## Retailer of the Year 2022

Wybrany przez dostawców

NIQ, Consumer Insights & Shopper Team

Warsaw, March 2023

NIQ

RETAILER OF THE YEAR 2022

Wybrany przez dostawców

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## Coming into view



We want the world to see us for who we truly are... a pathway to growth.



"For the fourteenth time in a row, as part of the Retailer of the Year survey, we ask suppliers about their cooperation with retail chains.

As a consumer intelligence company, every day we provide insights and advise both producers and retailers. The study, which honors the best retailers, is a natural continuation of this multilateral dialogue and partnership."

Karolina Zajdel-Pawlak Managing Director in Poland



## **Retailer Of The Year** choice was based on

# 123Interviews with people<br/>responsible for cooperation with<br/>retailers from manufactures and<br/>suppliers' sideCAWI and CATI interviews<br/>conducted in Jan & Feb 20231244 retailers' evaluations

## Formats and retailers evaluated

Multiformats	Supermarkets / proximity		Discounters
Auchan	Arhelan	Polomarket	Aldi
Carrefour	Chata Polska	SPAR Wasz Sklep	Biedronka
E.Leclerc	Dino	Stokrotka	Lidl
Kaufland	Intermarche	Top Market	Netto
	Lewiatan	Topaz	
Small format / Convenience	Wholesaler	s & Distributors	E-markets
Carrefour Express	Eurocash C&C		Auchan (auchandirect.pl, Glovo etc.)
Eurocash Dystrybucja & Franczyza (Delikatesy Centrum, ABC, Gama, Groszek, Euro Sklep, 1 minute)	GK Specjał		Barbora.pl
GK Specjał (Polska Sieć Handlowa NASZ SKLEP, Livio, Rabat Detal)	Makro Cash&Carry		Carrefour (carrefour.pl, Glovo etc.)
Grupa Chorten	Marol		E.Leclerc (leclerc.pl/e-zakupy.pl)
Grupa Makro – ODIDO	Selgros		Frisco.pl
Żabka			Intermarche (drive.intermarche.pl)
			Spar (e-spar.com.pl)

## **Collaboration areas taken into account in the evaluation**

## **#1**

## Contacts with the counterpart of your team from the chain

Easiness of contact, the degree of decision-making of team members, providing information about the changes, timeliness and reliability

### #2

#### Commercial terms and conditions

Terms of payment, volume and value of sales generated by customer

## #3

#### Business development collaboration

Marketing, category management, joint planning of business development, joint strategy development, promotional campaigns, product mix

#### Logistics

Flexibility of delivery dates, cooperation in planning and management of current and promotion stocks



#### Image

Chain's marketing activities, innovation, aesthetics of shopping areas, marketing materials – external impression **#6** 

#### Sustainability

Implementation of own activities and supporting the activities of producers that promote sustainability and contribution to environmental protection "Human relations between the teams and commercial terms remain invariably the most important aspects of cooperation with retail chains, from the suppliers' perspective.

The last few years however have added further dimensions to these criteria: inflation, affecting manufacturers and retailers alike, has increased the frequency with which terms and conditions are discussed, and created additional challenges for both sides.

Sky-rocketing prices make consumers more likely to search for promotions and other ways to optimize their spending – an additional motivation for suppliers and retailers to strengthen relationships and develop optimal promotional scenarios.

Finally, the war in Ukraine, just after pandemic – significantly impacted supply chain – another fundamental area of collaboration between retailers and suppliers.

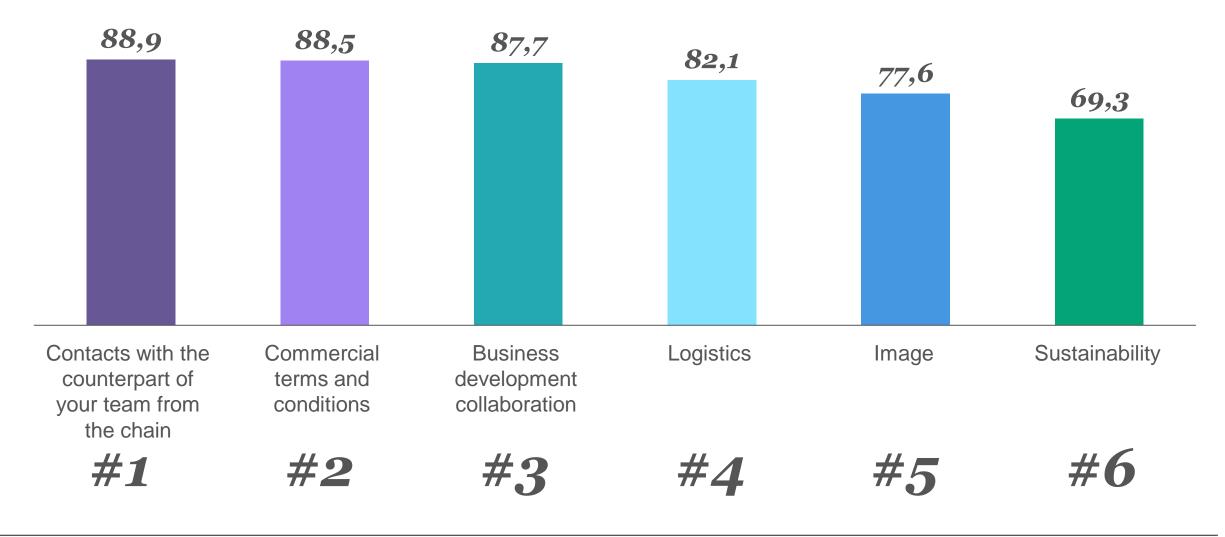
*Flexibility and mutual understanding when building a joint business development strategy became critically important.*"

Konrad Wacławik

Head of Retailer Services Poland



## **Importance of factors**



### NIQ

## The Winners

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"Frisco.pl was voted Retailer of the Year – Wybrany przez dostawców for the second time in a row, demonstrating outstanding level of partnership with cooperating manufacturers.

