

# POLAND LOGISTICS POWERHOUSE FOR EASTERN EUROPE

**Halina Brdulak**

*halina.brdulak@sgh.waw.pl*



WARSAW SCHOOL OF ECONOMICS

[www.sgh.waw.pl/english](http://www.sgh.waw.pl/english)

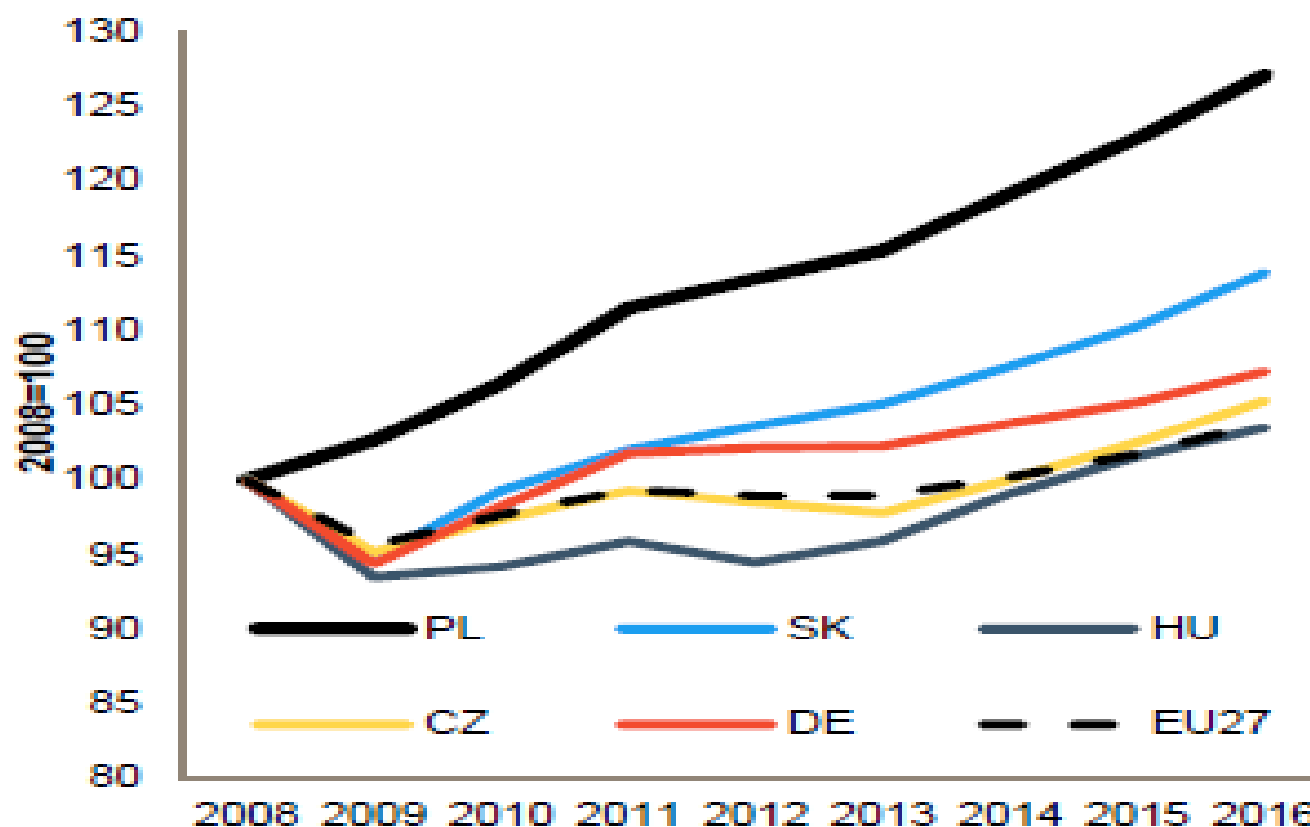
# Agenda

- 1. Macroeconomic data of CEE Region and Poland**
- 2. CEE Top Companies. Coface report**
- 3. Poland – biggest logistics market in CEE countries**
  - Modal Split**
  - National roads network in Poland**
  - Two core network corridors crossing Poland**
  - Logistics Park in Poland**
  - FDI in Poland**
  - Employment and Education**
  - Internet users in Poland**
  - Comparison of a developed and developing market in a vertical sector**

