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# Factors Affecting the Development of Catering Enterprises in Poland

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# FACTORS AFFECTING THE DEVELOPMENT OF CATERING ENTERPRISES IN POLAND

**Abstract**

In the European Union, including Poland, catering services are the largest industry in the hospitality sector. In today's world, catering companies play an important role in meeting the changing nutritional needs of consumers. The industry of catering services generates the largest part of added value and the majority of jobs in the hospitality sector. The development of catering services is undoubtedly related to the social and economic changes taking place in recent years in our country. This phenomenon is related to both the rich and the poor, because the offer is diverse catering companies. The research hypothesis is that the development of catering enterprises is unequal across the regions of Poland, and various factors having different correlative interrelations affect it. The research aim is to investigate the factors affecting the development of catering enterprises in Poland. The geographic distribution of catering enterprises into the regions of Poland is uneven: the highest concentration of enterprises is in Mazovia Province. In the period of 2000-2013, the number of catering enterprises has increased in most provinces. In the coming years will continue to develop possibility of increasing the efficiency of the market participants, as evidenced by both macroeconomic and microeconomic indicators.

**Keywords**: management, catering enterprises, restaurants, tourism, development, factors

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## Introduction

The context in which it operates: the modern consumer in the past decades (the development of civilization, globalization, accelerating the pace of life, invasion of new products and patterns of behavior, change in the economic and socio-demographic in the country, etc) has transformed the general model of consumption, including service consumption. This phenomenon is manifested in the rapid growth of consumption of services becoming a larger share of total consumption.[1]

The refreshments market is an important part of tourism economy. The development of catering services and tourism are closely linked. Between gastronomy and tourism there is a feedback loop.[2] The development of tourism and the catering industry is closely linked with the evolution of transportation and economic development, which led to the emergence of a new industry – tourism.[3] Owing to the development of tourism and the increased number of visitors to Poland as well as domestic tourists, the creation of new options were forced. This in turn encourages tourists to visits places with the developed infrastructure. This applies mainly to large cities, but can concern smaller cities, too. It should be emphasized that the definition of tourism adopted by the UNWTO (United Nations World Tourism Organization) stating that „tourism comprises the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited"[4], emphasizes the relationship between the hotel and catering and tourism, namely the need to create a database providing guests with the relevant conditions of stay and all kinds of entertainment. However, it should also be noted that gastronomy is often the goal of a tourist in itself, as evidenced by the development of culinary tourism.

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[1] M. Boguszewski-Kreft, *Usługi jako wiodący sektor współczesnej gospodarki*, "Handel Wewnętrzny" 2003, No. 4–5; E. Babicz-Zielińsk., R. Zabrocki, *Zachowania konsumentów na rynku wybranych form usług żywieniowych*, "Handel Wewnętrzny" 2005, No. 6; A. Dąbrowska, *Rozwój rynku usług w Polsce: uwarunkowania i perspektywy*, SGH, Warszawa 2008.

[2] E. Kwiatkowska, *Usługi gastronomiczne a rozwój turystyki w Polsce*, in: *Rozwój turystyki w warunkach Unii Europejskiej*, eds. W. Cabaj, J. Feczko, WSEiP, Kielce 2009, pp. 67–69.

[3] T. Knowles, *Zarządzanie hotelarstwem i gastronomią*, PWE, Warszawa 2001, p. 21.

[4] http://statistics.unwto.org/sites/all/files/pdf/unwto_tsa_1.pdf.

In today's world, catering companies play an important role in meeting the changing nutritional needs of consumers, which are carried out. The development of catering enterprises is undoubtedly related to the social and economic changes taking place in recent years in our country, in particular those in the conditions and lifestyles of different socio-economic groups due to both high and low income. This phenomenon concerns both the rich and the poor.

The research aim is to analyse the current situation and investigate the factors affecting the development of catering enterprises in Poland. The following tasks are set to achieve the research aim: to investigate the changes in indicators of catering enterprises in Poland and identify the factors affecting the development of catering enterprises. The research object is enterprises engaged in the industry of catering services. The research period is the years 2000–2013. The paper uses the secondary sources of information such as the statistical data of the Central Statistical Office (CSO), business reports, and industry newsletters and publications.