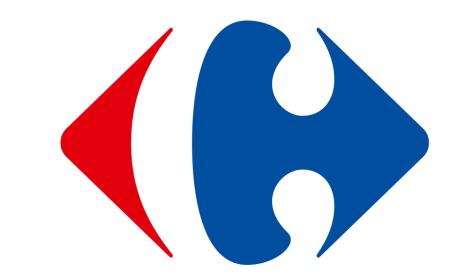
Jacek Palec, the CEO of Frisco, in the interview following Retailer of the Year Gala, shared multiple examples of close, trust-based cooperation enabling both sides data driven decisions. E-commerce shoppers' journey and choices can be well tracked and analysed enabling marketers improved targeting, covering precise assortment needs and pricing offering. Unique logistic model of Frisco allows agile piloting of NPDs as well as much wider repertoire of brand building actions as compared to traditional offline formats.

The not-so-secret ingredients of Frisco's competitive advantage are digital proficiency combined with top-notch logistics underpinned by respect and mutual openness in cooperation with manufacturers."

Karolina Zajdel-Pawlak Managing Director in Poland



## *Multiformat* chain of the year 2022



## Carrefour

Carrefour's strenghts in suppliers' eyes are: brand image, logistics and quality of contact & relationship with the retailer

## **Discounter** chain of the year 2022



Lidl is valued by suppliers for its brand image, logistics and quality of contact & relationship with the retailer Supermarkets / proximity chain of the year 2022



Chata Polska's strength is brand image, including chain's promotional activities, innovative approach, aesthetics of shopping areas, marketing materials Wholesalers & Distributors chain of the year 2022



Selgros' strengths are: quality of contact & relationship with the retailer, brand image and logistics Small format / Convenience chain of the year 2022



Żabka is valued by suppliers especially for its brand image, sustainability, quality of contact & relationship with the retailer FMCG E-commerce development triggered by pandemic does not stop. Today 60% of Polish shoppers do buy FMCG online.

48% of Polish online shoppers say that shopping online for grocery products helps them save money.

NIQ We-Commerce syndicated report, November 2022

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## *E-markets* chain of the year 2022



Frisco.pl strengths in suppliers' eyes are: brand image, logistics and quality of contact & relationship with the retailer "Environmental initiatives are already high on Retailers' agenda, and their importance will increase. They are expected by consumers, and required by governmental and organizational regulations, as i.e. ESG.

Economic pressure and energy crisis give another trigger to develop sustainable programs in the areas of renewable energy, recycling or zero waste, which should remain companies' big bets.

Sustainability should be now considered not only as inseparable part of building trusted and responsible brand, but also central to business operations.

We are proud to create a platform for suppliers to praise Sustainable Retailer of the Year"

Beata Kaczorek

Consumer and Shopper Insights Director, CEE | Consumer Insights



Sustainable Retailer of the Year

Wybrany przez dostawców

> Sustainable actions of Żabka have been noticed and appreciated by suppliers

"Retailer of the Year – Wybrany przez dostawców is the only award on the retail market awarded to retail and wholesale chains by their trading partners.

For suppliers, it is an opportunity to share their feedback and expectations,

while for the retailers it is a possibility to benchmark themselves to the competition."

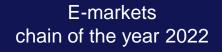
Anka Łękarska

Client Business Partner | Consumer & Shopper Insights





### Retailer of the Year 2022 Wybrany przez dostawców





Multiformat chain of the year 2022

CHATA POLSKA Etats. Lotolie. Monatchie

Supermarkets / proximity chain of the year 2022



Discounter chain of the year 2022



Wholesalers & Distributors chain of the year 2022



Small format / Convenience chain of the year 2022

Sustainable Retailer of the Year 2022 – Wybrany przez dostawców

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### **Congratulations to the Winners!**



From left: Casper Haring CEO ECU, Piotr Rajewski Dyrektor Handlowy Żabka, Joanna Kasowska Dyrektorka Jakości i Standardów Zarządzania Żywnością Żabka, Maciej Mitoraj Commercial Director Chata Polska, Joanna Kowalska Dyrektor Hali Sprzedaży Selgros, Jacek Palec CEO frisco.pl, Aleksandra Robaszkiewicz Head of Corporate Communications and CSR Lidl, Krzysztof Dobczyński Dyrektor Handlowy Działu Produktów Świeżych Carrefour, Karolina Zajdel-Pawlak Managing Director in Poland NielsenIQ

Thank you for all your votes and we look forward to seeing you next year

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## Coming into view

