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MARKETPLACE TRADE IN POLAND. STATE IN 2008-2018 AND PROSPECTS

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Abstract

In Poland, marketplace trade has a long tradition. There are interesting trends in its development. This form of trade was intensified substantially in the first years of the systemic transformation. A significant increase in the number of marketplaces was also observed in 2000-2008. However, the role of the marketplace in the retail trade sector has declined since 2008. The aim of this paper is to illustrate changes in trading at street markets in2008-2018, identify the main factors influencing their development and pinpoint those which will be significant in future. The sources include secondary data of the Polish Central Statistical Office (GUS) from the Local Data Bank (BDL), internal market statistics, direct research results, reports from various analytical institutions and agencies and available literature. The analysis of the data showed that the number of street markets in Poland declined by 1240 during 2008-2018, including 105 permanent markets and 1135 seasonal ones. The main reason for this change was the growth of discount stores and changes in customer preferences. Government programmes aimed at revitalising street markets and legal regulations facilitating the direct sale of food produced by farmers have not reversed this trend. The observed significant increase in consumer interest in unprocessed food which is safe for human health, which might be linked to the coronavirus pandemic, could result in a revival of street markets.

Keywords: food, retail trade, food supply chains, direct sales, marketplace.

JEL codes: D40, E20, Q02, Q13.

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Introduction

From time immemorial, the life activity of humans has focused mainly on acquiring food. The civilisational development of humanity is closely linked to meeting a basic physiological need, i.e. the need to satisfy hunger and thirst (Szczepański, 1981; Wolański, 1987). Satisfying our food needs is a leading issue in all socio-economic conditions. The modern system of food production and its subsequent management in time and space covers a set of complex organic, technical, technological and organisational elements and processes, which, when considered and applied comprehensively, form the so-called food economy (Woś, 1996). The horizontal and vertical links between the food economy and various sections of the national economy are the reason for which virtually the whole national economy is involved in all issues related to the nutrition of population.

Before food reaches the final consumer, it often has to undergo a long process "from farm to fork". The availability of food products at the right time, in a required quantity and of the right quality is ensured by supply chains. Their main links are: agricultural producers, processors, distributors, wholesalers, retailers and consumers, as well as producers of means of production and services supplying and serving the aforementioned links (Chechelski, 2009). Along with the socio-economic development, food chains are evolving and the hierarchy of importance of individual links is changing. In Poland, significant changes in the market structures took place during the period of systemic transformation (Kozera, 2007). The dominant position of agriculture in the centrally planned economy system was taken in the 90s by the agri-food industry, which at the beginning of the 21st century started losing its importance in favour of retail trade (Chechelski, 2015). In the past decade, retail trade became the most important link in the food chain in Poland (Momot, 2016).

As part of retail trade, marketplace trade is a traditional form of non-store retail sales and has a centuries-old tradition in our country. In the age of real socialism, it was a place of acquiring hard-to-reach goods, as well as one of few enclaves to create market substitutes. In the first years of systemic transformation, it strengthened its position. It resulted from the dynamic development of commercial activity, including, in particular, the emergence of new forms of small trade and revitalisation of previous forms, which was concentrated mainly in bazaars and market squares (Dąbrowski, 1996; Kropiwnicki, 2003). The intense transformations in market structures in supply chains taking place in Poland and related to globalisation, trade modernisation, increased concentration, networking and internationalisation of retail trade led to a decrease in the importance of traditional forms of trade (Karasiewicz and Trojanowski, 2016; Michalczyk, 2017; Plichta, 2005; Szymanowski, 2009).

It seemed that these changes would mean the inevitable twilight of marketplace trade. However, after a periodic decrease in 2004, the number of street markets started to grow and in 2008 it was 25% higher than in 2000 (Fig. 1). The subsequent years were not favourable for the development of street markets. As a consequence of the global financial and economic crisis, the economic slowdown gave rise to a process of reducing the number and area of street markets, which became intensified in the years 2009-2013, mainly due to growing competition on the part of discount chains. The modernisation of existing street markets and an increase in the number of seasonal street markets inhibited this trend. Despite the expansion of modern forms of trade, street markets remain an important place for shopping for a large percentage of buyers. Their attractiveness increases along with the spread of the coronavirus and an increase in the consumer demand for safe and local food products purchased close to home. The increased interest in this form of trade is also visible among producers and processors of food searching for methods to improve the efficiency of operation and increase the competitiveness on the food market.

The objective of the article is to illustrate the changes in marketplace trade in Poland in the years 2008-2018, identify the major factors of its development and the factors that will be important in the future. The article attempted to describe the conditions of marketplace trade in the context of a crisis situation caused by the coronavirus pandemic. The choice of the study period was intentional. The year 2008 was critical to the development of marketplace trade, ending a period of long-term prosperity, whereas 2018 was the last year from which there are available data from the Polish Central Statistical Office (GUS) illustrating these phenomena. The time range of the considerations mainly covers the above-mentioned decade[1], but in some cases a reference was made to the earlier years, which allowed for drawing more appropriate conclusions. What was analysed in the considerations, was the number of permanent and seasonal street markets, the total area and sales area of permanent street markets and the annual revenues from the marketplace fee. Information on the sales volumes of goods at stalls and in street markets was used to assess the importance of street markets in retail trade. The analysis was carried out on a national scale. The sources include secondary statistics from the Central Statistical Office (GUS) originating from the Local Data Bank (BDL) and internal market statistics, the results of direct studies conducted by various institutions and analytical agencies and the available literature of the subject. In assessing the revealed phenomena, the method of descriptive statistics has been used. The results of the analyses carried out have a cognitive value and practical implications. They are used to recognise the importance of marketplace trade in food retail trade under current management conditions and may be helpful in developing strategies for its development in the coming years.

