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DEVELOPMENT OF COMMERCE IN POLAND AS THE OUTCOME OF THE EUROPEAN INTEGRATION

Abstract. The article raises the role of processes of globalization in performance and development of commerce in Poland. The circumstances and determinants of globalization of the market as well as the outcomes of the process for the retail commerce sector. In the paper statistical data was quoted as pertaining to development of commerce in Poland in the years 1990–2007. Analysis was done as regarding changes in the number and structure of shops, employment volumes in commercial business and expansion of foreign large format of commercial chains. The analyses are of comparative character, as the statistical data was related to other European countries.

Key words: globalization of commerce, concentration of commerce.

1. GLOBALIZATION OF COMMERCE

Globalization is a process which results in unification of economic structures of individual countries. The process is inevitable as it results from civilization leap in information technology, growth in wealth of societies in highly developed countries, saturation in material goods of their markets, and liberalization of capital flows, both financial and intellectual. Globalization is a complex, multidimensional process, covering all crucial elements of management: strategy, structure, decision taking processes and development of the identity of the company. The idea of global marketing was for the first time emphasized in literature by T. Levitt in 1983, when in his article titled “The Globalization of Markets” he advanced a thesis that populations dwelling in different parts of the world have more in common as compared to differences between those groups. (Ambler T. [1999] p. 144). As the first global companies are regarded those ones which at the beginning of the nineties pursued reorientation of their organizational structures and development strategies towards internationalization of their production, distribution and promotion (Coca Cola, Mc Donald’s, Chrysler, Toyota).

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Globalization results in migration of lifestyles, consumption and values. In well-off societies modern large format shops are enjoying great success, which offer the customers doing their shopping not only in comfortable conditions, but also a variety of dining and entertainment facilities. As a result shopping is becoming a way of spending free time. As for other consumption trends in macro scale we can count focusing on health and quality of life, growing mobility of consumers, differentiation of behaviour patterns and places of consumption, adoption of 'green' attitudes and taking advantage of the latest developments of the information society.

The process of unification of Europe in longer prospects leads to levelling of consumers' income, which in turn results in lifestyles becoming similar. Consequently in each country the segment of consumers representing similar expectations and preferences is growing. As a rule those customers are young people, businessmen travelling all over the world, artists and sportsmen. Irrespectively of what part of the world they live in, they listen to the same kind of music, enjoy the same expensive alcoholic beverages, wear the same designer garments and watches and use the same brands of cellular phones. The pace of adopting by consumers of global patterns of behaviour and ways of satisfying their needs depends to the great extent on the age structure of the consumers. Young people in Poland perceive themselves as the first generation to be free of historical burdens, as a generation of well-educated Europeans, well equipped for living in the free market economy.

Internationalization of commerce has had a long, over one hundred years long tradition. Yet for historic and political reasons was the process accelerated as late as in the nineties of the 20th century. Owners of big and growing in power retail companies faced a dilemma of choice of optimal development strategy. Global retailers, thanks to their reserves and organizational assets, managed to achieve full control over sources of supply of strategic categories of goods. They gained such bargaining position in their relations with suppliers that enabled them to introduce own brands and full control over production process. In turn, in their relations with consumers those companies implemented modern instruments of multi-level communication with consumers within merchandising, and what is more – they were pursuing that not only in view of stimulating the sales, but literally creating needs and purchasing behaviour patterns. Dynamic growth in sales levels was then a natural consequence of modern multi-level communications with customers.

The main evidence for intensification of globalization processes is that the Polish market was entered by international shopping chains, financial corporations, as well as liberalization of the market of foreign currencies and freedom to travel all over the world. The immediate result of the globalization of market is

not only increased number of supranational companies, which pertains mostly to commerce, industry, banking and telecommunication.

The process of commerce globalization was inspired by numerous circumstances, and the most important seem to be: a need for standardization and unification of activities serving for advantages of the scale, the necessity of improvement in availability of goods and the comfort of doing shopping, the growing role of constant appraisal of effectiveness of commercial activity, demand for modern technology of sales and new innovative services. In the light of other classification of determinants of commerce globalization the following should be mentioned:

- market determinants – referring to volume and dynamics of changes in demand,
- political factors – contributing to the climate of openness and economic cooperation in the international scale,
- cost factors – determining advantages of the scale and profitability of supranational investment,
- factors relating to raising of the competitiveness of companies.

The advantage of globalization for trading companies is possibility of overcoming limitations, as imposed by the scope of activity, space and time. Increase of in the volume of international mergers and competitive takeovers of retail companies is a consequence of the strategy based upon entering new attractive markets. Of great meaning is also a fact that customers' behaviour and tastes tend to unify.

The potential of the Polish domestic market (38.2 mln consumers, which can be compared to Bulgaria, Hungary, the Czech Republic, Slovakia, Lithuania, Latvia and Estonia combined) and relatively low entry barriers contributed to the fact that concentration of competition in retail commerce is one of the biggest in Europe, which is demonstrated among others in number of global chains investing their assets in our country. In the countries of 'old Europe' the retail commerce is dominated by native large format chains, whereas in the 'new Europe' by individual foreign investors (Domański T. [2006] p. 30). In the group of the Central European countries Poland is an exception, as almost all major European chains are present here. Out of the 20 biggest chains as few as 5 have not set up their operations in Poland (Edeka and Globus of Germany, Delhaize Group of Belgium and the American Wal-Mart). In other countries the level of penetration of local market is far lower (Hungary and Slovakia 8 chains respectively, Germany and Spain – 10, Italy – 7 chains). The analysis of the number of foreign companies being in the group of 50 biggest worldwide retailers leads to similar conclusion. As for Poland 16 of those companies are present, and in Germany as few as 4, 5 in case of Portugal, 7 in Hungary, 8 in Italy and 11 in the Czech Republic. That data proves openness of the Polish market to foreign investment,

and confirms the assumption that the market is attractive (Mikusińska-Ozdobińska B. [2002] p. 16).

