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MARTA SKRZYPCZYK¹

Warsaw University of Life Sciences – SGGW, Poland

**CONCENTRATION PROCESSES IN THE RETAIL AND MEAT
PROCESSING INDUSTRY IN POLAND AND COMPETITIVE
RELATIONSHIPS IN THE FOOD CHAIN**

Key words: food retail, food products, meat processing, competition, concentration,
 CR_4 ratio, buyer power

ABSTRACT. The study investigates the consolidation of Poland's food retail and meat processing industry from 2010 to 2022. The aim was to assess the relative changes in concentration in these two sectors and to determine whether these processes affected competitive conditions in the food chain. For this purpose, the k -firm concentration ratio (CR_k) and HHI index were estimated using Central Statistical Office data supplemented by revenue data for Poland's largest meat processing and food retail companies. The research reveals a notable trend of mergers and acquisitions among food retail entities. As a result, the share of the top four retailers (CR_4) increased from 25% in 2010 to 46% in 2022, and the market moved from a highly competitive to loose oligopoly. At the same time, the concentration of the meat industry increased, but to a lesser extent – CR_4 in 2022 reached 33%. This would indicate that food retail firms' bargaining power towards meat industry firms has increased. However, given the economic potential of firms, there is a slight improvement in the meat industry's position *vis-à-vis* food retail. The concentration in the latter has been growing steadily, nevertheless, the sector itself has not been developing as dynamically as the meat processing one.

¹ Corresponding author: marta_skrzypczyk@sggw.edu.pl

INTRODUCTION

The political and economic transformation and the processes of globalization and integration of Poland with the European Union (UE) greatly impacted the direction of development of the market structures in the agri-food chain. The retail sector in particular has undergone significant changes, with the increased importance of retail chains [Ciechomski 2011], the expansion of new store formats [Twardzik 2017], and the development of private labels. Concentration and consolidation processes in the food processing sector were in turn triggered by adjusting to EU requirements, the emergence of transnational corporations [Chechelski 2017] and growing foreign sales opportunities [Szczepaniak 2019]. However, these changes were irregular over time and varied by industries – in some, clear oligopolistic processes were observed, while others stayed dispersed [Kraciuk 2008, Figiel, Kufel 2013].

Increasing consolidation of firms in the grocery retail or food manufacturing sector leads to an imbalance between food supply chain participants. Economically strong, consolidated entities are emerging in the retail and, in some cases, processing industry while entities producing or processing agricultural raw materials remain fragmented. The foregoing could potentially lead to uncompetitive behavior by dominant actors, mainly through the exercise of market power, which influences the price determination process.

Changes in the food processing and retail sector have been frequently analyzed in both Poland and the EU. This study, however, deals with the recent period when retail chains achieved a dominant position in the retail market and concerns began to arise about the abuse of market power. Thus, the article attempts to assess the relative changes in concentration in retail, versus concentration in the food industry, using the meat sector as an example. The latter was chosen due to its importance, as measured by its share in the value of total food industry sales (32% in 2022), and the observed acceleration of mergers and acquisitions in recent years. The purpose of the study is to determine whether the processes of consolidation have changed competitive conditions in the food chain.

The paper proceeds as follows. The next section describes concentration processes in economic theories. Then, the data and methodology are presented. The subsequent section provides the background of the Polish retail sector and an overview of the mergers and acquisitions in the retail and meat processing industry, together with the results. The final section concludes the outcomes.

CONCENTRATION PROCESSES IN ECONOMIC THEORIES

The process of concentration can be defined as an increase in the extent to which economic activity is controlled by large firms [Hannah, Kay 1977]. The study of its course is linked to the analysis of changes in a competitive environment. The baseline for theoretical research in this regard is the neoclassical model of perfect competition [Śliwińska 2013], i.e. markets with a large number of firms, where none has a sufficient share to influence the market price. At the other extreme is pure monopoly where a firm is the only (or potentially the only) supplier of a product for which there is no close substitute.

Undoubtedly, economic practice is much more complex. Edward Chamberlin notes that most economic situations contain elements of both: perfect competition and monopoly [Chamberlain 1933]. The behavior of firms under imperfect (or monopolistic) competition is studied, among others, within the framework of industrial organization – IO [Pawłowska, Puchalska 2019]. In its two main approaches: the structure-conduct-performance (SCP) paradigm and the efficiency hypothesis (EH), concentration is viewed as the quantitative indicator defining the market structure [Krivka 2016]. According to the SCP approach, a firm's performance depends on its behavior and tactics (market conduct), which are determined by the market structures. Thus market concentration, as an exogenous variable of market structure, influences the industry/firm's performance. The SCP paradigm was questioned by representatives of the Chicago School [e.g. Demsetz 1973]. Harold Demsetz [1973] points out that firms with lower costs or better products make higher profits. They are, therefore, more efficient, hence they expand, and their market share grows. Moreover, higher market concentration can provide a positive incentive, encouraging investment and technological change.

