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OUTDOOR MARKETS AS A REGIONAL FOOD DISTRIBUTION CHANNEL IN POLAND BETWEEN 2004 AND 2013

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INTRODUCTION

Trade plays a significant role in Poland's national economy. After industry, it is the second largest contributor to gross domestic product (GDP). In 2013, trade accounted for 16.5% of GDP, a slight 0.06% more than the 17.1% it reached in 2004. Trade made up about 19.5% of gross value added in 2004. As regards the retail sector in Poland, goods are purchased most often (56% of the time, in fact) directly from domestic producers and manufacturers, which makes up an approximately 29% share of the wholesale sector in the total sales [Internal Market 2013]. A trend to reduce the role of middlemen in the supply chain, including for food, is clearly notable nowadays, which is a positive development for sustainable production and the consumption of goods brought to market by a shorter supply chain, thus providing an opportunity for producers, especially of agricultural products, to earn a fair income. Poland had as many as 307 agricultural producer groups[1] operating in 2013, due to considerable fragmentation of farms and a weak network of producer organisations. Consequently, a large part of production capacity was dispersed among the farm holdings producing on a small scale. More than half of them generated less than 4 thousand EUR worth of produce, so the majority share features including low specialisation and limited participation in the market [RDP 2014–2020]. It is therefore important not only to provide opportunities to farmers with access to alternative outlets on agricultural markets, but to also enable local processing of agricultural produce on site in farm holdings. Given the viewpoint of especially small farms, the sales points they find attractive include marketplaces and bazaars as well as marginal sale points

[1] www.krs.org.pl [accessed: 25.11.2013].

designated by local authorities, where they can, for example, offer their raw materials, including farm produce and products processed on the farm, directly to the consumer. Such sale points include markets, bazaars and other sites specified by the local authorities as marginal sales space. Besides, for over a decade now, outdoor events such as bazaars, fairs, festivals, and special product days (for beans, cherries, plums, apples, oscypek – a Polish sheep cheese, wine and honey and other locally grown and/or produced products) have been promoted, and are now becoming increasingly popular across the country. The events have been organised in cooperation with local government authorities, public-private organisations, and chambers of commerce, providing a good opportunity to buy local products and acting as a magnet for both local farmers and tourists.

GOALS, SOURCE MATERIAL AND METHODOLOGY

The article seeks to show changes in the level and structure of seasonal and all-year outdoor markets in Poland since Poland's accession to the EU as one of the places where PDO (protected designation of origin) and PGI (protected geographical indication) labelled foods are sold. I refer to the results of research conducted during projects, including those concerning the consumers of traditional and regional food in Poland (grant 2007 – A programme of Cooperation Fund Agro-Smak 2, and project NN 112374540 NCN) as well as the producers of those products (grant MNiSW NN 112057234 and my own research conducted during 2010–2014). Comparative and descriptive methods are used in the analysis. Information about consumer preferences concerning traditional and regional food with EU geographical indications was obtained with the support of the PENTOR Research International polling organization in 2007 and with the support of TNS Polska polling organization in 2012. The survey was conducted among a representative sample of 1,038 and 1,200 Polish respondents over 15 years of age, respectively, using CAPI interviewing and by means of ad-hoc Omnibus method. The survey of producers of regional and traditional food was conducted between 2008–2010 (33% of the products from the list of traditional products, including also those awarded PDO, PGI and TSG – traditional speciality guaranteed, status) as well as in 2014 by means of a questionnaire (70 producers) and a telephone interview (120 entities).

