



# Distribution landscape in Poland

*De Care*  
PRZYSMAKI ŚWIATA

A decade of changes

■ AUSSEN  
■ WIRTSCHAFTS  
■ SEMINAR der Agrar- und Ernährungswirtschaft

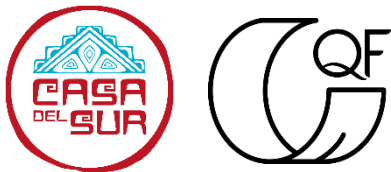
Bonn, 04.06.2024

# Who we are?

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## LEADER IN IMPORT WORLD FOODS IN POLAND WITH 35 YEARS OF EXPERIENCE

We develop  
our own brands



We are a distributor of  
external, authentic brands



We provide innovative  
solutions for private labels  
of our key partners



# Last decade on the Polish market

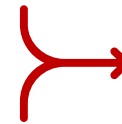
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2014



- ✓ Market more fragmented
- ✓ A lot of players on the market
- ✓ Domination of independent outlets

2024



- ✓ Consolidation in progress
- ✓ Less independent outlets
- ✓ Still several players on the market

355 k grocery stores  
in total with  
domination of  
independent outlets

<370 k  
grocery stores  
in total with  
domination of key  
retailers



Last success story of  
DINO (2438 stores).





# Premium segment

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! PREMIUM RETAIL CHAINS DISSAPEARD FROM THE MARKET



# Strong development of discounts

Discounters: approx.  
50% of the market



Tesco  
transformation



Strong price war between  
2 key players



**PO NAJTAŃSZY KOSZYK  
ZAKUPÓW W STYCZNIU  
DO BIEDRONKI IDĘ!**

**KOSZYK W STYCZNIU JEST  
NAJTAŃSZY W BIEDRONCE**

W 2023 ROKU



**TAŃSZY NIŻ**



na co wskazują jednoznacznie łączne wyniki koszyków  
**Fakt** i niezależnych badań ASM SALES  
FORCE AGENCY

**SPRAWDŹ**



# Rapid growth of convenience

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## High focus on new experience delivery to the customer



Nano format



Fast food concept



Shopping mall islands



Mobile store



zabka

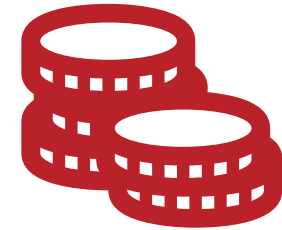
# Poles ALSO changed!



Aware of changes on the  
market



Aware of relation  
between product quality  
& price



Wealthier but still  
price-sensitive



High spend on grocery  
like never before



Benefit from the price  
war between chains

**Thank you!**

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