Processes of concentration may result in increasing market power [V. Tremblay and C. Tremblay 2012, Koltay et al. 2023], which could manifest itself in terms of firms' cooperation with suppliers/buyers. In this regard, John Kirkwood [2005, p. 33] refers to the concept of bargaining power, which he defines as "the power to obtain a concession from another party by threatening to impose a cost, or withdraw a benefit if the party does not grant the concession". An increase in the bargaining power of retailers may potentially lead to unfair terms for suppliers [Clarke 2002] and may affect their economic performance and the efficiency of the entire food chain. In the long term, unfair practices may harm consumer welfare and the country's food security.

RESEARCH MATERIAL AND METHODOLOGY

Consolidation processes are reflected in changes in market concentration, characterized by the number and distribution of firms. However, the measurement of concentration is problematic due to formal requirements and access to data. One of the simplest indicators is the k -firm concentration ratio (CR_k), defined as the market shares of the k -largest firms.

$$CR_k = \sum_{i=1}^k u_i$$

where: u_i – firm i 's market share.

The k -firm concentration ratio is well-recognized and frequently used due to its simplicity and relatively low sensitivity to changes in the number of firms, and thus increased comparability of the results obtained for different moments in time. However, CR_k may omit important information on the competitive situation. The formula used for its calculation does not consider the relative size of the leading firms. Moreover, the indicator ignores information on the number of all firms in the market and data on shares of small firms (ranked from $k + 1$).

Thresholds of CR_k vary depending on the analyst. William G. Shepherd and Joanna M. Shepherd [2003] classify the market as tight oligopoly (where collusion is likely) once CR_4 is over 70%. When CR_4 reaches 40% but is less than 60-70% Frederic M. Scherer and David Ross [1990] and William G. Shepherd and Joanna M. Shepherd [2003] define the market as (loose) oligopoly. Values below 40% indicate a competitive market. The concentration ratio for one firm above 90% is assumed to define a monopolized market. William G. Shepherd and Joanna M. Shepherd [2003] also point out that as a firm's market share increases to approximately 15%, market power begins to have significant effects.

A second frequently used indicator is the Herfindahl-Hirschman index (HHI) which is calculated using the formula:

$$HHI = \sum_{i=1}^N u_i^2$$

where: u_i – firm i 's market share, N – the total number of firms in the market.

When market share is expressed in percent, the values of the HHI are in the range of 0 (perfect competition) and 10,000 (pure monopoly). In regulatory practice, it is assumed that HHI below 1,000 indicates low market concentration, 1,000-1,800 moderate, while 1,800-2,500 suggests high market concentration. A score above 2,500 shows very high market concentration, similar to a monopoly or oligopoly situation [V. Tremblay and C. Tremblay 2012].

The HHI is characterized by complementarity, as it is calculated for all market players. However, its practical application is limited due to insufficient availability of statistical data. As an alternative, the minimum HHI ($\min HHI_M$) was proposed by Algirdas Krivka [2016]. It is calculated by splitting the set of firms in the market into two intervals – one containing the largest firms of which the market shares are available and the other one containing the remaining enterprises with unknown market shares that are assumed to be equal [Krivka 2016].

$$\min HHI = \sum_{i=1}^M u_i^2 + \sum_{i=M+1}^N u_i^2$$

where $i \in [1;M]$ is the first interval for which the market shares u_i of the firms are available and $i \in [M + 1;N]$ is the second interval for which the market shares are unknown but assumed to be equal.

To analyze changes in market concentration, data from the Central Statistical Office (CSO) on the value of retail trade, number of stores and value of sold production of the meat industry (PKD 10.1) were used. They were supplemented by revenue data for Poland's largest food and grocery retail companies, published by Portal Spożywczy and the Rzeczpospolita newspaper (the so-called "List 2000"). Given the difficulties in defining the relevant market and the lack of appropriate data, the calculated indicators are indicative but seem to illustrate reasonably well the trends in the food chain.

