Private label in Poland 2008

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A word from the author

“Today Poland's private label market is maturing. Retail chains are expanding their offerings – marketing new products and categories under private labels and placing private label goods on higher shelves. In addition to first price and medium price segment, premium private label products are also available in Poland today. Despite the changes, most Poles approached private labels with a reserve, believing the products to be of lower quality and – because of their low price – to be primarily marketed to persons of limited financial means.

Discount stores are responsible for the decisive majority of sales of private label products, with private labels accounting for as much as 85% of store assortment. Discounters will continue to have a large market share thanks to the ongoing development of the existing chains and the expansion plans announced by Aldi – a new player in this segment. In addition, we expect the importance of traditional stores in private label sales to slowly rise as private labels are introduced onto the small shop market by such large trading groups as Emperia Holding and Eurocash”.

Patrycja Ciosek, Retail Analyst

PMR Marketinsight Methodology

This report was prepared using PMR's MarketInsight Methodology. **PMR MarketInsight is a methodology developed by PMR which assists in the complex preparation of industry reports.** It defines the ways in which data should be collected for such reports and outlines the methods to be used in analysing the information collected in order to obtain a true picture of the market in question. It also contains special procedures to follow in the case of incomplete market

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PMR MarketInsight is the result of over 10 years of experience in conducting industry analysis on Central and Eastern European markets.

PMR MarketInsight Methodology

In the past 2 years private label products marketed in the middle price segment have seen significant growth in contrast to only a slight broadening of the bottom shelf assortment.

Report description

Our latest report is a unique and comprehensive source of information about the Polish private label market. This comprehensive study offers an in-depth analysis of the current market climate, providing valuable details on private label products, their sales value in recent years and its possible future trends. It delineates current and prospective market developments, traces consumer attitudes, and familiarises the reader with the market's key players.

A PMR database of more that 5,800 private label products from 13 largest grocery retail chains in Poland serves as a perfect complement to this global analysis of the sector.

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Key sections

Section one outlines the general socio-economic situation in Poland, with up-to-date information on its GDP, inflation, unemployment, salaries and demography.

Section two discusses general consumer behaviour and preferences in Poland, together with Poles' attitudes to brand-name products.

Section three focuses on the sales value of grocery retailers' private label products between 2005 and 2007, and presents forecasts for 2009. It determines the share of particular distribution channels in the total value of private label sales. It also defines the share of private labels in selected product categories.

Section four analyses the development of the private label market in Poland and identifies its leaders based on their private label selection. It classifies private label lines according to their price and specifies their presence within the assortment offered by particular retailers.

Section five provides an overview of key development trends on the Polish private label market.

Section six specifies factors determining market growth from the production and distribution point of view.

Section seven analyses changes in consumer attitudes to private label products in Poland.

In Poland discount stores account for the lion's share of private label sales; they generate nearly 66% of total turnover on that market.

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Most private label products are relatively basic goods from the bottom store shelf or counterparts of branded goods, without any significant added value.

Section eight looks at the nature of cooperation between retailers and private label manufacturers. It discusses manufacturers' strategies in this field, the advantages and disadvantages of such cooperation, and observes changes in their attitudes towards production for retailers.

Section nine presents a price comparison of private label products and brand name products in selected categories, which is based on the PMR database of Polish private labels attached to the report.

Section ten includes a detailed profile description of selected grocery chains. It provides crucial information on the history of their operations on the Polish market, revenues in 2006 and 2007, store count in March 2008, as well as a description of their strategies and private label assortment.

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Report overview

Following an overview of Poland's socio-economic situation, as well as the prevailing consumer preferences and attitudes, **Private label in Poland 2008** provides an in-depth analysis of the sales value of private label products offered by Polish grocery retailers, which includes the following information:

- sales value between 2005 and 2007
- sales value forecasts for 2009
- private label sales through particular distribution channels
- private label share in sales of selected product categories.

The report then provides a comprehensive overview of private label development in Poland, with special emphasis on the following elements:

- the current situation on the market: leaders in terms of private label assortment, as well as a description of particular private label lines, their presence in particular retailers, price level and number of SKUs
- key market development trends
- market growth determinants, in terms of production and distribution.

From among all retailers active on the Polish market, Tesco offers the most private label products. Carrefour ranks second.

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With time producer's attitude towards collaboration with retail chains has changed; increasingly more producers are highly positive about the benefits of the possibility of selling large batched of goods and of the stability of this distribution channel.

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It also analyses changes in consumer attitudes to private label products, as well as the nature of cooperation between private label manufacturers and retailers, taking into account the following aspects:

- advantages and disadvantages of such cooperation
- manufacturers' strategies
- changes in their attitudes towards such cooperation.

We then present the results of a PMR research conducted in Poland's 13 largest grocery retail chains. This includes a price comparison of private label products and most popular brand name products in more than a dozen categories.

These findings are followed by a detailed profile description of selected grocery chains in Poland, with particular emphasis on the following:

- their entry date and history of operations on the Polish market
- sales value in 2006 and 2007
- store count in March 2008
- growth strategies and other strategic elements (if available)
- logistics base (if available)
- private labels on offer: their description, launch dates, types and number of SKUs in 2006 and 2008, as well as their share in the overall assortment.

This report will be particularly useful to:

- the top management and decision makers of retail chains active on or considering entering the Polish private label market
- manufacturers already producing private label products or planning such cooperation with retailers
- investors, consultancies and legal advisors looking for reliable and up-to-date market data
- professionals who need to gain a thorough understanding of the sector.

The development of the private label market in Poland has been helped by the rising importance of modern retail formats and the progressive consolidation of the retail market.

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