the seller occurs only at the very end of the buying process. Such strategies are most often employed for selling clothes or shoes. Selling from vending machines is characterised by the lack of any dependence on the shop's opening hours. This form of sales is gaining popularity in Poland. Buying from vending machines is convenient but limited in terms of the range of products (Bał-Filipek, 2020, p. 31-33). Nowadays, the sales form with the highest potential is selling through electronic channels. Some entrepreneurs decide to launch online selling as an additional channel to the conventional purchase of products while others clearly focus on conducting their business in the virtual world. There are numerous benefits from selling online. For example, it is possible to present the company's offer clearly and in great detail. The customer is constantly updated on the follow-up of their orders, which makes shopping comfortable and convenient. An unquestionable advantage of online selling is that it creates a chance to attract customers from distant areas. A disadvantage is the limited contact with the customer (Brdulak 2017, p. 102, 103). However, it is worth noting that despite the constant development of state-of-art forms of sales, the traditional method continues to play a key role in the lives of Polish customers, especially when it comes to buying everyday goods.

## Large-Format Shops in Poland and Their Characteristics

In 2020, the gross added value generated by businesses providing services constituted 65.7% of the gross added value of the entire Polish economy. The dominant activity (according to added value) among all service providers was commerce (26.4%). It is comprised in section G and covers: wholesale and retail trade; repair of motor vehicles, including motorcycles.

In 2020, companies included in section G generated the revenue from sales in current prices of PLN 1,964.8 billion. The highest sales revenues in current prices in section G were obtained by wholesale and retail commerce enterprises (58.3% and 30.3%, respectively). Moreover, among all service providing companies, the ones engaged in trade were characterised by high employment. In 2020, the average employment in trade companies was 1,707.3 thousand people, which meant 2.1% fewer than in the previous year.

The value of wholesale sales in 2020 in Poland was 1,152,972.8 million Polish zloty (Tab. 1). Over years, businesses conducting wholesale sales have increased their sales value. However, it should be underlined that the value of wholesale sales in most Polish provinces decreased in year 2020 compared to 2019. The highest contribution to the overall wholesale sales was made by the sales of non-food products (84.4%). The sales of food and non-alcoholic beverages made up 13.1% and alcohols – 2.5%. A decrease in wholesale sales was observed in the group of foods and non-alcoholic beverages (by 1%) and in the group of non-food goods (by 0.4%). The only increase in the value of wholesale sales was noted for alcoholic beverages (by 3.8%) (Adach-Stankiewicz *et al.*, 2021).

Table 1

Dynamics of wholesale sales in total in years 2015-2020 (in million PLN)

Year	2015	2016	2017	2018	2019	2020
Poland	822,281.7	871,895.6	984,172.9	1,091,290.0	1,163,184.3	1,152,972.8
Min.	6,426.2	7,772.1	8,255.0	9,172.8	9,382.0	8,456.8
Max.	301,986.1	331,608.1	366,410.0	410,214.1	432,212.3	423,646.7

Source: the author, based on data from Local Data Bank.

In 2020, the retail sales value in current prices generated by commerce and non-commerce companies in Poland reached 890,637.10 million Polish zloty. In comparison with the previous year, a decrease by nearly 3% was noted (Tab. 2), of which the sales of non-food goods had the highest value in the total retail sales (PLN 569.4 billion).

In 2020, the highest contribution to the achieved sales was made by the business entities employing at least 50 people (54.2%); 27.6% share was generated by entities with up to 9 employees, and 18.2% – by businesses hiring from 10

Table 2

Dynamics of retail sales in total in years 2015-2020 (in million PLN)

Year	2015	2016	2017	2018	2019	2020
Poland	721,998.5	754,964.4	810,233.6	862,066.3	917,671.3	890,637.1
Min. (opolskie)	8,727.6	8,549.5	9,931.5	10,306.1	10,324.0	10,770.3
Max. (mazowieckie)	207,623.4	216,326.9	232,560.7	244,669.0	265,798.3	244,393.6

Source: the author, based on data from Local Data Bank.