OPEN MARKET TRADING IN POLAND BETWEEN 2004 AND 2013

The scale and standardization of the production output obtained from the acreage of farm holdings in Poland, especially those with an area of less than 5 ha, or about 1.5 million entities (approximately 69.2% of the total number of farms), has been a major obstacle preventing the availability of regular and continuous batches of products for the retail sector. Of course, farmers could sell their products directly on their farms – "at the gate", "under shelters", or "under a tarp", but it doing so they reduced the scope of potential opportunities and possibilities of creating added value. Farmers also sell their crops from May through October at places specifically designated for that purpose, and not only in small towns or villages within a given district or in adjacent areas. They look for ways to increase the scope of their operations using mobile sale points, specialized trailers, trucks, and tents where they display their products, but they are steadily pressured by strong competitors such as organized retail outlets (shops, including supermarkets and hypermarkets) competing by means of price or product variety. Despite these changes, local trade still takes place at marketplaces and continues to be popular among Polish people (especially retirees seeking to buy products at affordable prices directly from farmers, or mothers buying naturally fresh food for children), especially in rural areas. As for urban areas, local trade has been revived thanks to the migrant population and demand among local residents. Even though itinerant trade has phased out as a result of the increasing concentration of trade, forced specialization of business activities[2], the entrance of foreign retail chains to the market, and the development of shopping centres and other brick-and-mortar retail facilities, and the currently expanding mail-order sales and e-commerce and online shops, which are becoming increasingly important, local trade continues to be an attractive way of delivering goods, especially farm produce, to the final consumer. It also complements the domestically produced goods offered on the market.

Outdoor markets originated in Poland on squares where farmers sold crops and live animals (they were known as cereal or horse fairs). Despite their changed function, they have remained an example of a short supply chain which today also generates numerous economic, social and environmental benefits, on a micro as well as a macro scale (Table 1).

Outdoor markets generate income for local government budgets through the fees sellers pay for the right to sell their products. At the same time, they also generate income for sellers (including farmers), make use of and reinforce local resources by providing

TABLE 1. Local food supply systems and short supply chains in Poland given as examples of marketplace benefits

Benefit	Short supply chains
Commercial	diversification of the rural economy; generation of employment; sustained maintained funding for local areas; the use and strengthening of local resources
Economic	decentralisation of food systems; goods transported (or not) over short distances from the production site; reduced needs for activities such as transportation, freezing, warehousing, storage, processing, packaging, distribution; business opportunities both on the farm and outside farming; sustained production income
Social	preservation of cultural heritage; tradition – knowledge, folklore, reduction of the generation gap, integration; a sense of pride and belonging; the strengthening of social cohesion; opportunity for young people; the restoration of links between rural and urban areas; creation and strengthening of community ties; improved quality of life
Environmental	smaller carbon footprint, climate-friendly, less energy-intensive, lower greenhouse gas emissions, reduced consumption of fuel and other resources; maintenance of local or regional heritage, the keeping of traditional breeds and species of animals, or crops typical for the area, which are better suited to local conditions; promotion of biodiversity

Source: the author's own research.

[2] Stationary shops include: specific branch dealers, multi-branch and specialised goods shops, boutiques, department stores and merchant houses, superstores, industrial and grocery stores, discounters and other retail units (i.e. petrol stations, kiosks, vending machines, sales from warehouses).

TABLE 2. Total number of marketplaces (permanent and seasonal) and marketplaces or locations designated on streets or squares as seasonal points of sale in Poland in the years 2004–2013 (by voivodship)

