

**PMR** MARKET  
EXPERTS

# GROCERY RETAIL MARKET IN POLAND 2025

MARKET ANALYSIS AND DEVELOPMENT  
FORECASTS FOR 2024-2029



As expected from our previous edition of the report, the year 2024 brought a slowdown in the dynamics of the food market compared to 2022-2023. Although nominal growth was significantly lower than the previous year, in real terms the market value decline was smaller year-on-year, due to a slowdown in the rate of inflation in the food sector.

While the lower dynamics of the food market in 2024 had already been forecasted in the previous edition of the report, the declines were somewhat higher than we anticipated. Although 2024 saw a record wage increase for the 21st century, consumers remained cautious with their spending, rebuilding savings eroded by inflation.

Our forecasts indicate a rebound in the food market in 2025, not only nominally but also in real terms. A positive factor for the market will be the continued improvement in the material situation of Poles. Our projections show continued high wage growth, which, combined with a delayed effect of the 2024 wage increases, will translate into higher consumer spending and accelerate the year-on-year growth dynamics of the food market. Additionally, inflation is expected to slow down in the coming months, which will improve the real sales growth. Market forecasts are also supported by the ambitious development plans of the largest food retail chains regarding the opening of new outlets.



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Author of the report „Grocery market in Poland 2025”



## **Main objective**

Present a comprehensive overview of the grocery market in Poland, including the identification of the latest trends and an assessment of the development directions of distribution channels.

## **Additional objectives**

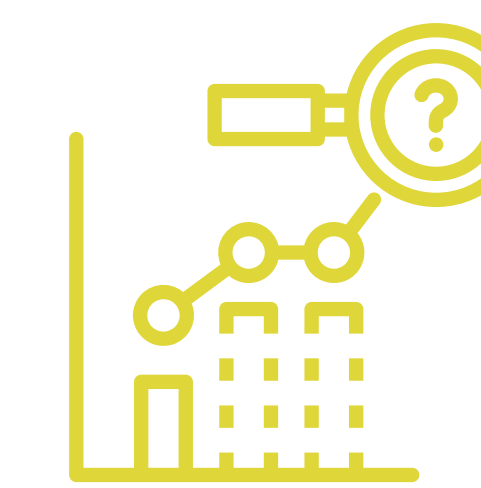
The specific objectives of the research and analysis carried out for the report were to identify:

- size and dynamics of changes in the largest sales channels in the grocery market,
- size of the franchised grocery market in both value and volume terms,
- the largest retail chains and trading groups in the grocery market and within individual sales channels,
- the latest factors and trends in the grocery market (macroeconomic and demographic, demand-side, supply-side, technological, and legal),
- changes in the number of grocery stores in the market and within specific sales channels,
- impact of inflation on the purchasing behavior of Polish consumers,
- places where food products are purchased and the factors influencing those choices.



### **Time span**

2021-2024



### **Forecast horizon**

2025-2030



### **Geographic coverage**

Poland

## **What can be found in the report?**

- market value and dynamics in 2021-2024
- value structure of the market in the years 2021–2024, broken down by sales channels
- factors influencing the market: macroeconomic and demographic, demand-side, supply-side, technological, and legal
- key players in the grocery market, including by sales channel, in the years 2021–2025
- forecasts up to 2030 for:
  - ↳ the value of the grocery market,
  - ↳ the value of the main grocery market sales channels,
  - ↳ the number of grocery stores, including by individual sales channel,
  - ↳ changes in food prices and other macroeconomic and demographic factors.



## Subject matter

- market value
- breakdown of the total market value by sales channels
- forecasts for:
  - ↳ the total market
  - ↳ individual sales channels
- rankings of major players
  - ↳ in the total market
  - ↳ in individual sales channels

## Scope

- discount stores
- hypermarkets
- supermarkets
- proximity supermarkets
- small grocery stores and convenience stores
- petrol station stores
- online sales
- alternative channel

## Product categories

- food products, including fresh food
- non-food products sold in grocery stores



## Ranking of the top players in the grocery market

- the largest companies and trading groups in terms of revenues
- the largest chains in terms of revenue and number of outlets

## Profiles of major grocery groups

The report also provides profiles of the largest grocery groups in the Polish market, including:

- number of stores in total and by format in 2021-2025,
- total revenues and by format in 2021-2025,
- market shares,
- location analysis and information on store space,
- development plans.

