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# PROCESSES OF CONCENTRATION OF WHOLESALE TRADE IN POLAND IN THE LIGHT OF EMPIRICAL RESEARCH

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**ABSTRACT**. **Background:** The increasing role of trade as the integrator of distribution channels has been observed in Poland recently. Retail companies have gained a competitive advantage in relationships with both suppliers and recipients. The natural questions are, how the situation of the wholesale trade looks at present in such a situation and what prospects it has for the future. The main aim of this paper is to identify and describe the influence of new conditions on the development of the wholesale trade as part of the supply chain. The hypothesis was assumed that this development is determined by processes related to the concentration of trade companies, which were also visiblerecently in Poland.
**Methods:** The main concentration processes in Polish trade were identified based on a literature review and previous research. Then, based on the results of a survey and data obtained from the Central Statistical Office, the influence of these trends on the development of wholesale trade was evaluated. The further directions of changes in Polish wholesale trade were also indicated. Empirical research was conducted by the use of a direct interview with a random sample of 108 wholesale companies, both independent and as part of chains. The research focused on wholesalers' opinions of market trends and integration processes in Polish wholesale trade and cover the years 2014-15.
**Results:** The results show the key market processes with regard to trade concentration. The biggest threats to the development of the wholesale trade are the processes of the horizontal concentration in retail. The concentration of retail companies leads to a shortening of the distribution channels and direct purchases from producers omitting the wholesale stage. Despite these threats, wholesalers describe their situation as good, and their opinion can be confirmed in data provided by the Central Statistical Office.
**Conclusions:** The market processes identified must be taken into consideration in formulating the strategies of wholesale companies in Poland. The author believes that one of possible solutions which should be implemented by wholesalers is multichannel sales, as described in this paper.

**Key words:** trade company, wholesale trade, multichannel trade, omnichannel sale.

## INTRODUCTION

The tendency towards a transformation of supply chains has been observed recently in Poland. The development of information technology, the globalization of trade, the introduction of new management standards and many other factors have led to changes in the performance of companies belonging to supply chains - trade companies, wholesale and retail companies. A change in the importance and function of separate elements of distribution channels has been observed. The role of trade as an integrator of distribution channels has increased and trade companies have gained a competitive advantage in relationships with both suppliers and clients. Therefore the question is how the situation of the wholesale trade looks in such an environment and what prospects for the further development of this segment of trade market are.

Due to continuous changes in wholesale trade, it is necessary to continue conducting research in this market segment. It should be

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emphasized that there is only a limited amount of research available on wholesale trade. Additionally, the quantity of such studies is much smaller than in the case of the retail trade. However, the wholesale trade is an important part of the supply chain, which significantly affects its effectiveness. This situation became the inspiration for the Author to conduct empirical research in this area of trade.

The main aim of this paper was to identify and describe the influence of new conditions on the development of wholesale trade as an element of the supply chain. The author's hypothesis was that the development of the wholesale trade is determined by the concentration of trade companies. These processes have also been observed recently in Poland. The results of empirical research into wholesale companies formed the basis of the analysis, and covered both independent companies and those in chains . Research focused on the market tendencies and integration processes occurring in Polish wholesale trade and covers Poland between 2014-15.

Table 1. Method of sample selection
Tabela 1. Metoda doboru próby

| No | Specification | Description |
|---|---|---|
| 1. | Methods of data collection | interview by the use of the questionnaire – electronic questionnaire and direct interviews |
| 2. | Main population | wholesale companies (of all types) operating in Wielkopolska region |
| 3. | Interviewees | managers, responsible for the whole strategy of the company |
| 4. | Sample size | 108 subjects |
| 5. | Method of sample selection | random |

Source: own work

The process of the sample selection is presented in the Table 1. The research was conducted on the sample of 108 wholesale companies. The branch structure of the sample is presented in the Table 2.

