Roczniki Akademii Rolniczej w Poznaniu – CCCLIX (2004)

MICHAŁ SZNAJDER, PRZEMYSŁAW RATAJCZAK

THE BRANCH OF CATERING SERVICES AS A SEGMENT OF THE DAIRY PRODUCTS MARKET IN POLAND

From Department of Food Management Economics
of The August Cieszkowski Agricultural University of Poznań

ABSTRACT. The paper shows the presence and perspectives for the future of dairy products consumption in catering services in Poland.

Key words: dairy, catering services, gastronomy

Introduction

In this paper the term "catering services" is understood as serving food in the following places:

– restaurants (including hotel restaurants and restaurants providing entertainment), bars, fast food outlets, cafes,

– places of impulse purchase of food, e.g. gastronomic outlets located in cultural institutions, at filling stations and shops, at train and underground stations, street kiosks,

– canteens located in enterprises, institutions, clubs, etc., which are run by external business entities,

– catering system and deliveries ordered by phone.

In an attempt to characterise the market of these services, allowing for the share of dairy products in them, the authors of the paper used the data collected by the country's system of public statistics. The data was supplemented by the information from two sources: interviews with businessmen running gastronomic businesses and publications on gastronomic services.

Rocz. AR Pozn. CCCLIX, Ekon. 3: 179-193

PL ISSN 1731-0261

The market of catering services in Poland

According to the Central Statistical Office (CSO) of the Republic of Poland at the end of 2002 there were 88.1 thous. gastronomic enterprises in Poland. Detailed information concerning the number of enterprises and their total income is shown in Table 1. It is necessary to admit that the units listed in Table 1 contain all types of units mentioned before. Central Statistical Office of Poland aggregates data and divides all units into four groups mentioned before. Unfortunately, the official state statistics do not provide the data which could help determine the share of individual types of enterprises in the turnover of the whole market.

The relevant information, which was the result of research conducted by the company CAL Research and Consulting in 2002, was quoted in the branch press in May last year (comp. **Pieńczykowska** 2003). However, it would surely be different from the official state data (if there was such data), which can be inferred from the differences in the number of gastronomic enterprises provided by the two sources. According to the data of the CSO in 2002 there were about 88 thous. gastronomic enterprises in Poland, whereas CAL R&C estimates the number of enterprises at only 44.8 thous. (2.5 thous. more than in 2002). The authors of the analysis explain the difference in comparison with the state statistics by the fact that they did not account for the canteens in institutions and enterprises, hospitals, military units and schools, which the CSO takes into account. In their opinion, another reason for the divergence is the fact that the CSO determines the number of enterprises on the basis of the register which lists all gastronomic entities, also seasonal ones and those which received a statistical number REGON but did not start to work.

CAL R&C also presents the type structure of gastronomic outlets in Poland in a slightly different manner. Table 2 includes a comparison illustrating the structure according to the CSO and according to CAL R&C.

CAL R&C analysts included the outlets without waiter service, where hot meals are served into the bars category, and those with waiter service and seats at tables into the restaurants category (comp. **Pieńczykowska** 2003). The outlets working late in the evenings and at night, offering a wide assortment of alcohol and a possibility to dance were included into the night clubs category. The fast food outlets category included small gastronomic outlets with several seats or no seats at all, which sell quickly prepared meals, snacks and drinks. The category did not include the outlets of international fast food chains (McDonald's, Pizza Hut, KFC, etc.), which were included into the restaurants category. As results from the information provided to the author of the discussed article by the representatives of those chains, they ran the total of about 300 outlets in 2001. The cafes category included gastronomic outlets with at least three tables, offering mainly pastries, desserts, tea and coffee to their clients. The outlets included into the gastronomic outlets category are the so-called small gastronomy at train, coach, underground and filling stations.

What also results from the contents of the article is the fact that restaurants and pubs reached the highest sales in 2001. The total income of restaurants gained that year was estimated at 2.5 billion PLN. In the case of pubs the income amounted to 2.3 billion PLN (the total income of the outlets included into these two groups amounted to about 1.2 billion USD).