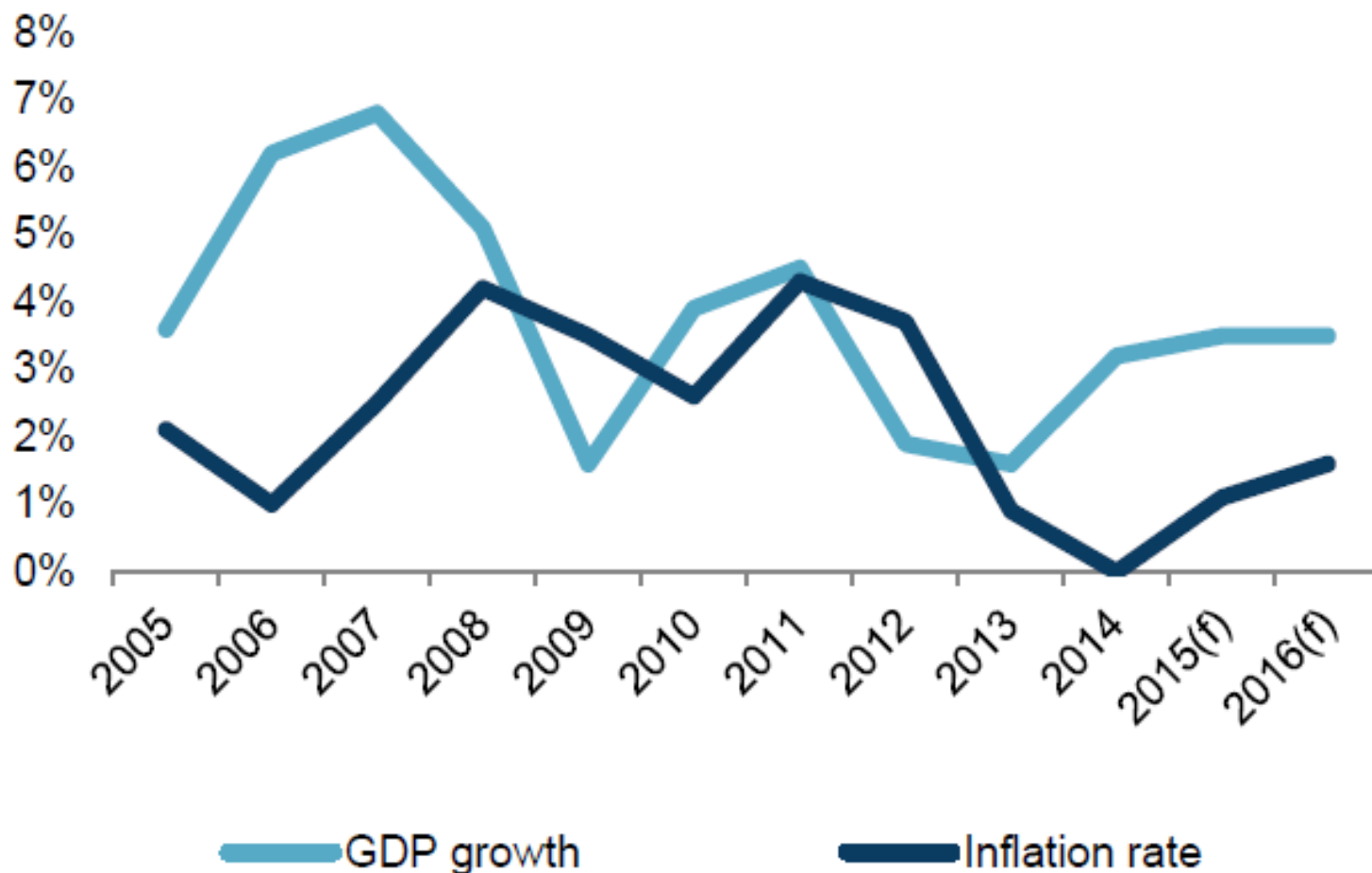
**Q&A**



# REAL GDP Growth (Index) in CEE ( *source: European Commision* 2015)

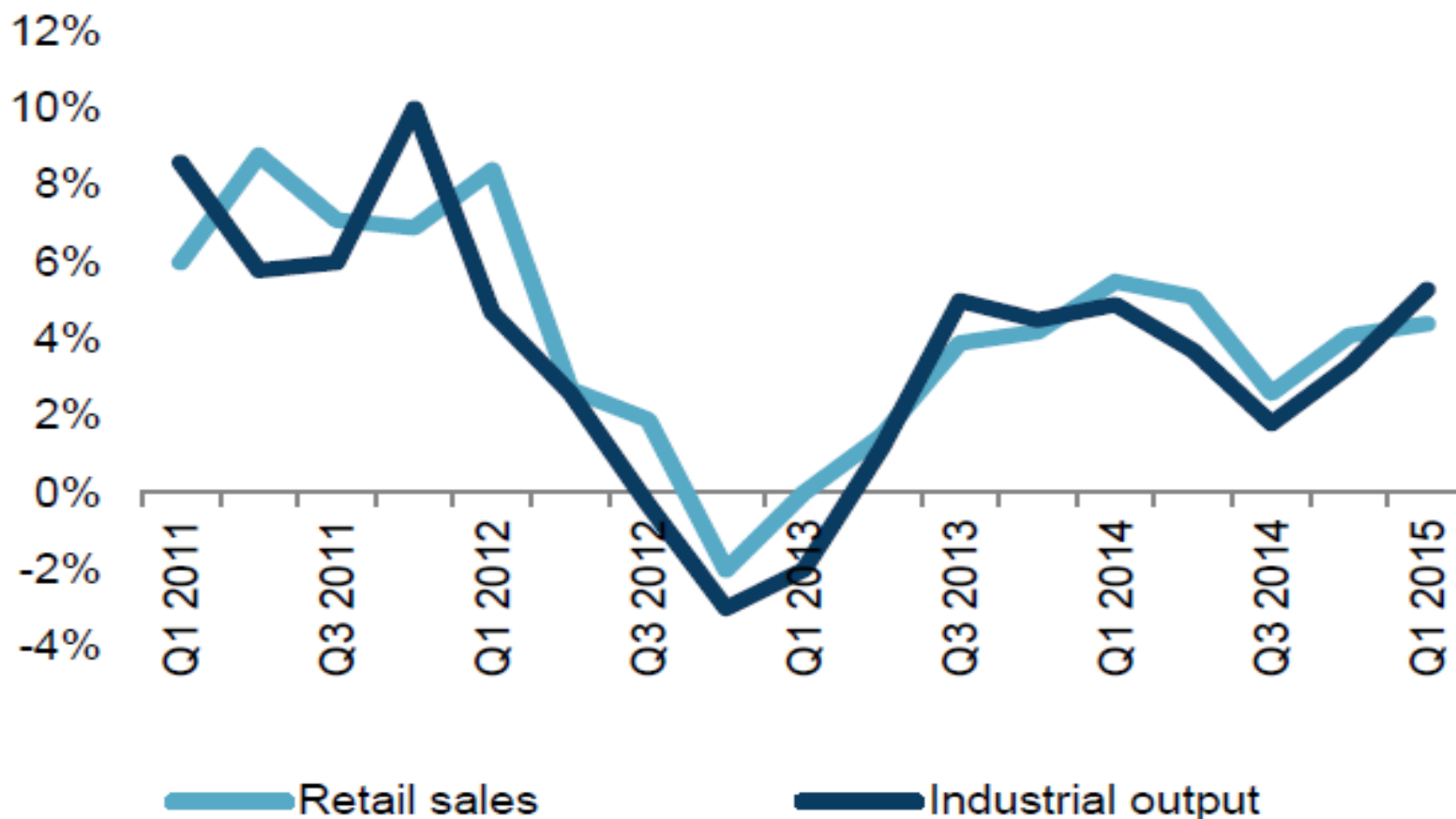


# GDP growth and inflation rate in Poland *(National Bank of Poland)*

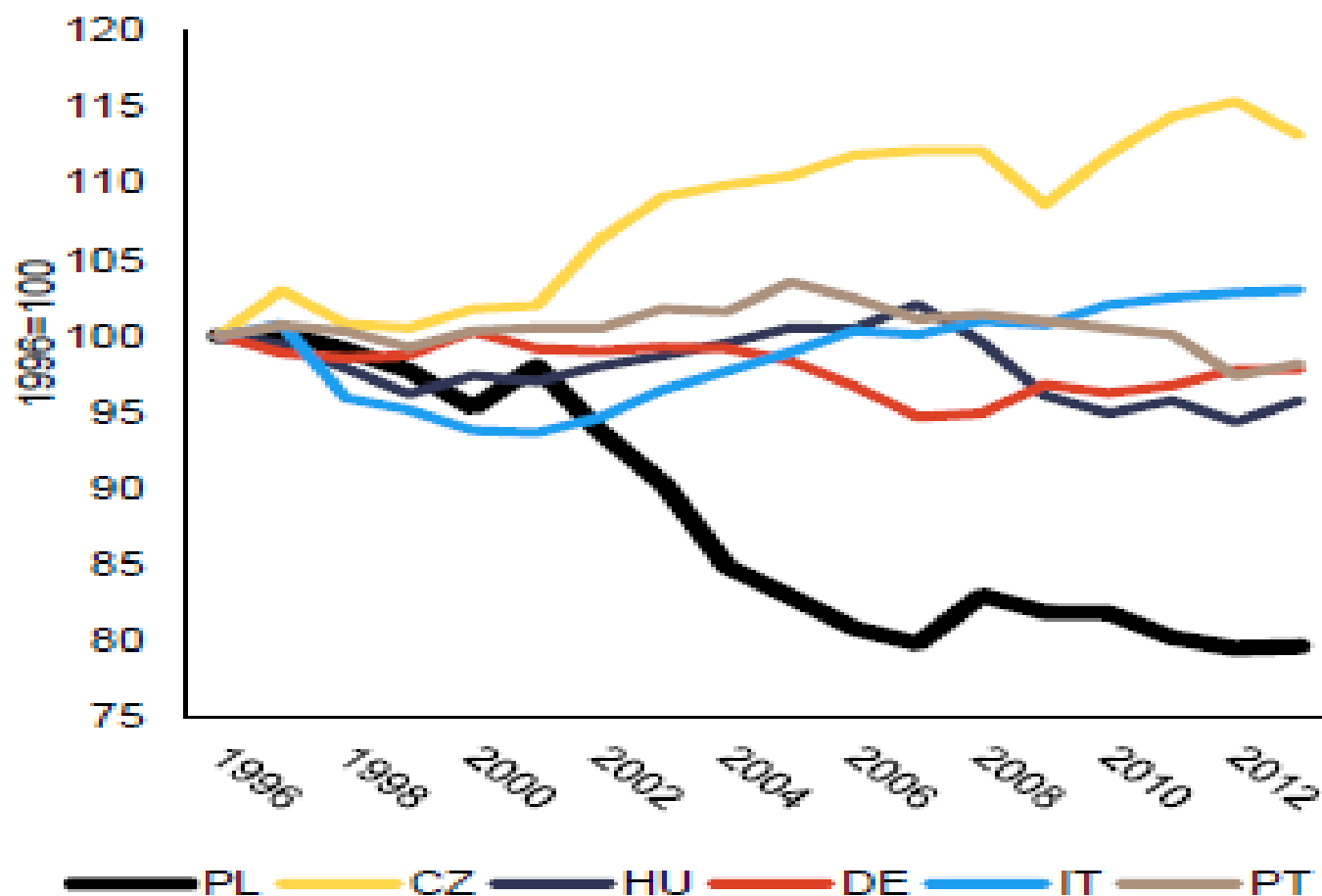


# Retail sales and industrial production growth in Poland

(Central Statistical Office 2015)