RESEARCH RESULTS

GENERAL CHARACTERISTICS OF THE FOOD RETAIL MARKET IN POLAND

The food retail sector has undergone significant fluctuations in the first two decades of the 21st century. Gradually, both the structure of the market and the value of food and beverage sales have changed. Looking at it in real terms, two periods stand out – the years 2010-2014, when the value of sales decreased by almost 4%, and the years 2015-2020, characterized by a particularly dynamic increase in the value of sales – by nearly 19% over the entire period (Figure 1).

In nominal terms, the value of retail total sales in Poland increased almost twofold between 2010 and 2022, to more than PLN 1,185 billion. Concerning food and beverage sales in retail outlets, the dynamics of change were weaker – the value increased by 59% to PLN 333.7 billion, which accounted for almost 30% of total sales in retail outlets (7 percentage points (p.p.) less than in 2010).

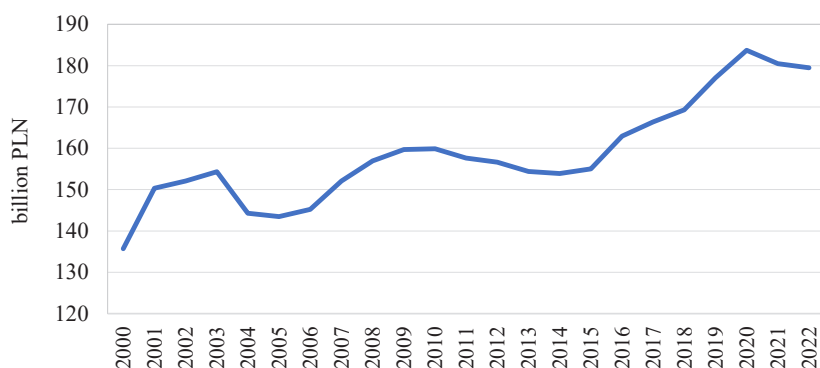


Figure 1. Value of retail sales of food and beverages (constant prices, 2000)

Source: own calculation based on CSO data [GUS 2023a]

CSO data shows significant differences in the development of the various store formats. Between 2010 and 2022, the number of stores in Poland decreased by 5.8%. At the same time, the number of supermarkets (the CSO includes the discount format in the supermarket ones), i.e. stores with a sales area of 400 sqm to 2,499 sqm, increased by 115%. In the hypermarket format (according to the CSO's definition, stores with an area of 2,500 sqm and above), the number of stores grew until 2014. In recent years, however, one has seen a decline, except in 2022 (Table 1).

Table 1. Value of total retail sales and sales of food and beverages (current prices, PLN billion) and number of stores in 2010-2022

Specification	2010	2015	2019	2020	2021	2022	Changes 2022/2010 [%]
Value of retail sales [billion PLN]							
Total	593.0	722.0	917.7	890.7	1 000.0	1 185.5	99.9
Food and beverages (F&B)	209.8	219.9	264.7	284.0	293.3	333.7	59.1
Share of F&B in total sales [%]	35.4	30.5	28.8	31.9	29.3	28.1	–
Number of stores							
Total	346,058	360,750	333,340	319,936	331,002	325,871	-5.8
Supermarkets	4,461	6,903	7,945	8,170	8,916	9,602	115.2
Hypermarkets	562	589	567	546	524	536	-4.6

Source: own calculations based on CSO data [GUS 2023a]

The above shows the transformations of the Polish retail market related to the liquidation of small independent stores, as well as the dynamic development of retail chains, especially discount stores. The stabilization of the number of hypermarkets is due to a change in the consumer habits of Poles, who prefer to shop close to home (hypermarkets are often located on the outskirts of cities) and the growing number of small households.

CONSOLIDATION PROCESSES

The data collected in the study shows that between 2010 and 2022, ten companies involved in food retail trade made acquisitions of other entities. The most expansive in terms of the number of stores acquired was Eurocash Group (focusing more on wholesale operations), which acquired almost 600 stores, and Maxima Grupè, which acquired stores of the Stokrotka chain. A significant impact on the performance of the retail market had similarly Spar acquisition of Piotr i Paweł in 2019. Also that year, there was another stage of integration of the Delikatesy Centrum chain (acquisitions/incorporation of more stores into the chain) and the resale of some stores belonging to the Tesco chain to Carrefour and Kaufland. In 2021, Netto (which operates discount stores) acquired Tesco stores.

Although in the discount store market, apart from the acquisition of Tesco by Netto, there were no mergers and acquisitions (M&A) in 2010-2022, it has experienced the most dynamic growth. Jeronimo Martins, owner of the Biedronka chain, has remained the leading player since 2004. Its revenues increased by 320% in 12 years. Thus, the company's share in food retail rose from 9% in 2010 to more than 25% in 2022 indicating that the entity's market power has become significant. At the same time, it should be noted that the firm's development was based on organic growth. The second position in food retail sales has been held by another discount chain – Lidl, whose market share in 2022 stood at approximately 10%. However, the most rapidly growing retail chain in Poland was Dino, which belongs to the supermarket format and was in the third position as of 2021.