## Analysis of consumer behavior

- frequency and locations of grocery shopping
- factors influencing the choice of regular shopping places
- consumer profiles in individual channels
- use of shopping apps and loyalty programs
- Impact of inflation on purchasing decisions, shopping habits, and meal preparation
- environmental issues in the context of grocery shopping

### What is new in this edition of the survey?

- shopping missions carried out across different sales channels

## Forecasts

For the purpose of the report, long-term development forecasts were prepared using econometric models and historical time series.

**The forecasts cover the period 2025-2030.**

In addition to projections for the value of the grocery market and its channels, the report also covers forecasts for 2025-2030 for selected demographic and macroeconomic indicators, including:

- GDP per capita and GDP real growth rate,
- overall CPI and retail food price index,
- average annual LFS unemployment rate and real change in average monthly gross wage in Poland,
- real change in disposable income of Polish households and private consumption,
- number of Poland's residents and share of each demographic group.

**The accuracy of PMR Market Experts' forecasts published in the reports is high – the typical error level (MAPE) is less than 3–5%.**



## The report answers, among others, the following questions:

- What is the value of the grocery market in Poland?
- What are the value of individual sales channels and projections for their development over the next 5 years?
- What are the largest grocery groups and chains in Poland in terms of revenue and number of outlets?
- Which players have increased their market share the most?
- What are the prevailing trends in the grocery market and its sales channels?
- Does inflation still influence Poles' shopping behaviour?
- What habits regarding grocery shopping and meal cooking have established among Poles?
- What can be expected in the near future?



**DATABASE** – along with the report, you will receive the key data for independent aggregation in an Excel spreadsheet.

## **PMR Market Experts** is a brand of market reports developed **by Hume's Institute.**

At PMR Market Experts, we have been publishing cyclical industry reports for 30 years. **Our main specializations include:**