to 49 people. Over the years submitted to our analysis, retail sales increased. However, they decreased in 2020 due to the COVID-19 pandemic. A considerable impact was made by periodic restrictions imposed on retail outlets. In 2020, there was an increase in sales of foods and non-alcoholic beverages (by 6.5%), alcoholic beverages and tobacco products (by 9.7%), while the sales of non-food goods decreased (by 5.5%). The sales of basic necessities, such as foods and beverages, increased. The highest contribution to the country's total retail sales was made by the mazowieckie province (27.4%), while the smallest one was attributed to the opolskie province 1.2% (Adach-Stankiewicz *et al.*, 2021). The highest value of sales per capita over the analysed period of time was noted in the mazowieckie and wielkopolskie provinces, while the lowest one occurred in the warmińsko-mazurskie province (Fig. 1).

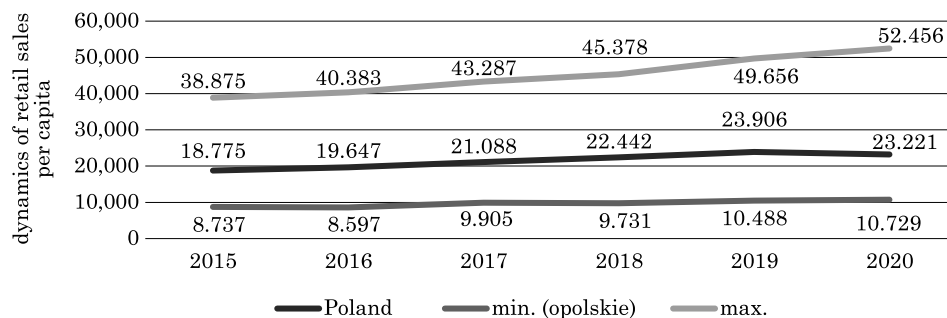


Fig. 1. Dynamics of retail sales in Poland in years 2015-2020 (in PLN)

Source: the author, based on data from Local Data Bank.

In 2020, there were 319,936 shops in Poland (Tab. 3). Compared to the previous year, that meant a decrease in the number of shops by 4% (13,404). Also, there was a decrease in the total sales floor area by 0.1%, as it equalled around 37,185 thousand m<sup>2</sup> in 2020. The biggest decline in sales floor area was noted among shops size between 100 and 299 m<sup>2</sup> (7.2%), while the smallest one was among shops with are area of up to 99 m<sup>2</sup> (1.7%). The shops which possessed 400 to 999 m<sup>2</sup> sales floor area grew larger by 4.2%. In 2019-2020, the number of shops decreased from 333,340 to 319,936 (Adach-Stankiewicz *et al.*, 2021).

Table 3

## Dynamics of the number of shops in Poland

Year	2015	2016	2017	2018	2019	2020
Poland	360,750	367,011	355,043	339,880	333,340	319,936
Min. (opolskie)	8,850	8,218	7,871	7,592	8,261	7,266
Max. (mazowieckie)	50,104	58,536	55,643	51,413	47,474	46,597

Source: the author, based on data from Local Data Bank.

In 2020, there were 120 persons per shop on average, while a year before that figure was 115 (Fig. 2).

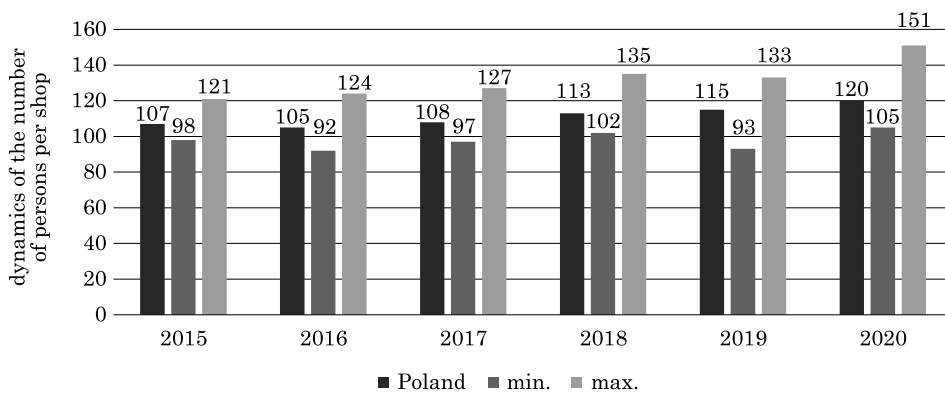


Fig. 2. Dynamics of the number of persons per shop in Poland, in years 2015-2020

Source: the author, based on data from Local Data Bank.