Marketplace trade in the food chain

Food supply is based on more or less developed relations among various groups of entities involved in the processes of producing and distributing food. The groups form the food supply chain (Dani, 2016; Dobrowolski, Marciniak, Łojewski and Bartnik 2016; Jarzębowski and Klepacki, 2013; Maternowska, 2011; Szymanowski, 2008). Marketplace trade is a traditional form of retail trade, i.e. the link before

[1] 2008 is a reference year and provides a basis for comparisons.

food reaches the consumer. It is part of commercial activity which is mainly related to the sale in street markets or bazaars[2]. According to Kotler (1994), retail sales cover all types of activity aimed at selling goods and services directly to the consumer for their personal, non-commercial use. The most important function of retail trade is to supply products to the final recipient at an appropriate time and place, to create convenient conditions for purchase and to guarantee satisfaction with the choice (Szulce, Chwałek, Ciechomski and Mielczarczyk, 2008). Retailers create physical infrastructure in the form of various types of sales outlets. According to the GUS nomenclature (*Rynek wewnętrzny*…, 2019, p. 44), retail sales outlets are commercial outlets including:

- large-format stores,
- stores including pharmacies,
- permanent small retail sales outlets (kiosks, booths, stalls),
- other mobile small retail sales outlets (points of doorstep selling and peddling),
- petrol stations.

The location of retail sales outlets may be either dispersed or concentrated (*Handel detaliczny…*, 2017). The concentrated location includes:

- commercial and retail centres,
- shopping areas,
- **street markets,**
- logistic centres.

The dispersed location includes: stores, kiosks and stalls.

In the nomenclature of the Ministry of Agriculture, a street market is understood as a separate area where the local sale of agricultural products takes place between farmers and non-farmers and between agricultural producers and commercial entities on specific days of the week (*Metodologia*..., 2002). This definition is not universal and does not reflect the nature of modern street markets. A common definition is that used by GUS. According to the GUS terminology (*Rynek wewnętrzny*…, 2019, p. 46), "street markets are separate areas or structures (square, street, market hall) with permanent or seasonal small retail sales outlets or facilities for conducting trade every day or on specific days of the week". There is a distinction between permanent and seasonal street markets. According to the definition adopted by the GUS Local Data Bank, a permanent street market is a "specific area or structure (square, street, market hall) with permanent retail outlets conducting trade every day or on specific days of the week and operates during the all calendar year, eventually works with certain breaks because of renovation, lack of staff (due to leave or illness), stocktaking". A seasonal street market is a "specific area or structure (square, street, market hall), where retail sales outlets exist and work not longer than six months in a calendar year (e.g. during holiday at the seaside) and where this activity is renewed in next seasons" (*Słownik pojęć*, 2020). The characteristic features of transactions concluded at street markets are (Czubała, 1996):

[2] Currently, the terms: open-air market, bazaar, market square, marketplace are used as synonyms and applied interchangeably.

- a relatively large number of customers;
- a small size of batches of goods sold at a time, adapted to the current consumption needs of individual buyers;
- fixing the prices of many products by way of negotiations;
- immediate payment of an amount due for goods purchased;
- close and often personal contact between the sellers and final buyers of products.

Today, marketplace trade complements retail trade, in particular, the forms based on permanent retail sales outlets and covers mainly local markets. According to the GUS definition, marketplace trade also includes street trade, which, in practice, makes it difficult to determine its actual size. In marketplace and bazaar trade, people selling goods which they did not produce themselves, but which they bought from someone else, have a significant yet difficult to estimate share. Another reason for the lack of accurate data on the scale of turnover and the number of entities participating in marketplace trade are the liberal, simplified rules governing its functioning (Ustawa, 2020). It is estimated that about PLN 20 billion pass through street markets and bazaars in Poland every year (Mazurkiewicz, 2017). Agri-food goods are most important in marketplace trade (Karwat-Woźniak, 2013), but due to the aforementioned lack of reliable data, there are great difficulties in determining the volume of trade in food in street markets and their share in retail food trade[3]. It is estimated that in Poland the share of marketplace trade in retail trade in fast-moving consumer goods (FMCG) amounts to 5-7%, which applies mainly to agri-food products and to non-food goods to a smaller extent (i.e. clothing, footwear, household goods, etc.) (*Dobra kondycja*... 2020).

The surveys show that street markets are regularly visited by about 15% of consumers (Ciechomski, 2014). According to a survey carried out by IPSOS upon request of the European Commission, among the Europeans it is the Poles who shop in bazaars most willingly, especially food. Almost half of the Poles buy fruit and vegetables only in street markets, and 29% buy meat (*Renesans handlu*... 2018). According to the surveys conducted in the Podkarpackie Province, street markets and bazaars are approved by 90% of the respondents and the number of buyers in market squares is slightly lower than the number of customers of small food stores or large-format stores (Cyran, 2013). In Warsaw, every third resident (27%) shops in the street market at least once a week (Michalak and Sojkin, 2018). In Kraków, products most often bought in street markets are domestic fruit and vegetables (79.9% of the respondents), foodstuffs (bread, drinks, etc. – 41.2%) and dairy products and flowers (Płaziak and Szymańska, 2016). Similarly, in Poznań products which are most willingly bought in street markets are fresh vegetables and fruit (98.3% of buyers), meat (36.2%), flowers, eggs and other food products (Ciechomski, 2014). Direct studies show that people who declare the use of market squares as a place to buy food products, do it frequently and regularly. Thus, it can be concluded that street markets in Poland are the forms of trade with a high potential.

[3] Revenues from retail sales conducted at stalls and in street markets, registered by GUS, apply to companies pursuing commercial activity and employing more than 9 persons.