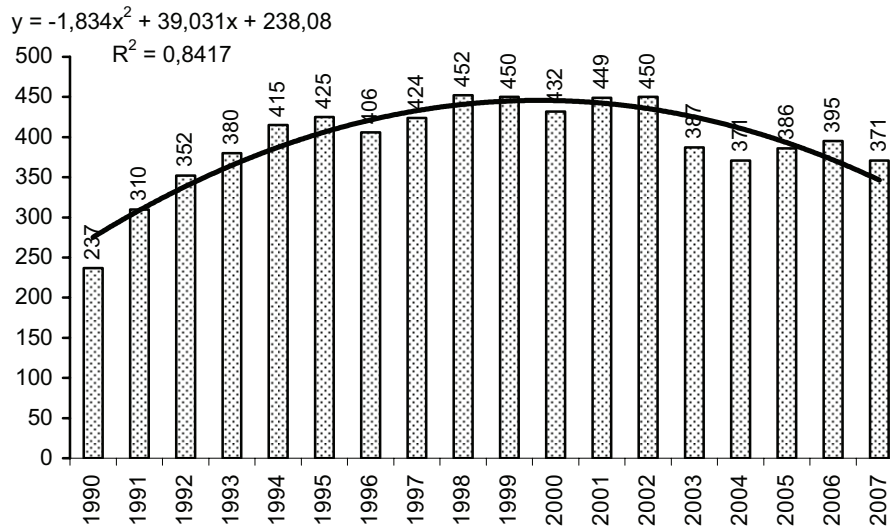
Economic activity going international leads to concentration of commerce, which is effected at the cost of small and middle-sized businesses, which either go bankrupt or are taken over by international chains. The dynamics of concentration processes can be proven by the fact that the total share of 30 biggest retailers having FMCG in their offer, with reference to the European market, in the years 1992–2001 grew from 51.5 to 70% (Sławińska M. [2004], p.21). It can be assumed that within the nearest years the 30 leading retailer companies can win as much as even 90% of the European market. A share in the food products market of 10 biggest retail companies is considerable, mainly the French and German ones, which elevated in the years 1995–2001 from 30 to 41%.

As for the prospects for the future we can expect, among others, fierce and sometimes unethical competition. It will lead to restructuring of commercial chains and evolution of individual types of units as constituting a given chain. It can be presumed that the life cycle of main organizational forms of retail commerce will undergo further reduction. The pace of commerce in Poland going international will undoubtedly get slower. Even nowadays Poland is counted among countries of the highest level of saturation with the investors in the area of FMCG. The next stage of internationalization of the domestic market will consist in investors entering the Polish market, engaging not only in chains of supermarkets and discount stores, but rather in delicatessens and specialist shops.

It is undoubtedly that in the future the globalization process will pose a challenge for independent commercial business. The owners' and managers' response to those transformations should be creating and implementing defensive or aggressive competition campaigns – the ones that would be optimal in the changing conditions to follow.

2. STRUCTURAL CHANGES OF THE COMMERCE IN POLAND

In the next part of the paper the Author concentrates on structural changes as were pursued in the Polish commerce in the years 1990–2007. In the Graph No. 1 the data presents the number of retail outlets in Poland and the function reflecting the changes. The Graph No. 2 presents data on the surface area of all the shops per 1000 inhabitants, as well as the sales surface area of average retail outlet, which in the years 1995–2007 grew from 46.5 to 80.0 square metres, which gives a figure of as much as 72%.

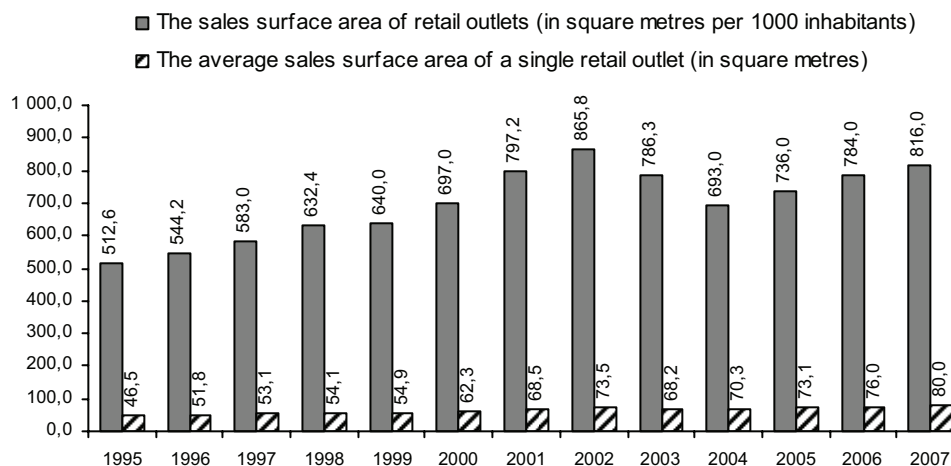


Graph No. 1 The total number of retail outlets in Poland in the years 1990–2007 in '000.