# Real Unit Labour Cost ( Source: European Commission Calculations 2015)



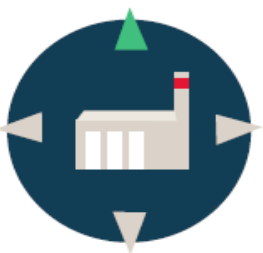
# CEE TOP 500 COMPANIES (*Coface August 2015*)



**572** billion EUR  
total turnover in 2014



**105** companies  
Minerals, chemicals, petroleum,  
plastics & pharma - top sector



**61** companies  
moved up in the ranking



**4.54** % Romania  
highest insolvency rate in CEE



**176** companies  
Poland - top country



**0.05** % Poland  
lowest insolvency rate in CEE

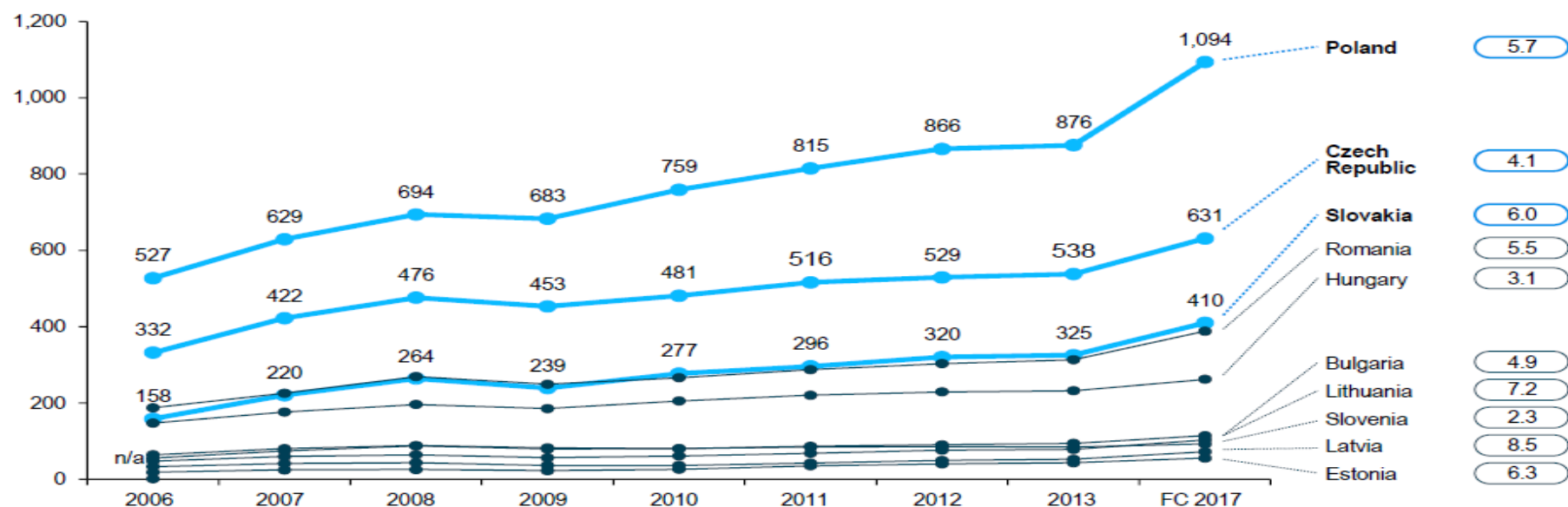


# Poland – biggest logistics market in CEE region

Europe/CEE – Focus on those countries with highest market potential and growth rates – e.g. Poland, Czech Republic ...

