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State of the Art

A background image showing a person's hands typing on a laptop keyboard. Overlaid on the image are several semi-transparent icons: shopping carts, dollar signs (\$), and Euro symbols (€).

**E-COMMERCE**

IN POLAND

FLANDERS INVESTMENT & TRADE MARKET SURVEY

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# E-COMMERCE IN POLAND

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## CONTENTS

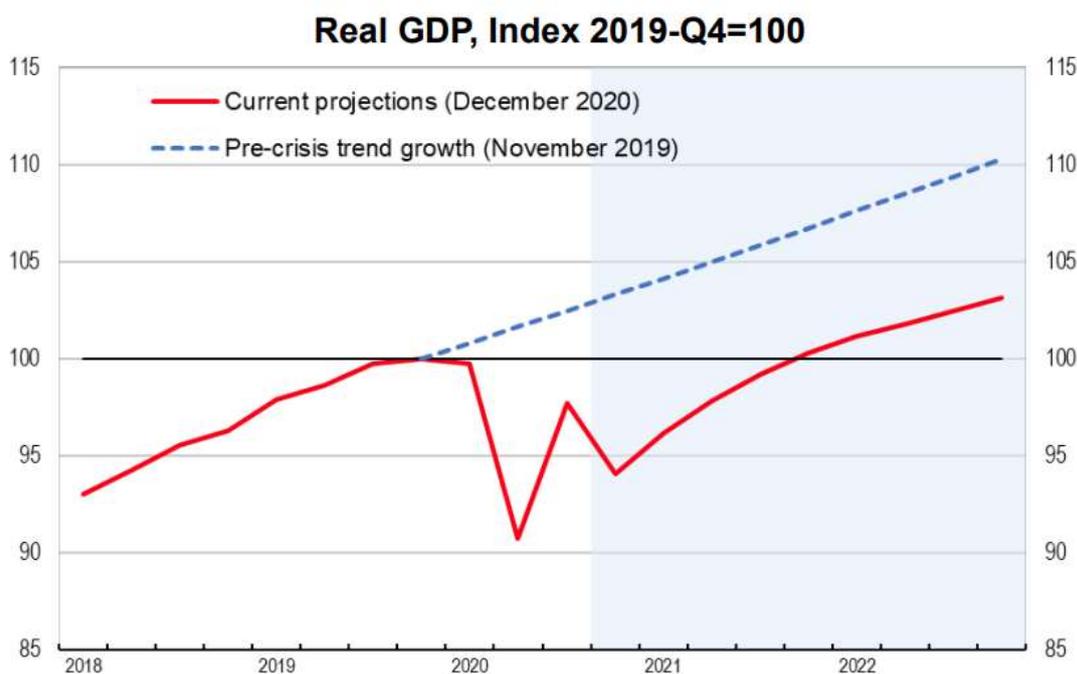
1.	POLAND ECONOMIC SITUATION 2021 - IN SHORT.....	3
2.	TRENDS IN E-COMMERCE.....	5
3.	E-COMMERCE BEFORE, DURING AND AFTER COVID-19.....	6
3.1	SECTORS.....	6
3.2	PURCHASING HABITS.....	7
3.3	LOGISTICS & WAREHOUSING.....	7
3.4	PAYMENT METHODES.....	7
4.	FOOD AND GROCERY SHOPPING ON-LINE.....	8
5.	CONSUMER BEHAVIOUR ON LINE.....	9
6.	MARKETPLACES IN POLAND.....	10
6.1	ALLEGRO – C2C, B2C, B2B.....	11
6.2	AMAZON.....	12
6.3	ZALANDO.....	13
7.	LOGISTICS: PARCEL LOCKERS & PICK UP POINTS.....	13
7.1	INPOST INTEGER.PL.....	14
7.2	PKN ORLEN – ORLEN PACZKA.....	15
8.	SOURCES.....	16



crisis and raise productivity. Finally boosting the capacity of small and medium-sized enterprises (SMEs) to innovate would help them to export more and adapt to a rapidly changing international environment.



## The crisis has dented economic prospects



Source: OECD (2019 and 2020), OECD Economic Outlook: Statistics and Projections (databases).

