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THE CHANGING POLISH FOOD CONSUMER*

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ABSTRACT

This paper provides an overview of major demographic and food trends in Poland and the rapid changes in Polish food retailing. The demographic changes include the size of the population; birth, death, marriage and divorce rates; the age distribution, education and household types. Two important demographic factors that will affect food consumption are the aging population and the major gap in education between urban and rural areas. In the next 20 years, the number of children will decrease radically, whereas the number of people over 64 years of age will rise significantly. Education levels are much lower in rural than in urban areas.

The average household budget share for food was 44.6% in 1988. It reached 55.3% in 1990 at the beginning of the transition to a market economy and fell to 37.8% in 1996. Under central planning, consumers had to adjust to what was made available. There was a limited assortment of goods and many people relied on home-produced food. Since 1989 and the transition to a market economy, food consumption patterns have undergone some substantial changes. Butter consumption has fallen sharply, while plant fat consumption has increased with the introduction of high quality margarine.

The change from central planning to a market economy has had a major impact on food retailing. U.S. fast food companies, such as McDonald's, have opened numerous outlets in Poland during the 1990s. Fast food is very popular, especially among young Poles. Under central planning, three government-owned chains dominated grocery retailing in Poland. The food marketing system was producer, not consumer driven. When the right to own private businesses was restored, many new food retailing stores were opened.

In 1996, final sales by food retailing stores in Poland were about $100 billion. A large portion of the sales is by small shops. However, foreign-owned grocery retailers have been expanding in Poland and had sales of $5 billion in 1997. The foreign-owned chains open larger stores, supermarkets and even hypermarkets. Many of the major Western European food retailers are now operating in Poland, such as Ahold, a big Dutch company, and Tengelman, a large German company.

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Major food trends have been changing over time in Poland, especially within the last ten years. The system of a centrally planned economy effectively hampered development of consumption and consumers' needs. The transition from a centrally planned economy to a market economy brought a revolution in the eating patterns of the Polish people. Many different factors affect food consumption. The most important are: demographic trends, the structure of households and their incomes, eating habits, and finally development of the food industry and trade.

DEMOGRAPHIC CHANGES

Population changes and other demographic factors are of great importance in determining food consumption trends. Demographic indicators and analyses are crucial knowledge for marketing. Demography gives essential information about potential customers, provides a basis for segmentation of the market and indicates consumer trends.

Size of the population

Poland with a population of about 38.6 million in 1996 was the 8th largest country in Europe and 29th largest in the world. Following the population's development over time is very difficult because of the frequent changes in Poland's borders. It was estimated that just before World War II about 35.1 million people lived in Poland, of this about 60% were of Polish ancestry. After the War in 1946, Poland´s population was about 23.9 million. Because of the Nazi policy demanding the extermination of the Polish nation, warfare, border shifts and migration, Poland suffered substantial population losses. In addition to the losses during the War, there was also a decrease in births typical in periods of extreme hardship. However, after the War, from 1946 Poland's population increased. The urban population grew more than three fold while the rural population remained almost constant. Depopulation of some rural areas occurred and decreases in the rural population may become more significant in the future.

The distribution of population in Poland is quite unequal and concentrated in certain areas. Warsaw, Lodz, Katowice, Cracow and Bielsko-Biala voivodships (regions) have the highest population density. On the other hand, the Suwalki region has the lowest population density. Depopulation has intensified in some areas of Poland, affecting larger and larger areas of the country, especially Jelenia Góra, Walbrzych, Olsztyn and Suwalki voivodships. At present, the area of greatest depopulation is near the eastern border of Poland. Depopulation of rural areas is occurring in a considerable part of the country.

Vital statistics of the population

The vital statistics of a population include births, deaths, marriage and divorces. Births and deaths determine the population growth rate. Within the space of the last century there was a systematic decrease in the birth rate from 45 per 1,000 people in 1895 to 11.2 in 1998 and in the death rate from 27 to 10 per 1,000 people. Over the same time the birth rate has been more variable, however in general, it has been decreasing. A rapid increase in the birth rate occurred after World War II which was defined as a demographic explosion. In recent years the birth rate declined and population growth is near zero. The consequences of this will appear in the structure of the population.