Source: Own study on the basis of Central Statistical Office of Poland source data.

In the group of retail shops the biggest drop in their number was noted for small foodstuff shops. In the five years between 2003–2007 the number of traditional foodstuff shops decreased by 5.9%, but the drop affected mainly the smallest shops of the sales surface area up to 40 square metres (11.4% drop). In the period in question the number of hypermarkets grew from 202 to 329, i.e. by 62.9%, supermarkets by 58.3%, petrol stations by 30.5%, chemist's by 40.0%. The data proves dynamics of concentration processes in Polish retail business and businessmen looking for constantly more effective formats of commercial activity.

In the years 2005–2008 the surface area of shops remained on the level of 28–29 million square metres (which compared to 14.4 million in 1989 illustrates unprecedented development of commerce). Yet another fact speaks for saturation of the sales surface area and new challenges resulting from expansion of e-commerce, namely in 2007 the total surface area in Poland shrank, as compared to 2006, by 2%, which stands for 571.7 thousand square metres. The change pertains to shops of domestic ownership (decrease by 3.5%), whereas in the analysed year the surface area of shops of foreign ownership increased by as much as 24.0%. The Graph No. 2 presents changes in the sales surface area of shops, which illustrates development of retail commerce in Poland.



Graph No. 2. Changes in the sales surface area of retail outlets

Source: Own study on the basis of *Rynek Wewnętrzny (1995–2002)*, the Central Statistical Office of Poland, Warsaw, and *Domestic commerce in Poland in 2007*, academic editing U. Klosiewicz-Gorecka, Institute for Market, Consumption and Business Cycles Research, Warsaw 2008, p. 86.

The dynamics of structural changes happening in retail commerce is considerable. As appraising the structure of retail network in Poland it should be noted that having the rate of the number of shops per 1000 inhabitants as the biggest in Europe, the urban development rate is one of the lowest ones – as expressed in the sales surface area per 1000 inhabitants. Data on the total number of food-stuff, chemist's shops and department stores in Poland as compared to other European countries, as well as the number of inhabitants per one shop was presented in the Graphs No. 3 and 4.

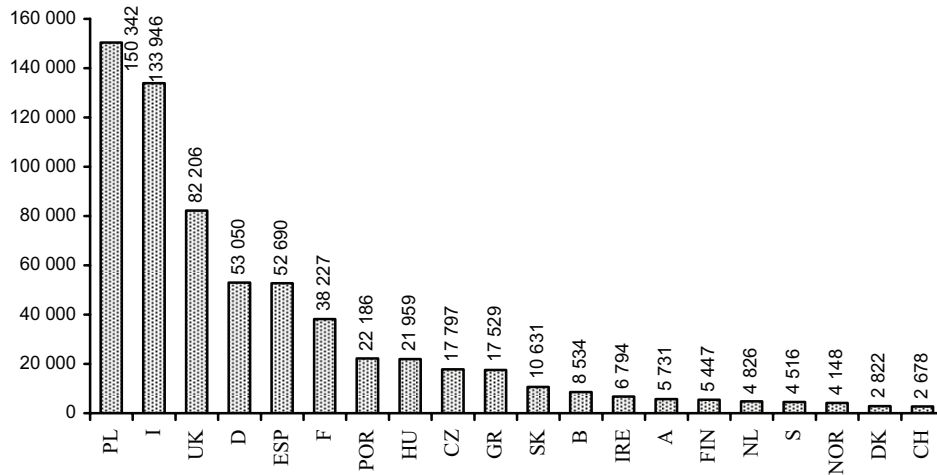
According to the level of development of retail commerce, the countries of Western Europe can be divided into four groups:

1) Scandinavian countries (Norway, Sweden and Finland) and Switzerland, distinguished by a high rate of concentration. In those countries 90% of consumers are serviced by five dominant retail companies. Such a high level of consolidation of commerce is caused undoubtedly by special dispersion of consumers, as well as much lower number of the latter as compared to southern European countries,

2) Great Britain and Germany, where the highest rate of integration is noted, which enables, among others, implementation of the most modern information technology and merchandising strategies.

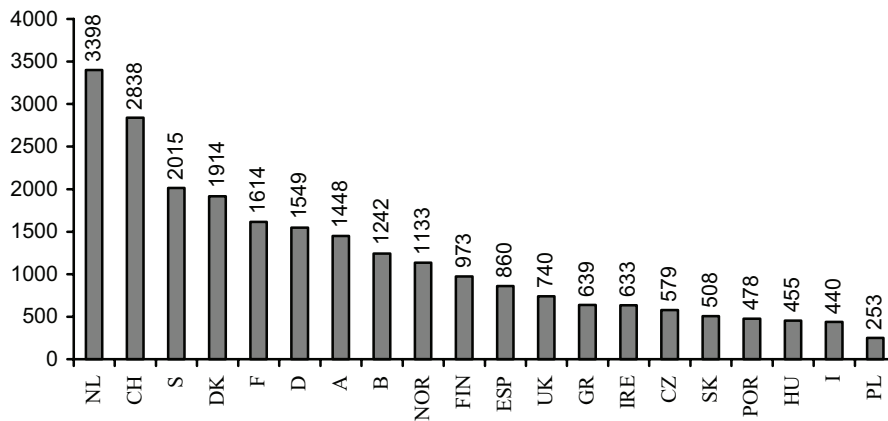
3) France, Holland, Belgium, Denmark and Spain, where a drop in the number of shops is noted, with subsequent increase of their surface area, raised standards of servicing, and openness to processes of globalization,

4) Italy, Greece, Portugal, where traditional independent commerce is pre-dominant, poorly equipped one, the transformation of which is inspired by expansion of foreign chains (mainly French ones) and where lobbying for protection of domestic retailers is very strong.



