

NON-FOOD DISCOUNTERS MARKET IN POLAND 2025

MARKET ANALYSIS AND DEVELOPMENT
FORECASTS FOR 2025-2030



In 2024, the value of non-food discounters sales exceeded PLN 13 billion net, according to PMR Market Experts data. From 2020 to 2024, the market's average annual growth rate was over 20%, indicating that industrial discount stores grew faster than online sales.

The dynamic development of non-food discounters in recent years has been driven by several factors:

- first of all, such stores have been extremely effective in filling the blank spots on the Polish trade map, entering medium and small-sized towns (even those with less than 10,000 inhabitants),
- non-food discounters also developed dynamically in retail parks, which are a retail format with very good development prospects, unlike traditional shopping malls,
- in addition to compactness and proximity to the customer (which translates into the speed of shopping), the advantages of non-food discounters also include a favorable price-quality ratio.

The growth of the non-food discount market is driven by an increasing number of stores and the growing recognition of specific networks.

This makes non-food discounters increasingly important players in Poland's retail market, especially in categories such as clothing and footwear, home furnishings, pet products, and household chemicals.

The comprehensive market analysis, including development forecasts up to 2030, can be found in PMR's latest report: **„Non-Food Discount Market in Poland 2025”**



Main objective

Providing a comprehensive analysis of non-food discounters in Poland and presenting forecasts for its development.

Additional objectives:

- assess the market size in terms of sales value and number of stores
- identify major product categories in non-food discounters market, their sales value, and dynamics from 2020–2024
- present the share of non-food discounts in selected product categories within the retail market – currently and in forecast horizons
- identify the largest non-food discount networks by sales value and number of stores

What does the report contain?

- **market value** of non-food discounters in 2020–2024 along with forecasts for its development up to 2030
- **number of non-food discounters** in 2020–2024 along with forecasts for its development up to 2030
- **profiles of the largest non-food discount networks** and their development plans
- **major product categories** in the non-food discounters market
- **brand awareness** of industrial discount chains over recent years
- **consumer profile** of non-food discount shoppers, both overall and within specific networks
- **competitive environment** within major product categories

Subject matter

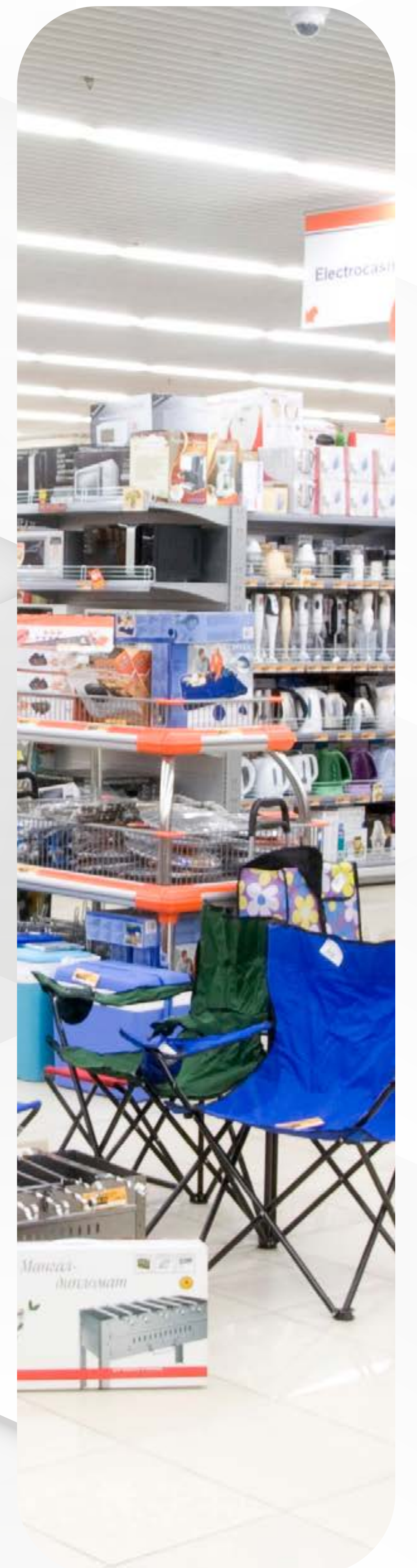
- market value
- number of stores
- market value structure broken down into:
 - product categories
 - major players
- forecasts for market value
- forecasts for the number of stores
- sales value and market shares of major player

