



NEW ZEALAND
FOREIGN AFFAIRS & TRADE
Manatū Aorere

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Poland – e-commerce offers real opportunities for Kiwi companies

MARKET INTELLIGENCE REPORT

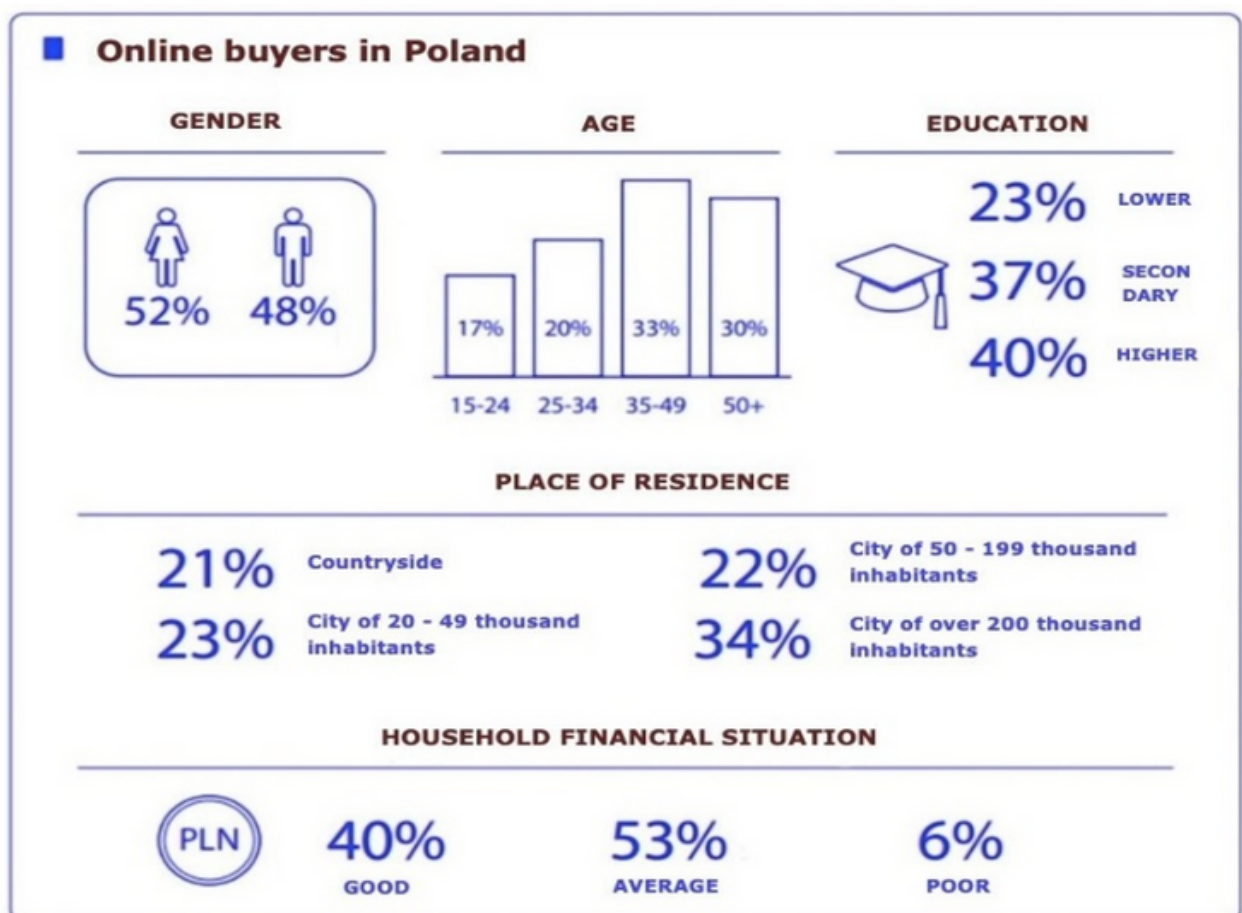
Summary

- After years of rapid expansion, the development of the Polish e-commerce market is slowing, but its profitability continues to grow. It is estimated that in 2027 the market's value will amount to PLN 187 billion (\$74 billion NZD). Of Poland's 37.6 million citizens, 30 million are active Internet users and 77% of them regularly shop online.
- Social commerce, live commerce and mobile commerce are gaining in popularity, especially among younger consumers. The trend indicates that popular social media services and mobile apps may soon be the dominant online shopping platforms.
- Access to 24-hour shopping, easy payment, rapid deliveries and easy returns are key factors in attracting online buyers.
- Going forward, modern technologies (including instant payment options), Artificial Intelligence and environment-friendly solutions will be key driving forces contributing to the development of the Polish e-market. Customer insights and data will be critical to capitalise on these.