Graph No. 3. The number of shops (foodstuff, chemist's and department stores) in Poland and certain European countries in 2006

Source: Own study on the basis of the Strategic report Distribution of FMCG in Poland 2008, GfK Polonia.



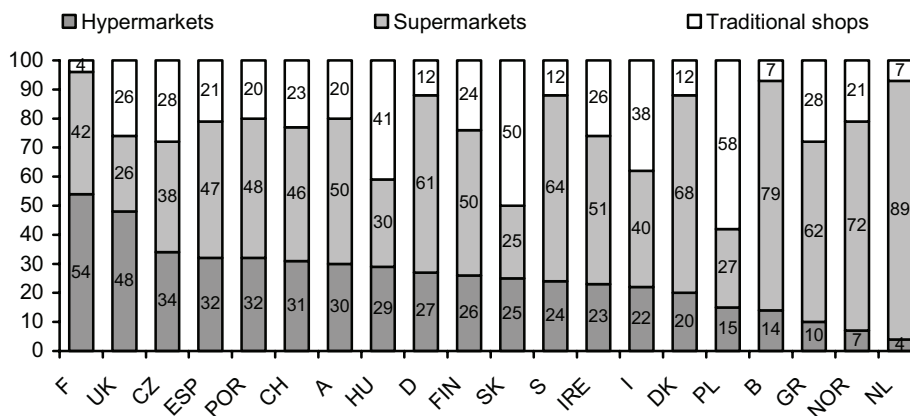
Graph No. 4 The number of inhabitants per 1 shop in Poland and in certain European countries

Source: Own study on the basis of the data presented by GfK Polonia, *the Strategic report, Distribution of FMCG in Poland 2008*, and *the Statistical Yearbook by the Central Statistical Office of Poland, 2008*.

The Graph No. 5 presents share of hypermarkets, supermarkets and traditional small corner shops in the total turnover of retail business.

On the background of the analysis of development of commerce in Western Europe we can distinguish:

- the stage of traditional development (at present Greece, Portugal are in the stage),
- the stage of semi-advanced development (Spain, Italy),
- the stage of advanced development (Belgium, Holland, Denmark, France),
- the stage of high development (Germany, Great Britain). (Kłosiewicz-Górecka U., Strużycki M. [1997], p. 2).



Graph No. 5 Share of different types of shops in distribution channels of goods in 2006 (in%)

Source: Own study on the basis of the GfK Polonia, *the Strategic report Distribution of FMCG in Poland 2008*.

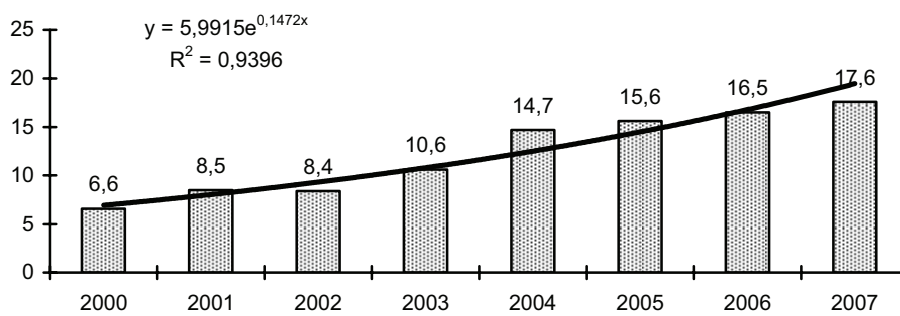
In the highly developed countries of Western Europe the processes of integration and concentration are pursued on the ongoing basis in commerce, since from one side they are a result of gobbling up of weaker, smaller companies by bigger ones, and on the other hand they are the result of companies' reactions to threats as resulting from operating in more and more competitive and unstable environment. Moreover they result from depleting of prospects for independent development as basing on own internal assets. The degree of integration of trade varies in individual branches, where the most integrated is foodstuff branch, as in Holland, Germany and the Great Britain the five biggest retail chains are pursuing over 50% of overall foodstuff sales volume.

The fact proving diversity of models in different countries is that in 1997 the number of retail commerce companies per 1000 inhabitants fluctuated to a great extent. In the most well-off countries large format retail companies were predomi-

nant. Their number was from 5 to 8 per 1000 inhabitants: Austria (5.0); Germany (5.4); Great Britain (5.8); France (7.8). In the next group of countries the number was twice as big: Spain (13.1); Portugal (13.4); USA (13.3); Italy (15.7); and in the countries where commerce is fragmented to the greatest extent, as the Czech Republic (22.0) and Poland (22.5) the rates were even bigger.