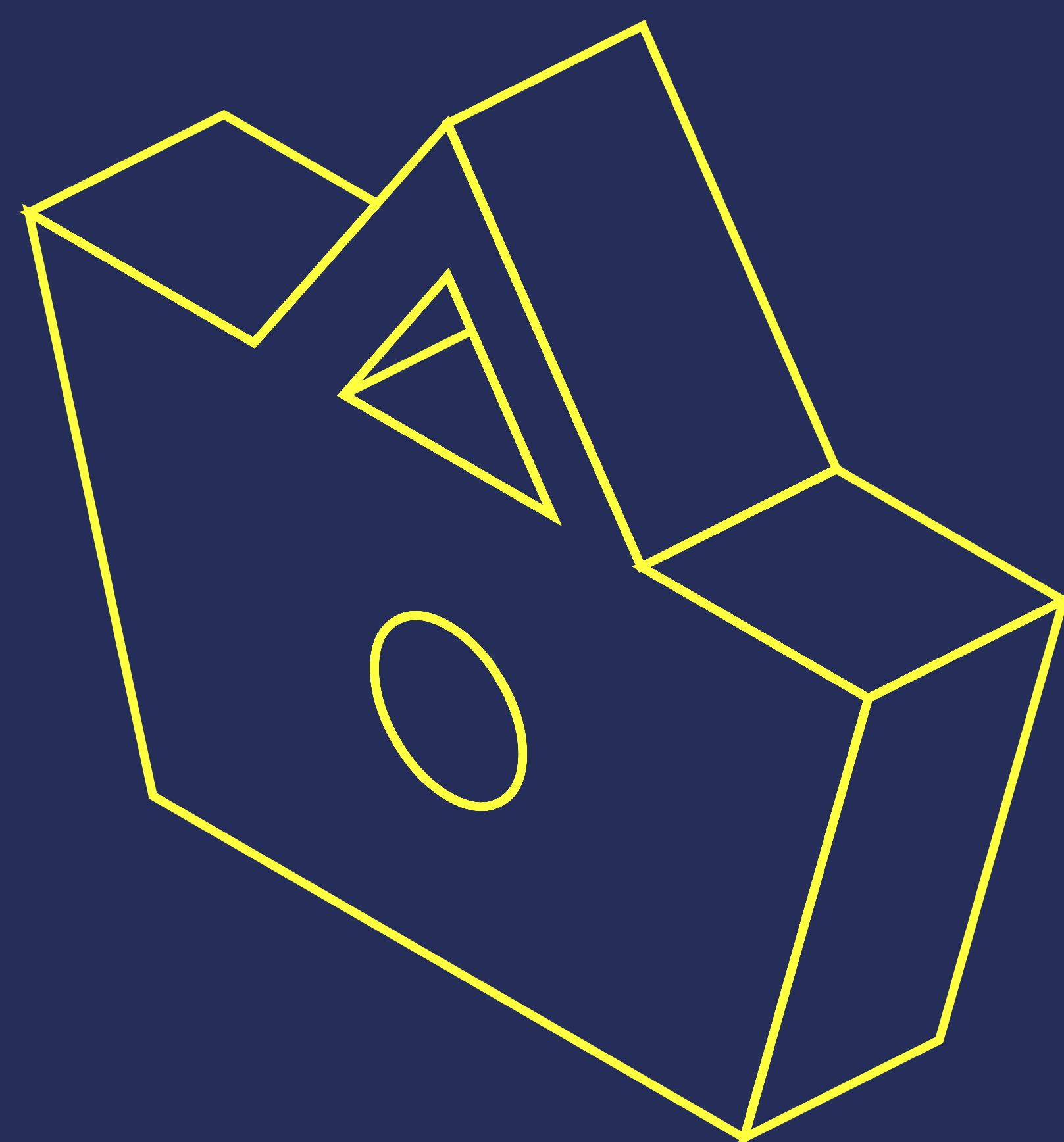
- Digital & ICT
- Retail
- Pharma & Healthcare
- Construction

Our reports are more than just a collection of facts – they provide **reliable knowledge based on proven methodology.** We combine primary and secondary data, proprietary algorithms, and econometric models to deliver precise information about the market, its values, dynamics, segments, and key players.

**We are part of Hume's Institute** – a 360° research agency specializing in quantitative and qualitative research, forecasting, and market predictions. The experience in data analysis and verification of PMR Market Experts, unique insights, and reliable forecasts provided by Hume's Institute give our clients real knowledge and a competitive edge.

More than 600 clients worldwide have already used our services. We have researched over 5,000 brands, operating in more than 50 markets. **We are trusted by leading companies and collaborate with 70% of the brands listed on the prestigious Fortune 500.**





# RETAIL

MARKET ANALYSIS AND 5-YEAR DEVELOPMENT FORECASTS

- Retail market of home appliances, electronics and digital media in Poland
- Food to Go retail market in Poland
- Cosmetics retail market in Poland
- DIY retail in Poland
- Home furnishings retail market in Poland
- HoReCa market in Poland (additional data update: March, September, December)
- Grocery retail market in Poland
- Clothing and footwear retail market in Poland
- Sports goods retail market in Poland
- Children's products retail market in Poland
- Online retail market in Poland (additional data update: March)
- Diet catering market in Poland
- Retail market in Poland
- Pet care and products market in Poland
- HoReCa supply market in Poland
- Non-food discounters market in Poland
- Diet catering market in Czech Republic
- Clothing and footwear retail market in Czech Republic
- Weekly: PMR Retail Insight (Poland, Hungary, Romania, Slovakia, Czech Republic)

NOVELTIES



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