Marketplace trade in Poland in the years 2008-2018

In Poland, the organisation of street markets and market halls falls under responsibility of local governments (Ustawa, 1990). The major source of data on the type and number of street markets are the GUS studies. They show that between 2008 and 2018 the number of street markets, both permanent and seasonal, showed a downward trend, which was a reversal of the trend in the years 2000-2008 (Fig. 1). In 2018, 9,283 street markets were registered with the national register kept by municipal local government units, i.e. by 1,240 (11.8%) fewer than in 2008 (Table 1). This situation resulted from non-uniform changes in the number of permanent and seasonal street markets. In the analysed period, the number of permanent street markets was steadily decreasing year by year. In 2018, it was 2,156 and was by 105 (4.6%) lower than in 2008. The number of seasonal street markets decreased in the years 2009-2013, i.e. during the economic slowdown. In 2013, it was 6,460, when compared to 8,262 in 2008, which means a decrease by 1,802 (21.8%). Since 2014, along with the economic recovery, it has started to grow again but has not reached the level of 2008. In 2018, in Poland there were 7,127 seasonal street markets, i.e. by 667 more than in 2013, but by 1,135 (13.7%) fewer than in 2008 (Tab.1).

In 2008, in the area of 2,261 street markets registered with municipal offices, there were 2,029 street markets with a predominance of small retail sales. In these street markets, trade was conducted in 111.1 thousand permanent small retail sales outlets, of which 73.7 thousand were open daily (*Rynek wewnętrzny*…, 2009). In 2018, from among 2,156 permanent street markets, 2,073 were characterised by the predominance of small retail sales. In their territory, there were 91.5 thousand permanent small retail sales outlets, including 51.5 thousand functioning on a daily basis (*Rynek wewnętrzny*, 2019). The above data shows that in the years 2008-2018, the number of permanent street markets with the predominance of small retail sales slightly increased, with a decrease in the number of permanent small retail sales outlets, including a significant reduction in the number of outlets operating daily (by 22,2 000, i.e. by 30%).

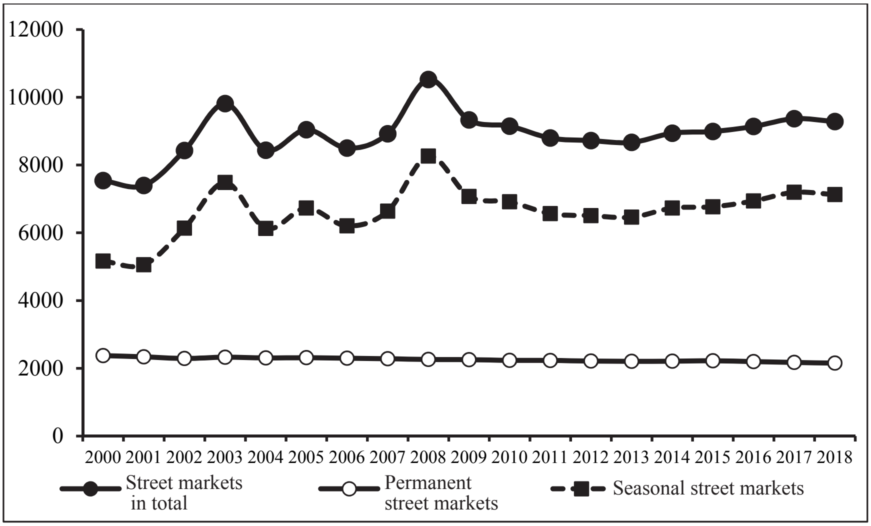

Fig. 1. The number of street markets in Poland in the years 2000-2018.
Source: own study based on the GUS Local Data Bank data.

Table 1

Street markets in Poland (as of 31.12)

Specification	2008	2013	2018
Total number of street markets	10,523	8,667	9,283
Permanent street markets	2,261	2,207	2,156
Seasonal street markets	8,262	6,460	7,127
Permanent street markets with the predominance of small retail sales	2,029	2,105	2,073
Total area of permanent street markets (m^2)	14,798,091	14,483,937	14,147,893
including: sales area (m^2)	9,209,355	8,734,261	8,479,817
Annual revenues from the marketplace fee (thousand PLN)	264,913.5	230,828.8	187,366.3

Source: GUS Local Data Bank.

In the years 2008-2018, seasonal street markets had the predominant share in the total number of street markets with minor differences in the individual years. In 2008, 2013 and 2018, it was 78.5%, 74.5% and 76.8%, respectively. The analysis of the above data leads to a conclusion that the recorded trends of changes in the number of street markets did not significantly affect the structure of their base. In 2018, the share of seasonal street markets decreased slightly (by 1.7 p.p.) in favour of the share of permanent street markets when compared to 2008.

A decrease in the number of street markets in the years 2008-2018 was accompanied by a decrease in their area. In 2018, the total area of permanent street markets amounted to 14.1 million m2 and was by 4% smaller than in 2008 (Fig. 2). The sales area of permanent street markets decreased by 8% (from 9.2 million m^2 in 2008 to 8.5 million m^2 in 2018). In 2018, a single permanent street market occupied, on average, 6,562 m^2, i.e. just like in 2008, while its sales area decreased by 3.4 %, to 3,933 m^2 from 4,073 in 2008. It was probably associated with the improved technical infrastructure of street markets, including, inter alia, the development of sanitary, storage or catering facilities.

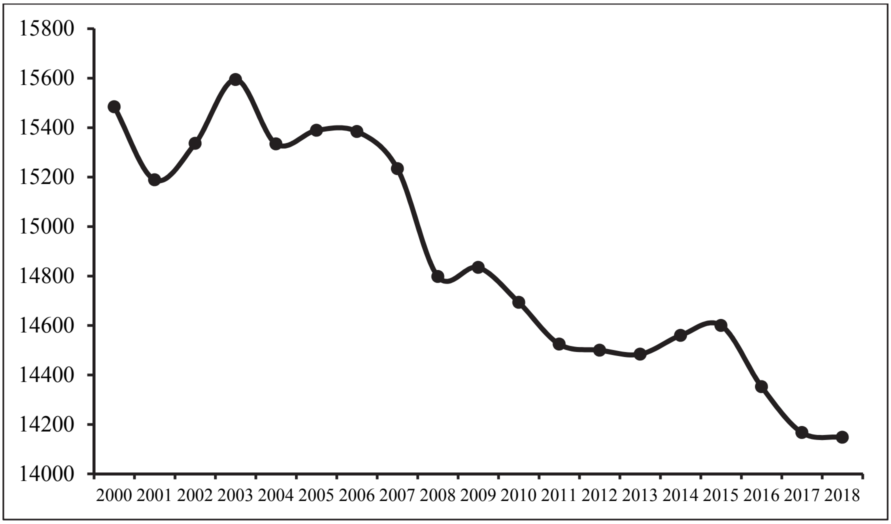

Fig. 2. The area of permanent street markets in the years 2000-2018 (m^2).
Source: own study based on the GUS Local Data Bank data.