Table 2. Branch structure of the sample
Tabela 2. Struktura próby według branż

| No | Branch | Share in sample |
|---|---|---|
| 1 | Food | 22,2% |
| 2 | Construction | 16,7% |
| 3 | Chemical | 11,1% |
| 4 | Clothing | 8,3% |
| 5 | AGD | 8,3% |
| 6 | Electrotechnical | 8,3% |
| 7 | Pharmaceutical | 8,3% |
| 8 | Packaging | 5,6% |
| 9 | Products for animals | 5,6% |
| 10 | Automotive | 5,6% |
| | **Total** | **100,0%** |

Source: questionnaire survey

As was mentioned previously, the sample consisted of both independent wholesalers and chain wholesalers from various sectors. The structure of the sample with regard to company type is presented in Table 3.

Table 3. The structure of the sample with regard to company type
Tabela 3. Struktura próby według rodzaju hurtowni

| No | Branch | Quantity | Structure |
|---|---|---|---|
| 1 | Chain wholesalers | 15 | 13,9 % |
| 2 | Independent wholesalers | 93 | 86,1 % |
| | **Total** | **108** | **100,0%** |

Source: questionnaire survey

Inductive reasoning was the basic research method used in the analysis.

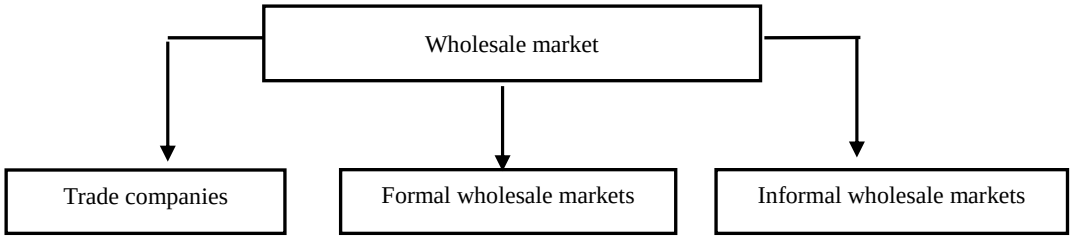
There are several different definitions of the wholesale trade to be found in the literature. It is an exchange of large batches of goods. The wholesale trade is a connecting element between a producer and a consumer within the distribution channel [Rosenbloom 2013]. At the level of wholesale trade, the transfer of goods from the production occurs, which are then split in smaller batches and transferred to retail clients, production plants, group consumers and even individual consumers [Urban, Olszańska 1998].

According to the Central Statistical Office (CSO), wholesale trade is the sale of already acquired goods on own account to other recipients (not the end user, e.g. other wholesalers, retailers, producers). This sale can be conducted both from the company's own warehouse or another in which the goods belonging to the wholesaler are stored.

According to CSO wholesale is also the value of the sale realized on the basis of a direct payment or a contract (agents, auction dealers), as well as the value of the sales conducted on the basis of an 'indirect transfer' (the transfer of goods directly from the supplier to the receiver without the warehouses which complete the delivery) [CSO 2015].

The development of wholesale companies results from big demand for such services as these help overcome the barriers which a producer might face during the process of distributing their goods. These barriers could be: differences in the place of production and the place of consumption, different production batches, different consumption batches, different times of production and consumption. Wholesale trade eliminates these barriers and allows goods to be provided to retailers.An important function of each wholesale company is to organize the physical flow of goods, i.e. the management of deliveries, loading, preparing transport documentation and insuring the goods. It is important to mention that wholesalers finance the process of the sale of goods by buying these goods. Additionally, they cover the cost of their transport, storing them and clients lending [Specht, Fritz, 2005].

There are various types of wholesale activities, with the main types of them being presented in Figure 1.




Source: own work based on Szulce, Chwałek, Ciechomski, 2008

Fig. 1. Classification of agency types of wholesale trade
Rys. 1. Klasyfikacja form pośrednictwa w ramach handlu hurtowego

As can be concluded from the Figure 1, the organizational types of wholesale activities and the area covered by them are diverse. These wholesale companies can be divided in two groups. The companies from the first group provide a wide range of services, while the second group provides only a limited range of services. These two groups of companies were the subject of the empirical research.