12

Picture Source: dronelife.com



- **The smartphone** has become the preferred **device for online shopping**.
- **Sale of food** via the Internet will systematically grow, modern logistics offer tools that enable the delivery of perishable products without compromising their quality.
- Customers accustomed to the amenities introduced by **digital solutions** will expect similar ones also in traditional stores.

### 3. E-COMMERCE BEFORE, DURING AND AFTER COVID-19

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The pandemic revolutionized the e-commerce sector in two ways.

- Firstly, it has changed the **purchasing habits** of consumers, who definitely like online shopping, primarily because of security, speed and simplicity.
- Secondly, it forced business to rapidly **digitally transform** and adapt to new realities more efficiently. Not only the largest players but also representatives of the SME sector have joined the online sales channel

Although **e-commerce has grown rapidly and dynamically in recent years in Poland**, the limitations related to the pandemic have accelerated growth - making it necessary to adapt to the new reality. The sellers had to start or intensify their activities on the Internet. The results of the latest **elzba** (The Electronic Economy Chamber of Commerce) report: 'Omni-commerce. I buy comfortably 2021' show that **84% of active internet users already buy online**. That's a 12% increase compared to 2020 and as much as 27% with regard to 2019. During the pandemic, a really large group of consumers - regardless of age - found out that online shopping can be not only helpful, but also simple and intuitive.

**In 2021**, however, is more of a challenge for online stores and marketplaces - **it will be difficult to keep up with the pace of 2020, when sellers and buyers went digital in a big way**. Competition is tough and customer acquisition is becoming more and more difficult. PwC experts emphasize that compared to Western European countries, Poland has a relatively small number of **online stores**, therefore **the number may increase significantly in the coming months and years**.

The coronavirus pandemic has shown new directions in the development of the e-commerce industry. The **fight for a customer** in an increasingly competitive network focuses on an **attractive price, a large selection of offers, payment and delivery methods** as well as the **convenience of shopping**, with UX design at the forefront. **A new group of online shoppers** has also emerged.

#### 3.1 SECTORS

The industries that are invariably strong in online are **fashion and electronics**. During the pandemic, on-line sales **benefited greatly** at such sectors: **home and garden, health, food products, jewellery, food with home delivery, automotive**. Industries with **less consumer interest are: tourism, entertainment and culture in terms of tickets for events**.







**BLIK** is a mobile payment system launched on February 9, 2015 by six Polish banks. It enables smartphone users to make cashless payments in stationary and online stores, to withdraw and deposit cash at ATMs, and to make transfers and generate checks with a digital code. Gaining the payment market in Poland rapidly as it is a very convenient, fast and safe method of payment.

On the other hand, the more **traditional payment methods** have lost most of their popularity over the last year: **cash on delivery** (a decrease from 46 to 24%), an individual transfer to the account (from 43% to 34%) and cash at the point of receipt of goods (from 16 to 9 percent) - according to the Blue Media study 'How to buy on the Internet', carried out at the beginning of May.

## 4. FOOD AND GROCERY SHOPPING ON-LINE

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The pandemic has definitely influenced **online grocery shopping**, which was previously only available in Warsaw. Now they can be made all over Poland and not only from big players. Stores that have online sales available adapt fully to the consumer's needs in terms of delivery, digital payments and service, which have significantly improved. At the beginning of the pandemic, 59% of food products were poorly assessed on the Internet by surveyed consumers. Two months later, it was only 28% and now **87% evaluates the availability of these products as good or very good.**

The online channel's share in total food purchases is still low. Although, according to the Central Statistical Office of Poland, in 2020 it almost doubled. At the turn of 2020 and 2021 Internet purchases still accounted for less than 1% of all retail spending on food. Therefore, it should be assumed that the increase in the share of e-commerce in food trade will be a gradual, long-term process rather than a revolutionary jump forward. It should also be remembered that the pandemic brought about an accelerated **growth in the ready-made food delivery industry** (in particular in dietary catering). This trend, providing consumers with great convenience, will probably also continue in the coming years, which to some extent may have a substitution effect in relation to the purchase of food products.