The highest number of customers per shop (151) was noted in 2020 in the podkarpackie province. This is explained by a nearly 2000 decline in the number of shops. In year 2020, compared to the previous year, there was a drop in the number of shops of almost all branches in the country (Fig. 3).

The largest share in the total number of shops operating in year 2020 was composed of those selling other goods (44.6%), food (20.5%) and clothes (10.3%). In 2020, the least numerous were fish shops (0.3%). The highest decrease in the number of shops was observed among shops with other goods (a decline by 6.7 thousand shops). Also, the number of shops with motor vehicles decreased (by 4.1 thousand) and general food shops (fewer by 2 thousand shops). However, an increase was observed in the number of shops classified into four branches. The highest increase was recorded among clothes shops (900 more outlets) and shops with textiles (400 shops). Also, the number of shops with cosmetics and toiletries and shops with furniture and lighting equipment increased slightly (Adach-Stankiewicz *et al.*, 2021).

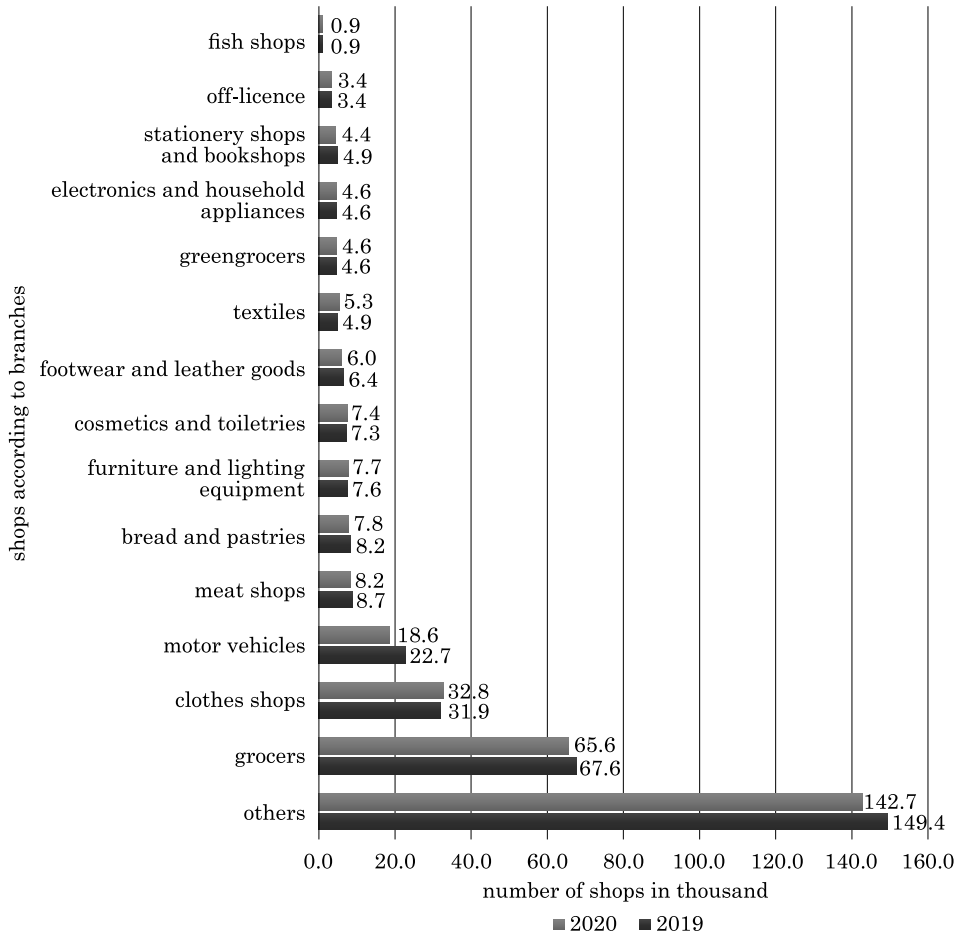


Fig. 3. Structure of shops according to branches in Poland in years 2019 and 2020  
Source: the author, based on data from Statistics Poland (GUS).