In Poland almost every shop is an independent economic entity. It is a proof of high degree of decentralization of the domestic commerce, which makes shortening of distribution channels (skipping the wholesale distributor), or introducing other forms of servicing – very difficult, or even impossible at all. The structural fragmentation of Polish commerce is determined foremost by the large number of one-man companies run by individuals. In the past twenty years the share of the private sector in pursuing retail commerce grew from 2.6 to 98.6% between 1987 and 2007.

The special role of commerce in the economy of Poland is demonstrated by the fact that commercial companies stand for about one-third of all companies in Poland – in 2007 the figure was 31.2%. The sector of retail commerce is dispersed to a great extent. The share of individuals running their own commercial business in the total number of registered companies is as high as 83%, whereas as many as 97.2% of them are small businesses, employing up to 9 people. Small scale commerce comprises shops of the sales surface area up to 50 square metres. In 2007 98.2% of businesses owned 1 or 2 shops (which constitutes a figure of 311.5 thousand companies). Over three-fourth of shops are located in towns, and the percentage decreased from 84.7% in 1990 to about 76% in recent years. The average foreign shop was almost six times as big as the domestic one (in 2005 the ratio of surface was 811.1 to 143.6 square metres). Foreign commercial companies were running 6755 shops (1.8%), but those were units of large surface area, as they comprised 17.6% of the total sales surface area, which is illustrated in the Graph No. 6.



Graph No. 6 The share of sales surface area of the foreign ownership in the total sales surface area

Source: own study on the basis of *The Domestic Market (1995–2002)*, the Central Statistical Office, Warsaw, and *The Domestic Commerce in Poland in 2007*, academic editing U. Kłosiewicz-Górecka, Institute for Market, Consumption and Business Cycles Research, Warsaw 2008.

The determinants of the success of foreign chains:

- acceptance by customers proven by the growing value of shopping basket and customers' loyalty,
- positively better environment of doing shopping than in traditional shops,
- adequate capital resources of owners (Strużycki M. [1999], p. 149),
- achieving advantage of the scale thanks to high discounts, prolonged payment terms,
- modern strategy of dynamic market expansion (Szromnik A. [1998] p. 99),
- filling the technological gap in Polish commerce,
- professional managerial personnel.

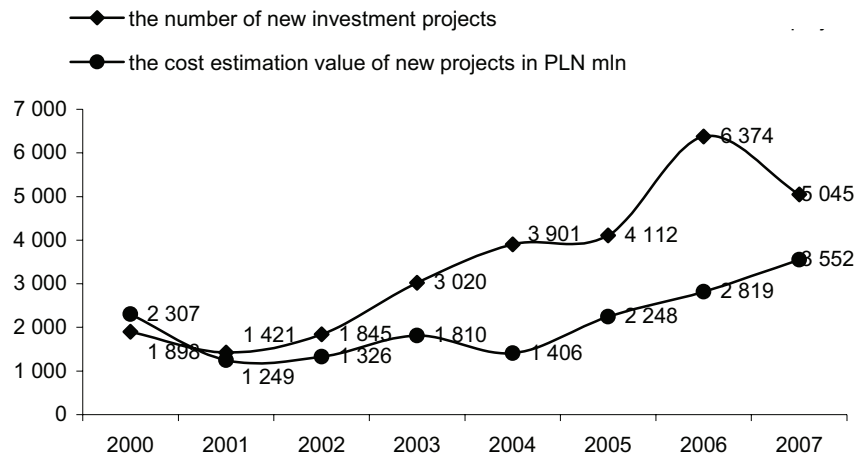
Foreign chains are pursuing the strategy of going international. It does not consist however in maximal unification of product range in offer, forms of servicing the customer or sales services, but in practical implementation of the rule of "Think Global, Act Local". Although as such elements of marketing strategy as product brand, its packaging or advertising can be unified, but the pricing level, promotion in the outlet or ways of servicing the customers should take local differences into account. As the example can serve the Ahold of Holland, which pursue their operations in 27 countries and have almost 60% of the volumes sold abroad, have implemented the slogan: "Everything the consumer sees we localize. Everything they don't see, we globalize" (Kotler Ph. [2003] p. 93). To other leading European retailers implementing the strategy of expansion beyond domestic market such giants should be counted as Metro Group, Auchan, Schwarz Group, Carrefour, Casino, Rewe Group, Aldi, Tesco, Intermarche and Leclerc. In the Table I the biggest foreign chains, conducting their activities in Poland in 2000–2008 are compared.

Table 1. Activity of global commercial chains in expansion onto the Polish market, expressed in the number of hypermarkets owned in the years 2000–2008

Chain	The first outlet	Average surface area of 1 unit	2000	2001	2002	2003	2004	2005	2006	2007	2008
Auchan	1996	11 000	8	12	15	17	18	19	21	22	22
E.Leclerc	1996	7 500	7	9	9	11	11	16	20	13	13
Carrefour	1997	12 000	7	8	13	13	15	31	34	62	78
Real	1997	8 500	24	25	25	27	27	28	30	50	50
Tesco	1998	11 000	10	14	17	35	39	49	51	52	84
Kaufland	2001	4 000	–	2	11	23	43	67	83	93	101

Source: Own study on the basis of Retail Today Network and GfK Polonia.