Year	Voivodships															
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Total number of marketplaces (permanent and seasonal)																	
2004	2 204	214	230	212	214	2 238	592	67	271	98	469	453	206	110	355	503	8 436
2005	2 266	218	240	227	213	1 832	563	67	285	102	674	475	164	287	359	1 070	9 042
2006	2 112	225	241	225	238	1 710	582	82	253	102	350	489	163	337	361	1 030	8 500
2007	2 166	233	242	221	238	1 643	969	80	257	103	378	469	199	207	358	1 160	8 923
2008	2 869	219	240	232	244	1 396	877	357	268	98	310	493	155	285	721	1 759	10 523
2009	795	265	248	238	266	1 357	1 047	516	272	124	685	554	155	132	716	1 959	9 329
2010	845	259	248	225	276	1 317	1 183	468	270	137	373	532	149	135	710	2 021	9 148
2011	801	270	276	195	279	1 334	1 046	463	243	138	386	539	150	133	708	1 835	8 796
2012	803	302	282	166	286	1 487	1 047	463	248	152	343	504	146	131	708	1 653	8 721
2013	992	310	290	161	337	1 293	1 018	545	249	153	322	499	141	136	712	1 509	8 667
2013 (%)	11.4	3.6	3.3	1.9	3.9	14.9	11.7	6.3	2.9	1.8	3.7	5.8	1.6	1.6	8.2	17.4	100
Marketplaces or locations designated on streets or squares as seasonal points of sales																	
2004	2 049	69	41	139	51	2 082	279	16	139	16	374	236	118	31	104	384	6 128
2005	2 106	73	53	151	44	1 676	253	17	156	20	576	259	83	208	101	953	6 729
2006	1 954	80	55	151	72	1 554	265	25	128	20	260	274	83	257	109	916	6 203
2007	2 011	87	59	149	70	1 487	652	24	132	20	291	258	120	127	105	1 047	6 639
2008	2 716	79	51	155	80	1 244	567	299	144	19	223	291	76	205	470	1 643	8 262
2009	643	127	58	163	87	1 206	731	463	145	45	596	359	78	55	469	1 848	7 073
2010	696	123	57	150	90	1 167	872	415	144	58	281	349	72	56	473	1 910	6 913
2011	654	135	85	121	94	1 185	734	411	115	59	293	349	69	55	474	1 731	6 564
2012	658	168	97	92	103	1 340	727	413	117	74	254	318	65	54	474	1 552	6 506
2013	850	175	102	87	160	1 147	701	494	118	72	234	316	59	56	479	1 410	6 460
2013 (%)	13	3	2	1	2	18	11	8	2	1	4	5	1	1	7	22	100

Voivodships: 1 – Dolnośląskie (Lower Silesia), 2 – Kujawsko-pomorskie, 3 – Lubelskie, 4 – Lubuskie, 5 – Łódzkie, 6 – Małopolskie, 7 – Mazowieckie (Mazovia), 8 – Opolskie, 9 – Podkarpackie, 10 – Podlaskie, 11 – Pomorskie, 12 – Śląskie (Silesia), 13 – Świętokrzyskie, 14 – Warmińsko-mazurskie (Warmia and Mazuria), 15 – Wielkopolskie, 16 – Zachodniopomorskie (Western Pomerania), 17 – Poland Total.

Source: the author's own calculations based on the Local Data Bank of the Central Statistical Office in Poland, retrived from http://stat.gov.pl/bdlen/ [accessed: 23.04.2015].

jobs for local inhabitants, shorten both the supply and carbon chains, and enable the sale of products which are characteristic of a given region (and therefore protect the region's cultural or genetic heritage, including its old species, plant types, and traditional animal breeds). Despite numerous measures taken by local governments (municipalities) to improve the conditions and standards of outdoor markets (in villages as well as in towns and cities), and to increase the safety and comfort of working/shopping, improve the image of stands as well as the condition of infrastructural amenities (e.g. paved roads, parking spaces, lighting, running water, sewage system, roofs over stands, toilets), the number of outdoor markets has been declining nationwide since 2008 (Table 2).