The average revenue per top four firms operating in food retail increased by 198% in 2010-2022, with a 54% increase in the total value of food and beverages retail sales. As a result, the share of the top four food retailers (CR_4) increased from 25% in 2010 to 41% in 2021 and 46% in 2022. The $\min HHI_{20}$, on the other hand, increased its value by almost 4 fold.

Taking into account the thresholds of CR_k , the market has moved from a highly competitive to a loose oligopoly. However, this does not mean a worsening of competitive conditions. William G. Shepherd and Joanna M. Shepherd [2003] stress that loose oligopoly still tends toward effective competition which could be reduced through collusion only in the case of tight oligopoly. This is in line with the results of a study by Małgorzata Pawłowska and Katarzyna Puchalska [2019], who found that, despite

Table 2. CR_4 ratio, $\min HHI_{20}$ and average revenues of the largest firms in grocery retail in 2010-2022

Specification	2010	2015	2020	2021	2022	Changes 2022/2010 [%]
CR_4 [%]	25	29	38	41	46	–
$\min HHI_{20}$	234	495	656	735	882	–
Average revenues per top four firms [billion PLN]	12,934.3	15,936.8	26,781.7	30,249.8	38,537.5	198
Average revenues per top ten firms [billion PLN]	8,220.1	11,863.9	15,451.4	16,888.6	21,117.7	157

Source: own calculations based on [GUS 2023a, Portal Spożywczy 2023, Rzeczpospolita 2023]

growing concentration, major players in the Polish retail grocery market are increasingly competing against each other, as evidenced by the growth of the Linda index. The values of the $\min HHI_{20}$, despite the substantial change, also confirm the above.

The situation in the meat sector (red and poultry meat; PKD: 10.1) was somewhat different. The industry was characterized by a low concentration level and slow consolidation [Drożdż et al. 2017]. Piotr Chechelski [2017] points out that the process accelerated only in late 2016 and early 2017 when mergers and acquisitions occurred among a group of major companies. The most critical transactions include the Italian group Pini Polska acquisition by the Chinese WH Group, owner of Animex Foods, and Cedrob's acquisition of shares in Gobarto (Duda). In recent years, French Societe LDC, the owner of Drosed, has also been active in the Polish market.

Table 3. CR_4 ratio, $\min HHI_{20}$ and average revenues of the largest firms in the meat processing in 2010-2022

Specification	2010	2015	2020	2021	2022	Changes 2022/2010 [%]
CR_4 [%]	22	23	33	35	33	–
$\min HHI_{20}$	177	191	377	411	399	–
Average revenues per top four firms [billion PLN]	2,018.95	3,062.75	5,508.7	6,247.4	8,120.6	302
Average revenues per top ten firms [billion PLN]	1,147.45	1,930.97	3,058.05	3,411.35	4,524.6	294

Source: own calculations based on [GUS 2023b, Portal Spożywczy 2023, Rzeczpospolita 2023]

The described M&A activities have changed the meat market structure, but to a lesser extent than was the case for food retail. Although the average revenue per top four firms increased more than fourfold in 2010-2022, the CR_4 ratio increased by only 11 p.p. to 33% compared to 21 p.p. to 46% in the case of food retail. The minHHI_{20} index, on the other hand, has increased more than 2 fold but still remained at levels indicating a highly competitive market.

However, given the economic potential of firms, measured by revenue value, there is a slight improvement in the meat industry's position *vis-à-vis* grocery retail (Table 4). In 2022, the average firm belonging to the top four meat companies generated revenues that accounted for 21% of the average retail firm's revenues, compared to less than 16% in 2010.

Table 4. Average revenues of the largest firms in meat processing versus the largest grocery firms in 2010-2022

Specification	2010	2015	2020	2021	2022	Changes 2022/2010 [%]
Average revenues of the four largest meat firms vs. the four largest grocery firms	0.156	0.192	0.206	0.207	0.211	35
Average revenues of the ten largest meat firms vs. the ten largest grocery firms	0.140	0.163	0.198	0.202	0.214	53

Source: own calculations based on [Portal Spożywczy 2023, Rzeczpospolita 2023]

Slightly greater change occurred for the top ten meat processing firms, with an increase in the revenue share of the top ten retail firms from 14% in 2010 to more than 21% in 2022. The economic potential of meat firms, therefore, remains significantly lower than that of retail firms, but improved over the 12 years analyzed.