The measure of Poland's share in the processes of globalization is the scale of direct investment pursued by foreign capital. The substantial part is investment of commercial companies, which determines its significant role in the growth of real assets of the commercial sector. It is estimated that the participation of foreign investors in investment in commerce in Poland is approximately 50%. The Graph No. 7 presents data on scale of investment in commerce in the years 2000–2007. Thanks to that, obsolete self-service shops of the socialism era were replaced by modern shopping malls. The process of the commerce in Poland going international has been effected since 1990, and is advanced to the greatest extent in conurbations, such as Warsaw, the Tricity (Gdańsk, Gdynia, Sopot) and the Upper Silesia.



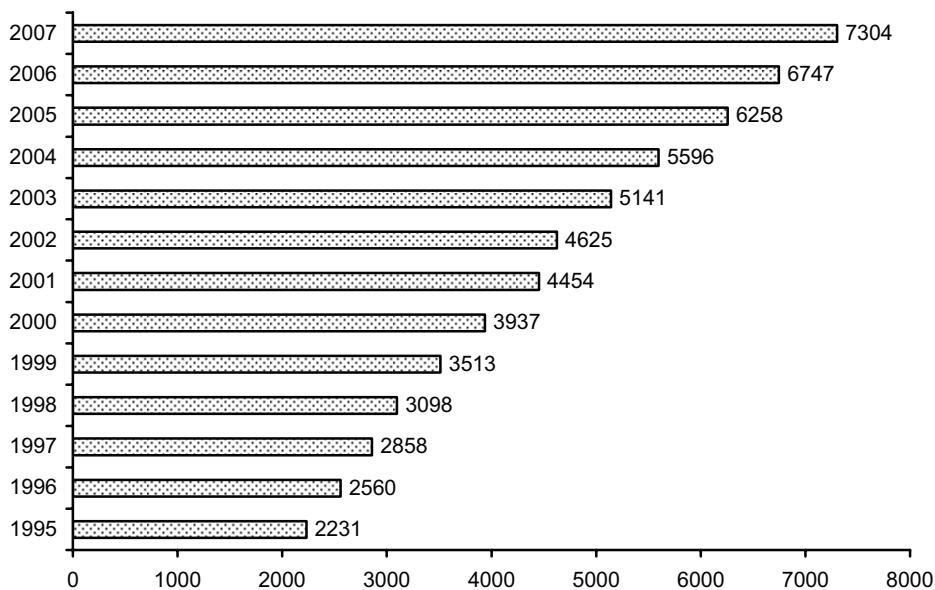
Graph No. 7 The scale of investment in Poland in commerce in the years 2000–2007

Source: Own study on the basis of *Poland 2008. The report on the condition of the economy*, the Ministry of Economy, the Economic Analyses and Forecasts Department, Warsaw 2007, p. 171.

Legal regulations in Poland regarding location of large format commercial units in the past years were among those of the most liberal in Europe. Almost one third of the 50 biggest European retail companies were present in Poland. Even then in 2004 in Poland there were 6 hypermarkets to 1 million of population. To compare, 22 were in France, 16 in the Czech Republic, 14 in Slovakia, 8 in Hungary and Spain, and 5 in Italy. In the next fragment of this paper the pace of expansion of modern large format shops is presented.

3. EXPANSION OF LARGE FORMAT SHOPS

The process of the commerce going international, that has been in place since 1990, is determined by various circumstances. In the past the pace and scale of the process were changeable. The dynamics of the processes in the Polish commerce is similar to the one of Spain, where the foreign investors were enjoying favourable climate as well. Global commercial companies have undergone very dynamic development on the Polish market since 1995, and in the retail commerce the processes of globalization have somewhat slower pace and cover narrow range as compared to retailing. The Graph No. 8 illustrates openness of the Polish market to foreign investment. It illustrates the number of the biggest foreign retail companies being on top 50 positions in the ranking of companies of the biggest sales volume in Poland.



Graph No. 8 The number of shops of the surface over 400 sq. metres in Poland in the years 1995–2007

Source: Own study based on the data from the Central Statistical Office of Poland.

The Table No. 2 presents statistical data as illustrating the changes in the number and sales surface area of large format shops in the years 1998–2007.

Table No. 2 The characteristics of changes in retail commerce in Poland in the years 1998–2007

Details	1998	2000	2001	2002	2003	2004	2005	2006	2007
Department stores	142	135	137	106	102	99	95	91	76
Specialist retailers	580	500	510	499	517	501	462	431	372
Hypermarkets (inc. for	54	99	190	216	293	338	374	410	396
Supermarkets	936	1602	1739	1863	2043	2347	2716	3003	3506
Commercial companies of turnover 100 mln or more	104	111	122	117	149	173	212	238	232
Sales surface area of malls									
a) total in sq. m. '000	.	.	.	2,9	3,5	4,0	4,5	5,2	5,7
b) per 1000 inhabitants	.	.	.	74	92	104	115	137	149