## Characteristics of Retail Trade in Large-Format Shops in Poland

In Poland, the food retail trade is dominated by large foreign retail chains, including Biedronka, Lidl, Kaufland, Auchan. Discount shops, hypermarkets and supermarkets compose the majority of the retail market. There are also Polish retail chains in the segment of large-format shops, such as Stokrotka, Polomarket, Dino, Top Market (Tab. 4). However, these companies face strong international competition, which significantly hinder their development (Momot *et al.*, 2016).

Table 4

## Structure of retail chains in food retail trade in Poland

Form of sale	Segment	Biggest chains
Modern	hypermarkets	Auchan, Kaufland, Carrefour, E.Leclerc
	discount shops	Biedronka, Lidl, Aldi, Netto, Mere
	large supermarkets	Auchan, Intermache, Carrefour market, E.Leclerc
	proximity supermarkets	Spar, Dino, Stokrotka, Mila, Polomarket, Freshmarket
	convenience shops (including hard franchising)	Żabka, Delikatesy-Centrum, Express, Spar Express, Spar, Topaz
	soft franchising	Lewiatan, Groszek, Top Market, ABC, Euro Sklep, Livio
Traditional	traditional retail trade	Spółem

Source: the author, based on the report *Polski Rynek Handlu Spożywczego w 2010-2020*.

Hypermarkets are shops with the floor area over 2,500 m<sup>2</sup> which offer both food and non-food products. The range of products is between 30,000 to 50,000, of which more than half are food products. Hypermarkets are most often situated in suburbs of large cities. Supermarkets are also large shops. Their sales floor area varies from 500 to 2,500 m<sup>2</sup>. They are also shops with a mixed range of products, which offer between 5,000 to 10,000 products. Food products make up at least 70% of the shop's offer. Large supermarkets are often situated in housing estates of large and medium-size towns. Discount shops can be found in similar locations. Discount shops are the type of shops with sales floor area similar to that of supermarkets, but usually offering up to 2,000 products, with the prevalent share of food products, up to 95% of all goods. A large share of products are sold as own brands, that is products manufactured specifically for a given retailer, and these can make up from around 60% of all products in Biedronka to 90% in other chains (Pasternak & Musiał, 2023). A distinguishing feature of discount shops are relatively low prices, which can be kept so low owing to low retail margin rates, lower costs of customer service, transport and storage of goods, as well as the use of special offers. Discount shops usually display modest interior furnishings, and the small staff are mostly busy operating checkouts and replenishing goods on the shelves in the shop (Twardzik, 2017, p. 12). Examples of discount shops in Poland are the chains Biedronka, Lidl, Netto and Aldi, of which Biedronka has the most shops, over 3100 outlets all over Poland. In practice, however, discount shops increasingly often widen their range of products and pay more attention to overall quality. As a result, although the prices are still quite low, the difference between discount and other shops is to some extent blurred (Kondej, 2017, p. 19, 20).



Biedronka, Lidl, Netto and Aldi, that is the four biggest chains of retail shops in Poland, secured a nearly 40% share of the retail trade market in Poland in the third quarter of 2021. Supermarkets, hypermarkets and discount shops (that is modern retail outlets) reached over 60% (KRWL, 2021). The huge success of discount shops stems from their adaptability to buyers' needs and expectations. Discount shops satisfy the demand of many consumers, who consider low prices as an important decision stimulus. Moreover, discount shops are often situated in residential areas, which makes them convenient for doing everyday shopping. The improved visual layout of discount shops and enrichment of their offer has enabled them to attract more demanding customers. These factors have contributed to the current popularity of discount shops, whose number is constantly growing (Kondej, 2017, s. 154). In 2015, there were 3,600 discount shops in Poland, compared to around 2,200 in year 2010. Back in year 2000, there were only 700 such shops in whole Poland, but 2 years later that number increased to over 900. In 2004, the number of discount shops rose to 1,150, and then to 1,540 in 2006 and 1,690 in 2008. Discount and large-format shops as well as multi-functional shopping centres are the most rapidly developing forms of contemporary trade; in contrast, the growth of supermarket and hypermarket chains has slowed down since 2010. Discount shop chains appear in almost all Polish towns, and are now spreading to the countryside (Twardzik, 2017, p. 11, 13).