## 1. Characteristics of catering enterprises in Poland

The primary objectives of catering enterprises is the preparation and sale of food and beverages to be consumed either within the facility or for take away consumption for tourists and domestic consumers. Catering establishments include permanent and seasonal catering establishments and outlets. Seasonal catering establishments are open for a certain period of time and operate not longer than six months in a calendar year. Portable retail sales points and vending machines are not treated as catering establishments. The sites of this type are divided into two groups: the establishments available in all ways to the general public and the establishments that target service to specific groups of consumers.

One of the characteristics of the catering establishment development is the number of these enterprises (Table 1). According to CSO data, in 2013 there were 67 693 catering establishments as compared to 84 342 in 2000; 90 537 in 2004, and 81 789 in 2008.[5] According to the data in Table 1, the number of catering enterprises gradually increased in Poland in the period of 2000–2007 (the economic boom period) and after 2007 – it gradually decreased (the economic crisis period).

[5] E. Gheribi, *Konsument i przedsiębiorstwo na rynku usług gastronomicznych*, Black Unicorn, Jastrzębie Zdrój 2013, p. 102.

Table 1

Number of catering establishments and market share in %
in Poland in the years 2000–2013

| Specification | 2007 | in % | 2008 | in % | 2012 | in % | 2013 | in % | Increase/ decrease 2013/2000 (in %) | Increase/ decrease 2013/2007 (in %) |
|---|---|---|---|---|---|---|---|---|---|---|
| Total | 88 995 | 100 | 81 789 | 100 | 68 787 | 100 | 67 693 | 100 | –19,74 | –23,93 |
| including: | | | | | | | | | | |
| public sector | 2 237 | 2,51 | 1863 | 2,27 | 1430 | 2,1 | 1 221 | 1,8 | –63,23 | –45,41 |
| private sector | 86 758 | 97,49 | 79 926 | 97,7 | 67 357 | 97,9 | 66 472 | 98,2 | –17,96 | –23,38 |
| Restaurants | 10927 | 12,2 | 13947 | 17,2 | 16 478 | 23,9 | 16 936 | 25,0 | +98,80 | +54,99 |
| Bars | 38 391 | 43,1 | 33 486 | 40,9 | 25 885 | 37,6 | 25 195 | 37,2 | –30,86 | –34,37 |
| Eating facilities | 33 717 | 37,8 | 29 051 | 35,5 | 21 120 | 32,2 | 21 447 | 31,6 | –33,76 | –63,60 |
| Canteens | 6576 | 6,9 | 5305 | 6,4 | 4304 | 6,3 | 4 115 | 6,1 | –41,30 | –37,42 |

Source: own calculations based on CSO (GUS) data.

The decreasing number of catering establishments (excluding restaurants) proves that the economic crisis has also been observed in the described sector. At present most catering establishments, approximately 98.2%, are privately owned. The catering establishments structure is dominated by bars (37.21% of the total number) and eating facilities – food stands (31.68% of the total number). The next largest group is restaurants (25.01% of total number), and canteens comprise only 6.1% total number of catering establishments. According to CSO data, in 2013 there were 16 936 restaurants, compared to 8 519 in 2000, 9 195 in 2004 and 13 947 in 2008.[6]

The restaurant industry is a significant improvement in the quality and variety of services, but the industry still is not available to many consumers. These changes are particularly evident in big cities. According to Masłowski,[7] opinions and expert estimates indicate significant structural transformations taking place within the community. These transformations are reflected in the dynamic increase of the number of companies specializing in the Polish regional cuisine as

[6] Ibidem, p. 102

[7] A. Masłowski, *Rynek usług gastronomicznych uwarunkowania i kierunki rozwoju*, IRWiK, Warszawa 2001, p. 9.

well as other national cuisines (Italian, Chinese, Japanese, Arabic).[8] Restaurants represent higher quality services than a few years ago in both the property (interior, accessories), offered meals (breakfast, lunch, dinner, brunch), and services (home delivery, takeaway sales, organization of events).[9]

The data of Tab. 2 show that the highest concentration of enterprises engaged in the industry of catering services is in the Mazovia Province (4937 enterprises in 2013), which accounts for 31.23% of all catering enterprises in Poland. According to CSO data, most of catering establishments is located in the provinces of: Mazovia (31.23%), Little Poland (10.93%) and Silesia (10.22%). In the majority of provinces (in 2013 and as compared to 2010), there increased the number both of total catering establishments and restaurants (Tab. 2). The number of catering enterprises and restaurants has increased mostly in the Mazovia Province, where the Polish capital, Warsaw, is located. The geographic distribution of catering enterprises is uneven in the regions of Poland as is shown in Table 2.