Table 1

Polish gastronomy in 1995-2002 according to the data of the CSO
(based on "Statistical yearbooks of the Republic of Poland". CSO, Warsaw 1996-2003 and on Polska... 2004)
Polska gastronomia w latach 1995-2002 według danych GUS
(na podstawie „Roczników statystycznych RP". GUS, Warszawa 1996-2003 i Polska... 2004)

Specification Wyszczególnienie	Unit Jednostka	1995	1996	1997	1998	1999	2000	2001	2002
1	2	3	4	5	6	7	8	9	10
Number of gastronomic enterprises Liczba placówek gastronomicznych		60 845	61 280	64 985	70 318	77 591	84 342	87 020	88 100
restaurants restauracje		4 857	5 180	5 010	6 237	7 140	8 519	8 725	8 813
bars bary		23 493	22 710	28 516	31 061	34 523	36 436	37 697	38 250
canteens stołówki		3 815	5 674	4 847	5 423	6 046	7 010	7 175	7 250
gastronomic outlets punkty gastronomiczne		28 680	27 716	26 612	27 597	29 882	32 377	33 423	33 787
Income from gastronomic business (current prices)[1] Przychody z działalności gastronomicznej (ceny bieżące)[1]	M. USD[2] mln USD	2 898.4	3 186.6	3 261.1	3 529.8	3 481.8	3 538.8	3 980.8	4 070.0
	M. PLN mln PLN	7 027.0	8 592.8	10 698.9	12 332.0	13 814.1	15 381.0	16 296.8	16 603.4

Table 1 – cont.

1	2	3	4	5	6	7	8	9	10
sales of food products[3,4] sprzedaż produktów żywnościowych[3,4]	M. USD[2] mln USD	546.4	539.5	633.7	717.0	721.9	614.4	658.6	671.0
	M. PLN mln PLN	1 324.8	1 454.7	2 079.2	2 505.0	2 864.1	2 670.5	2 696.2	2 737.2
sales of gastronomic products[4] sprzedaż produktów gastronomicznych[4]	M. USD[2] mln USD	1 267.9	1 465.5	1 548.5	1 676.6	1 706.2	1 780.9	2 059.4	2 116.2
	M. PLN mln PLN	3 073.9	3 951.8	5 080.2	5 857.7	6 769.3	7 740.5	8 431.1	8 633.2
total sales of food in gastronomic enterprises[4] razem sprzedaż produktów żywnościowych i gastronomicznych[4]	M. USD[2] mln USD	1 814.3	2 005.0	2 182.2	2 393.7	2 428.1	2 395.3	2 718.0	2 787.2
	M. PLN mln PLN	4 398.7	5 406.5	7 159.4	8 362.7	9 633.4	10 411.0	11 127.3	11 370.4

[1]Sales of alcohol and tobacco is included.
[2]Values converted into USD according to the average rate of the year.
[3]Sales of products not processed in the unit.
[4]Sales of alcohol is excluded.
[1]Włączając sprzedaż alkoholu i tytoniu.
[2]Wartości przeliczone na USD według średniego kursu rocznego.
[3]Sprzedaż produktów nie przetwarzanych w zakładzie gastronomicznym.
[4]Wyłączając sprzedaż wyrobów alkoholowych.

Table 2

The number of gastronomic outlets in Poland in 2001 and their total income according to the CSO CAL R&C (based on "Statistical yearbooks of the Republic of Poland". CSO, Warsaw 1996-2003 and on Pieńczykowska 2003)
Liczba lokali gastronomicznych w Polsce w 2001 roku i ich całkowity dochód według GUS i CAL R&C (na podstawie „Roczników statystycznych RP". GUS, Warszawa 1996-2003 i Pieńczykowskiej 2003)

Main channels of providing gastronomic services Główne kanały świadczenia usług gastronomicznych	Number of entities providing gastronomic services Liczba przedsiębiorstw świadczących usługi gastronomiczne	
	according to the CSO data według danych GUS	according to CAL R&C data według danych CAL R&C
Bars Bary	37 697	7 950
Pubs Puby		7 700
Restaurants Restauracje	8 725	6 500
Night clubs Kluby nocne		4 600
Fast food outlets Punkty „fast food"		6 850
Cafes Kawiarnie		2 900
Gastronomic outlets Punkty gastronomiczne	33 423	8 300
Canteens Stołówki	7 175	
Total number of outlets Razem liczba placówek	87 020	44 800
Total income (billions PLN) Przychód (mld PLN)	16.3	13.0
Total income (billions USD)[1] Przychód (mld USD)[1]	4.0	3.2

[1]Values converted into USD according to the average rate of the year.
[1]Wartości przeliczone na USD według średniego kursu rocznego.