The marriage rate per 1,000 people declined quite sharply over time, even more in urban areas than rural areas. The divorce rate is very low when compared with Western Europe and the United States, although the rate has increased especially in urban areas. Table 1 contains the vital statistics of population in Poland from 1946 to 1995, including changes in rural and urban areas. Both birth and death rates are higher in rural areas than in urban areas.

Table 1. Vital statistics of population in Poland from 1946 to 1995 (per 1,000 people)

Years	1946	1955	1969	1976	1995
Total					
Marriages	11.9	9.5	8.3	9.5	5.4
Divorces	0.3	0.5	1.0	1.1	1.0
Births	26.2	29.1	16.3	19.6	11.2
Deaths	10.2	9.6	8.1	8.9	10.0
Urban areas					
Marriages	13.8	10.8	8.3	9.5	5.1
Divorces	0.8	0.9	1.7	1.6	1.3
Births	25.2	28.6	14.1	18.2	9.8
Deaths	9.9	8.9	7.7	8.5	9.4
Rural areas					
Marriages	10.9	8.4	8.3	9.5	5.8
Divorces	0.1	0.2	0.3	0.4	0.4
Births	26.7	29.5	18.7	21.3	13.5
Deaths	10.3	10.1	8.5	9.5	11.0

Source: Statistical Yearbook, Central Statistical Office (CSO) 1997.

Age distribution of the Polish population

The age distribution of a population usually shows the percentage composition of people by age and often by gender. A diagram of the age distribution can have different shapes depending on the structure. The age distribution of young societies resembles a pyramid with a wide base and a sharp vertex. For societies with little population growth and a large older population, the shape may be closer to a rectangle with no more young than older people. The age structure of the population in Poland changed quite considerably since World War II. In 1950 the age distribution of the Polish population was almost a pyramid with two distinct narrow bands for 5-9 year olds and for 30-34 year old people, which resulted from both of the World Wars. By 1995 the structure changed from a pyramid to almost a rectangle. The age distribution of the Polish population in 1995 is typical for an ageing society.

Projections of population development for the next 20-30 years are extremely important for determining future economic activity. Table 2 shows projections of the age structure of the Polish population for the years 2000, 2010, and 2020. According to those projections the population is expected to increase by 1.8 million people during the next 20 years. However, the number of children will decrease radically. The share of the population between 15 and 24 years old will decrease substantially. The number of people over 64 years old will increase significantly (by 1.8 million). The changes in the age structure of the Polish population will have a major influence on food marketing. The food industry will need to focus increasingly on the needs of older people.

Table 2. Projected age structure of the population in Poland(in thousands)

Population at age	2000	2010	2020
		Total	
Total	38,854	40,185	40,695
0-2	1,440	1,721	1,408
3-6	1,771	2,314	2,018
7-14	4,388	3,884	4,503
15-19	3,356	2,398	2,713
20-24	3,207	2,822	2,258
25-44	10,978	11,614	11,452
45-64	9,032	10,598	9,849
over 64	4,682	4,834	6,490

Source: Statistical Yearbook, Central Statistical Office (CSO) 1997.

Education

Education has an important influence on the levels of income and consumption. Table 3 shows education levels of the Polish people by gender for urban and rural residents. One can easily notice the substantial differences between the education of the urban and rural population. The most visible difference is the lack of university-educated people in rural areas. Rural women tend to have much less education than urban women. The differences in education are one of the factors causing a major differentiation between urban and rural consumers.

Table 3. Education distribution of Polish population by gender for urban and rural residences in 1995 (in percent).

Level of	Urban areas		Rural areas	
Education	Male	Female	Male	Female
University	10.7	8.9	1.8	2.0
Secondary	29.2	38.5	12.2	18.6
Vocational	32.6	17.7	35.9	20.3
Elementary	24.5	30.3	42.0	45.6

Source: Statistical Yearbook, Central Statistical Office (CSO) 1997.

Polish households

The Central Statistical Office(CSO) divides Polish households by two criteria, i.e., by source of income or socio-economic group and by the number of persons in a household. The CSO used five socio-economic groups: workers' households, workers-farmers' households, farmers' households, pensioners' households, and those working on their own. Since 1993 households of people receiving unearned sources of income have also been distinguished. Table 4 compares the number of households in Poland by socio-economic group and by number of persons in the household.