In many small Polish towns, Biedronka is the only chain of discount shops. Lidl most often locates its outlets in western Poland and in Masovia (central Poland). Another chain called Netto also prefers western and central Poland. Of these three chains, Aldi has the smallest number of shops, and these tend to be situated in larger towns (Twardzik, 2017, p. 16).

The other segments include shops with the sales floor area of up to 500 m<sup>2</sup>. They are typically situated in residential areas of large, medium-size and small towns. The floor area of proximity supermarkets varies from 200 to 500 m<sup>2</sup>. These shops operate under hard franchising schemes or as independent shops. They offer from 4,000 to 8,000 products, of which 90% are food products. Convenience shops are run in the same form, but they include self-service. Their floor area is small, just around 60 m<sup>2</sup>. They offer basic food products, alcohols, tobacco and newspapers. The convenience sector in Poland encompasses the chain called Żabka, which has the largest number of shops in Poland (7,325 in June 2021). Shops run as soft franchises are typically self-service ones. The sales floor area is usually between 50 and 300 m<sup>2</sup>. Traditional retail forms, that is single grocery shops, not organised into chains, are still prevalent in the Polish countryside (*Polski rynek handlu spożywczego...*, 2016; *Sektor spożywczy...*, 2022).

In 2018, hypermarkets represented 1% of the retail market structure in Poland. Supermarkets and discount shops made up 5% of the market each. The largest share of the above market was composed of traditional retail commerce (89%) (Tab. 5).

Table 5

Dynamics of the number of large retailers in Poland in 2015-2018

Type of shops	2015	2016	2017	2018
Large-format shops	7,172	7,245	7,362	7,629
Hypermarkets	342	344	346	341
Supermarkets	3,133	3,125	3,167	3,281
Discount shops	3,697	3,776	3,849	4,007

Source: the author, based on the *Raport. Perspektywy poprawy konkurencyjności...* (2020).

In 2018, there were 341 hypermarkets operating in Poland, which meant a 1.4% decline relative to the previous year. In that year, the most numerous type of shops in Poland were discount outlets (4,007). However, it is worth noting that the formal differences distinguishing these forms of retail sales are increasingly less distinct. The strong competition between retailers forces some hypermarket owners to lower prices while owners of discount shops feel obliged to improve the quality of customer service (*Raport. Perspektywy poprawy konkurencyjności...*, 2020; *Nowe trendy w segmencie niezależnych...*, 2020).

According to the 2021 Listonic report, Lidl was the most popular chain of grocery shops in the category of food shops and discount shops (*Ranking popularności sieci handlowych w Polsce*, 2021). In that year, Lidl reached over 27% share among all Listonic lists of shops. Despite a decrease of 7.78 percent points compared to the previous year, this German chain remained the leader for the third time in a row. This was made possible owing to the broad support to the prosperity of outlets, for example by allocating a large budget to advertising, enrichment of the assortment of products, and improvement of the loyalty application. The second place in the Listonic ranking was secured by the chain of discount shops Biedronka. The share of this chain equalled 25.31% and in comparison to the previous year it meant a decrease by 4.57 percent points. At that time, this Portuguese chain of discount shops introduced self-service checkouts as a convenience for the staff and customers. In addition, the customer loyalty campaign called “Gang Swojaków” encouraged customers to buy more. The third place on the podium was won by the French hypermarket chain Auchan, which relative to the year before achieved an increase by 0.48 percent points and gained a share of 9.88%. In year 2021, Auchan celebrated its 25<sup>th</sup> anniversary of operation on the Polish market.

In the category of proximity and convenience shops in Poland, the chain Dino enjoyed the largest share (3.15% among all Listonic shop lists). The second place was taken by the convenience shop Żabka, with its share of 2.85%, while the third place was secured by Stokrotka, with a 1.69% share.

In the past few years, the food sector in Poland has experienced stable development. This is confirmed by the steady increase in food retail sales.