Contract logistics market size per country [EUR m] CEE

CAGR '13-'17 [%]



Source: TI Global Contract Logistics 2013

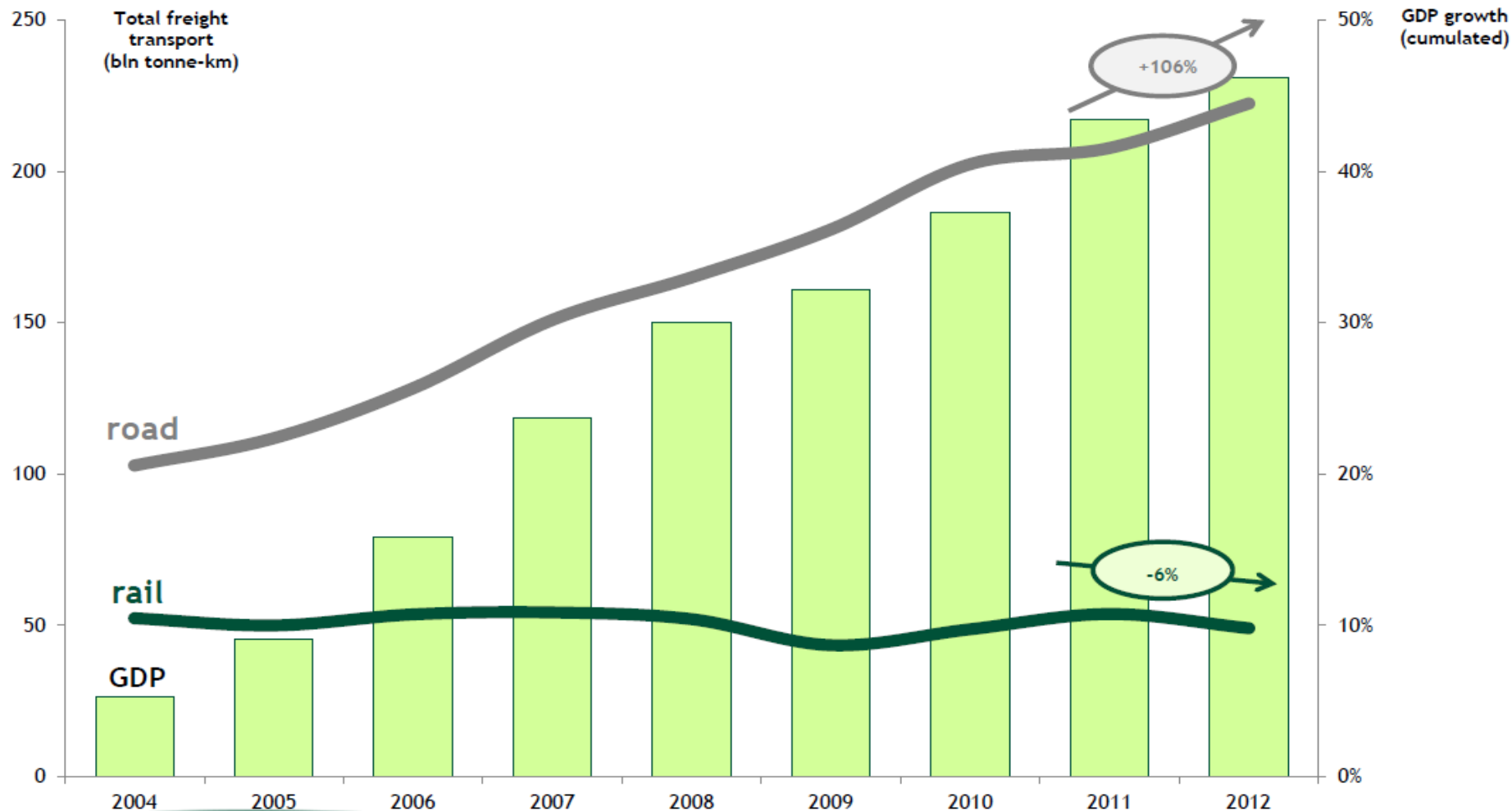


WARSAW SCHOOL OF ECONOMICS

[www.sgh.waw.pl/english](http://www.sgh.waw.pl/english)

