

# Poland Retail Report Q2 2016

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## Abstracts

**BMI View:** Preliminary real GDP estimates for 2015 indicate that the Polish economy beat expectations, growing by 3.6% against consensus expectations for growth of 3.5%. This continued strong economic performance will support growth in employment opportunities and household incomes, directly benefiting the retail sector. We believe that amendments to the 2016 budget will prove to be growth positive in the short-run and the government's policies to increase social transfers to households via child benefits will also support increases in household consumption.

### Key Views & Developments

We expect total household spending to amount to USD272bn in 2016, down by 1.5%, mostly due to appreciated US dollar. In Polish zloty terms, we expect a rise of 4.4% this year.

Essential spending will continue to account for the majority of household spending, with the largest sector represented by housing and utilities at 24.3% in 2016.

The number of households falling into the key USD10,000+ wage bracket is expected to reach 7.9mn in 2016, representing 57.4% of all households.

## Contents

BMI Industry View

SWOT

Industry Forecast

Headline Retail Forecast

Table: Total Household Spending (Poland 2013-2020)

Table: Retail Sector Spending, % Of Total (Poland 2013-2020)

Table: Retail Sector Spending, % of GDP (Poland 2013-2020)

Table: Headline Retail Sector Spending (Poland 2013-2020)

Retail Sector Forecast

Table: Food, Drink & Tobacco Spending (Poland 2013-2020)

Table: Clothing & Footwear Spending (Poland 2013-2020)

Table: Household Goods Spending (Poland 2013-2020)

Table: Personal Care Spending (Poland 2013-2020)

Household Numbers And Income Forecast

Table: Household Income Data (Poland 2013-2020)

Table: Labour Market Data (Poland 2013-2020)

Demographic Forecast

Table: Total Population (Poland 2013-2020)

Table: Population: Babies (Poland 2013-2020)

Table: Population: Young Children (Poland 2013-2020)

Table: Population: Children (Poland 2013-2020)

Table: Population: Young Teens and Older Children (Poland 2013-2020)

Table: Population: Young People (Poland 2013-2020)

Table: Population: Older Teenagers (Poland 2013-2020)

Table: Population: 21yrs + (Poland 2013-2020)

Table: Population: Young Adults (Poland 2013-2020)

Table: Population: Middle Aged (Poland 2013-2020)

Table: Population: Urban (Poland 2013-2020)

Industry Risk Reward Ratings

Central And Eastern Europe Risk/Reward Index

Table: Central And Eastern Europe Retail Risk/Reward Index, Q216

Poland Risk/Reward Index

Rewards

Risks

Market Overview

Competitive Landscape

Clothing & Footwear

- Table: Selected Clothing & Footwear Retailers
- Household Goods
  - Table: Selected Household Goods/Homeware/Home Improvement Retailers
- Electronics
  - Table: Selected Electronics Retailers
- Department Stores
  - Table: Selected Department Stores
- E-commerce
  - Table: Selected E-commerce/Online Marketplaces
- Pharmacies
  - Table: Selected Drug Stores/Pharmacies
- Glossary
- Methodology
- Industry Forecast Methodology
- Sources
- Risk/Reward Index Methodology
  - Table: Retail Risk/Reward Index Indicators
  - Table: Weighting Of Indicators

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