The worrying economic situation that occurred in 2020 has not hindered the growth of this sector. It is expected that in the near future the retail food sales in traditional shops will increase by about 2.5% annually. For a number of reasons, it is certain that online food shopping will not dominate over traditional sales. Customers definitely prefer to go to traditional shops, if only because they find it easier to choose from many products – all goods are clearly displayed in one location, and these products are tangible. When it comes to small products, especially food ones, e-commerce is practically unable to compete with traditional sales. It can only act as a supplementary form of shopping. The choice and purchase of the right goods in an online shop would be both inconvenient and time-consuming. For the time being, potential benefits to be gained from making purchases from home are outweighed by the disadvantages of this form of sales. This will forever be compounded by the fear of receiving the goods that may fail to meet one's expectations. When buying food products in a conventional shop, consumers can see how fresh the products are, check their best-before dates, etc., which can be more difficult if not outright impossible when buying online. The multitude of traditional retail outlets and the variety of offered goods mean that consumers prefer to buy the brands that they are used to and to do shopping in their favourite shops.

The growth of retail sales in Poland entails an increasing availability of various sales outlets in convenient locations, close to one's place of residence. The consumer is less likely to struggle with the issue of a distance to the nearest shop but is more likely to face the challenge of choosing the shop to do shopping because of a large number of shops situated at a similar distance from where they live. The COVID-19 pandemic demonstrated that even a threat of potential infection did not deter consumers from visiting their favourite shop. At that time, the problem for the buyer was the restrictions imposed on retail outlets by the authorities rather than the fear of the pandemic. On the other hand, large-format shops which offer a broad assortment of products at one place attracts many buyers, which enables these shops to offer goods at affordable prices, which in turn is still a top priority for most consumers in Poland. This stimulates an avalanche growth of large-format retail shop chains in Poland. Such business enterprises, because of the huge turnover they generate in comparison to small local shops, are able to put up with a decrease in revenues over a longer time in an event of a crisis.

However, this does not mean that online shops which offer the same type of products cannot compete with traditional shops. In recent years, some transformations have been occurring in Poland and elsewhere in the world in how the sphere of consumption is shaped. The contemporary consumer differs significantly from consumers even a few or a dozen years ago. New consumption trends have emerged. An example is smart shopping. Consumers search for the best possible offer available on the market, which will meet their demand to the highest degree, using for this purpose a variety of sources (both

traditional and e-commerce). Traditional shops are therefore forced to compete in prices with online sellers and/or to expand the range of services they offer in order to encourage consumers to do shopping in the traditional form (*Raport. Perspektywy poprawy konkurencyjności...*, 2020; *Sektor spożywczy...*, 2022; Zalega & Rostek, 2015). In the long run, this will stimulate some evolution of traditional ways of distributing goods, and will force entrepreneurs to modify and adjust their ways of running business to the changing environment.

## Summary

The growing prosperity of the Polish society observed in recent years has not only stimulated a rise in the level of spending but also led to some changes in consumer behaviour. Polish households are interested in buying a large and diverse assortment of products. Small shops, which are unable to compete with large-format ones neither in terms of the variety and richness of their sales offer not in prices, are steadily losing popularity. The price of a product is still one of the key determinants of Polish consumer choices. Poles want to buy cheap but also, and possibly foremost, they want to make purchases at 'bargain' or 'promotional' prices, which gives them the impression that they manage their budgets efficiently and endows them with the sense of greater satisfaction from their purchases. The role of large-format shops gains in importance during crisis situations, like the recent COVID-19 pandemic. Going to such shops allows one to reduce the number of visits to shops and to buy a variety of products in large quantities. Paradoxically, such events are not only an obstacle to the expansion on the market but also lead to the marginalisation of small shops. This development is further strengthened by the fact that large-format shops are more resilient to fluctuations in demand owing to much greater financial resources and therefore a bigger 'financial cushion', which ensures the survival in the face of unfavourable fluctuations in the environment. With their large resources, the large-format retail shop model creates better opportunities to supplement their distribution channels by launching other channels, e.g. online ones, which in the event of a pandemic threat can effectively cushion any decline in revenues from traditional sales. It can therefore be expected that in near future such retail chains will gain in importance in overall sales of food products, both in Poland and in all developed market economies.

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