One major element that shows an increase in the catering market is the systematically growing revenue. The revenue of catering establishments is generated mainly by own food production, followed by alcohol and tobacco sales. It needs to be highlighted that the revenue generated by own food production has been rapidly increasing. In 2013, own production generated 72.6% of total catering activity revenue. From the sale of trade commodities including alcoholic beverages, tobacco has generated 25.10%. Only 2.28% of the revenue has been generated by other economic activities (Table 3).

[8] E. Gheribi, *Konsument i przedsiębiorstwo na rynku usług gastronomicznych*, Black Unicorn, Jastrzębie Zdrój 2013, pp. 113–116.

[9] Ibidem, p. 106.

Table 2

Number of catering establishments by province in Poland in the years 2007–2013*

| Province | Catering establishments | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | Total | | | | | Included restaurants | | | | |
| | 2010 | 2011 | 2012 | 2013 | Increase/decrease 2013/2000 (in %) | 2010 | 2011 | 2012 | 2013 | Increase/decrease 2013/2010 (in %) |
| Poland | 14408 | 13886 | 15137 | 15807 | +9,71 | 4625 | 4447 | 4806 | 5264 | +13,82 |
| Lower Silesia | 1219 | 1218 | 1304 | 1341 | +10,01 | 414 | 413 | 420 | 450 | +8,70 |
| Kujawy-Pomerania | 524 | 487 | 534 | 543 | +3,63 | 181 | 167 | 184 | 201 | +11,05 |
| Lublin | 509 | 511 | 465 | 432 | –15,13 | 123 | 137 | 146 | 177 | +43,90 |
| Lubusz | 297 | 251 | 239 | 236 | –20,54 | 107 | 99 | 87 | 91 | –14,95 |
| Łódź | 664 | 565 | 549 | 625 | –5,87 | 287 | 250 | 185 | 214 | –25,44 |
| Little Poland | 1480 | 1422 | 1614 | 1728 | +16,76 | 515 | 480 | 612 | 668 | +29,71 |
| Mazovia | 3992 | 4025 | 4771 | 4937 | +23,67 | 913 | 938 | 1120 | 1209 | +32,42 |
| Opole | 254 | 217 | 247 | 235 | –7,48 | 94 | 77 | 99 | 100 | +6,38 |
| Podkarpacie | 511 | 535 | 531 | 563 | +10,18 | 183 | 206 | 184 | 208 | +13,66 |
| Podlasie | 334 | 291 | 280 | 301 | –9,88 | 107 | 107 | 101 | 114 | +6,54 |
| Pomerania | 702 | 678 | 723 | 869 | +23,79 | 234 | 215 | 230 | 311 | +32,91 |
| Silesia | 1581 | 1532 | 1557 | 1615 | +2,15 | 570 | 548 | 594 | 633 | +11,05 |
| Świętokrzyskie | 283 | 272 | 341 | 309 | +9,19 | 93 | 93 | 113 | 115 | +23,66 |
| Warmia-Mazovia | 444 | 396 | 413 | 397 | –10,59 | 162 | 147 | 157 | 173 | +6,79 |
| Great Poland | 968 | 893 | 1003 | 986 | +1,86 | 432 | 398 | 403 | 397 | –8,10 |
| West Pomerania | 646 | 593 | 566 | 690 | +6,81 | 210 | 172 | 171 | 203 | –3,33 |

Source: own calculations based on CSO (GUS) data

* Data concern the enterprises employing more than 9 persons.

