



ANTIMONOPOLY
OFFICE
OF THE SLOVAK
REPUBLIC

Competition law enforcement in the retail trade – experience, legislative initiatives and cases in Slovakia

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POINTS FOR DISCUSSION

- ❑ Retail market structure and recent changes in Slovakia
- ❑ Activities of the AMO in the area of agriculture/food production/retail markets
- ❑ UTPs and legislative initiatives in Slovakia
- ❑ OMNIBUS and new organization of agriculture markets within the CAP reform

I. RETAIL MARKET STRUCTURE AND RECENT CHANGES IN SLOVAKIA

TOP BROAD - RANGE RETAILERS			
Ranking	Company	Revenues in 2016 in mil. € excl. VAT (Index 2016/2015)	Chain (number of own stores as of the end of 2016)
1	TESCO STORES SR	1451,4 (104,6)	Tesco hypermarket (67), supermarket (75), Expres (28), Extra (8), OD (3), ČS (18)
2	LIDL SR	1043,3 (106,9)	Lidl (126)
3	KAUFLAND SR	1000,7 (108,2)	Kaufland (62)
4	GGT	522,1 (104,4)	GGT veľkoobchod (1)
5	BILLA SLOVENSKO	493,5 (104,8)	Billa (136)
6	METRO CASH & CARRY SLOVAKIA	426,6 (101,8)	Metro (6)
7	NAY	314,0 (163,1)	Nay (36), Electroworld (18)
8	C&A MODE	230,9 (102,8)	C&A (16)
9	LABAŠ	228,4 (105,5)	Fresh supermarket (26), Labaš veľkoobchod (1)
10	DM DROGERIE MARKT	197,7 (106,6)	dm drogerie markt (138)
11	MERKURY MARKET SLOVAKIA	175,3 (108,5)	Merkury Market (19)
12	CBA SLOVAKIA	143,0 (101,7)	CBA Potraviny, Cent Supermarket, CBA, Diskont CBA (306), veľkoobchod (2)
13	MILK-AGRO	128,0 (100,6)	Milk-Agro maloobchod (188), Milk-Agro veľkoobchod (26)
14	IKEA BRATISLAVA	101,5 (104,0)	IKEA (1)
15	OBI Slovakia	98,9 (100,0)	OBI (13)
16	COOP JEDNOTA NOVÉ ZÁMKY, S.D.	95,2 (102,4)	Coop Jednota supermarket (41), Tempo (4), Coop Jednota Potraviny (66)
17	COOP JEDNOTA KRUPINA, S. D	95,0 (102,5)	Coop Jednota supermarket (32), Coop Jednota Potraviny (129)
18	STAVMAT STAVEBNINY	91,5 (117,0)	Stavmat stavebné centrum (34)
19	VDP LEVICE	90,04 (100,8)	VDP veľkoobchod (4)
20	TERNO REAL ESTATE	88,9 (94,6)	Terno supermarket (5), Terno samoobsluha (19), Moja Samoška (67), Hypernova hypermarket (7)
	COOP JEDNOTA SLOVENSKO TOTAL	1558,0 (101,4)	2153

Source: TaP magazine, 2017, <http://www.tovrapredaj.sk/top30/>

II. RETAIL MARKET STRUCTURE AND RECENT CHANGES IN SLOVAKIA

- Market consolidation via acquisitions of smaller retail chains/smaller-format store chains
- Establishment of retail purchasing/buying alliances
- New concept of retail stores as a respond to the new trends and changes in consumer behavior/preferences



ACTIVITIES OF THE AMO

- Food sector analyses in 2012-2014 - preliminary findings in dairy sector leading to further investigation
- RPM Case in dairy sector in 2016
- Recent AMO activities - detecting problems of the market participants across the whole food sector (informal discussions going on)

UTPs and LEGISLATIVE INITIATIVES IN SLOVAKIA

- *Slovak Act No. 362/2012 Coll. on Unfair Trading Practices related to Food* effective since January 5, 2013 – the Ministry of Agriculture and Rural Development of the SR as a competent authority in Slovakia

- black list of UTPs
- question of enforcement capacity of the Act/results since 2013
- 130 investigated cases – no fines imposed so far?

	2013	2014	2015	2016	2017
No. of investigations	24	20	8	34	40

- amendment of the existing act publicly announced
- position of the AMO within the UTP processes in question - market players call for changes in competences

NEW ORGANISATION OF AGRICULTURE MARKETS WITHIN THE „CAP“ REFORM

- Position of the Commission and NCAs within the recent CAP legislative processes on the EU level
- Potential effects of the proposed amendments of the CAP on functioning of the markets in different Member States

Thank you for your attention!

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