Table 4. Number and structure of households by number of persons in 1996

Number of persons in a household	Households							
	Total	Employee		Employee-farmers	Farmer	Pensioners	Working on their own	Owning non-earned sources
		Workers	Non-workers					
Total	31,907	8,788	5,220	1,637	2,120	11,013	1,816	1,277
1-person	4,399	303	423	7	59	3,392	49	166
2-person	7,889	1,193	1,112	100	312	4,716	224	232
3-person	6,739	2,291	1,489	223	430	1,562	427	317
4-person	7,050	2,991	1,566	419	434	668	689	283
5-person	3,389	1,323	468	397	402	380	275	144
6-person and more	2,441	687	162	527	483	295	152	135

Source: Statistical Yearbook, Central Statistical Office (CSO) 1997

Household budgets and consumption

The CSO survey provides information about budgets and expenditures of the households in Poland, including:

- Average monthly food and beverage expenditures by socio-economic and income group, including more than 20 classes of foodstuffs.
- Average monthly food consumption by socio-economic and income group for the foodstuffs mentioned below (Table 5).

Table 5. Per capita average monthly consumption of selected food products by households in 1996

Specification	Total	Households of						
		Employees		Employee-farmers	Farmers	Working on their own	Pensioners	Owning non-earned sources
		Workers	Non-workers					
Bakery products (kg)*	7.50	7.25	6.32	8.17	8.52	6.13	8.34	7.21
Potatoes (kg)	8.50	7.50	6.06	9.08	9.88	6.36	11.14	8.52
Fresh and processed leguminous, vegetables and mushrooms (kg)	5.76	4.84	5.37	5.96	6.45	5.12	7.18	4.70
Fresh and processed fruits (kg)	3.76	3.04	4.80	3.14	3.37	4.56	4.42	2.26
Meat (kg)	5.23	4.67	4.85	5.30	6.30	4.93	6.03	3.85
Fats and oils (kg)	1.60	1.44	1.38	1.58	1.73	1.31	2.03	1.36
Milk and dairy products (l)	6.80	5.05	5.33	8.91	9.72	5.38	8.66	5.28
Cheese (kg)	0.80	0.65	0.96	0.78	0.72	0.84	0.96	0.48
Eggs (pieces)	14.79	12.62	13.69	15.92	18.18	13.03	17.45	11.60
Sugar (kg)	1.94	1.64	1.49	2.29	2.47	1.42	2.48	1.53
Fish and processed fish (kg)	0.45	0.40	0.47	0.34	0.40	0.45	0.58	0.30

Source: Statistical Yearbook. Central Statistical Office (CSO) 1997.

*1 kg = 2.2 pounds

Household budgets

The share of household income spent on overall food expenditures is lower in richer societies, in accordance with Engel's Law. Engel's Law also states that the household budget share of total food expenditures falls as household income rises. Table 6 shows the average percentage of disposable household income devoted to total food expenditures in Poland from 1988 to 1996. Real incomes and living standards fell in 1990 at the beginning of the transition to a market economy, but have risen since then.

Table 6. Household Budget Shares for Food (percent)

1988	1989	1990	1991	1992	1993	1994	1996
44.6	46.9	55.3	45.7	44.8	42.6	39.9	37.8

The Institute of Labor and Social Welfare (Instytut Pracy i Spraw Socjalnych) has announced the poverty income guidelines (so-called minimum living wage) for Poland for about 20 years. A fixed consumer goods basket represents people's needs and prices of goods in the basket are collected. There are four separate baskets for four family types, namely: one-person and four-person workers' households, and one-person and two-person pensioners' households. A so-called minimum existence level is also calculated. It was estimated in 1994 that 43.2% of the people did not obtain a minimum living wage and 23.3% did not reach the minimum existence level. The status of people receiving unearned sources of income was the most difficult and up to 89% of those households did not obtain even the minimum. In spite of the prevailing opinion, pensioners were situated better than average and only 38.6% of them did not obtain the minimum.