Undoubtedly the biggest enterprises on the market of catering services in Poland are Polish fast food chains of well-known international brands: McDonald's, Pizza Hut, Kentucky Fried Chicken and TelePizza. In 2003 McDonald's had 203 outlets, of which 42 worked in the franchise system, run by 34 licensees. The company is developing very dynamically in Poland. So far it has invested more than 650 M. USD. In 2003 in Poland there also worked 122 restaurants belonging to the corporation American Restaurants (AmRest): 58 Pizza Hut restaurants and 64 KFC restaurants. In 2001 the total sales value in the outlets of both chains reached about 350 M. PLN (about 87 M. USD), and in 2002 about 400 M. PLN (99 M. USD). AmRest is planning to open 25 new restaurants a year until 2006 allocating the amount of nearly 300 M. PLN (about 74 M. USD) for the purpose (**300 mln...** 2003). TelePizza Poland Sp. z o.o., which belongs to the Spanish TelePizza, Plc. and has been present in Poland since 1992, ran 90 restaurants in 2003, of which 25 worked in the franchise system. The company is planning to open 120 restaurants in Poland by 2005. Half of them will be run by franchisees. According to the assumptions of the management a restaurant of the chain is supposed to be in every town populated over 80 thous.

Changes in the market of catering services

As results from the data of the CSO shown in Table 1, there is a steady, though not very rapid, increase of income from gastronomic services. In principle it concerns all types of outlets. The dynamics of the increase dropped in the early years of the new millennium. In fact, new gastronomic outlets are being opened, but their number only slightly exceeds the number of those which are being closed. However, new trends in business appear in Poland.

Running canteens at enterprises and institutions by catering companies is a new trend on the market of catering services. For the time being only several hundred canteens in all Poland are being served in this manner, and the income of the three biggest service providers, which run more than 200 of them, reaches the total value of about 100 M. PLN (about 25 M. USD). In specialists' opinion after appropriate stimulation of the Polish economy the number of enterprise canteens run in this manner will be rising by about 200 every year (**Olszewski** 2003). Such a trend of development of the market of catering services is relevant for manufacturers of dairy products because of the higher share of the products in sales, in comparison with open gastronomy, amounting to 3--10%.

What is an important phenomenon to the market of catering services is the appearance and gradual increase of popularity of food coupons, which are distributed by a growing number of employers as a factor motivating employees. Sodexho Pass and Accor Services, which are the dominating enterprises on the Polish market of coupons, reached the sales value of 21 M. PLN (5.25 M. USD) in 2002. The coupons are accepted by over 10 thous. outlets around the country (**Bony** 2003). The outlets are usually not owned by the issuers of coupons. There are Fast foods, canteen, restaurants, etc. cooperating with the issuers. Coupons are sometimes used also as one "legal tender" by some retailers.

However, the tendency in gastronomy which is negative to the dairy industry is the constant decrease in the number of so called milk bars. The bars are specific to Poland gastronomic outlets, where meals made from milk and dairy products have a considerable share in the menu. A nationwide network of milk bars began to be formed in the second half of the 1950's. They were organized by Spółdzielnia Spożywców "Społem" (Consumers' Cooperative Society), which began to grow in importance again after the period of Stalinism, when it was mainly involved in trade. The beginnings of the Society go back to the mid-19th century. Milk bars, which are orientated towards serving the clients of low financial resources, have been subsidized by the state, though now to a lesser extent. Their clients are mainly students, schoolchildren and lonely people with low earnings. The menu in the outlets is more meagre than the offer of other gastronomic enterprises, but due to this fact it is affordable to a wider range of clients. To make their offer more attractive to consumers milk bars added over than dairy dishes types of dishes to their menu. By the time the “not dairy dishes” have dominated the offer. Noondays the name “milk bar” stands for past period, but the argument to keep the name is that the share of dairy dishes in the menu is still significant. Except of dairy dishes also simple flower, meat and vegetable dishes are served in the units. The share of dairy dishes (mainly milk, cottage cheese, maturing cheeses and butter) in the sales value in such outlets usually amounts to 10-12%. The system changes of the 1990’s were accompanied by the introduction of market economy and gradual limitation of the state’s involvement (also financial) in the activity of enterprises, which resulted in a falling number of milk bars. Unfortunately, the gradual limitation of subsidies causes a decrease in the number of milk bars. While there were about 270 milk bars in Poland in 2000, in 2001 there were only 225 left. Owing to the relatively small number of such outlets and low prices the services of milk bars do not have a large share in the market of catering services, but they are necessary and popular. Stronger financial support from external sources would surely lead to a quick increase of their network.