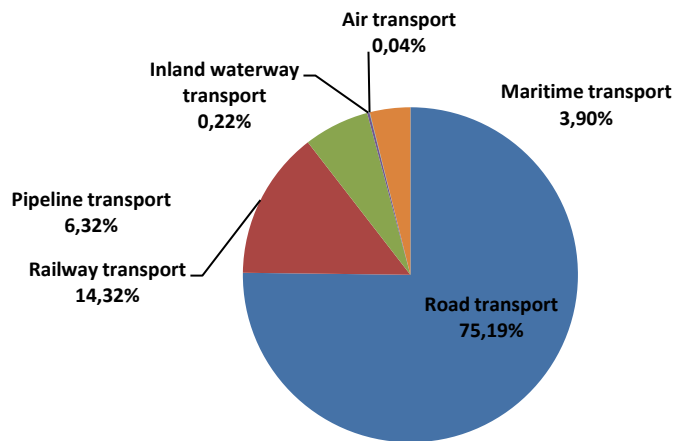


# TRANSPORT MARKET DEVELOPMENT IN POLAND 2004-2012



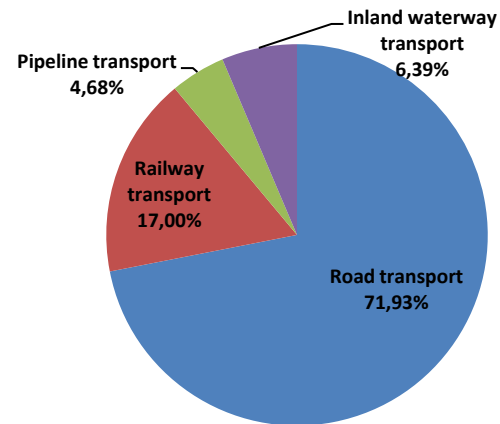
# Poland and EU-28 –transport of goods – comparison (Modal Split)

Poland - transport of goods by mode of transport in 2014 (% of total tkm)



Source: GUS

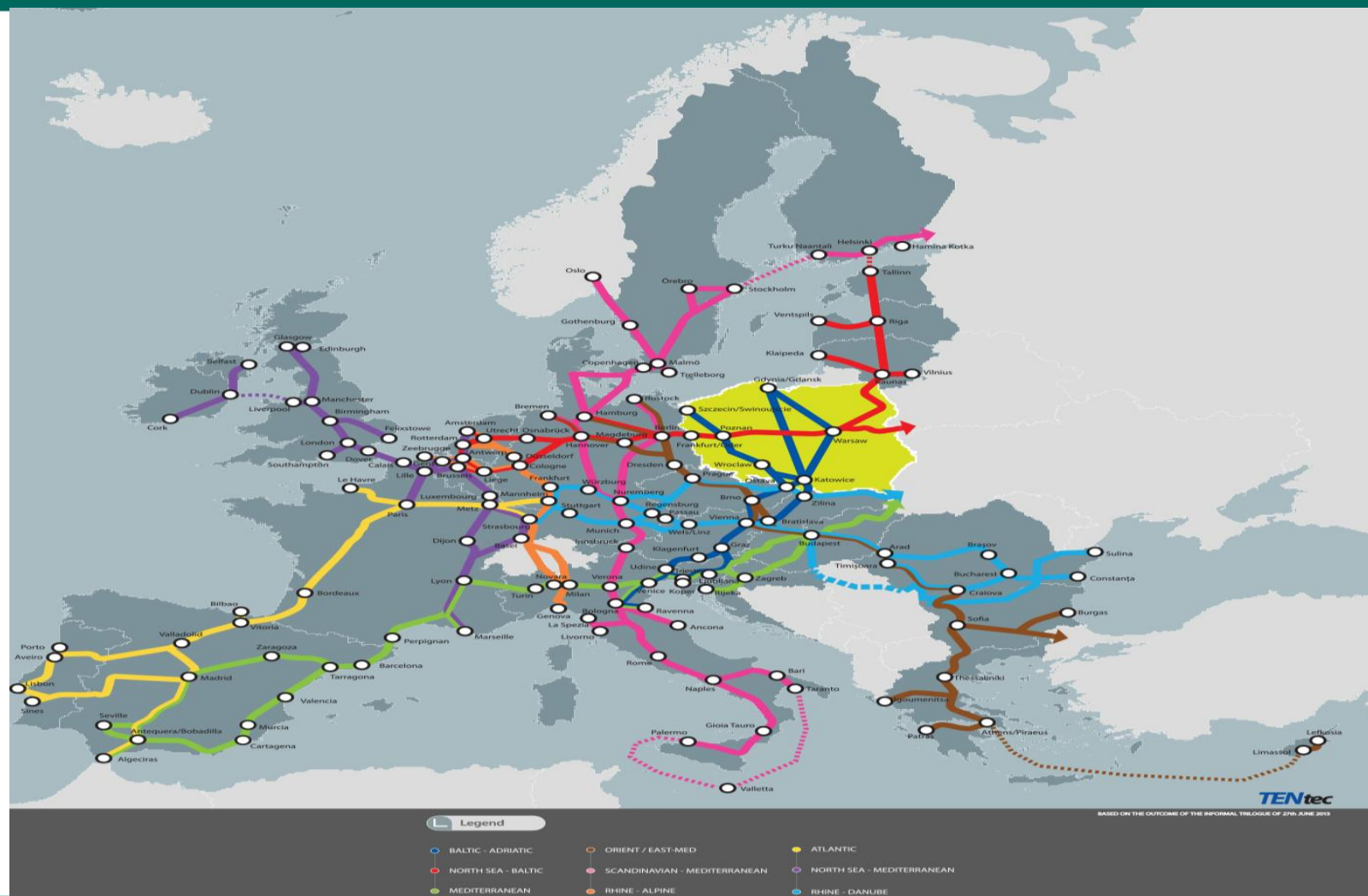
EU-28 - transport of goods by mode of transport in 2013 (% of total tkm)