Scope: Non-food discounters

Time span: 2020-2024

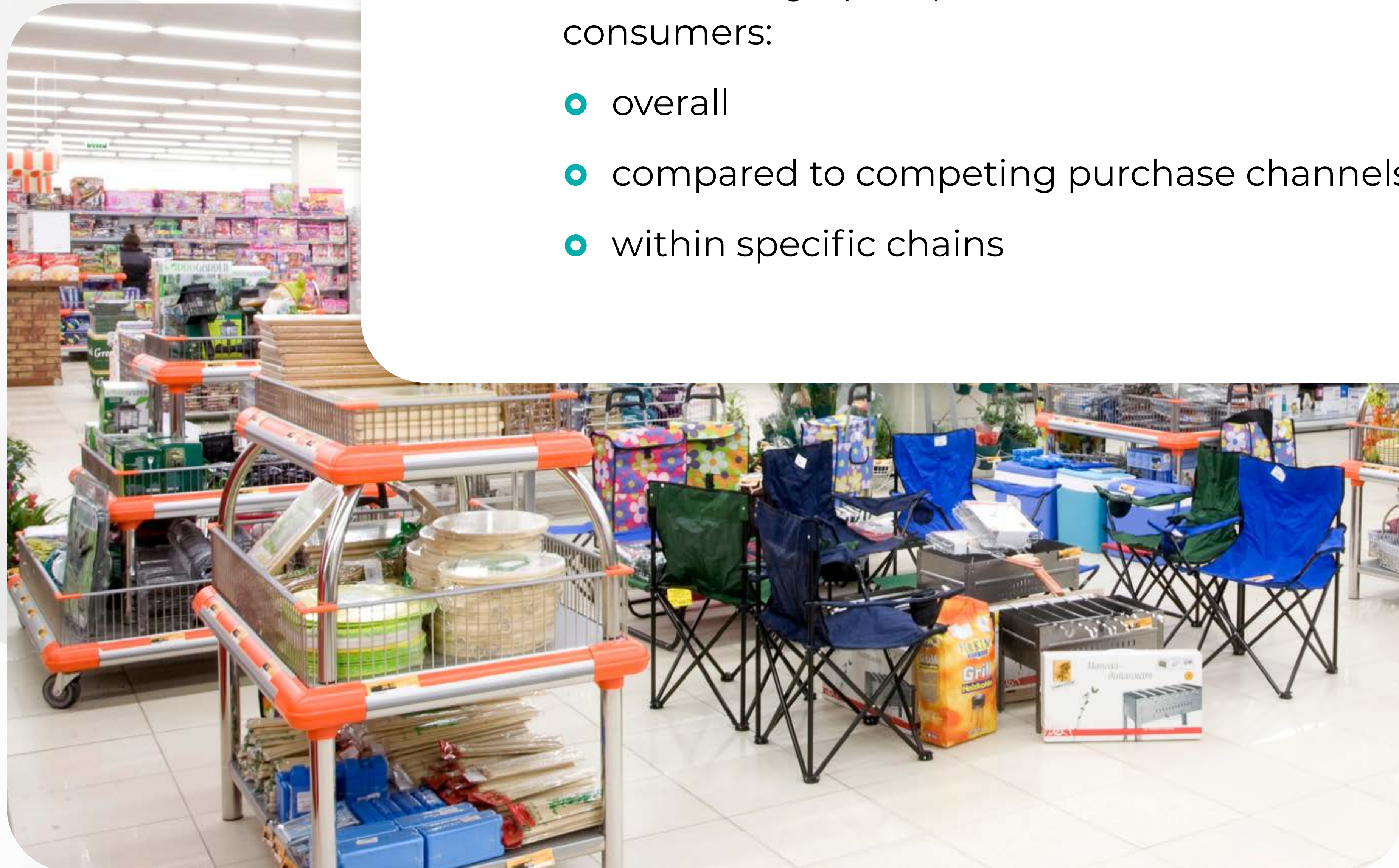
Forecast horizon: 2025-2030

Geographic coverage: Poland



Profile of non-food discounters consumer

- awareness of major discount chains
- frequency of visits to individual discount chains
- socio-demographic profile of non-food discount consumers:
 - overall
 - compared to competing purchase channels
 - within specific chains



Profiles of major non-food discount chains:

- sales value and market shares
- number of stores
- sales per store
- development plans
- specializations and most frequently chosen product categories
- consumer profile

Why to buy this report, i.e. what important questions it answers?