A decrease in the number and area of street markets has been reflected in a decrease in the revenues from the marketplace fee. Marketplace fees support the budgets of municipalities and can be a major source of their income. According to GUS, in 2018, the annual revenues from the marketplace fee in permanent and seasonal street markets amounted to about PLN 187.4 million and were by about PLN 76.5 million lower than in 2008 (Fig. 3). It is important to mention that since 2016 some municipalities have used a possibility of abandoning the collection of fees in order to support small business and maintain street markets in their territory (Wójcik, 2015).

Due to a decreased number of street markets, with an increase in the population of Poland[4], the demographic availability of these establishments, expressed in the number of street markets per 100 thousand residents, was deteriorated. In 2018, this number was 24 while in 2008 it was 28. In 2018, per 100 thousand residents

[4] According to GUS, in 2008 in Poland there were 38,135.9 residents and in 2018 – 38,411.1.

there were 6 permanent street markets, i.e. just like in 2008, and 19 seasonal street markets, i.e. by 3 fewer than in 2008. In 2008, one street market served 3,624 residents and in 2018 – 4,138 residents. In 2008, there were 16,867 residents per one permanent street market and 4,616 per one seasonal street market, while in 2018 it was 17,816 and 5,390, respectively.

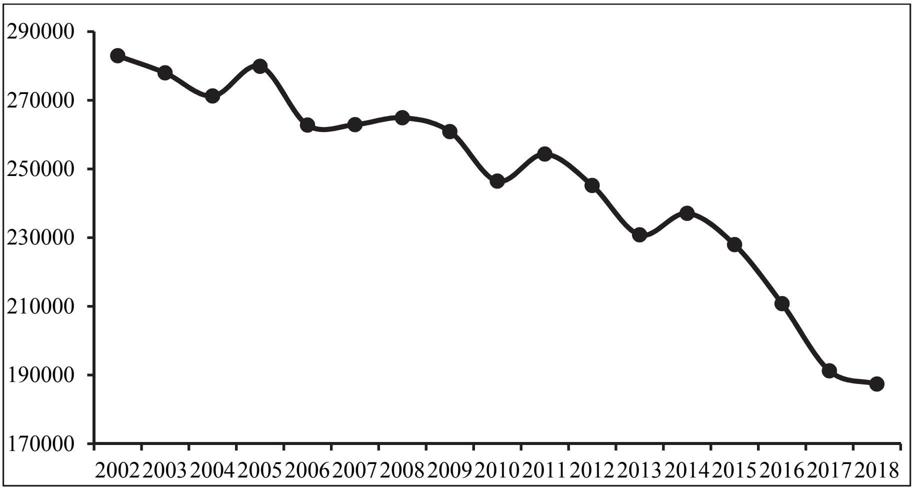

Fig. 3. Annual revenues from the marketplace fee in the years 2002-2018 (thousand PLN).
Source: own study based on the GUS Local Data Bank data.

One of the relevant indices informing about the importance of street markets in retail trade is the volume of revenues from sales at stalls and in street markets and its share of the total amount of revenues from sales of goods and services in retail trade[5]. According to GUS, in 2017 the amount of revenues from retail sales at current prices, excluding retail trade in motor vehicles, amounted to PLN 525,514.6 million and was by PLN 136,773.7 million, i.e. by 35.2% higher than in 2009, while retail sales at stalls and in street markets amounted to PLN 6,592.0 million and decreased by PLN 495.9 million when compared to 2009, i.e. by 7.0% (Table 2). By adjusting the above indices of changes in sales with the inflation rate[6], it can be noticed that in the analysed period, a 20.0% increase in retail sales at fixed prices was accompanied by a 17.5% real decrease in sales at stalls and in street markets. The share of sales at stalls and in street markets in the total value of retail sales (at current prices) decreased from 1.82% in 2009 to 1.25% in 2017.

[5] The available GUS data on the volume of retail sales and purchases of goods at stalls and in street markets applies to the years 2009-2017. When analysing it, we must remember that it applies to companies pursuing commercial activity and employing more than 9 persons.

[6] In 2017, when compared to 2009, the rise in the prices of consumer goods and services was 12.65%.

The results of the analyses carried out confirmed the decreasing importance of marketplace trade in the years 2008 and 2018. They highlighted the improving position of street markets in recent years, which may suggest a reversal of this unfavourable trend and the gradual revival of this traditional form of trade (Fig. 1 and Table 2). Therefore, it is worth analysing these phenomena in detail, considering their causes and the answer to the following question: which of them will be important in the future?

Table 2

Revenues from retail sales in Poland in the years 2009-2017

Specification	2009	2013	2017
Revenues from retail sales, excluding retail trade in motor vehicles (million PLN, current prices)	388,740.9	445,712.2	525,514.6
Retail sales at stalls and in street markets (million PLN, current prices)	7,087.9	4,969.9	6,592.0
Share of sales at stalls and in street markets in revenues from retail sales	1.82	1.11	1.25

Source: the GUS data and own calculations.