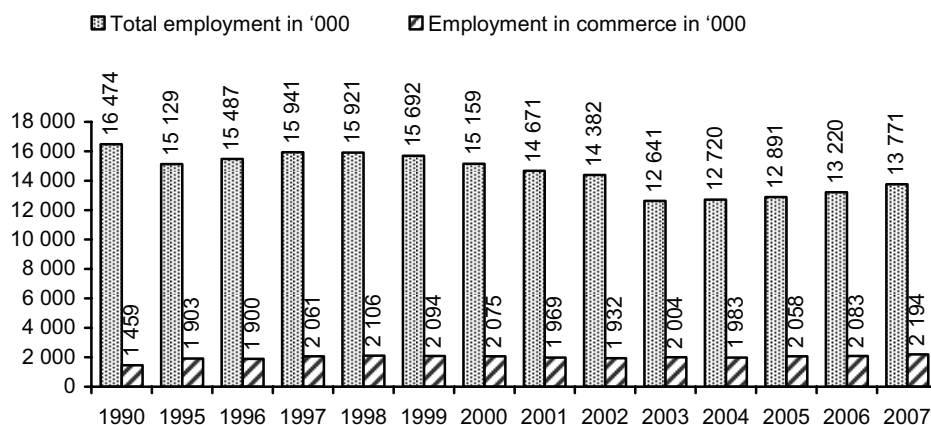
Source: Own study based on the data from the Central Statistical Office of Poland and E. Maleszyk *The influence of concentration on transformations in retailing*, in: *Challenges that distributors are facing on the European internal market*, The Institute for Domestic Market and Consumption, Warsaw 2004, p. 41, *The Report on the Condition of Polish Domestic Commerce in 2006*, p. 112, and *The Domestic Commerce in Poland in 2007*, academic editing U. Kłosiewicz-Górecka, Institute for Market, Consumption and Business Cycles Research, Warsaw 2008.

It should be noted that the number of large format shops is growing dynamically, and supermarkets in particular, and at the same time decreasing number of department stores and specialist shops, which are losing in the competitions with hypermarkets and malls. What is interesting, in 2007 for the first time the average sales area surface of supermarkets decreased, which is an illustration of the trend of abandoning from units of the area of 6–10 thousand square metres in favour of more profitable units of the area of 2–3 thousand square metres located in smaller towns.

Results of somewhat rare research results show a positive impact of large format commercial units on growth in employment, as manifesting in generating much larger number of new jobs than the drop in traditional forms of commerce. As an example: in France in the years 1972–82, when the characteristic feature of that period was expansion of that kind of commerce, 550 thousand new jobs were created, whereas the job loss figure in the traditional shops was 320 thousand. (Misiąg F. [2000], p. 29).

In the past dozen of years, and particularly in the period of market transformation, the employment figure in the commercial sector in Poland was growing systematically, which is shown in the data of the Table 2. It is characteristic that in the years 1995–2002 the employment figure grew by 28.4 thousand whilst in the industry the figure dropped by 873.3 thousand, and in construction industry the drop was 167.9 thousand jobs. Subsequently in the years 2002–2007 the employment level in industry climbed by 8.7%, and in the sector of commerce and repair services 13.5% up. Commerce still remains a stable place of employ-

ment, either in a form of regular jobs or self-employment, and is a chance for people losing their jobs in other sectors, and in this context absorbs labour surplus as a buffer for market transformations.



Graph No. 9 Employment figures in commerce (the section of: 'commerce and repair services') in Poland in the years 1990–2007

Source: Own study on the basis of *the Statistical Yearbooks GUS* for the years 1996–2008.

It ought to be mentioned that the index presenting the ratio of employment in commerce to total employment in Poland stabilized on the level similar to the one of its counterparts in the EU. For comparative reasons: in the middle of the nineties it was: 12.0% for Belgium, 15.4% for Spain, 13.1% for Germany, 14.1% for France, 14.9% for Great Britain, and 17.1% for Italy (Spyra Z. [2007] p. 119). In 2001 the ratio was highest for Greece (17.2%) and lowest for Finland (11.6%). Thus in European countries commerce created relatively stable number of jobs.

Apart from noticeable quantitative changes, also qualitative changes can be observed on the Polish market (Szromnik A. [2001], p.15). They are related to unification of activities, new standards of servicing the customer, comfort of doing shopping, completeness of product range and services in offer, implementation of modern technology and the transfer of know-how. Organizational and functional changes as well as those connected with ownership had place in the past twenty years at the pace that was faster than in other sectors, such as agriculture or construction industry.

4. CONCENTRATION OF COMMERCE

Tendencies for dynamically growing role of modern distribution channels in the sales of fast moving consumer goods enhanced at the end of the nineties. The quantitative share of the channels (i.e. sale through hypermarkets, supermarkets and discount shops) in the total turnover grew from 28 to 46% in the years 1999–2003, and for the first time exceeded the share of traditional shops in retail sales (43% of turnover). In the years 1999–2003 there was almost twofold increase of the share of FMCG in the total sales volume of hypermarkets – from 8 to 16%. A considerable increase in retail sales volumes of FMCG was noted at supermarkets and discount shops whereas the role of other distribution channels was decreasing systematically. Year by year the share in the total sales volume was decreasing in case of corner shops. In 2006 the share of hypermarkets in the overall sales volume amounted to 19%, supermarkets and discount shops – 29%, and other shops 52% respectively. Hypermarkets and discount shops growing in popularity results from their better and better approachability, as well as from growth of their popularity as they tend to offer special prices and promotions.

The importance of modern distribution channels is growing systematically in Polish retailing. In case of FMCG the share of such forms of commercial activity (hypermarkets, supermarkets and discount shops) in the total sales volume in 2007 was 45% as compared to 16% in 1998 respectively. It is estimated that the percentage will climb up to 50% in 2010.