The greatest number of outdoor markets (the total of 55.5%) in Poland was recorded in four provinces: Małopolska, Mazovia, Lower Silesia and Western Pomerania. Their popularity in those regions can be attributed to the communities living there, trading traditions, relations between the sellers and the buyers, the number of small farms (up to 5 ha), the location of outdoor markets, or their growing operations in certain seasons, especially in tourist venues at the seaside and in the mountains. In 2013 there were 2,207 permanent outdoor markets and 6,460 seasonal outdoor markets (on streets and squares), i.e. by nearly 1,300 more than in 2000. Retail outdoor markets comprised the dominant share of the all-year markets (95%, i.e. 2105). The greatest number of those operated in Mazovia (295), Wielkopolska (222) and Silesia (181), while the smallest number can be found in provinces Opolskie (50) and Lubuskie (where 73 out of 74 were retail outdoor markets), and 77–79 in provinces: Podlasie, Warmia and Mazuria and Świętokrzyskie. With the declining number of outdoor markets, their area also declined by approximately 10% between 2004–2013, to 14.4 million m^2, mainly as a result of loss of grounds by all-year markets (by 5%, 194 thousand m^2) and lack of room in the streets around squares for conducting seasonal trading activities. In 2013, the sales area on permanent markets accounted for 60% of the total market area. The number of permanent retail outlets at outdoor markets operating daily, which includes roofed booths (e.g. selling vegetables or fruit, or both), or stands (constructed with portable devices on which products are displayed for sale), amounted to 58.7 thousand, which accounted for 58% of the total number of permanent outdoor markets. Cyrek and Cyran (2006) point out that outdoor markets are attractive for clients due to low prices of products and a broad range of goods offered for sale. Customers purchase directly from producers because they are convinced that the products are high quality, and they are attracted by the sellers' kindness. The location of a market also plays a role here. Finally, according to Cyrek (2012), consumers choose outdoor markets because of specific types of products sold there and nowhere else.

PREFERENCES OF REGIONAL FOOD CONSUMERS IN POLAND

Between 2008–2014, 66% of products on the list of traditional products were sold mainly in locations where they were produced, including on farms, in bakeries, or at the producer's homes. A slightly smaller number of producers decided to reach consumers on the local market, such as the nearest town, neighbouring towns and municipalities (59%) and regional markets, i.e. provincial markets (58%) [Borowska 2010]. In reaching consumers, crop producers use mostly short distribution channels, based on direct supply and sales (83%). The majority of traditional and local products are sold using outdoor markets as the main channel of distribution (58%), most often on the local market (38%) [Krajeński and Zabrocki 2008]. However, the selling place, the type of shop, or sale within the area of product origin are also taken into account as far as the perception of a listed product's authenticity is concerned [Bryła 2013]. In 2012, consumers in Poland expressed a desire to buy regional foods with geographical indications to be available at a nearby shop (59%), at a supermarket (32.3%), or at a nearby outdoor market (27.3%), during various local/regional events and celebrations, including at fairs (17.9%), specialized shops (15.6%), or the producer's place (13.3%); some people prefer direct home delivery (6.3%), and every twentieth respondent would like to taste it in a restaurant or a bar. However, at 2.3%, few would be prepared to go to a warehouse, and only 2% would buy such products online.

For a decade there has been a trend in Poland to minimize food processing while preserving its safety. Consumers expect producers to use processing methods that guarantee the preservation of raw product values such as aroma, freshness, taste and natural nutrients [Krupa and Krupa 2009]. Time-consuming to produce, regional Polish foods have been ousted from the market by mass production. This is why a revival of regional and ethnic foods and products granted PDI, PGI and TSG indications is underway. Growing interest in thus labelled regional and traditional foods is attributable mainly to their quality (every other consumer says as much), unique taste (over 44%), and the desire for wholesome, additive-free food (33%). Next 17% eat regional foods because they are in vogue and every tenth consumer avoids buying mass-produced food for everyday consumption. Indeed, the number of certified producers and their production grew systematically between 2007 and 2014, corroborating the existence of a trend. In 2014 alone 431 producers had the right to sell certified regional and traditional products (i.e. 29 out of 36 products)[3].

For the sake of comparison, the estimated production volume at that time for PDO foods was: oscypek 56.9 t, nadwiślanka sour cherries 665.6 t, and wrzawska beans 15 t. For foods labelled PGI, the numbers were the following: grójeckie apples 12 thousand t, łąckie apples 1 thousand t, kaszubska strawberries 466 t, sechlońska plums 46 t. For TSG the figures were: pierekaczewnik 733 pieces, *Camelina sativa* oil 6 thousand l.