Determinants of development of street markets in the years 2008-2018

When considering the conditions for the development of street markets in the analysed period, we can identify the factors both conducive to increasing the number of street markets and depreciating their activity, factors that are direct and indirect, incidental and fixed, specific and universal, major and secondary, etc. The limited scope of the paper does not allow for their full description. Their description can be found in the literature of the subject (Ciechomski, 2014; Hamulczuk, 2016a). By reviewing them, we will focus primarily on the reasons for the decreasing number of street markets. The analysis of the structure of retail outlets by their organisational structure leads to a conclusion that the major factor restricting marketplace trade in the years 2008-2018 was the expansion of hyper – and supermarket chains, which became an alternative to bazaars. As it has been mentioned earlier, a significant decrease in the number of street markets took place in the years 2008-2013 (Fig. 1). At that time, the Polish economy experienced the effects of the global financial and economic crisis, which was reflected in the slower growth rate of gross domestic product, intensification of negative trends in the labour market and deterioration of the income situation of the population. The consumers' willingness to buy food decreased, the importance of a price as a selection criterion increased (Świetlik, 2014). The exacerbation of the competitive struggle led to the development of new formats of large-format trade, including, in particular, discount stores using low-price strategies (Kucharska, 2016; Momot, 2016). According to GUS, the years 2008-2013 were marked by the largest increase in the number of stores with a sales area of 400-999 m2, i.e. smaller supermarkets (Table 3). Cheap discount stores and supermarkets became a real threat to the development of street markets. The studies by the Centre for Public Opinion Research (CBOS) show that in 2013 almost ¾ of the respondents (73%) bought at least half of food products at discount stores. Bazaars, which used to be appreciated in the past, became less popular (*Jak i gdzie*..., 2013).

Table 3

Stores and petrol stations by their organisational structure

Specification	2008	2013	2018
Total	395,736	362,615	349,220
Stores	385,663	353,562	339,880
including:			
department stores	76	64	73
shopping centres	312	227	172
hypermarkets	463	592	570
supermarkets	3,629	6,210	7,659
stores with a sales area of 400 m^2 and more	8,634	11,922	14,886
stores with a sales area of 400-999 m^2	6,107	8,484	10,882
stores with a sales area of 99 m2 and fewer	356,433	318,317	299,608
Petrol stations	10,073	9,053	9,370

Source: the GUS data.

In the subsequent years, looking for the growth opportunities, large-format chains began to emergein smaller cities. They managed local markets and changed their structure (Twardzik, 2017). Small towns, which have offered traditional trade so far, became a lucrative place of expansion for retail chain investors. Over time, we could notice a tendency to locate discount chains not only in small towns, but also in rural areas, situated in the vicinity of larger units. The newly emerging discount stores attracted customers by offering a wider choice of goods and much lower prices than small retail trade, as well as numerous promotions and discounts. Many small local stores did not meet the competition requirements and ended their activity (Table 2). Owing to growing competition from large-format stores, street markets also faced a similar fate, although marketplace trade lost less to them than local stores[7]. Another reason for a decrease in the number and area of street markets was the emerging shopping malls, hotels and residential buildings, ousting street markets from attractively located areas. Local authorities were closing bazaars, replacing them with more profitable projects[8].

[7] When compared to 2008, in 2018 the number of stores with an area of 99 m^2 and fewer decreased by 16% while the number of street markets decreased by 11.8%, including permanent street markets which decreased by 4.6%.

[8] In some Polish cities, shopping malls were built in the areas of street markets, e.g. Jagiellonia in Białystok or Cuprum Arean in Lubin. The famous Banach street market in Warsaw has been occupied by so-called TBS i.e. a building with flats for rent. The intense construction of hotels was carried out in connection with, inter alia, the "Euro 2012" European Football Championship held in Poland.

The literature shows that changes in consumer preferences and stronger regulations related to food safety, phytosanitary or business requirements (Hamulczuk, 2016b) also contributed to the lower importance of marketplace trade. This is confirmed by studies, which show that the Poles changed their preferences as regards the place where they carry out their shopping “missions”. They began to appreciate the convenience, proximity of retail outlets and time saving. For many customers, especially young ones, shopping in street markets, when compared to discount stores or shopping malls, became unattractive. They admitted that they preferred shopping in hypermarkets, where they had access to a wide range of food products in one place, “under one roof”. As factors discouraging them from shopping in street markets, the respondents also mentioned: impossibility to pay by card, lack of parking spaces, inconvenient opening hours, unsatisfactory sanitary and hygienic conditions, opacity of the product range, poor choice of goods, time-consuming shopping, etc. On the other hand, for sellers trading in street markets, a major drawback was, first of all, unsatisfactory technical infrastructure, and, in particular, the lack of sanitary facilities, with rather excessive – in their opinion – fees charged for the space occupied or for entering the market square (Michalak and Sojkin, 2018; Michałowska and Urban, 2013).

A number of measures have been taken at the local and central levels to inhibit the downward trend in the development of street markets. On the initiative of the Ministry of Agriculture and Rural Development, in 2011 the *Mój Rynek* (*My Market*) programme was created with the aim to support, create and modernise street markets. Thanks to EU funds of EUR 54 million from the Rural Development Programme 2007-2013 (RDP 2007-2013), it was possible to co-finance investments consisting in the construction, reconstruction, renovation or equipping of permanent street markets. The proposal to build street markets was addressed to local governments in cities with up to 50 thousand residents. A new street market could be built provided that 50% of products offered there come from and are sold by local farmers (*Mój Rynek*, 2011). Due to the socio-economic benefits of this form of trade, many municipalities took measures to support street markets’ activity. As a result, in the years 2011-2015 about 200 local street markets were built or modernised in Poland. New or modernised street markets are in line with the modern standards of trading, have been equipped with parking spaces and sanitary and hygienic facilities. Support for investment in street markets is continued from the RDP 2014-2020, whereby it applies to the construction or modernisation of street markets in cities of up to 200 thousand residents (Rozporządzenie..., 2016a).