Table 3

Revenues from catering activity (current prices)
in mln zl in the years 2000–2013 in Poland

| Specification | 2000 | 2007 | 2010 | 2013 | Increase/ decrease in 2013/2000 (in %) | Increase/ decrease in 2013/2007 (in %) |
|---|---|---|---|---|---|---|
| Revenues from catering activity | 15 381 | 20 220 | 21 683 | 25 701 | +67,09 | +27,10 |
| From catering production | 7 740,5 | 12 286 | 15 022,0 | 18 661 | +141,08 | +51,88 |
| From sale of trade commodities of which from the sale of alcoholic beverages, tobacco | 6 967,0 | 7 369 | 6 043,2 | 6 452 | –7,4 | –17,99 |
| From other activity | 673,5 | 565 | 617,6 | 588 | –12,7 | +9,2 |

Source: own calculations based on CSO (GUS) data.

## 2. Factors affecting the development of catering enterprises

The scale and structure of catering establishments are impacted primarily by consumers. The demand for the development of catering establishments' conditions is related to the level of the economic development in terms of the macro- (national product, unemployment rate) and the micro level (the income situation, the structure of expenditure, the socio-demographic – cultural households).

Among the general conditions for the development of catering services, the following have been highlighted:

– economic growth (Table 4),
– general increase in job involvement,
– increase in women's professional activity (Table 5),
– increase in the level of education and skills of the population (Figure 1),
– growth in consumer income individuals (Figure 2),
– extent of life and an increase in the number of people in the working age,
– change in the population's demographic structure: a growing share of 1- and 2-persons households, and three or more decreases (Figure 3),
– changes in consumer attitudes and motivation,
– changes in time management,
– development of tourism,

– increase in the spendings on restaurant and hotel services (Table 6), (Figure 4),
– increase in the interest in other nations' cultures.

In recent years the possibility of increasing the efficiency of market participants has developed, as evidenced by the macroeconomic indicators showing economic growth, unemployment and the demographic situation. Gross domestic product is the main category in the system of national accounts and illustrates the final result of the activity of all entities of the national economy. The basic component of gross domestic product is the sum of gross added value of all ownership sectors, or institutional sectors, or all sections of the national economy. In terms of the gross domestic product (GDP), Poland is the 9th biggest economy in the EU and the 23rd biggest economy in the world (2011 GDP in current prices, USD-denominated.[10] Poland's GDP increased by 8.3% in 2010/2013 according to the updated estimates by CSO. At the same time, the domestic demand grew by 3.5%. This data shows an economic recovery when compared with the tough last year. The dynamics of the gross domestic product (GDP) growth, domestic demand, and final consumption expenditure is shown in Table 4.

Table 4

Indices of main macroeconomic categories in the national economy (constant prices)

| Specification | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | Previous year = 100 | | | | | | | 2000 = 100 | 2005 = 100 | 2010 = 100 |
| Gross Domestic Product (GDP) | 106,8 | 105,1 | 101,6 | 103,9 | 104,5 | 102,0 | 101,6 | 158,4 | 136,2 | 108,3 |
| Domestic demand | 108,7 | 105,6 | 98,9 | 104,6 | 103,6 | 99,9 | 100,0 | 147,2 | 131,8 | 103,5 |
| Final consumption expenditure | 104,6 | 106,1 | 102,0 | 103,4 | 101,6 | 101,0 | 101,2 | 148,3 | 127,8 | 103,8 |

Source: own calculations based on CSO (GUS) data.

Over recent years, observers have grown accustomed to the Polish economy's relatively good performance against the backdrop of the region of Central and Eastern Europe as well as the entire European Union. It was particularly visible

[10] IMF, World Economic Outlook Database, April 2013.

in 2009, when Polish GDP, according to Eurostat data, grew by 1.6%, thus making Poland the only EU country with positive economic growth. It was also in 2010 and 2011 that the Polish economy stood out among European peers: the Polish GDP growth by 3.9% in 2010 was the third highest in the EU, while the 4.5% economic growth in 2011 ranked Poland fourth among the 27 member states.