SUMMARY AND CONCLUSIONS

The food retail has undergone strong transformations. New store formats have appeared in the Polish market: hypermarkets, discount stores, supermarkets, and convenience stores. The role of retail chains has significantly increased. The survey results indicate that the concentration of firms has increased due to mergers and acquisitions and organic growth. After 2020, the market has gone from competitive to loose oligopoly.

At the meat industry level, some changes have also been observed. However, the process of firm consolidation accelerated only in late 2016 and early 2017 and the CR₄ ratio increased by only 11 p.p. to 33% in 2010-2022 compared to 21 p.p. to 46% in the case of food retail. This would indicate a deterioration in the meat industry's position relative to grocery retail. On the other hand, although the largest meat processing firms have significantly lower economic potential than large retail chains, their revenues increased more than in the case of retail trade.

Although the study's results do not provide a clear answer as to the changes in competitive determinants in the food chain, some tentative policy conclusions can be drawn. The data suggest that the economic potential of retail chains is significantly greater than that of meat firms, so the risk of imposing unfair terms for suppliers arises. Nevertheless, the benefits retailers achieve may be transferred to consumers. At the same time, further increases in retail trade concentration may lead to a point in which the chains are the sole beneficiaries of lower purchase prices. The above suggests that competition policy should stay vigilant and prevent any dampening of competition. However, it seems that for the meat sector, further concentration processes would be advisable.

The analysis has some limitations. First of all, it should be stressed that many firms have operations across industries. Thus, the available data, which covers their total activities, does not allow a comprehensive and precise assessment of their shares in the relevant market. Moreover, the mere determination of changes in the concentration level does not imply changes in the degree of exerted market power. For this reason, a further research direction could be to analyze the impact of M&A-induced changes on the pricing mechanisms and to investigate whether there are distortions in the pass-through rate of input prices to retail prices due to increasing concentration.

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PROCESY KONCENTRACJI W HANDLU DETALICZNYM
ORAZ PRZETWÓRSTWIE MIĘSA A RELACJE KONKURENCYJNE
W ŁAŃCUCHU ŻYWNOŚCIOWYM

Słowa kluczowe: handel detaliczny, artykuły spożywcze, przetwórstwo mięsa,
konkurencja, koncentracja, wskaźnik CR_4 , siła rynkowa

ABSTRAKT. W artykule zbadano przebieg konsolidacji przedsiębiorstw działających w ramach detalicznego handlu artykułami spożywczymi oraz przetwórstwa mięsa w Polsce w latach 2010-2022. Celem była ocena względnych zmian koncentracji w tych dwóch sektorach i ustalenie, czy procesy te wpłynęły na uwarunkowania konkurencyjne w łańcuchu marketingowym żywności. Dla potrzeb analizy oszacowano wskaźnik koncentracji k -podmiotów (CR_k) oraz indeks HHI, wykorzystując dane GUS uzupełnione o dane o przychodach największych przedsiębiorstw handlu detalicznego żywnością i artykułami spożywczymi. Przedstawiono przebieg fuzji i przejęć wśród podmiotów handlu detalicznego artykułami spożywczymi. Ich efektem był wzrost udziału czterech największych spółek w rynku (CR_4), z 25% w 2010 roku do 46% w 2022 roku. Tym samym rynek handlu detalicznego artykułami spożywczymi zmienił się z wysoce konkurencyjnego w luźny oligopol. W analogicznym czasie koncentracja przemysłu mięsnego zwiększyła się, ale w mniejszym stopniu – CR_4 w 2022 roku osiągnął 33%. Oznacza to, że siła przetargowa przedsiębiorstw handlu detalicznego artykułami spożywczymi w stosunku do przedsiębiorstw przemysłu mięsnego wzrosła. Jednak uwzględniając potencjał ekonomiczny podmiotów, można pisać o nieznacznej poprawie pozycji przemysłu mięsnego względem handlu detalicznego artykułami spożywczymi. Koncentracja w tym ostatnim stale zwiększa się, niemniej sam sektor nie rozwija się tak dynamicznie jak sektor przetwórstwa mięsnego.

AUTHOR

MARTA SKRZYPCZYK, MSC

ORCID: 0000-0002-1967-6081

Warsaw University of Life Sciences – SGGW

Institute of Economics and Finance

Department of International Economics and Agribusiness

e-mail: marta_skrzypczyk@sggw.edu.pl

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