The reason for supporting the marketplace form of trade is not only to meet the expectations of consumers, but also to create mechanisms to make it easier for farmers to sell products produced on the farm. The current legislative situation allows them to do so as part of, inter alia, direct supplies (Rozporządzenie..., 2007), direct sales (Rozporządzenie..., 2015), marginal, localised and restricted activity (MLR) (Rozporządzenie..., 2016b) and agricultural retail trade (ART) (*Rolniczy handel*..., 2020). In each form of activity, marketplace trade acts as a direct channel for selling agri-food products. For consumers, it is the shortest food supply chain, guaranteeing the freshness and high quality of products.

Marketplace trade in the face of new challenges

Due to the growing expansion of large-format store chains (*Biedronka*..., 2020)[9] and the further reduction in the number and area of traditional, permanent street markets, it seems reasonable to ask about the future of this form of trade. The answer is not simple, as under current management conditions all economic forecasts are encumbered with a high risk. In 2020, the Polish economy, just like the whole global economy, faced challenges related to the spread of the coronavirus. The COVID-19 pandemic contributed to an unprecedented decrease in the global macroeconomic activity, including a recession in the economies being the major trading partners of Poland. The International Monetary Fund (IMF) forecasts that in 2020 the global economy will decrease by 4.9% y-o-y, the American economy by 8.0% and the euro zone economy by 10.2%, including the economy of Germany by 7.8% and that of Poland by 4.6% (*World Economic*..., 2020, p. 7, 20). According to the World Bank, in 2020 global GDP will decrease by 5.2% y-o-y and in Poland it will be 4.2% lower than in 2019 (*Global Economic*..., 2020, p. 4, 207). The European Commission expects that in 2020 GDP in Poland will decrease by 4.3% on an annual basis due to disruptions in economic activity caused by the lockdown and a strong decrease in the internal demand (*European Economic*..., 2020, pp. 130-131).

The pandemic has an adverse impact on the Polish economy in two ways. The first one is directly related to the number of the sick resulting in the loss of the working population and increased sickness absence. The second type of negative consequences is caused by measures limiting the spread of the coronavirus (closure of the borders, restriction of air traffic, cancellation of events, closure of stores, restaurants, service establishments, etc.). It is estimated that the impact of the coronavirus on the Polish economy may be more serious than in the case of the global financial crisis of 2008-2009, as our country is strongly integrated into global value chains and due to the high importance of small and medium-sized companies, whose activity has been temporarily halted, in employment (Reiserer, 2020). The security measures applied left large part of the Poles without sources of income and had a negative impact on the financial condition of most households and companies. According to a survey conducted in May 2020 by the Centre for Public Opinion Research (CBOS) on the impact of the epidemic on the professional situation of the Polish residents, between March and April 3% of professionally active people lost their jobs, 5% closed their companies and 20% started working part-time. More than 1/4 of the families surveyed (*Skutki*..., 2020) were affected by the loss of earning opportunities due to the coronavirus pandemic(which does not mean total unemployment). According to GUS, in May 2020, average employment in the enterprise sector was 3.2% lower than the year

[9] In 2019, the Biedronka investment programme amounted to EUR 388 million, which included 128 new stores (including 33 of smaller format) and modernisation of 252 existing stores.

before, and the registered unemployment rate was 6% when compared to 5.4% in ay 2019. When compared to the same period in 2018, in May 2020 the purchasing power of the average gross monthly salary in the enterprise sector decreased by 1.5% (Sytuacja.., 2020, p. 5). While at the beginning of 2020, the Poles were generally satisfied with their financial situation (more than 73% of the respondents to the Santander Consumer Bank survey) (Polacy ..., 2020), in May more than half of the respondents (54%) negatively assessed changes in their households' budgets (*Z obawą*..., 2020).

As an unprecedented event, the coronavirus pandemic severely affected the domestic agri-food sector, particularly food trade, resulting in logistic difficulties and problems in maintaining stable supply chains. Serious disturbances took place, inter alia, in the export, due to movement restrictions and growing transport costs. The weakening of the population income's growth rate, with the continued and relatively high level of prices of food and the restrictions in retail trade introduced in mid-March so as to counteract the development of the epidemic contributed to a decrease in the domestic food demand[10]. According to GUS, in April and May 2020, retail sales of food, drinks and products, at fixed prices, in companies employing more than 9 persons were lower than the year before by 14.9% and 7.6%, respectively. Also, the lockdown of the HoReCa sector had a negative impact on the consumption of food (*Koronawirus*..., 2020).

It is too early to assess the long-term impact of the pandemic on the food market and its environment. However, there are several phenomena that, despite the whole complexity of the situation, can be seen as opportunities for street markets. This is suggested by the results of studies on nutrition trends, consumer behaviour on the food market and purchasing preferences during the pandemic. They show that the consumer trends remained the same as before the pandemic, but their intensity changed. For several years, the Poles have been treating health as one of priorities among life values (*Wartości*..., 2016). The pandemic strengthened this trend, increased the interest in safety and convenience of shopping, locality and smart shopping. According to the "Global State of the Consumer Tracker" report drawn up by the Deloitte analytical company, the factor that currently determines the purchasing decisions of Polish consumers to the greatest extent is their concern for the health of their families. It is reported by three quarters of the Poles and it is the highest rate in Europe (Report: The Global..., 2020). This translates into the type of food products chosen and places where they are bought. The consumers' concern for health, stronger than ever, intensifies the demand for products purchased close to home, from trusted sources adhering to the quality standards. The Poles are aware that the action that contributes most to staying in good health is proper nutrition (*Zdrowie*..., 2016). The fear of the virus made them start attaching great importance to the hygiene of nutrition and a need to boost immunity. Therefore, when shopping, they focus on basic, mainly fresh, healthy food products. More time spent at home

[10] They were partially lifted at the beginning of May.

and the return to cooking and eating meals in the family circle were reflected in the increased demand for products being a basis of the daily menu. The experience of isolation, during which consumers had time to cook at home, became an impulse to shift to the diet richer in plant ingredients and based on more traditional ways of eating. The point is not just the composition of meals, but also the way of acquiring food (*Zdrowsze*..., 2020). As a result, the basket of food purchases is now more traditional, less sophisticated, with the greater share of natural products, especially vegetables and fruits (Zwyczaje..., 2020)[11]. Polish consumers surveyed in May by the Mindshare Polska agency declared their willingness to increase the demand for fruits and vegetables in the next 6 months by 22% (*Jak koronawirus*.., 2020).