- What will be the growth dynamics of the market between 2025–2030?
- What is the sales value of clothing and footwear, home furnishings, and food products sold by non-food discounters?
- How many stores and what sales values do the largest discount chains hold?
- What are the development plans of individual chains for the coming years?
- What will be the total number of industrial discount stores in 2030?
- Which consumer groups are the most frequent visitors?
- Consumer profile of non-food discounters – which groups shop at these stores most frequently?

Together with the report, we provide the most important data in the Excel spreadsheet for individual aggregation.



FORECASTS

Long-term market development forecasts were prepared for the report using econometric models and a historical time series.

The forecasts cover the period 2025-2030.

In addition to the forecasts for the value of the market and number of stores, the report also covers forecasts for selected macroeconomic indicators, including:

- GDP per capita and real GDP growth rate
- inflation
- average annual LFS unemployment rate and real change in average monthly gross wage in Poland
- real growth rate of household disposable income in Poland and private consumption
- number of Poland's residents and share of each demographic group

FORECASTING METHODOLOGY



We are one of the leading research and analytics companies in Poland!

As **PMR Market Experts**, we help our Clients to obtain and analyse data, enabling them to better understand market processes, plan strategic and operational actions, and ultimately develop their business.

We boast **30 years of experience** and a **team of nearly 100 experts**. In our reports, we use secondary data combined with proprietary primary databases and qualitative and quantitative research.

We provide **market analyses for four main sectors**:

- construction,
- retail,
- healthcare and pharmaceuticals,
- IT and telecommunications.

We also prepare **customised research projects** focused on the area chosen by the Client. In addition, we offer **consultancy services** combining different areas, i.e. marketing research, market sizing, forecasting, and sales management.





RETAIL

MARKET ANALYSIS AND 5-YEAR DEVELOPMENT FORECASTS

- **Food to Go** retail market in Poland
- **Cosmetics** retail market in Poland
- **DIY** retail in Poland
- **Home furnishings** retail market in Poland
- **HoReCa** market in Poland (additional data update: March, September, December)
- **Grocery** retail market in Poland
- **Clothing and footwear** retail market in Poland
- **Sports goods** retail market in Poland
- **Children's products** retail market in Poland
- **Online retail** market in Poland (additional data update: March)
- **Diet catering** market in Poland
- **Retail** market in Poland
- **Pet care and products** market in Poland
- **HoReCa supply** market in Poland
- **Non-food discounters** market in Poland
- **Diet catering** market in Czech Republic
- **Clothing and footwear** retail market in Czech Republic
- Weekly: **PMR Retail Insight** (Poland, Hungary, Romania, Slovakia, Czech Republic)

NOVELTIES

Forecasting methodology

The class and type of the developed **econometric models** are selected according to the **characteristics of the data analysed**. In practice, models using **multiple regression** (the least squares method) and **autoregression** (ARIMA, VAR) are the most common. We use both **primary variables** and their **transformations** (e.g. logarithms) to capture the relevant relationships.

The **final market value forecasts** are not just based on a single best model but are a **weighted average of forecasts** from a selected set of best models. The weights are selected based on model fit indices. This procedure makes it possible to consider **more factors** influencing market development, hence **improving the forecast precision**.

When developing the **final forecasts**, we take into account not only the **statistical quality of the models** (model adjustment to empirical data, normality and homoscedasticity of residuals, statistical significance of structural parameters) but also their **consistency** with market knowledge and **qualitative information** gathered by PMR's analytical team.

The models use data on industry sectors, macroeconomic indicators and demographics, as well as the results of our analyses. Most often, there are **60-80 types of indicators** considered.



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MARKET
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CONTACT:

Anna Bukowska

Business Development Manager

tel.: +48 605 834 000

anna.bukowska@pmrmarketexperts.com



OFFICE

Królewska 57
30-081 Kraków, Poland



CONTACT

tel.: +48 609 290 093
+48 782 011 000
info@pmrcorporate.com



WWW

www.pmrmarketexperts.com
www.mypmr.pro