Source: Eurostat

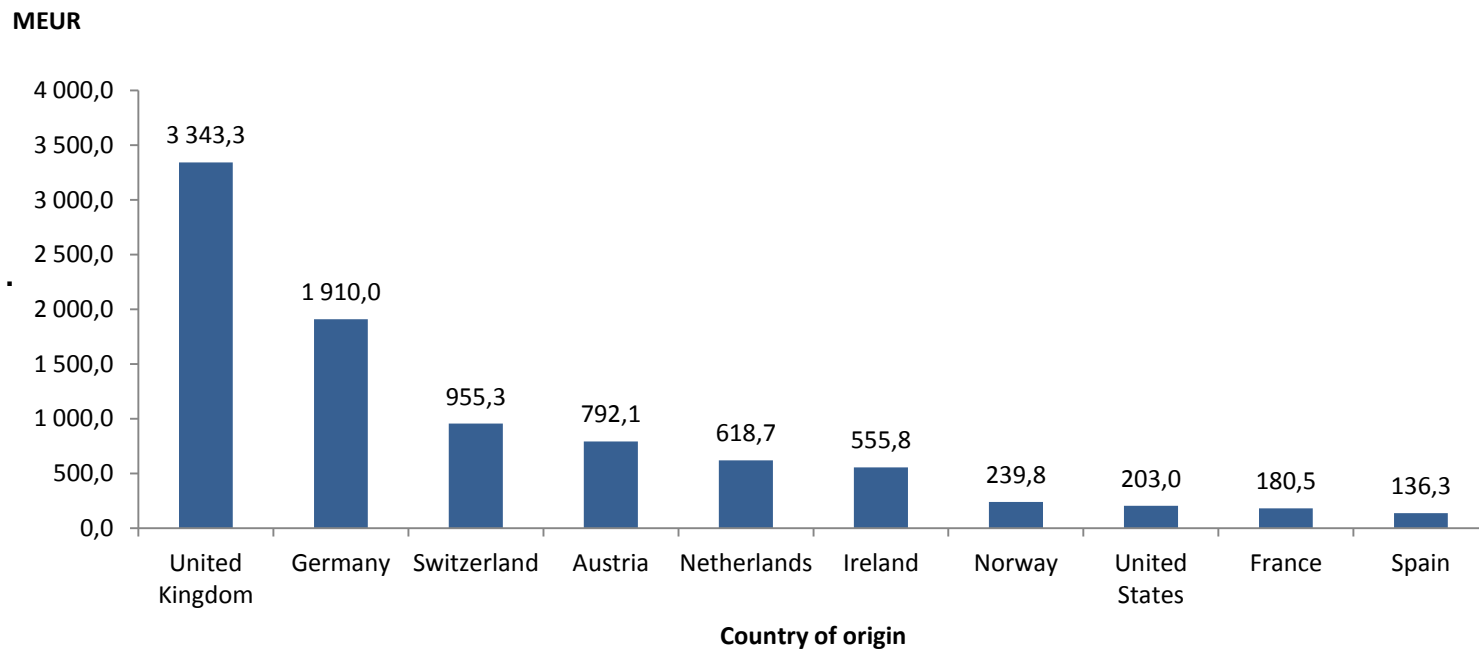


# Poland has 2 Core Network Corridors crossing its country



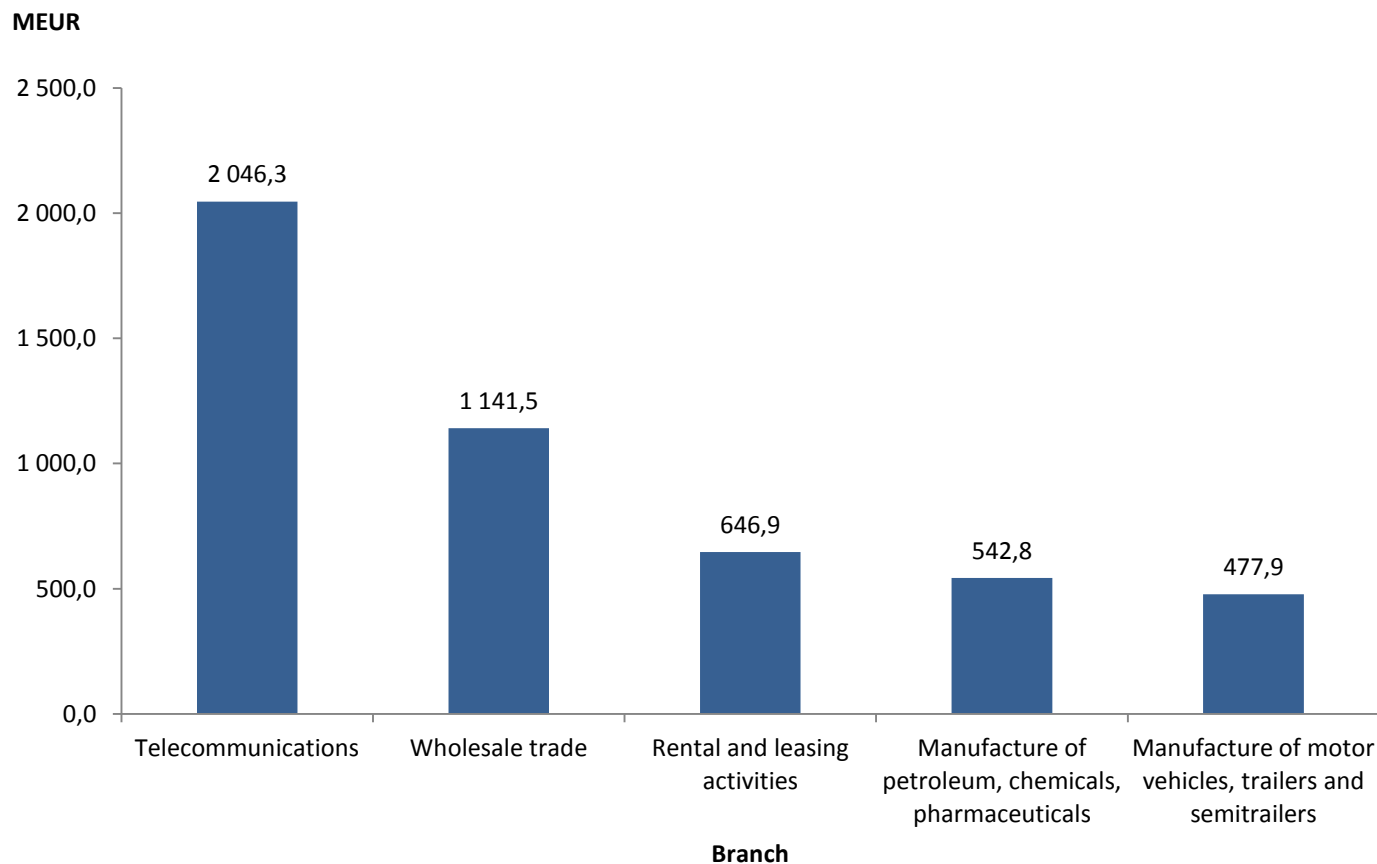
# FDI IN POLAND IN 2013 BY THE COUNTRY OF ORIGIN

Foreign direct investment in Poland in 2013 by the country of origin in EUR million



# FDI IN POLAND 2013

**Foreign direct investment in Poland in 2013  
by economic activity of direct investment enterprise**