As a result of the profound changes in the Polish labour market, the current levels of employment and economic activity in Poland differ significantly from other EU economies. Just over half of Poland's population aged over 15 is economically active. The high level of economic inactivity among Poles is a phenomenon caused by the delay in young people entering the labour market on the one hand, and the growing number of persons taking retirement, pension or early retirement on the other. According to CSO results, the number of working people aged over 15 amounted to 15 568 000 in 2013. Compared to 2012, there is a decrease in the average annual level of employment by 0.1%. Women's employment rate stands at 63%, and that of men – at 75%. Women's participation in the economy and their contribution to family finances have increased, thereby decreasing the gender employment gap. In the meantime, women still bear the brunt of unpaid work within the household and family. Compared to 2000 and 2007, the number of working men and women has increased (Table 5).

Table 5

Economic activity of the population aged 15 and more in Poland in the years 2007–2013 in thous

| Specification | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | Increase/ decrease in 2013/2000 (in %) | Increase/ decrease in 2013/2007 (in %) |
|---|---|---|---|---|---|---|---|---|---|
| | Annual averages | | | | | | | | |
| Economically active persons | 16 859 | 17 011 | 17 279 | 17 123 | 17 221 | 17 340 | 17 361 | +0.35 | +2.97 |
| Men | 9 234 | 9 317 | 9 455 | 9 446 | 9 504 | 9 551 | 9 568 | +1.81 | +3.61 |
| Woman | 7 799 | 7 626 | 7 824 | 7 677 | 7 717 | 7 789 | 7 793 | –1.39 | –0.07 |
| Employed persons | 15 241 | 15 800 | 15 868 | 15 473 | 15 562 | 15 591 | 15 568 | +7.07 | +2.14 |
| Men | 8 403 | 8 718 | 8 722 | 8 566 | 8 648 | 8 651 | 8 641 | +7.12 | +2.83 |
| Woman | 6 838 | 7 082 | 7 147 | 6 908 | 6 914 | 6 940 | 6 927 | +6.99 | +1.3 |

Source: own calculations based on CSO (GUS) data.

However, the microeconomic factors should mainly include: income, household spending on food and nutritional goals, and other – cultural and social – factors.[11] An increase in wages of the Polish society makes it more and more likely to spend money, and this affects the growth of private consumption.[12]

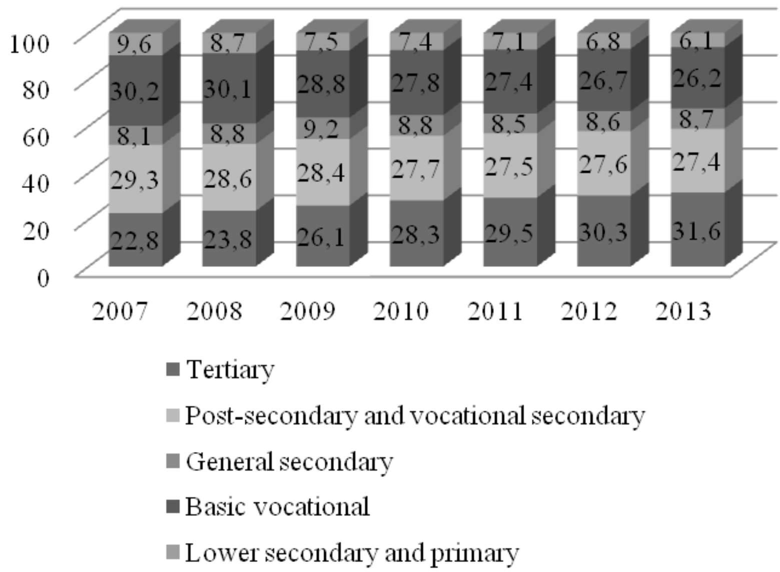


Fig. 1. Structure of employed persons by educational level in 2007–2013 in %
Source: own calculations based on CSO (GUS) data.

In the European reporting, household expenditures on meals in restaurants and hotels are presented together. The share of the Polish household expenditures equalled 1.4 % in 2000 and increased to 2.3% in 2009, in 2013 it increased to 3% thus indicating a very low level in comparison to other countries (e.g. Malta 18,1%, Spain 16%, Greece 12.9%).[13] The expenditure on catering services depends, among other factors, on family size (Figure 3). The highest expenditures for restaurants and hotels per capita in households have been noticed in one-

[11] E. Gheribi, *Uwarunkowania rozwoju przedsiębiorstw gastronomicznych w Polsce,* "Marketing i Rynek" 2013, No. 4, pp. 29–35.