Report

E-commerce is one of the fastest growing industries in Poland. In 2004, only 5% of Poles made at least one purchase online. In 2019, the number exceeded 50%. Since then, online sales in Poland have continued to grow, and accelerated during COVID-19. In 2021, as many as 94% of Poles had bought something online at least once and 77% shopped online regularly. Some New Zealand consumer products have found success online in Poland, including cosmetics/skin care, Mānuka honey, infant formula, wine, and apparel

This trend continued over 2022, as outlined in the annual report "[E-commerce in Poland 2022](#)". The survey included Internet users aged 15 and over and found that although all age groups shop online, the 35-49 and 50+ age groups are the most active. The data indicates that women shop online slightly more often than men and that online buyers mostly live in large cities.



Source: "E-commerce in Poland 2022"

What, why and how do Poles buy online?

Clothing, footwear, cosmetics/perfumes, books, records, films, pharmaceuticals, audio-visual/household appliances and sportswear are the most popular categories purchased online by at least half of online buyers in Poland. Online grocery shopping is also gaining in popularity. More than 30% of Polish consumers buy their groceries online several times a month, and over 15% purchase these several times a week. New Zealand apparel and food and beverage products do well online.



Source: "E-commerce in Poland 2022"

Attractive product price (promotions and special offers), low shipping/delivery costs and previous positive customer experiences are the most important factors influencing buyer choice. According to Poles, online shopping is convenient, uncomplicated, safe, and offers more choice. Polish consumer law allows a buyer to return goods within 14 days of purchase without reason if they have been purchased online. This presents some risks— one distributor of New Zealand products noted that up to 20-25% of purchases are returned due to change of mind.

Most popular shopping platforms

A small number of platforms dominate the Polish market and have good recognition with Polish customers: Polish Allegro (85% recognition), Dutch OLX (36%), German Zalando (19%), American Amazon (17%) and Chinese Aliexpress (15%). Some New Zealand consumer products have also found retail success working with other well-known international platforms tied to retail stores, such as Sephora and Douglas, as well as proprietary websites. Three categories of goods - clothing, footwear and sportswear are most popular among those visiting foreign websites.

Most often purchased on foreign platforms

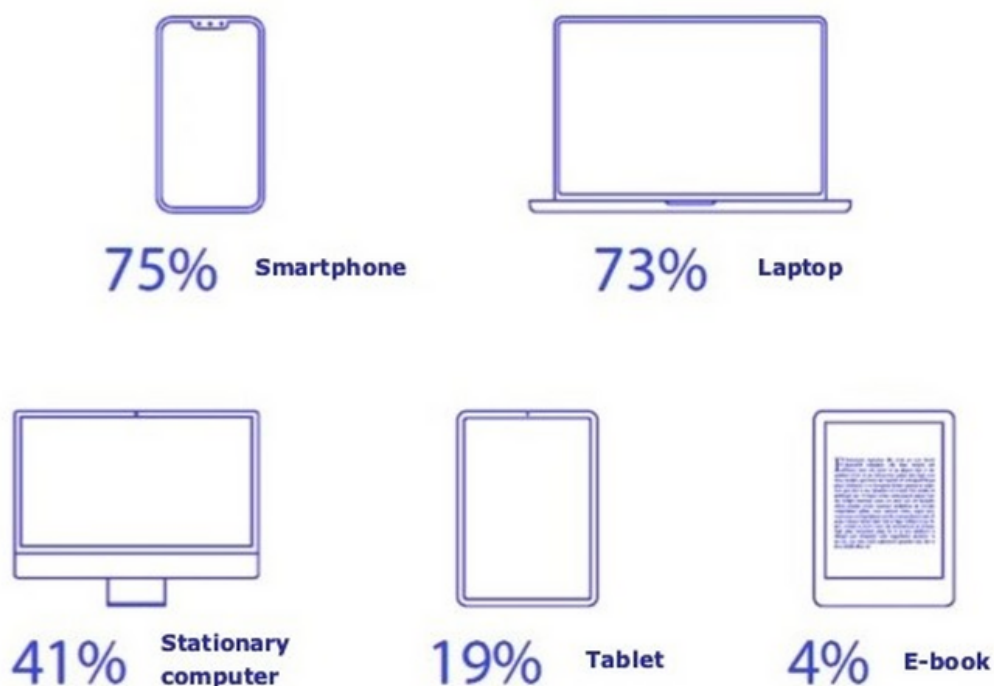


Source: "E-commerce in Poland 2022"

Social and live commerce are also becoming popular. Currently, 36% of Poles buy on social platforms. Most popular are Facebook (78%), Instagram (31%) and YouTube (19%). Polish online buyers also buy from online stores of specific brands after being re-directed to them from social media. Every fourth Pole buys something during live broadcasting, and every tenth does it "often". The products most often bought via social/live commerce are clothing and footwear, cosmetics and perfumes, books, CDs and films, children's products, bikes, audio/video devices and household appliances.

