



# Polish Retail *Looks To The Future*

ESM SPEAKS TO THIERRY ETCEMENDIGARAY, COMMERCIAL DIRECTOR, CARREFOUR POLAND, AND MATEUSZ BORUTA, MANAGING DIRECTOR, ECR POLAND, ABOUT HOW A COLLABORATIVE APPROACH IS BOOSTING POLISH RETAIL.

**P**olish retail has been in the spotlight for somewhat contentious reasons in recent months. Following the Polish government's decision to introduce a 'retail tax' on some of the biggest chains operating in the country last year, this past June saw the European Commission rule that such a tax would be in breach of EU rules, and is therefore a non-starter.

Thus, with the controversial tax parked (at least for the moment), the onus is now on operators to work collaboratively on solutions that can lift the sector as a whole. As ESM has discovered, this process is very much under way, with ECR Poland at the forefront of developing cooperative solutions for retailers and brands.

## State Of The Nation

The Polish market is one of the most diverse in Europe – most major international groups, such as Carrefour, Auchan and Tesco, have a presence there – and it is also fairly fragmented, with very different demographics in urban and rural areas.

"It's very important to adapt your food assortment in each area, according to the purchasing power of consumers," says Thierry Etchemendigaray, commercial director of Carrefour Poland, adding, "[Successful operators need] to have a competitive price level relative to the market, to have an aggressive and well-targeted promotional policy, to improve the quality of service, and to build the offer online."

## Looking For Opportunities

Etchemendigaray has been with Carrefour Poland for four years, having held similar roles in Belgium and Italy. As he explains, the retailer is at the forefront of developing new concepts, such as the recent roll-out of the Carrefour Gourmet format, in a country more familiar with discounters.

"The target was to adapt the concept according to the expectations of Polish consumers," he says. "We want to become the leader in the gourmet-store category."

On the digital side, Carrefour Poland has developed an extensive e-commerce network in Warsaw, soon to be rolled out to other

cities, and it recently bolstered its CSR capabilities by adopting the SENS food-labelling system, which informs consumers about the nutritional and recommended consumption frequency of certain products.

## Strong Foundations

With every new concept, strong foundations are required, and ECR Poland, part of the ECR Community, has been proactive in engaging with brands and retailers in developing collaborative, beneficial programmes.

As well as working with Etchemendigaray and his team at Carrefour, ECR Poland counts Auchan, Makro, Intermarché, Tesco, Jerónimo Martins and others among its members on the retail side, and brand heavyweights such as Danone, P&G, Unilever, Mars, Nestlé and L'Oréal on the brand side.

"The collaboration between trading partners is still very important, now perhaps more than ever," says Mateusz Boruta, managing director of ECR Poland.

In June, the group hosted the latest edition of its ECR Forum, which saw two days of discussion to develop best-practice initiatives around areas such as category management, shopper marketing, EDI, HR initiatives, and shrinkage and on-shelf availability (OSA) – a common topic of focus for many regional ECR bodies. As Boruta says, it is important for ECR Poland to "reactivate" its community around these themes.

"Shrinkage and OSA are the two important fields, where collaboration still has good potential to grow and bring in more benefits to our members," he says. "We have been highly encouraged by the ECR Community Shrinkage & OSA Group and are trying to adapt their achievements to Polish reality."

"[With a change in the employment demographic, ECR Poland also needs to address both] ongoing, 'traditional' fields, such as the whole value-chain optimisation and shopper understanding, but also a number of new areas, like labour diversity and workforce availability," says Boruta. "This is something that has become very apparent to many businesses in Poland in recent years."

Poland may have a diverse, complex grocery landscape, but by thinking collaboratively and measuring the needs of the industry, both in the short term and into the future, it is also full of opportunities. ■

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