[12] E. Kwiatkowska, *Udział usług gastronomicznych w realizacji potrzeb żywieniowych konsumentów*, "Marketing i Rynek" 2010, No. 7, pp. 28–33

[13] Eurostat Database, 2013.

person households, the lowest – in multi-person households. The highest share has been noticed in self-employed households, the lowest in farmers households (Table 7).

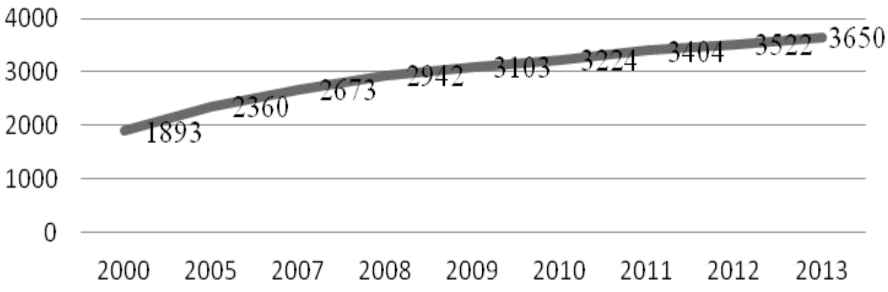


Fig. 2. Average monthly gross wages and salaries 2000–2013
Source: own calculations based on CSO (GUS) data.

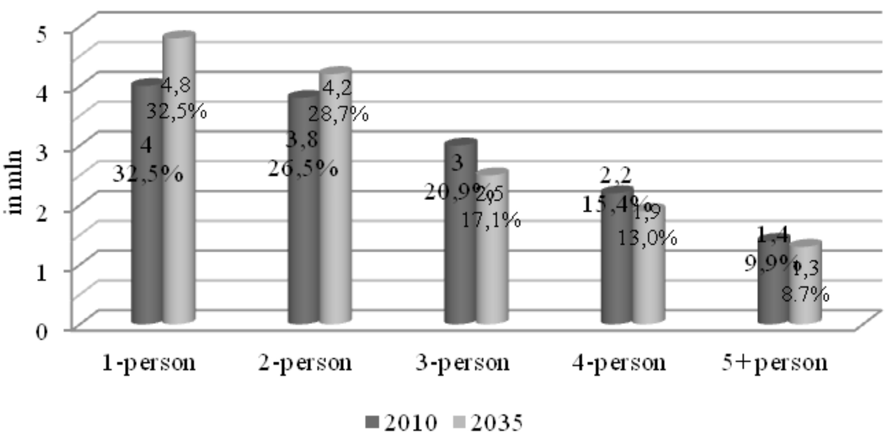


Fig. 3. Forecast of household structure for the years 2010–2035 in Poland in mln
Source: own calculations based on CSO (GUS) data.

Table 6

Average monthly expenditures for restaurants and hotels per capita in households in 2000–2013 in Poland

| Specification | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | Increase in 2013/ 2000 (in %) | Increase in 2013/ 2007 (in %) |
|---|---|---|---|---|---|---|---|---|---|
| Restaurants and hotels | 15,39 | 18,08 | 20,72 | 22,93 | 24,82 | 29,25 | 30,64 | 264.32 | 99.09 |
| Of employees | 16,82 | 19,60 | 23,44 | 25,19 | 28,49 | 32,56 | 33,78 | 202.41 | 100.83 |
| Of farmers | 4,80 | 8,62 | 5,68 | 6,42 | 5,21 | 9,65 | 13,01 | 703.08 | 171.04 |
| Of the self--employed | 31,05 | 36,53 | 35,44 | 42,98 | 39,79 | 49,12 | 54,40 | 247.82 | 75.20 |
| Of retirees and pensioners | 9,41 | 9,93 | 12,05 | 12,76 | 13,51 | 17,21 | 18,14 | 257.79 | 92.77 |

Source: own calculations based on CSO (GUS) data.