The most popular devices used for online shopping in Poland are smartphones and laptops, with as many as 92% of younger buyers using only smartphones. More than half of all buyers use multiple channels when shopping online.

Most popular devices



Source: "E-commerce in Poland 2022"

Payments, deliveries and returns

Support services including payments and shipping are areas where novel Polish technology have facilitated growth. The most frequently chosen payment methods are: quick transfers via payment services (70%), BLIK[1] (58%) and online card payments (43%). 12% of e-consumers use deferred payments.

Polish consumers like to pay quickly and receive quickly - 25% expect to receive their online purchases within 1-2 days, 67% within 3-5 days, while only 5% are prepared to wait for more than six days. They find self-service parcel terminals or parcel lockers more convenient than courier deliveries. As many as 81% of buyers use InPost[2] (popular also for allowing returns), home or work courier deliveries are chosen by just over 40% of e-consumers. Free delivery, same day deliveries and weekend deliveries increase the popularity of some online shopping platforms.

Being able to return products quickly is also important in the Polish market. The majority of Polish consumers who return products, do so by InPost (74%), with others preferring to return them free of charge to stationery stores or sending them back door-to-door by a courier (42% each).

The future of the Polish e-commerce market

According to the [report](#) "Prospects for the development of the e-commerce market in Poland 2018-2027" the value of the e-commerce market in Poland will increase by PLN 94 billion (\$37 billion NZD) to PLN 187 billion (\$75 billion NZD), between 2021 and 2027.

■ Size of the e-commerce market in Poland [PLN billions]



Source: "Prospects for the development of the e-commerce market in Poland 2018-2027"

More than half of the increase (54%) will come from three categories – fashion (PLN 21 billion/\$8 billion NZD), electronics (PLN 19 billion/\$7.6 billion NZD) and health and beauty (PLN 11 billion/\$4 billion NZD). The food industry is also expected to grow thanks to the development of quick-commerce services (q-commerce), guaranteeing instant deliveries straight to consumers.

Since the end of COVID restrictions, market growth has slowed, although the influx of Ukrainian refugees and cost of living pressures have helped slow the fall in growth. Inflation is having an impact on many Polish SMEs, with evidence that firms that are not able to pivot away from “bricks and mortar retail” are struggling. Inflation (which topped 17% during 2023 but has begun easing) has also prompted many consumers to go online to look for cheaper product offerings.

Post-2023, the market is expected to flatten out at a lower, more stable, growth rate, with most growth coming from the "digital native" generations (Millennials and Generation Z), for whom online activity (including shopping) is a natural part of daily life. As in other markets, access to quality customer data is important, as well as having in-house capability to use that data, but competition for staff is pushing up costs. Artificial Intelligence (AI) solutions like visual search, advanced algorithms, biometric methods or personalised recommendations are expected to play an increasingly important role in the Polish e-commerce industry, with Polish and Ukrainian back-room firms offering sought-after skills in areas like programming.

Environmental credentials will also be an important factor determining the choices of e-consumers who more often than traditional buyers pay attention to eco-friendly options. Many online consumers are eager to buy goods with ecological or reusable packaging. Over 68% declare their willingness to use container return schemes (where a deposit on packaging is refunded if the empty container is returned). Increasing social awareness in the area of environmental pollution and the search for sustainable solutions mean that an increasing number of e-shops will have to meet those expectations. Poland is also introducing measures to ban certain single-use plastics, consistent with the EU's 2019 Directive.

Although the market is maturing, firms have told us that there are still plenty of opportunities for new sellers to join the market. While there are only a narrow range of New Zealand products readily available in Poland, there is a very positive image of New Zealand among Poles and a great level of trust in high quality Kiwi products.

A Polish distributor of New Zealand products identified the following factors that it found helpful while developing its online business in Poland:

- Good IT infrastructure – hiring a person is more costly than maintaining a well-designed, well-operated IT system that is well integrated with service suppliers such as couriers.
 - Successful marketing – making the brand recognisable and cooperating with local influencers.
 - Visual representation – high quality pictures of the product are preferable and investing in quality marketing materials and graphics is important.
 - Social media – Facebook campaigns, Instagram presence, fan-pages, website optimisation.
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More info

[1] BLIK is a Polish cashless payment system allowing users to make instant payments (as well as card-less cash withdrawals and real time money transfers) using only a standard mobile banking app.

[1] InPost is the Polish leader in modern logistics services and has created a network of over 20,000 self-service parcel lockers throughout Poland. Some lockers are refrigerated and as many as 98% of shipments reach recipients on the next day.

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