In 2007, according to 57% of Poles, traditional and regional food included „products, food articles and spirits, the quality and unique properties of which resulted from the application of traditional production methods, at least 25 years old, which constituted integrity components of a given region". However, as much as 34% of the population claimed not to know of such products. It turned out that Poles were able to make associations with concrete names of food PDO-labelled articles (bryndza podhalańska cheese, for example), as well as products that were undergoing EU protection application procedures and were on the list of traditional products [Act… 2005] (i.e.: oscypek cheese, andruty kaliskie wafers, kiełbasa lisiecka, meads, St Martin's croissants, and korycińskie cheeses). They could also name products which they positively associated

[3] Unpublished data of GIJHARS from March 2015.

with the traditional Polish cuisine (e.g. pork chops, vodka, particular breads and cheeses, lacto-fermented cucumbers, and sauerkraut). Another group included people who indicated products associated positively with traditional/regional products, but they were not such products, and the fourth group of respondents included consumers who bought products originating in the region (e.g. agricultural raw-materials, processed products based on local products) [Jąder 2012].

One might conclude that when that 2007 survey was conducted some percentage of Poles interpreted the notion of "traditional or regional products" freely and individually, identifying them usually intuitively [Borowska 2007, 2008]. In the subsequent years this perception did not change much, although the percentage of consumers who started to recognise PGI, PDO and TSG products grew. In mid-2012, 13.3% of Poles over 15 years of age were aware of PDO, 13.5% of PGI and 17.15% of TSG. This relatively higher percentage was influenced by media coverage of criminal penalties for those offering fraudulent products which imitate genuine products and mislead consumers. In 2013, MillwardBrown announced that the three labels were recognizable by 6–9% of consumers, though every third person was familiar with the idea of marking products in this way. In the case of producers and distributors, 90% had heard of the European system for marking regional and traditional products. Of that 90%, 80% were producers and approximately 50% were distributors [Internal Market 2013][4].

Comparing this awareness with the knowledge of rural communities, especially that of farmers and other beneficiaries of RDP 2007–2014 with non-farmers, the former demonstrate greater awareness of food quality systems [Polish countryside… 2013] (21–24% of respondents), while the labels are known only to 15–17% of non-farmers. Growing awareness is very important, as it helps individuals make informed decisions about product purchases, and creates demand for those quality products.

It is worth examining the directions future consumption of certified regional foods in Poland may take. First, depending on the product concerned, its main consumers will be the inhabitants of the region where the food is produced. The second group of target recipients will be tourists, 60% of whom state a desire to taste regional products during their trips to the locations where they are produced [Apettite for Region 2013], and 50% of whom seek to purchase such products and food prepared by local suppliers. Approximately 67% bring regional food products home from vacation, including mainly cheeses (35%), honey (14%), fish (14%), cold meats (13%), and bread (8%). These are bought usually during regular or seasonal local and regional events such as festivals, fairs, and product days. Apart from those, culinary trails are growing in popularity (there are already nearly 40 in Poland, centred around regional, local and traditional food such as the "Oscypek Trail", the "Plum Trail", and the "Silesian Tastes" culinary trail). Rural tourism farms and HoReCa partners are also popular [Chojka 2009]. The third group of consumers is going to be new buyers who do not yet know of the products, and the fourth group is those who for the time being are against such foods for objective and/or subjective reasons. All due measures should be taken to encourage the last two consumer groups to buy and taste regional products at least once in their lives.

[4] www.trzyznakismaku.pl [May 2013].