Food sales in Poland

Dairy products are an important component of the Poles’ diet. Milk and dairy products were a relatively cheap source of animal protein in the times of centrally planned economy and difficulties purchasing meat, which were related with it. This resulted in a larger share of dairy products in consumption than nowadays. Along with the decreasing differences in the prices of meat and milk products there was a gradual decrease in the share of the latter in the food market to the current level of about 4%. The changes in the food market in 1995-2002 were presented in Table 3.

The share of food in retail sales after a slight but steady fall in the last decade of the last century has been growing slowly again since 2000. This may be the result of limitation in the purchase of durable goods in consequence of impoverishment of a considerable part of society in the period. The slower dynamics of increase in the retail sales of products could also prove it.

Table 4 shows the changes in the market of catering services which took place in 1995-2002.

To highlight the situation of Catering Services and their share in total food sales Table 4 collects some data from Tables 1 and 3 are present supplemented by other data. The data from the second row of Table 4 corresponds with the data from the second row of Table 3; the data from third and fourth rows of Table 4 corresponds to the data from rows 19, 9 and 11 of Table 1. the data supplemented by data of total food sales could estimate the share of Catering Services in the total food market.

It results from the information included in the table that the share of gastronomic outlets in the sales of food is close to 10%. It is a relatively low level in comparison with e.g. the countries of the European Union (35-40%), which proves that there are

Table 3

The total share of food and dairy products in retail sales in Poland in 1995-2002
(based on "Statistical yearbooks of the Republic of Poland". CSO, Warsaw 1996-2003)
Całkowity udział żywności i produktów mlecznych w sprzedaży detalicznej w Polsce w latach 1995-2002
(na podstawie „Roczników statystycznych RP". GUS, Warszawa 1996-2003)

Specification Wyszczególnienie	Unit Jednostka	1995	1996	1997	1998	1999	2000	2001	2002
Retail sales of products Sprzedaż detaliczna produktów	M. PLN mln PLN	169 585.0	213 240.7	258 165.8	291 197.4	323 686.5	360 317.5	375 437.9	385 701.0
sales of food[1] sprzedaż żywności[1]	M. PLN mln PLN	55 963.1	68 023.8	80 805.9	90 503.4	90 725.1	102 861.0	109 954.2	113 920.0
Share of food in value of retail sales of products Udział żywności w sprzedaży detalicznej produktów	%	35.6	34.4	34.1	34.0	31.0	31.4	32.3	32.5
Share of dairy products in value of retail sales of food[2] Udział nabiału w sprzedaży detalicznej żywności[2]	%	4.9	4.7	4.7	4.6	4.3	4.2	4.2	4.1

[1]Alcohol and tobacco products not included.
[2]Based on research on household budgets.
[1]Wyłączając alkohol i wyroby tytoniowe.
[2]Na podstawie badań budżetów gospodarstw domowych.