## DEVELOPMENT TRENDS IN POLISH TRADE

The dynamic changes in Polish trade, which could be observed significantly since the beginning of the economic transformation, also cover wholesale trade. According to the scientific literature, the most important tendencies in the Polish wholesale trade are as follows [Szumilak 2007]:

- creation of business groups as the effect of capital concentration in the wholesale trade,
- decreasing the number of individual business entities due to the increasing professionalization of such activities,
- integrating wholesalers by organizing associations, groups and other agreements,
- assortment specialization of wholesale companies,
- increase in foreign capital as an effect of the internalization of wholesale trade,
- implementation of the experience of foreign companies in logistics services of clients,
- introduction of modern information systems.

As mentioned above, most of these tendencies are connected with concentration processes in wholesale trade. Such a situation

has been observed in Poland for many years. This concentration on the market can take various forms. The most important ones are:

- horizontal concentration - consists in the conjunction of companies operating at the same level, e.g. the conjunction of wholesale companies or the conjunction of retail chains,
- vertical concentration - consists in the conjunction of companies operating at different levels, e.g. the conjunction of a wholesale company with a retail company.

Concentrating (vertical and horizontal ones) trade changes the structure of entities on the market and has a significant influence on the relationships among suppliers and trade companies [Ciechomski 2010].

The list of market tendencies connected with the concentration process in wholesale trade were prepared in connection with the above-mentioned facts as well as on the basis of the literature and results of previous empirical research. The processes subject to analysis were divided according to the level of the turnover at which they occur. Therefore they are:

- processes of concentration at the level of producer,
- processes of concentration at the level of wholesaler,
- processes of concentration at the level of retailer,
- processes of concentration connected with the development of online trade in Poland.

The first part of the research was to identify concentration processes occurring in the production sector and influencing the relationships between producers and trade companies. Therefore wholesalers were asked whether they observe a market tendency of the conjunction of producers. The processes of the conjunction at the same level of turnover, otherwise known as horizontal integration, are very important due to the fact that they it changes the competitive situation of both individual companies and the sector as a whole. This issue is an important part of the model of Porter's five forces. It assumes that in the supplier-recipient relationship, the higher the level of concentration on one of the sides, the greater its weight in terms of tender procedures, which is manifested in the ability to impose particular trade conditions during the negotiation process. Opinions about tendencies in the area of production are presented in Table 4.

Table 4. The opinions about development tendencies in the area of the production
Tabela 4. Opinie respondentów na temat trendów rozwojowych w obszarze produkcji

| No | Specification | Evaluation | | | | |
|---|---|---|---|---|---|---|
| | | **I agree totally** | **I agree** | **difficult to say** | **I do not agree** | **I completely disagree** |
| 1 | Producers connect with each other and therefore their number decreases (the concentration at the level of producers) | 13,9% | 22,2% | 22,2% | **38,9%** | 2,8% |
| 2 | Producers create distribution centers and take over the functions of the wholesale trade | 11,1% | **55,6%** | 11,1% | 22,2% | 0,0% |

Source: questionnaire survey

As can be concluded from the answers, the wholesalers admitted that they do not notice any process of producers merging, which would increase the negotiation strength of producers. Therefore, this occurrence is positive for trade companies. Respondents pointed out another market trend, which is a threat for the wholesale trade. They highlighted the growing tendency for producers to create their own distribution centers and therefore taking over some functions, realized by wholesale trade. By investing in distribution channels and their own distribution centers,producers are in a sense competing with wholesalers. The process of shortening distribution channels, defined as decreasing turnover levels in trade and direct relationships between producers and retailers has been observed for years. Such activities are to the benefit of producers, due to

the fact that they increase both effectiveness and control over sales channels. This shortening of distribution channels is also positive for final clients within supply chains. Decreasing the functional costs of these channels results from the process of shortening distribution channels, which leads directly to lower retail prices.

This phenemenon is very dangerous for the wholesale trade as the previously mentioned functions and tasks of the wholesale trade are taken over by other participants of the distribution channels. It can be assumed that such a situation will force wholesale companies to change their strategies and the tools they use.

The development tendencies in the retail trade were taken into consideration during this research. The opinions of wholesalers are presented in Table 5.