Certain views on negative impact of foreign commercial chains on traditional ways of commerce do not prove correct in statistical data. It turns out however that according to the data available from the Central Statistical Office the number of commercial outlets remains stable. The drop in that sphere affected only rural areas and some specialist lines. The liquidated shops used to be replaced by new ones, according to the rule that the market abhors a vacuum. Moreover leading native commercial chains (Piotr i Paweł, Polomarket, MarcPol, Aldik) are aware of threats from international chains and initiate a consolidation process. Others, like Lewiatan Detal, Lewiatan'94, Euro-Net, ABC) initiate integration activities and as a result increase turnover and share in the total volume of sales. What is worth noticing, some Polish commercial chains, like Rast, Bomi, Eko-Holding, Bać-Pol issue shares traded on the Warsaw Stock Exchange. Thus they raise funds necessary for construction on purchases of new facilities and raising the standard of old ones.

The strategy of foreign commercial chains owners consists not only in construction of entirely new facilities, but also acquiring existing shops, or even whole chains of shops from other operators. First assumptions that would speak for concentration of networks could be made in 1999–2002, when the owners

changed in case of 26 Globi supermarkets, 11 Billa supermarkets, 13 of HIT and 5 of Jumbo.

In August 2006 the franchise chain of 219 Delikatesy Centrum shops was purchased by the Eurocash. In November 2006 19 hypermarkets of the Géant were taken over by Real. A couple of months earlier Tesco had purchased 145 discount shops from Leader Price that belong to Casino Group. In the same year the chain of 17 local supermarkets and smaller shops of the ABC was purchased by Polomarket. And the commercial company of Rast had been created in 2006 out of a merger of three chains based in the city of Olsztyn, namely of: Rast, Hermes and Duet, and was sold to a new investor 2 years later. Such consolidation processes take place more and more often and refer to both domestic and foreign chains. The goal of integration is achieving advantageous position on the market and implementation of optimal competitive strategy.

In the middle of 2007 Carrefour took over 183 Albert supermarkets and 15 so-called mini-hypermarkets (of the sales surface area of up to 2 thousand square metres) Hypernova and 4 petrol stations. In August 2007 the ownership changed for 1800 convenience stores of Żabka. The list of outlets "for sale" is much longer. There are such chains on it like: Auchan, Leclerc, Billa. What is interesting, not only are companies of poor financial standing on the list, but also those ones which are doing very well and whose market value reached a peak. It should be noted however that the vast majority of poorly managed chains has already been bought out. Hostile takeovers are a consequence of conflict of interest between owners of various chains. Moreover, lack of cooperation and consolidation of activities between retailers and wholesalers means looking for ways of expansion on the market by means of mergers. It should be noticed, on the other hand, that economic crisis, whose first symptoms were observed in the summer of 2008, imposes a limit on takeovers and mergers in Poland. Many a potential investor prefer to assume a waiting attitude in circumstances of economic crisis.

To resume, it should be pointed out that the process of expansion of large format commercial chains will develop onto the markets of next countries. It will be fostered by the climate of opening the boundaries between countries and international friendship and real goodwill. Observing transformations on the Polish market leads to a conclusion that the foreign chains entering here created positive conditions for widespread availability of achievements in techniques of commerce (just in time delivery, Efficient Consumer Response, e-commerce) and modern methods of promotion and sale. Pro-market oriented domestic chains make use of the method of benchmarking to follow positive examples of ideas in other countries as how to achieve success in business. Merchants do approve the mechanism of competition as the invisible hand contributing to dynamics of the market. As a consequence of inflow of investment into Poland thorough restructuring of com-

merce occurred alongside with its concentration. Thanks to that inflow of capital and investment in commerce the technological gap between Poland and developed countries, after 50 years of separation, was minimized.

Inevitability of globalization processes is the outcome of technological progress, liberalization of commerce and changes in mentality of individuals and societies as a whole. The changes consist in wide acceptance and tolerance towards other cultures, religions and nations, to much bigger extent than in the previous century. One of the greatest advantages of globalization is that it is not a result of top-down decisions, on the contrary – a result of integration of the “little global village”, which is reflected in freedom to travel, to take up professional business activity. The process of globalization has a multi-level influence on various aspects of social and economic issues, in those – on development of commerce.

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*Wiesław Ciechowski***ROZWÓJ HANDLU W POLSCE JAKO REZULTAT INTEGRACJI EUROPEJSKIEJ**

Artykuł poświęcony jest roli procesów globalizacyjnych w funkcjonowaniu i rozwoju handlu w Polsce. Opisano w nim przesłanki i determinanty globalizacji rynku oraz rezultaty tego procesu dla sektora handlu detalicznego. W artykule przybliżono dane statystyczne ilustrujące rozwój handlu w Polsce w latach 1990–2007. Interpretacji poddano zmiany w zakresie liczby i struktury sklepów, wielkości zatrudnienia w handlu oraz problematykę ekspansji zagranicznych wielkopowierzchniowych sieci handlowych. Analizy mają charakter porównawczy, bowiem dane statystyczne dotyczące polskiego handlu odnoszono w relacji do innych krajów europejskich.

Słowa kluczowe: globalizacja handlu, koncentracja handlu.