Table 4

The share of gastronomic outlets in food sales in Poland in 1995-2002 (based on "Statistical yearbooks of the Republic of Poland". CSO, Warsaw 1996-2003)
Udział lokali gastronomicznych w sprzedaży żywności w Polsce w latach 1995-2002 (na podstawie „Roczników statystycznych RP". GUS, Warszawa 1996-2003)

Specification Wyszczególnienie	Unit Jednostka	1995	1996	1997	1998	1999	2000	2001	2002
Total food sales[1] Sprzedaż żywnosci[1]	M. PLN mln PLN	60 361.8	73 430.3	87 965.3	98 866.1	100 358.5	113 272.0	121 081.5	125 290.4
retail sales detal	M. PLN mln PLN	55 963.1	68 023.8	80 805.9	90 503.4	90 725.1	102 861.0	109 954.2	113 920.0
Sales of food in gastronomic outlets[1] Sprzedaż żywności w placówkach gastronomicznych[1]	M. PLN mln PLN	4 398.7	5 406.5	7 159.4	8 362.7	9 633.4	10 411.0	11 127.3	11 370.4
Sales of trade commodities in gastronomic outlets[1] Sprzedaż pozostałych produktów w placówkach gastronomicznych[1]	M. PLN mln PLN	1 324.8	1 454.7	2 079.2	2 505.0	2 864.1	2 670.5	2 696.2	2 737.2
Sales of products manufactured by gastronomy[1] Sprzedaż produktów gastronomicznych[1]	M. PLN mln PLN	3 073.9	3 951.8	5 080.2	5 857.7	6 769.3	7 740.5	8 431.1	8 633.2
Share of gastronomy in value of food sales Udział gastronomii w wartości sprzedaży żywności	%	7.3	7.4	8.1	8.5	9.6	9.2	9.2	9.1
Share of retail trade outlets in value of food sales Udział detalu w wartości sprzedaży żywności	%	92.7	92.6	91.9	91.5	90.4	90.8	90.8	90.9

[1]Alcohol and tobacco products not included.
[1]Wyłączając alkohol i wyroby tytoniowe.

potential possibilities for market development. It is also worth noting that there was a decrease in the share of gastronomy in catering, which took place in 2000. Also in this case the reason for this could have been the impoverishment of part of society. However, the branch press informs us that there was a slight increase in the share of gastronomy in total food sales in the first half of 2003 in relation to the first half of 2002.

Factors affecting the development of catering services

The birthrate is obviously relevant to the global demand for catering services. In 1995-2002 the population of Poland dropped from 38.6 M. to 38.2 M. and the birthrate fell from 0.12% to minus 0.02%. The gradual ageing of society may be a factor complicating the development of gastronomic market.

Of the other factors the most important for the development of catering services in Poland is the level of citizens' wealth, which is above all affected by: the amount of GNP, the trend and tempo of changes in it, as well as the unemployment rate. The reduction of the share of gastronomy in the food sales in 2000-2002 corresponds to the gradual reduction in the dynamics of GNP increase in the period from about 4% to about 1% a year and the steady increase of unemployment rate, which rose from 10.4% in December 1998 to 20% in December 2003 (**Polish...** 2004). Detailed information concerning the problem is shown in Table 5.

The results of the research on household budgets also prove the importance of wealth level for using gastronomic services. The average declared expenses on these services are by 50% higher in the households of people working on their own account outside agriculture than in workers' households. They are four times as high as in pensioners and annuitants' households and almost six times as high as in farmers' households (**Polska...** 2004).

The crucial role of society's income in the development of gastronomic services is also confirmed by the results of research on consumers' preferences obtained by the authors of this paper. In the research conducted for three years at the Department of Food Management Economics, Agricultural University of Poznań, the method of direct questionnaire was used. The research was conducted on about 4600 respondents around the country. Only 5% of the respondents whose net monthly income amounts to less than 250 PLN per person declared frequent consumption of meals in restaurants (more than 56% of the respondents in this group declare that they never use restaurants) and 50% of the respondents whose net income per person amounts to 1751-2000 PLN (27% answered "never").

The low level of citizens' wealth is such a strong factor inhibiting the development of the market of catering services that it reduces the influence of other factors. Improvement in the Poles' material situation will certainly result in an increase in the importance of other factors. The results of the aforementioned research conducted at the Agricultural University of Poznań let us conclude that besides the population and birthrate the crucial demographic factors include: age structure of society, dominant family structure and citizens' place of residence. Among the cultural factors the education is significant. Information concerning the problem is shown in Table 6.