CHANGES IN POLISH CONSUMER EATING BEHAVIOR

Eating patterns in Poland has been changing continuously over time. Over many centuries distinct regional and social differences appeared. In the Nineteenth Century potatoes became very popular and a major part of the diet. In periods of shortage, potatoes were even used for baking a type of bread. Flour was the other basic product, especially rye flour. Since the beginning of the Twentieth Century bread has been an important part of the diet. Traditionally, food processing and preparation took place mainly on farms and in homes. Only in the last few years has the purchase of prepared foods become popular.

Consumption patterns during the centrally planned economy

Consumer trends and development of the food processing industry and trade in Poland reflect many of the changes in other parts of the world. However, under the two totalitarian systems imposed first during World War II by the Nazis and then by the Communists with a centrally planned economy, Polish consumers, industry and trade were excluded from the mainstream of changes for almost 50 years. Losses caused by that situation were more painful because those years were a period of revolutionary changes in consumer tastes and preferences, in food processing technologies and systems of trade.

During that period in Poland, knowledge and analysis of the food consumer seemed absolutely pointless. Consumers had to adjust to what the centrally planned economic system made available. Very low earnings, about $10 to $20 a month, also limited consumption. However, it does not mean that consumers did not change in spite of the difficult conditions. Consumer behavior in that period was conditioned by the following factors:

- Arbitrary government decisions regarding the level of consumption with a system of coupons or availability of commodities with a limited assortment of goods,
- The need to ensure family food security through own home-produced food and household reserves of food,
- The appreciation of cooking ability as a way to achieve variety and quality in the diet even with the limited availability of foodstuffs.

Several examples of changing consumer behavior in that time can be given. The state promotion of low-fat milk is one of the most interesting examples of shaping consumer tastes in Poland in the 1960s. At that time in democratic countries with market economies, low-fat milk was promoted as healthier and consumers were encouraged to buy such milk. The dairy industry responded to that new food trend by delivering low-fat milk to the market. In Poland, the Communist authorities arbitrarily decided to limit the whole milk supply. Unprepared for such a change, Polish consumers were very dissatisfied because of the decision and viewed it as another symptom of economic crisis. After 20 years when the free market was restored, Polish consumers could freely return to whole milk. However, tastes had changed and very few people wanted to buy whole milk then. In general, consumers' wants and needs did not develop under the centrally planned economy. The collapse of the system was the beginning of revolutionary changes in consumption patterns and the emergence of a new Polish consumer.

Present consumption patterns

In 1997, several years after the introduction of a market economy, Poles were surveyed by the Center for the Survey of Public Opinion (COBOS) about changes in their food eating patterns. Almost half of the people (47%) thought they ate healthier food than ten years ago, whereas 29% of those interviewed had not observed any changes in their diet. About 8% could not compare their present food consumption patterns with their old patterns. Young people, i.e. pupils and students, most often did not notice any changes. About 16% of individuals thought that their families ate less healthy food than ten years earlier. The opinions about food consumption patterns were clearly connected with the level of education and household income. The higher the education level and the better their economic situation the more often people felt their current diet was healthier.

The large price increases for many foodstuffs, the introduction of many new food products and even whole new categories of products, and the permanent availability of all foodstuffs with a market economy have led to a sudden and deep change in food consumption patterns and nutrient intake. The caloric value of the food eaten has decreased from 3,489 kilocalories (kcal) per day, per capita in 1989 to 3,248 kcal per day in 1994. Consumption of animal fats has decreased from 101 grams to 77 grams. The main reason for this was the rapid decline in butter consumption from 8.8 kilograms (kg) annually per person in 1988 to 3.8 kg in 1994 and the decrease in meat and whole milk consumption (Table 7).

However, total food consumption has remained at nearly the same level because plant fats and oils replaced animal fats. Between 1989 and 1994 plant fat consumption increased from about 8 kg per capita per year to almost 13 kg, which was connected with the increase in margarine consumption. After 1989, soft, easy-to-spread margarine, produced according to Western technologies, appeared on the Polish market for the first time. The introduction of better and relatively cheap margarine in relation to butter was connected with a national advertising campaign. Surveys of home budgets confirm the shift.