Table 5. The opinions about development tendencies in the retail trade in Poland
Tabela 5. Opinie respondentów na temat trendów rozwojowych w handlu detalicznym w Polsce

| No | Specification | Evaluation | | | | |
|---|---|---|---|---|---|---|
| | | **I agree totally** | **I agree** | **difficult to say** | **I do not agree** | **I disagree entirely** |
| 1 | The number of super- and hypermarkets (shops) will increase in the next three years | 16,7% | **36,1%** | 27,8% | 16,7% | 2,8% |
| 2 | The number of operators (owners) of retail chains will increase in the next three years | 5,6% | 27,8% | 22,2% | **38,9%** | 5,6% |
| 3 | Retailers take over other retailers (horizontal concentration at the retail level) | 25,0% | **38,9%** | 19,4% | 16,7% | 0,0% |
| 4 | The proportion of goods purchasing directly from producers will increase | 19,4% | **44,4%** | 13,9% | 22,2% | 0,0% |

Source: questionnaire survey

The market trend related to producers setting up distribution centres is also connected with other trends occurring in the retail sector. As it can be concluded from the answers presented in the table, wholesalers recognize the towards horizontal concentration in the retail trade, which consists mainly in the merging of retail companies. As in the case of producers, it increases the competitive strength of retailers and therefore the ability to negotiate better commercial conditions.

Additionally, the negotiation capability of retailers is increased by another tendency observed by respondents, i.e. the increase in the number of self-service shops in Poland. According to the wholesalers interviewed, the number of self-service shops will increase during the next three years. At the same time, they do not expect that new supermarket chains will appear on the Polish market, in fact, the opposite is true: according to most respondents, there will be fewer supermarket chains.

The respondents' answers confirm the trend observed in Poland for several years of growing a number of self-service shops and a simultaneous decrease in the number of operators of supermarket chains [Ciechomski, Strojny 2009]. This tendency towards the horizontal integration of large-format stores in Poland further increases the role of those retail chains already functioning on the Polish market. The increase in the number of self-service shops also increases the role of chains as a distribution channel for producers, due to the fact that a greater proportion of income is created by this sales channel. At the same time, the decrease in the number of supermarket chain operators increases the concentration level of this part of the market and strengthens retailers' negotiation position of. The described tendency is the negative occurrence and provides the threat for the development of the wholesale trade in Poland.

The tendency for retailers to purchase directly from the producers is another dangerous factor for the development of the wholesale trade on the Polish market. This tendency was recognized and confirmed by 64% of the wholesalers interviewed. It is also confirmed by the Central Statistical Office. It

is another confirmation of previously given statement of shortening of distribution channels and establishing direct relationships between producers and retailers without the level of the wholesale trade. It will force a change in the competition strategy and whole business model of wholesale trade.

The increasing use of private label brands by trade companies is a good example a such a situation. The private label brands are an important competitive instrument for trade companies. They enable customer loyalty to be built for these brands. In this way, trade companies make themselves independent of suppliers, which are usually producers. This tendency started a few years ago by retail chains in Poland and is still developing. It was also confirmed in the study, where 94% of respondents indicated that the proportion of private label brands is still growing across the entire assortment range of trade companies.

The market tendencies occurring in the wholesale companies were another issue analyzed in this research. These opinions are the key regarding the main aim of this research. As can be concluded from Table 6, a few distinct tendencies can be observed in the wholesale market in Poland.

Table 6. The opinions about development tendencies in wholesale trade in Poland
Tabela 6. Opinie respondentów na temat trendów rozwojowych w handlu hurtowym w Polsce

| No | Specification | Evaluation | | | | |
|---|---|---|---|---|---|---|
| | | I agree totally | I agree | difficult to say | I do not agree | I disagree entirely |
| 1 | The number of independent wholesale companies in Poland will decrease | 27,8% | **44,4%** | 22,2% | 5,6% | 0,0% |
| 2 | Wholesalers in Poland will take over other wholesalers (concentration at the wholesale level) | 19,4% | **41,7%** | 25,0% | 13,9% | 0,0% |
| 3 | Wholesalers in Poland will take over retailers (vertical concentration) | 5,6% | **36,1%** | 27,8% | 30,6% | 0,0% |

Source: questionnaire survey

The first trend is the decrease in the number of wholesale companies. 71% of respondents confirmed such an opinion. Taking this into account, the development possibilities of wholesale companies are limited.