Table 5

The share of gastronomic outlets in the retail sales of food in Poland in 1995-2002 (on the base of Polska... 2004)
Udział lokali gastronomicznych w sprzedaży detalicznej żywności w Polsce w latach 1995-2002 (na podstawie Polska... 2004)

Specification Wyszczególnienie	Unit Jednostka	1998	1999	2000	2001	2002
Gross National Product (current prices) Produkt Krajowy Brutto (ceny bieżące)	M. PLN mln PLN	553 560.1	615 115.3	684 981.9	721 575.3	769 400.0
Gross National Product (current prices) Produkt Krajowy Brutto (ceny bieżące)	M. USD mln USD	158 445.2	155 038.5	157 597.5	176 256.2	188 601.5
Real dynamics of GNP (average prices from previous year = 100%) Dynamika PKB (średnie ceny poprzedniego roku = 100%)	%	104.8	104.1	104.0	101.0	101.3
Unemployment rate in June Stopa bezrobocia w czerwcu	%	9.6	11.6	13.6	15.9	17.4
Unemployment rate in December Stopa bezrobocia w grudniu	%	10.4	13.1	15.1	17.5	18.0

However, the most crucial cultural factor affecting the development of the gastronomic branch in Poland seems to be the strong tradition of consuming meals at home. As results from the data shown in Table 7, two thirds of all the respondents declare that this is the place where they consume all meals. This tradition will probably be gradually broken by young people, whose increasingly active lifestyles make them spend most of the day away from home.

The introduction of extend lunch break by an increasing number of enterprises will also contribute to the changes. In the past 15 min break was common in the workplace. The short time was not sufficient to leave the workplace. Workers consumed meals or snacks brought from home. Nowadays as breaks become longer it is possible to use the offer of Catering Services.

Table 6

The declared frequency of consuming meals in gastronomic outlets in Poland (%) (based on questionnaire research)
Deklarowana częstotliwość konsumowania posiłków w lokalach gastronomicznych w Polsce (%) (na podstawie badań ankietowych)

Factor Czynnik	Often Często	Never Nigdy
Age (years) Wiek (lata)		
20-29	10.5	30.3
30-44	9.5	43.5
45-54	5.5	52.5
55-64	5.9	64.0
over 64 – ponad 64	1.1	80.7
Family structure Struktura rodziny		
lonely people osoby samotne	19.8	43.8
childless married couples małżeństwa bezdzietne	19.4	33.3
young childless families młode małżeństwa bezdzietne	16.0	29.6
families with pre-school children rodziny z dziećmi w wieku przedszkolnym	7.8	41.1
families with children aged over 6 years rodziny z dziećmi w wieku powyżej 6 lat	5.9	44.1
Place of residence Miejsce zamieszkania		
cities populated over 100 thous. inhabitants miasta powyżej 100 tys. mieszkańców	16.5	29.7
rural areas wieś	3.5	54.8
Education level Wykształcenie		
elementary education podstawowe	2.2	60.7
secondary education średnie	8.3	40.3
university education wyższe	13.9	27.0

Table 7
The declared frequency of consuming meals at home and in different kinds of gastronomic outlets in Poland (%) (based on questionnaire research)
Deklarowana częstotliwość konsumowania posiłków w domu i w poszczególnych typach lokali gastronomicznych w Polsce (%) (na podstawie badań ankietowych)

Place of meal consumption Miejsce konsumpcji	Always Zawsze	Often Często	Occasionally Okazyjnie	Never Nigdy
Home Dom	66.0	29.9	3.5	0.6
Restaurant Restauracja	0.2	7.7	47.0	45.1
Milk bar Bar mleczny	0.0	2.6	23.9	73.5
Fast food chain bar Sieć „fast food"	0.5	8.1	35.1	56.3
Fast food outlet Punkt gastronomiczny	0.4	4.6	26.4	68.6

The tradition of consuming meals at home is also crucial to the share of dairy products in the offer of gastronomy. Most Poles treat eating out as something extraordinary, going beyond everyday routine. In this situation they choose the dishes which they do not consume every day for various reasons. Because in clients' awareness dairy products are still associated with everyday life, they are rarely ordered. In the authors' opinion the consumption of dairy products in gastronomic outlets will increase considerably when using the outlets becomes an everyday routine for most of the society.