Table 7. Per capita food consumption of selected products in kg, from 1988 to 1996

Years	Cereals and bakery products	Meat and processed meat	Fish	Milk	Butter	Sugar	Fruits and vegetables
1988*	117	68.3	6.5	271	8.8	50.0	147
1989*	118	68.6	6.1	260	7.0	46.9	147
1990*	115	68.6	5.4	241	6.2	44.1	148
1991*	116	73.2	6.2	231	5.0	35.4	163
1992*	119	70.3	6.4	217	4.1	36.3	157
1993*	122	67.6	6.7	209	3.6	27.9	167
1994*	120	62.6	6.7	202	3.8	24.7	150
1995	118	61.6	6.5	196	3.7	23.7	152
1996	118	62.8	6.5	193	3.7	23.5	149

*Source: *Kramer J., Statistical Yearbooks, Central Statistical Office (CSO), 1989-1997.*

Eating customs

In November 1997, the Center for the Survey of Public Opinion (COBOS) conducted a survey of the eating habits of 1,000 adults in Poland. The results of the survey can be used to characterize Polish eating behavior. More than a half of the people surveyed (about 52%) were convinced that they eat a healthy diet whereas 38% claimed their diet was not very healthy. Only about 5% thought their diet was very bad.

In general Poles were satisfied with their diet. Most were convinced that their diet contained all the nutrients in the proper quantities. However, they felt they ate too little fish. More than 56% of the people said they eat too little fish and 22% said that they consumed too little milk, vegetables, and fruits. Some 10% claimed they eat too many vegetables and cereal products. Almost 27% estimated they ate too many sweets, but one in seven would have liked to eat them more. Only 20% of those interviewed considered their meals too fatty. It suggests that Poles are not very aware of the danger of excess fat consumption given the high fat content of the average diet.

Polish people appear to be rather conservative consumers. Some 70% of those interviewed said they are not going to change their food consumption pattern and eating customs. Of course, it depended on gender, age and place of residence. Women more often wanted to change their eating behavior (33%) than men (26%), younger persons below 24 years old (34%) than older people over 65 (13%), and urban residents than rural ones. Willingness to change eating habits also depended on level of education, socio-economic position and income level. Better educated and younger people, and individuals with higher incomes tended to be more willing to change their eating patterns.

The freshness of purchased food was the most important attribute for the average consumer. Some 31% of Poles always checked the expiration date and 26% often did it. Only 15% almost never checked the date of expiration. It was usually those over age 65 with only a primary education, and more often men than women who never checked the expiration date. Most Polish people (70%) never read information about the ingredients of food or they did it very randomly. The purchase of so-called healthy food in Poland is not very popular. Some 32% of interviewed Poles admitted that the appearance of fast food chains in Poland had influenced their eating patterns (especially young people - about 56%).

FAST FOOD SERVICE

As a consequence of the collapse of the centrally planned economy, the Polish market opened to foreign food retail chains and food service chains. Almost at once McDonald's, Burger King, Kentucky Fried Chicken, Pizza Hut and other companies appeared in Poland. During the 1990s, they opened several outlets in different cities and they have become extremely popular especially among young people. As the fast food markets in Western Europe and America became saturated, the fast food companies expanded into Central and Eastern Europe and the emerging economies in the Third World. Similar to other countries, as the value of time has risen in Poland with better wages and salaries, people demanded more convenience food and wanted to do less cooking. The prospects for fast food restaurants look very good in Poland as these trends continue.

FOOD STORE RETAILING

During the period of central planning in Poland, food retailing was almost entirely controlled by three state chains: PSS (General Consumers' Cooperative), GS (Village Cooperative), and MHD (Municipal Retail Trade). PSS was responsible for food retailing in Polish towns and cities, GS served rural areas, and MHD was responsible for the non-food retail trade. In addition, there existed some small store chains, like Pewex or Baltona. Other small private traders were involved in the marketing of fruits and vegetables.

Food marketing in a centrally planned economy was considered from the producer's perspective, but not from the consumers'. Food supply was a result of arbitrary decisions undertaken by state officials and it was particularly visible in the form of a central distribution list. Those decisions had nothing in common with consumer demand. The activity of food wholesaling was considered a state secret. The food retailing system in Poland consisted of numerous small units.