At the same time, more than 60% of respondents recognized the horizontal concentration in the wholesale market in Poland, which consists in the conjunction of wholesale companies in Poland. It can be assumed that this merging is the answer to previously described market situation. The process of the horizontal integration within the wholesale trade can have various shapes and ranges, from a purchase group to full business integration. Such tendencies will become stronger and stronger.

At the same time, there is no unambiguous opinion among respondents on vertical integration. Only a small proportion of those interviewed agreed that wholesale companies will take over or merge with retail companies. This process has been visible in the last 25 years (following the economic transformation at the beginning of the nineties) and affected the formation of several trade networks in Poland, consisting mainly of small retail shops. It can be assumed that this tendency is decreasing and there will be no significant changes in this area during the next years.

The respondents were asked to give an opinion about the level of turnover on the wholesale market in Poland in the next three years. It should be pointed out that according to data from the Central Statistical Office, wholesale trade turnover in Poland in the period of last four years in Poland stayed at a similar level. The wholesale turnover in 2014 was 1,018.3 billion zł, 0.8% higher than in the previous year. It should be pointed out that the wholesale turnover of companies with more than 50 employees constituted 47.1% of total turnover, as in previous years (Central Statistical Office 2015]. The respondents' opinions on this subject are presented in Table 7.

Table 7. Opinions about prospects for developing their own companies
Tabela 7. Opinie respondentów na temat perspektyw rozwoju własnej firmy

| No | Specification | Evaluation | | | | |
|---|---|---|---|---|---|---|
| | | I agree totally | I agree | difficult to say | I do not agree | I disagree entirely |
| 1 | Wholesale turnover in Poland will decrease | 11,1% | 27,8% | **30,6%** | 27,8% | 2,8% |
| 2 | The turnover of our company will grow in next 3 years | 25,0% | 27,8% | **41,7%** | 5,6% | 0,0% |

Source: questionnaire survey

The data presented in Table 7 show that the respondents were not in agreement as to whether the turnover of wholesale companies in Poland will increase or decrease. This is understandable, taking into account the analysis conducted, which shows that respondents see many threats to the development of the wholesale trade in Poland. At the same time, it should be emphasized that respondents were rather optimistic about the increase in the turnover of their own companies. Therefore the respondents see better prospects for their own companies rather than for wholesale trade as a whole.

At the end, the respondents were asked to give an opinion about the development of Internet trade in Poland. Their answers are presented in Table 8.

Table 8. The opinions about perspectives of development of the Internet trade in Poland
Tabela 8. Opinie respondentów na temat trendów rozwojowych w handlu internetowym w Polsce

| No | Specification | Evaluation | | | | |
|---|---|---|---|---|---|---|
| | | I agree totally | I agree | difficult to say | I do not agree | I do not agree totally |
| 1 | Wholesalers create their own Internet shops | 27,8% | **61,1%** | 8,3% | 2,8% | 0,0% |
| 2 | Turnover in Internet trade in Poland will increase in next 3 years | 44,4% | **52,8%** | 2,8% | 0,0% | 0,0% |

Source: questionnaire survey

As it can be assumed from the table that the respondents recognize the trend of wholesalers setting up their own Internet shops. This opinion was confirmed by 89% of those interviewed . Therefore, it is one of the most recognized and unambiguous market tendencies. It is closely related to the opinion expressed by 97% of respondents that Internet trade turnover will grow during the next three years. This creates new challenges for wholesalers and at the same time, it presents a chance for wholesalers to increase turnover and enter the retail sector. Internet trade allows companies to omit the retail level and reach individual consumers directly. But it requires wholesalers to acquire new skills and often to change the whole business structure of the company.