The future of the market of catering services in Poland

The dynamics of the increase in the market of catering services in Poland until now and press reports on the increased sales in the first half of 2003 made the authors of this paper assume the forecast sales values of the services at the level shown in Table 8. In the opinions of specialists dealing with the gastronomic market, which are quoted in the branch press (**W Polsce...** 2004), by 2005 the sales value should approach the amount of 18 billion PLN (4.5 billion USD). Because of rapid changes in the economical situation in Poland caused often by political decisions prognoses from different research centers could vary. Experts from the Institute of Home Market and Consumption estimate that the development of the market of gastronomic services will be rather small in the near future, mainly due to the relatively low level of citizens' wealth. More rapid increase will take place only when people's income gradually rises. This fact can be hoped for in view of the forthcoming Poland's accession to the European Union (**Wzrost...** 2003).

The authors of this paper determined the share of sales of dairy products in catering services on the basis of interviews with representatives of the branch. They let us conclude that the sales of dairy products in restaurants is only a small fraction of 1% of the

Table 8

A forecast for the volume of the market of catering services in 2003-2004
Prognoza wielkości rynku usług cateringowych na lata 2003-2004

Specification Wyszczególnienie	Unit Jednostka	Year – Lata	
		2003	2004
Estimated income from gastronomic business (current prices) Przewidywany przychód z działalności gastronomicznej (ceny bieżące)	M. PLN mln PLN M. USD mln USD	17 200 4 300	18 500 4 635
Share of dairy products in market of catering services Udział nabiału w rynku usług cateringowych	%	1.0	1.0

income value. Although, as has been mentioned before, dairy products make about 12% of the sales value in milk bars, but the share of these catering outlets in the gastronomic market is relatively small. Therefore, allowing for higher consumption of dairy products in canteens and considerable use of maturing cheeses as ingredients in fast food outlets, it can be assumed that in the nearest years the share of these products in the market of gastronomic services will be reaching the values of about 1%. There are no signs indicating forthcoming improvement in the current situation in gastronomy. Dairymen are trying to improve it by adjusting their offer to the needs of the branch, which mainly concerns the size of packages used for delivering products for gastronomy. However, it is obviously clients that will decide about the development of the market of gastronomic services and increase in the share of dairy products. For the time being they consider eating out to be too expensive.

Conclusions

1. At present cultural traditions make most Poles consume all their meals at home.
2. Despite that fact about 10% of the domestic income from the sales of food is gained through sales in gastronomic outlets; in gastronomy the income from the sales of food exceeds 11 billion PLN (2.7 billion USD).
3. The market of catering services in Poland is a market of high development potential on condition society's income rises considerably.
4. Rapid changes especially in young people's lifestyle favour the development of gastronomy.
5. The share of dairy products in the market of catering services amounts to about 1%.

Literature

Bony żywieniowe zdobywają rynek. (2003). Now. Gastron. 1, 5: 28.
Olszewski K. (2003): Około 200 restauracji pracowniczych na rynku. Now. Gastron. 1, 9: 27-29.
Pieńczykowska J. (2003): Rocznie przybywa 5 proc. barów. Now. Gastron. 1, 5: 18-19.

Polska statystyka publiczna. (marzec 2004). GUS, Warszawa. http://www.stats.gov.pl.
300 mln inwestycji. Plany rozwoju Pizzy Hut i KFC. (2003). Now. Gastron. 1, 1-3: 45.
W Polsce dominują bary, puby i fast foody. (2004). Now. Gastron. 2, 2: 19.
Wzrost za pięć lat. (2003). Now. Gastron. 1, 7: 28-29.

USŁUGI ŻYWIENIOWE JAKO SEGMENT RYNKU PRODUKTÓW MLECZARSKICH W POLSCE

S t r e s z c z e n i e

W artykule podjęto próbę scharakteryzowania rynku usług cateringowych w Polsce z uwzględnieniem udziału produktów mlecznych w tym rynku. Omówiono aktualny stan i zmiany zachodzące na polskim rynku usług cateringowych oraz czynniki wpływające na rozwój sektora. Przedstawiono również prognozę wielkości sprzedaży usług cateringowych na lata 2003-2004 i przewidywany udział produktów mlecznych w analizowanym rynku.