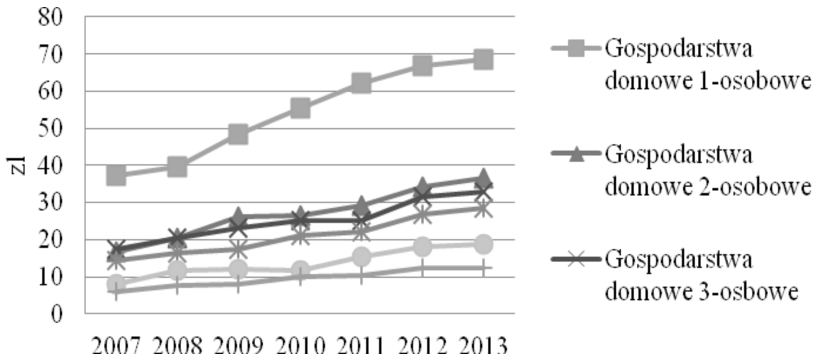


Fig. 4. Average monthly per capita expenditures in households by number of persons for catering services in 2007 and 2013 (in zlotys)

Source: own calculations based on CSO (GUS) data.

## Conclusion

In conclusion, we can say that recent decades have seen a dynamic development of catering enterprises in Poland. At present, more and more frequently we eat in a restaurant, canteen etc., or at a place "on our way." In the forthcoming years, an increase in demand for catering services is predicted taking into consideration the foreseen economic growth and improved financial standing of Polish households. The catering sector is heavily dependent upon disposable incomes. The increase in the population's wealth and changes in eating habits and lifestyle create a great opportunity and challenge for the development of a wide range of food services. Consequently, the income of the catering businesses will grow.

Despite the fact that the use of catering services in Poland, as compared to the developed countries, is still low, the demand for eating outside the home in the country will continue to grow.

An undoubted obstacle which quantifies the qualitative development of the restaurant is a barrier in demand associated with the slow increase in consumer real wages, rising operating costs – particularly personnel costs (wages, social insurance, social costs), the cost of renting and others. However, in the forthcoming years an increase in the demand for catering services is predicted.

The development of the catering market and its direction will depend on three main factors of change: socio-economic, demographic and cultural.

Poland is considered by many official organizations as one of the most attractive tourist destinations in the world, so these circumstances will certainly contribute to the situation that in the forthcoming years the number of tourists coming to Poland and the number of people using hotels and restaurants services will increase.

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## CZYNNIKI WPŁYWAJĄCE NA ROZWÓJ PRZEDSIĘBIORSTW GASTRONOMICZNYCH W POLSCE

### Streszczenie

W Unii Europejskiej, w tym w Polsce, usługi gastronomiczne są największym przemysłem w sektorze hotelarskim. W dzisiejszym świecie, firmy gastronomiczne odgrywają ważną rolę w zmieniającym się zaspokajaniu potrzeb żywieniowych i społecznych. Branża usług gastronomicznych generuje największą część wartości dodanej i oferuje większość miejsc pracy w tym sektorze. Rozwój usług gastronomicznych jest niewątpliwie związany ze zmianami społecznymi i gospodarczymi zachodzącymi w ostatnich latach w naszym kraju. Zjawisko to związane jest zarówno z bogatymi jak i biednymi, ponieważ oferta jest różnorodna. Hipotezą badawczą jest to, że rozwój przedsiębiorstw cateringowych jest nierównomierny w poszczególnych regionach Polski i są różne czynniki, które wpływają na ich rozwój. Celem badania była identyfikacja czynników wpływających na rozwój przedsiębiorstw gastronomicznych w Polsce. Podział geograficzny Przedsiębiorstwa gastronomiczne w Polsce są nierówno rozmieszczone w podziale geograficznym. Najwyższa koncentracja tego typu przedsiębiorstw występuje w województwie mazowieckim. W okresie 2000–2013 liczba przedsiębiorstw gastronomicznych wzrosła w większości województw. W najbliższych latach będzie nadal się rozwijać dzięki możliwości zwiększenia efektywności uczestników rynku, o czym świadczą zarówno wskaźniki makroekonomiczne i mikroekonomiczne.

**Słowa kluczowe**: zarządzanie, przedsiębiorstwa gastronomiczne, restauracje, turystyka, rozwój, czynniki