## DIRECTIONS OF CHANGES IN THE WHOLESALE TRADE IN POLAND

The researches show trends in wholesale trade and allow developments to be pointed out. Some occurrences, which should be treated as threats, are especially noticeable.

The process of centralization is very characteristic for Polish trade as a whole, as is the tendency towards horizontal concentration. This is manifested by the merging of wholesales with other wholesalers as well as that of retailers in big trade chains. Similar processes can be observed among producers, although to a lesser degree. It should be also pointed out that respondents do not notice any tendencies of vertical concentration, e.g. the merging of wholesalers with retailers.

The centralization of retail trade is the most important threat to the development of wholesale trade. According to empirical research, more than 52% of respondents agree that the number of large format stores in Poland will grow during the next three years. Therefore, it can be concluded that the proportion of supermarkets in total retail sales in Poland will increase. It should be noted that respondents do not agree whether the number of operators will grow or not. Therefore, it can be concluded that new supermarkets will be created by operators who are already active on the Polish market.

The centralization of trade leads to the shortening of distribution channels. This constituets a significant threat to wholesale companies, which is also confirmed by Central Statistical Office data, i.e. big retail companies, especially those of a foreign origin, supply themselves directly at the producers or importers.

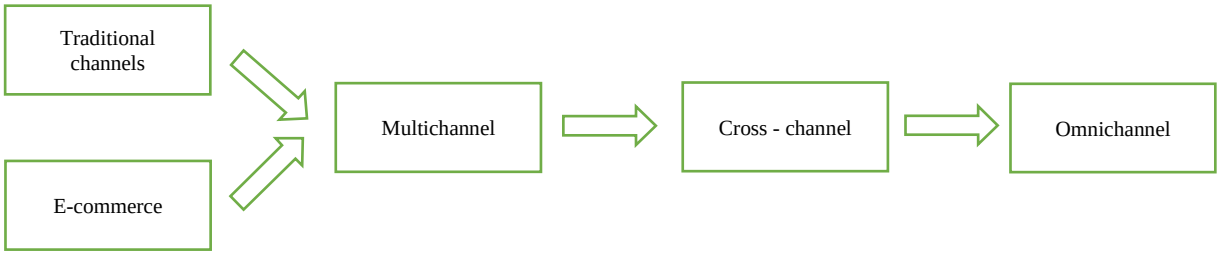
At the same time, wholesalers evaluate their own competitive position as good and assume a further increase in their turnover. Again, these statements are confirmed by data of Central Statistical Office, which indicate the stable situation of wholesale companies with regard to turnover during the last few years.

The next significant trend in Polish trade is the dynamic development of Internet trade. According to empirical research, the respondents are convinced of further increases in e-commerce turnover. Wholesalers increasingly use this modern sales channel, which creates a chance for them to develop and also to reach new customer groups without the retail level directly.

The development of multichannel sales should be pointed out as a direction of further development of trade in Poland, including wholesale trade. Multichannel sales are more and more used in the business practice, both by trade and production companies. Meanwhile, in contrast to the foreign literature, there is still a lack of such research in the Polish scientific literature.

The development of e-commerce technology motivates companies which have so far only operated in traditional sales channels to use this type of channel. On the other hand, companies which are active in Internet trade also consider starting businesses by the use of traditional channels. In this case, we can also call it a multichannel sale. The phases of the development of sales are presented in Figure 2.

The multichannel sale is admitted to be the company strategy which uses for sale purposes both traditional channels as well as its own Internet channel. Therefore, both traditional and electronic sale channels are used in multichannel sale. Besides, the returns are possible only by the use of the same channel where a client bought a product previously. The databases of clients of various channels are not fully integrated in this type of sale [Fost 2014].




Source: own work

Fig. 2. Phases of the development of multichannel sale
Rys. 2. Etapy rozwoju sprzedaży wielokanałowej

The next phase is what is known as 'cross-channel sales'. This phase is treated as a temporary one between multichannel and omnichannel sales. In general, this solution is closer to the multichannel sales, but there is already one database of clients for the whole

company. Returns are accepted through the channels where the client previously bought a product. Therefore, from the client's point of view, there is no practical difference between multichannel and cross-channel sales [Heinemann 2013].