In general, large grocery stores - and pharmacies - were rated as coping the best with the pandemic. In the food category, in addition to orders with e-store delivery, consumers also rate very positively the option





## 6. MARKETPLACES IN POLAND

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A marketplace is a platform that offers goods of many online sellers in one place, allowing them to be purchased by customers. One of the main advantages is the almost instant access to a very large number of customers, without large investments in marketing. Marketplaces have a high brand recognition and thus increase their credibility among buyers. There are also disadvantages such as very high competition of sellers in one place and price fight.

### Popular marketplaces in Poland

- **Allegro.pl - the largest online transactional platform in Poland, has approx. 40% share in e-commerce in Poland.**
- Amazon.de - The largest online store in the world, in Poland Amazon.pl since March 2021.
- Ebay.pl - Worldwide sales platform.
- Facebook.com/Marketplace - the largest social networking site in the world.
- Pl.aliexpress.com - Chinese online sales service where you can find mainly products from Chinese manufacturers. As of today (December 2021), the sales from Poland is not possible, but it's probably just a matter of time.
- Morele.net - Online store operating in the consumer electronics segment (computers, laptops, computer components, RTV and household appliances).
- Carrefour.pl - Online store offering own products and products of business partners.
- **Ceneo.pl - The second largest e-commerce website in Poland.**
- Okazje.info - A popular price comparison engine in Poland. The portal compares prices from various online stores, supermarkets and electro markets, compares them and makes these data available to its users.
- Google.com/Shopping - Price comparison engine offered by the internet giant Google.
- Empik.pl - Marketplace offered by the Polish sales network of books, music publications, films, games, programs, prints, audiobooks, computer accessories and press.
- Showroom.pl - The largest Polish online store where you can find clothes and accessories from European boutiques.
- Arena.pl - A trading platform with a selected offer that guarantees fast and safe shopping, only from reliable sellers.
- Emag.pl (formerly Agito.pl) - Marketplace offering, among others telephones, electronics, televisions and computer equipment, toys, household appliances, clothing and cosmetics at attractive prices



Allegro lists three areas that define online shopping trends. First, it is the price that has to be competitive. That is why promotions are going on all the time. This is a change compared to previous years, when these stocks were focused on a very specific time frame, for example Black Friday. Today promotions, great prices and bestsellers go on non-stop. Which, of course, does not prevent sales festivals such as Black Week, Smart Week and others from developing. The turnover during these days is dynamically growing from year to year. An interesting trend in this area are the more and more popular live venues, i.e. the sale of products online live, which, of course, is accompanied by promotional prices.

The role of **Smart! Loyalty programs** (smart delivery – Allegro Smart) is also growing, eliminating the basic barrier of online shopping, i.e. the price of delivery. Participants of such programs buy more often.

**Allegro Biznes** – platform shopping for companies. The platform offers nearly 120 million offers and approx. 100 thousand sellers. Payment has been postponed up to 60 days. There are also discounts and promotions. Discounts on wholesale price lists can reach up to 55%, and discounts on large orders 30%. Via Allegro Biznes you can buy, among others basic office products (e.g. stationery, cleaning products, IT equipment, etc.). The offer is also to be adapted to specific industries, such as car repair shops, construction companies and beauty salons.

## 6.2 AMAZON



By entering the Polish market in March 2021, Amazon created another sales channel and opportunities for Polish small entrepreneurs. The Amazon platform, which is backed by ultra-modern technologies and the highest level of customer-centricity, allow these companies to reach even more customers and shopping opportunities, and thus increase sales. It should be a chance for even more Polish online stores to be created to meet more and more specific shopping needs of customers.

In October 2021, six months after the official launch of Amazon in Poland, the website is relatively quiet. The platform increased the number of visitors in the spring 2021, but it is far behind Allegro. The data show that Amazon.pl - at its peak - had up to 4.3 million users in Poland who previously were sent to the German part of the platform. But as numbers can be interpreted in different ways, it appeared, that four million Amazon.pl users are not customers, but only people who have even entered the seller's portal for a moment. According to experts, Amazon has chosen this model of operation in Poland because it wants to calmly analyze the Polish market. And the competition has nothing to fear at the moment. Amazon did not conduct a spectacular advertising campaign that would send a signal that this giant is really entering Poland for