When analysing consumer behaviour in the conditions of the pandemic, it can be observed that consumers are paying more attention to the quality and origin of food products, whereby a sense of safety is contained in the word "quality". For the sake of healthy nutrition, they are searching for high-quality food, processed as little as possible, with a proven source of origin (10 trendów..., 2020). One form of sale that guarantees a proven source of origin and ensures the freshness and low level of processing of food is the direct sale of agricultural products produced on the farm directly to the final customer by selling them in street markets. In this context, the recorded positive purchasing declarations made by Polish consumers with respect to fruits and vegetables are a good omen for the development of marketplace sales. Fruits and vegetables are products most commonly bought in street markets. They are characterised by the seasonality of production. Eating seasonal products is associated with better taste sensations, freshness and higher nutritive value.

Under the current conditions, food safety is becoming a decisive value and driving force for the development of street markets. Therefore, shopping in a bazaar is gaining popularity not only with the elderly, usually associated with this type of shopping, but also with younger customers who are searching for tasty, unprocessed, safe and healthy food in a street market.

The pandemic also creates new needs among consumers in the area of comfort and safety of shopping. According to the report prepared by the GfK Polonia Household Panel entitled "The impact of COVID-19 on the FMCG market", the safety of shopping has become the most important aspect for the vast majority of Poles. As many as 81% of consumers said they would choose such a sales outlet where the risk of contact with other customers is as low as possible (*GfK: Bezpieczeństwo*..., 2020). Given the existing risk, consumers prefer to shop close to their homes so as to limit their movement and contact with other people. They are more willing to visit sales outlets located outside closed spaces in shopping malls. These outlets are mainly bazaars and street markets. Street markets allow to do shopping in the open air, which reduces the risk of being infected with the coronavirus. They allow consumers to avoid large crowds of people, and also offer a more personalised service and a pos-

[11] „National studies on the consumption of vegetables and fruit" are conducted by Kantar Polska for the National Association of Fruit and Vegetable Producer Groups.

sibility to obtain information about the origin of a product. The studies by Deloitte show that a large percentage of consumers focus on the safety and proximity to the place of shopping more than on prices (*Pandemia wciąż*..., 2020). The results of the studies by GfK Polonia show that nowadays the usefulness of food products is equally important to consumers as a possibility of buying them safely. The safety of shopping is becoming a new definition of the 'convenience' trend (Report: Wpływ COVID-19..., 2020)[12]. This trend will certainly be reinforced, thus fostering the growth of popularity of street markets.

The studies conducted by the PEMI Association showed that currently one of the key elements affecting the purchasing decisions of the Poles is the origin of a product (*Badanie: zachowania*..., 2020)[13]. In the face of the pandemic, local patriotism has been revealed. 89.3% of consumers declared their willingness to buy local products. Consumers prefer products produced in a region where they live, mainly because of their will to support domestic producers and because of product safety. They are convinced that Polish products are safer than imported ones, especially during the pandemic. They see local food as better quality food, with the desirable sensory characteristics, such as being fresh, natural, authentic and delicious. They believe that such food is the healthiest, and moreover, long-distance transport is harmful to the environment. According to the Deloitte experts, the trend of locality will become more important, and the shorter the food mile is, the more attractive the product will be (*Strach przed*..., 2020). The positive attitude of consumers towards local products purchased in street markets is supported by a nationwide information campaign entitled "Buy consciously – Polish product", which is aimed at promoting the purchase of Polish food products, guaranteeing sales for Polish producers (*Information campaign*..., 2020).

The outbreak of the pandemic not only changed the way of life, but also lowered the sense of financial security of the Poles. In the times of the economic downturn and continued economic uncertainty, consumers' propensity for spending money decreased and the popularity of "smart shopping" increased. This term refers to smart, clever, well-thought shopping, expressing the saving-oriented, rational attitude based on consumer pragmatism (Zalega, 2013). According to the studies conducted upon request of the BIG InfoMonitor Economic Information Office, due to the pandemic 60% of the surveyed Polish residents intend to make savings in management of household expenses, with 45% planning to save money on larger purchases and 15% on basic products (*W czasie*..., 2020). The studies conducted by various analytical companies show that in the conditions of the pandemic Polish consumers treat their expenses in a well-thought manner. Lower household budgets and the associated saving measures are changing the way of

[12] The report was developed by the GfK Polonia Household Panel based on the survey conducted in April 2020.

[13] PEMI – the abbreviated name of the Association: Podpis Elektroniczny-Mobile-Internet. The survey was conducted on 6-16 April 2020.

shopping. Also, the economic aspect of shopping is changed – the demand is shifted towards cheaper products (*Finanse*..., 2020). In view of the smaller amount of money, the food basket contains mainly basic products of local origin preferably at a promotional price.

The concern for health makes consumers more and more interested in buying "healthy" food, and, at the same time, for many of them the price is still one of the most important determinants of purchasing a product. Street markets respond to these challenges by offering consumers a possibility to buy food products often at lower prices than in retail stores. Bazaars and street markets can offer lower prices due to lower costs caused by, inter alia, lower tax burden or lower costs of product transport compared to stores. The marketplace price of most goods is negotiable. The method of determining it is based on an agreement between the seller and the buyer, and its amount is determined by the supply and demand relations. Street market customers, especially the elderly and those with lower average income levels, appreciate the availability of basic products at competitive prices and a possibility to negotiate these prices. It can be assumed that in view of the projected deterioration of the population's income situation in 2020, the Poles will pay even more attention to the prices of food and the number of people interested in buying food in street markets will increase.