Finally, omnichannel sales means the full integration of sale channels and communication channels. A company allows clients to contact them and eventually to buy in the form most suitable at the moment. Returns are also conducted in the way most suitable for the client at present. Therefore, the omnichannel strategy is the most sophisticated and, at the same time, the most expensive one. It is the exemplification of the marketing philosophy. The client is the one who decides on the place, time and form of the purchase, and on the place, time and form of delivery and possible returns.

The development of the multichannel sales influences effectively the shape and the structure of distribution channels of producers and trade companies. From the point of view of a wholesale company, the introduction of new sales channels by the producer will constitute a threat, because the importance of wholesalers as the sole sales channel will decrease.

On the other hand, wholesalers also have possibility to use an additional sales channel, a fact confirmed by empirical research. It will create a chance to gain new clients and increase incomes.

The implementation of a new sales channel requires significant financial input. Therefore, it is essential to conduct an analysis of the effectiveness of individual sales channels. It can be assumed that there are some synergy effects among channels in omnichannel sales but these are very difficult to analyze. However, this will not change the fact that the omnichannel sales provide one of biggest opportunities for development, also for wholesale companies.

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# PROCESY KONCENTRACJI W HANDLU HURTOWYM W POLSCE W ŚWIETLE BADAŃ EMPIRYCZNYCH

**STRESZCZENIE**. **Wstęp:** W ostatnich latach wzrasta rola handlu, jako integratora kanałów dystrybucji w Polsce. Przedsiębiorstwa handlu detalicznego, uzyskały przewagę konkurencyjną zarówno w relacjach z dostawcami, jak i w relacjach z odbiorcami. Powstaje pytanie, jak w tym kontekście wygląda sytuacja handlu hurtowego i jakie są perspektywy dalszego rozwoju tego segmentu działalności handlowej. Głównym celem pracy była identyfikacja i określenie wpływu nowych uwarunkowań rozwoju handlu hurtowego, jako elementu łańcucha dostaw. Autor przyjął hipotezę, że rozwój handlu hurtowego jest zdeterminowany przez procesy koncentracji przedsiębiorstw handlowych, które są zauważalne w Polsce w ostatnich latach.
**Metody:** Na podstawie literatury oraz wcześniejszych badań zidentyfikowano podstawowe procesy koncentracji w polskim handlu. Następnie, w oparciu o wyniki badań ankietowych oraz dane GUS, dokonano oceny wpływu tych trendów na rozwój handlu hurtowego oraz wskazano kierunki dalszych przemian w polskim handlu hurtowym. Badania empiryczne przeprowadzono metodą wywiadu bezpośredniego na losowo dobranej próbie 108 przedsiębiorstw handlu hurtowego. Zakres podmiotowy badania, obejmował zarówno hurtownie niezależne jak i hurtownie sieciowe. Przedmiot badań stanowiły opinie hurtowników dotyczące tendencji rynkowych oraz procesy integracyjne zachodzące w polskim hurcie. Zakres przestrzenny badań obejmował obszar RP, a zakres czasowy obejmował lata 2014 - 2015.
**Wyniki:** Wyniki badań prezentują kluczowe procesy rynkowe, związane z koncentracją w handlu. Jak wynika z przeprowadzonych badań, największym zagrożeniem dla rozwoju handlu hurtowego, są procesy koncentracji poziomej na szczeblu detalu. Koncentracja firm detalicznych prowadzi do skracania się kanałów dystrybucji i bezpośrednich zakupów dokonywanych przez sieci handlowe u producentów, z pominięciem szczebla hurtu. Kolejnym istotnym zagrożeniem dla hurtu jest rozwój handlu internetowego. Pomimo tych zagrożeń, hurtownicy oceniają aktualną sytuację swojej firmy, jako dobrą, co z kolei znajduje potwierdzenie w danych GUS.
**Wnioski:** Zidentyfikowane procesy rynkowe muszą zostać uwzględnione w strategiach działania przedsiębiorstw handlu hurtowego w Polsce. Zdaniem autora, jednym z rozwiązań, które firmy hurtowe powinny zastosować może być wdrożenie opisanej w artykule koncepcji sprzedaży wielokanałowej.