FACILITATING THE DEVELOPMENT OF DIRECT SALES OF ANIMAL PRODUCTS, INCLUDING REGIONAL PRODUCTS WITH PGI, PDO AND TSG DESIGNATIONS IN POLAND

Poland has taken legislative action to enable the sale of regional products with PGI, PDO and TSG designations not only on local markets but also nationwide. The legislation comes in response to two issues: one, farmers' expectations vis-a-vis conducting direct sales on farms and beyond (at culinary events, fairs, and the like) of insignificant amounts of some unprocessed animal products and the resulting limitations [Regulation… 2007, Polish countryside… 2013, RDP 2014–2020]; and, second, due to growing consumer interest in food purchased directly from farmers. As of 2016, legislation will enter into force, including on the scope of direct sales of animal products. It will introduce convenient changes, including the following:
- extending the catalogue of products marketed not only on farms;
- increasing established production quantity limits, as well as new products;
- allowing for exceeding direct sales volume by entities in a given week, provided that consent has been granted by a competent poviat veterinary officer;
- preserving annual sales limits;
- lifting – under certain conditions – restrictions on direct sales during fairs and exhibitions organized for promotion purposes in Poland;
- introducing "collective sales" during events.

These measures are intended to facilitate entities (e.g. farmers) to sell directly products of animal origin without the need to register their business operations (as of 28 September 2015 there were over 7.3 million registered entities). It will also be easier to reach the final consumer. Until now, farmers could sell directly only unprocessed products; in order to sell processed food, they had to register and obtain the required permits. For 1 January 2016, farmers will be able to sell their food without registering, and their operations will be taxed at 2 % of their sales volume, with turnover not to exceed 0.6 million PLN per annum.

SUMMARY

Analysis of changes in supply and demand on the market of quality regional foods with geographical indications shows that producers have stopped being anonymous. Their products are better advertised and their brand is being built more professionally. Certification of production attests to products' origin, and the products are more easily found on the market not only through direct but also indirect (traditional and modern) distribution channels. Though those producers have not yet been satisfactorily integrated, their products are expanding on the market (especially in terms of processed products) in the case of market leaders and organized producer groups. Stakeholders of this still niche market still face numerous challenges, including effective and continuous education of producers and society on the system of food quality, the multi-directional promotion of products in Poland and abroad, institutional public and private support – at the national and local levels – of actions which identify both cultural and culinary heritage.

My own research and analysis of regional data on outdoor markets in Poland between 2004–2013 allow the following conclusions to be drawn:

1. Since 2008 the total number of outdoor markets in Poland has been declining, with seasonal outdoor markets and sales places on streets and squares growing in number. Despite the trend, outdoor markets are still of significant importance to the distribution of agricultural products, including those of regional character and those with geographical indications. They are still an attractive shopping alternative to a supermarket, not only in towns and cities, but also in rural areas, creating opportunities for direct contact between customers and producers to occur.
2. A positive change has consisted in the market of high quality certified food with geographical indications steadily growing in Poland–interest in the food has led producers to increase their production (cases in point being oscypek cheese, St Martin's croissants, Cracow pretzels, kaszubska strawberries, nadwiślanka sour cherries, wrzawska beans, regional honeys, and the like).
3. A proposed legislative solution governing direct sales of products of animal origin is set to enter into force on 1 January 2016. It is targeted at consumers' expectations and addresses the concerns of agricultural organizations. The bill provides for a number of amenities created for sales entities, including farmers, which are to shorten long supply chains, and facilitate final consumers' access to those products, including those with geographical indications.

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Summary. The article examines the importance of all-year and seasonal outdoor markets in the supply chain of regional food with PDO and PGI geographical indications. The author elaborates on changes to sales levels and the structure of outdoor markets in Poland in the years 2004–2013. She looks at the role outdoor markets play in the food supply chain, including the supply of regional food, especially agricultural products. She used consumer surveys as a primary source of information and data from Poland's Central Statistical Office as a secondary source. The article concludes with reflections on the possibility of developing direct sales of regional foods in Poland's outdoor markets in the context of consumer expectations.

Key words: domestic trade, direct sales, outdoor markets, regional products (PDO, PGI)

JEL: L66, M31, Q13

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