However, it must be added that the price is not the most important for all customers of street markets. It is important in combination with product quality. Some buyers focus on the price, while others focus on searching for additional values that a product brings, e.g. freshness, authenticity, originality, etc. Street markets were usually considered a place of shopping by the poorer part of society (Ciechomski, 2014). Currently, it can be seen that they are more and more often visited by wealthy people, who have been satisfied with the offer of supermarkets so far. Now, they want to buy food which is healthier, produced by traditional methods, of regional nature, and, first of all, tasty and pay higher prices for it, according to its quality (*Study: w czasie*..., 2020).

Street markets and bazaars are not only places for selling goods, but also places for acquiring information about a product. They offer some added value, i.e. the possibility of interpersonal contacts, a direct conversation with the seller. Shopping in street markets takes place face-to-face with the producer. The buyer can examine a product, ask about its price and production method. For contemporary "smart customers", it is very important to obtain this information and that they can personally meet the producer from whom they buy goods. They value their money, they want to make informed choices and be sure that a product they pay for meets their expectations.

Direct contact with the customer is also important for suppliers of goods. Obtaining feedback from consumers allows them to recognise their preferences and to better adapt the product range to their needs. However, this does not determine an increase in the interest of agricultural producers in trade in street markets.

The basic motive is an opportunity to sell products at a profitable price. Restrictions on the movement of goods and decreasing consumption of food, caused by the pandemic, have significantly reduced possibilities to sell products produced on own farms. Street markets responded to this challenge by actively supporting the development of the local food sector and the distribution of products through short supply chains. They allowed agricultural producers to sell agri-food products, created for them an opportunity to gain additional income and empower them in the food supply chain. Selling in a street market is a reason for which the margin achieved by intermediaries in the developed supply chain remains on the farm. Agricultural producers can also achieve higher income through added value in the process of pre-processing or deeper processing of agricultural products. Increased profits may also result from a higher selling price, justified by the appropriate quality of products. These considerations lead to the conclusion that, paradoxically, the situation resulting from the restrictions associated with the coronavirus creates great opportunities for the development of street markets and can bring positive solutions to the development of the local food sector and the short supply chains.

Summary and conclusions

After a period of dynamic development in the years 2000-2008, marketplace trade in Poland entered a phase of decline. In the years 2008-2018, there was a significant decrease in the number and area of street markets ousted from urban space by discount stores and supermarkets. Government programmes aimed at revitalising street markets and institutional arrangements introduced to make it easier for farmers to sell food products produced on their own farms periodically halted this process, but did not reverse the overall trend. The lack of official data does not allow to assess marketplace trade in 2019. From the market observations and media information, it results that the process of decreasing the number and area of street markets, recorded in the previous years, was continued.

There are many indications that despite the adverse conditions associated with the coronavirus pandemic 2020 will bring a reversal of this unfavourable trend. Over a short period of time, the pandemic placed the Polish economy and society into a new reality. The change in the supply and demand situation in the food market radically changed the face of trade. The restrictions on the movement of goods, caused by the pandemic, resulted in distortions in the functioning of food supply chains. Farmers found themselves in an unprecedented situation, i.e. an impossibility to sell products produced on their own farms. On the other hand, for consumers, especially those from urban areas, the opportunities to obtain food in retail trade outlets have been significantly reduced. The pandemic changed the lifestyle, preferences, priorities and nutritional behaviour of consumers. It made consumers pay greater attention to the issues of healthcare, food security and safety of purchase and the origin of products. Street markets successfully met these challenges, strengthening their activity with regard to supporting direct sales by local suppliers. They allowed farmers to sell produced agri-food products and created an opportunity to obtain higher income, while meeting consumer expectations. There is no doubt that the current trends will prevailfor a long time and the revival of marketplace trade will continue. More and more consumers recognise the benefits of buying food in street markets not only for themselves, but also for the environment. In the light of the considerations, we may daresay that in the coming years marketplace trade in Poland will gain popularity and increase its share in retail trade in food. The development of this form of trade will be important for ensuring food security and food safety, the challenges which are currently faced worldwide.

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HANDEL TARGOWISKOWY W POLSCE. STAN W LATACH 2008-2018 I PERSPEKTYWY

Abstrakt

W Polsce handel targowiskowy ma długoletnią tradycję. W jego rozwoju dają się zauważyć interesujące tendencje. Znaczny wzrost natężenia tej formy handlu nastąpił w pierwszych latach transformacji systemowej. Istotny wzrost liczby targowisk odnotowano także w latach 2000-2008. Po 2008 r. znaczenie handlu targowiskowego zaczęło maleć. Celem artykułu jest zobrazowanie zmian handlu targowiskowego w latach 2008-2018, identyfikacja głównych czynników jego rozwoju oraz wskazanie tych, które będą miały znaczenie na przyszłość. Wykorzystano wtórne dane statystyczne GUS pochodzące z Banku Danych Lokalnych (BDL) i statystyki rynku wewnętrznego, wyniki badań bezpośrednich, raporty różnych instytucji i agencji analitycznych oraz dostępną literaturę przedmiotu. Przeprowadzone analizy pokazały, że w latach 2008-2018 ubyło w Polsce 1240 targowisk, w tym 105 stałych i 1135 sezonowych. Głównym czynnikiem sprawczym tego zjawiska była ekspansja sieci sklepów dyskontowych i zmiana preferencji nabywców. Rządowe programy rewitalizacji targowisk i prawne regulacje ułatwiające producentom rolnym sprzedaż żywności wyprodukowanej we własnym gospodarstwie nie odwróciły tej tendencji. Na ożywienie handlu targowiskowego może wpłynąć obserwowany wzrost zainteresowania konsumentów zakupem nieprzetworzonej i bezpiecznej dla zdrowia żywności związany z pandemią koronawirusa.

Słowa kluczowe: żywność, handel detaliczny, łańcuchy dostaw żywności, sprzedaż bezpośrednia, targowisko.

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