**Słowa kluczowe:** przedsiębiorstwo handlowe, handel hurtowy, handel wielokanałowy, sprzedaż multichannel, sprzedaż omnichannel

# KONZENTRATIONSPROZESSE IM GROßHANDEL IN POLEN IN ANSEHNUNG VON EMPIRISCHEN FORSCHUNGEN

**ZUSAMMENFASSUNG. Einleitung**: In den letzten Jahren wächst die Rolle des Handels, der als Integrator von Distributionskanälen in Polen angesehen wird. Einzelhandelsunternehmen erlangten eine Wettbewerbsfähigkeit, sowohl im Verhältnis zu ihren Lieferanten, als auch zu ihren Empfängern. Angesichts dessen entsteht also die Frage, wie in diesem Zusammenhang die Situation innerhalb des Großhandels aussieht und welche Perspektiven für die weitere Entwicklung des Segmentes von Handelstätigkeit bestehen. Das Hauptziel der Arbeit war es, den Einfluss neuer Voraussetzungen auf die Entwicklung des Großhandels als des Bestandsteiles der Lieferkette zu identifizieren und zu ermitteln. Der Autor ließ sich von der Hypothese leiten, dass die Entwicklung des Großhandels durch die in den letzten Jahren in Polen erfolgenden Konzentrationsprozesse von Handelsunternehmen determiniert wird.
**Methoden**: Aufgrund der Gegenstandsliteratur und früherer Forschungen wurden die grundlegenden Konzentrationsprozesse innerhalb des polnischen Handels ermittelt. Ferner wurde anhand der Ergebnisse von Umfrageforschungen und statistischen Daten die Bewertung des Einflusses solcher Trends auf die Entwicklung des Großhandels vorgenommen und auf die Richtungen weiterer Veränderungen innerhalb des polnischen Großhandels hingewiesen. Die empirischen Untersuchungen wurden anhand der Methode des direkten Interviews in einer Losgröße von 108 Großhandelsunternehmen durchgeführt. Der betreffende Untersuchungsbereich umfasste sowohl unabhängig wirkende Großhandelsunternehmen, als auch Netz-Großhandelseinrichtungen. Zum Forschungsgegenstand gelangten die von Großhändlern projizierten Erachten, die die Marktrends sowie die innerhalb des polnischen Großhandels auftretenden Integrationsprozesse anbetrafen. Der Forschungsraum umfasste das Gebiet der Republik Polen und die Forschungen fanden im Zeitraum 2014 - 2015 statt.

**Ergebnisse:** Die Ergebnisse stellen schlüsselhafte Marktprozesse, die mit der Konzentration im Handel verbunden sind, dar. Wie aus den durchgeführten Forschungen hervorgeht, stellen die horizontalen Konzentrationsprozesse auf der Stufe des Einzelhandels die größte Gefährdung für die Entwicklung des Großhandels dar. Die Konzentration der Einzelhandel-Firmen führt zur Verkürzung von Distributionskanälen und zu den Einkäufen von Handelswaren, die durch die Handelsnetze direkt bei Produzenten und bei der Vermeidung der Großhandel-Ebene betätigt werden. Eine nächste Gefährdung für den Großhandel stellt der E-Handel dar. Trotz dieser Gefährdungen finden die Großhändler die Situation ihrer Firmen gut, was demzufolge in den betreffenden statistischen Daten seine Bestätigung findet.
**Fazit:** Die ermittelten Marktprozesse müssen in den Strategien für die Betätigung von Großhandelsunternehmen in Polen berücksichtigt werden. Nach Ansicht des Autors kann die Einführung des im Beitrag projizierten Konzeptes für den Mehrkanal-Absatz, das die Großhandel-Firmen in Anspruch nehmen sollten, eine der Lösungen in diesem Bereich sein.

**Codewörter:** Handelsunternehmen, Großhandel, Mehrkanal-Handel, Multichannel-Verkauf, Omnichannel-Verkauf.

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