Restoring a common right to undertake economic activity to the Polish people in the late 1980s resulted in an avalanche of interest in retail trade. Thousands of food retailing stores and wholesalers were created during that time. At present there is not one universal system of food retail stores in Poland. The food retailers can be divided into two general groups: traditional small food stores and large stores -- supermarkets and hypermarkets. Final sales by all food retailing stores in Poland were valued at 213 billion Polish zloty (about US $80 billion) in 1996 and around 300 billion zloty (about $100 billion) in 1997.

According to the results of the COBOS survey mentioned above, 80% of the Polish people claim that low price is the most important attribute of a food product and then quality. Because of that, up to 72% of surveyed consumers said they did their major foodstuff shopping only in supermarkets. Some 16% chose bazaars or open air markets and 12% used conventional shops not far from their homes. However, the proportion of people actually doing their shopping in supermarkets and the other stores are exactly reversed.

Conventional shops

A large portion of final food retail sales is by small shops. There are 220 stores per every

10,000 inhabitants in Poland and that is above average for Europe. Usually these are very small food shops with an average size up to 50 square meters (about 540 square feet). There are very few stores over 400 square meters (about 4,300 square feet) in size, in all only 2,560 such stores. Table 8 shows the number of food stores by their size. The size of stores has been increasing and the process is expected to continue.

Table 8. Number of food stores in Poland by their size (in square meters)

Years	Size of food stores					
	> 50m^2	51-100	101-200	201-300	301-400	>400 m^2
1993	347,650	19,875	8,189	2,075	867	1,926
1994	383,064	10,421	8,072	2,035	863	1,994
1995	391,297	20,268	8,563	2,238	1,003	2,231
1996	369,976	20,661	8,929	2,377	1,110	2,560

Source: Mejssner M.

Supermarkets

In 1996 foreign-owned retail food store chains had sales of about 5 billion zloty ($1.90 billion) and it was estimated that in 1997 their sales reached 15 billion zloty ($5 billion). Table 9 shows the development of retail food stores with foreign capital in Poland.

Table 9. Number of stores with foreign capital from 1992 to 1997

Years	1992	1993	1994	1995	1996	1997
Number of stores	331	336	483	748	925	1,100
Share in total number of stores	0.09	0.09	0.12	0.18	0.23	0.30

Source: Mejssner M.

Foreign food retail chains entering the Polish market rarely adapt or build small stores.

Usually they build supermarkets which range in size from about 950 to 1,500 square meters (about 10,000 to 16,000 square feet), hypermarkets of more than 2000 square meters (21,500 square feet), and discount stores with over 400 square meters (4,300 square feet) in area. They organize shopping centers, distribution centers, and chains consisting of large self-service stores. Some chains have only mail-order stores or use direct store delivery. Every year for the past several years, the number of supermarkets and hypermarkets in Poland has almost doubled. Among the chains which have already entered the Polish food market the following play the most important role: Ahold & Allkauf Poland (a joint venture of the Dutch Royal Ahold and German Allkauf group), Auchan, Biedronka, Billa Polen Ltd. (the Austrian concern Billa), EuroCash Poland, Gent (a French commercial firm), Hit (the German Dohle group), Jumbo (the Portuguese concern Geronimo Martins), Leclerc (a French association of traders), Makro Cash & Carry, Metro AG (a German commercial firm), miniMAL (owned by the German firm Rewe), Netto (the Danish Dank Supermarket), Plus Discount (the German firm Tengelman), Real Poland (the German Metro group), Rema (the company of Norwegian Reitangruppen and Czech Interkontakt), Savia (a joint-stock company with the main shareholder British Tesco corp.), and Tip Discount (the German Metro AG group).

CONCLUSIONS

The eating patterns of Polish consumers are continuing to change rapidly, and thus, major changes in the system of food sales and marketing will continue. Following these consumer changes and projecting their future directions are of great importance for food processing and manufacturing, and for food wholesaling and food retailing. The food industry both influences the behavior of food consumers and, on the other hand, should be flexible enough to recognize and meet the needs and wishes of the changing Polish food consumer.

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