# MAIN INVESTORS IN POLAND (2013 AND 2014)



# How Amazon decides on a location?

„Each year we evaluate our fulfillment topology around the World looking for the best opportunities to serve our customers

We do not think in single nations but European wide

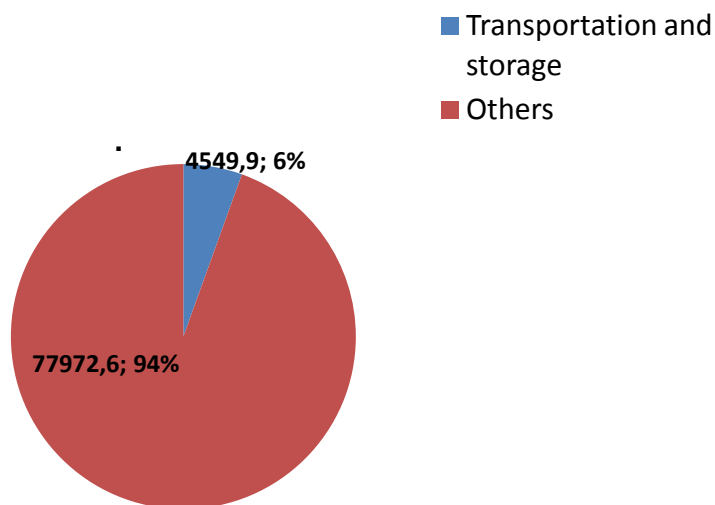
There are a combination of factors we consider:

- Transportation infrastructure
- Labor availability
- Speed of construction
- Relationship with local communities.”



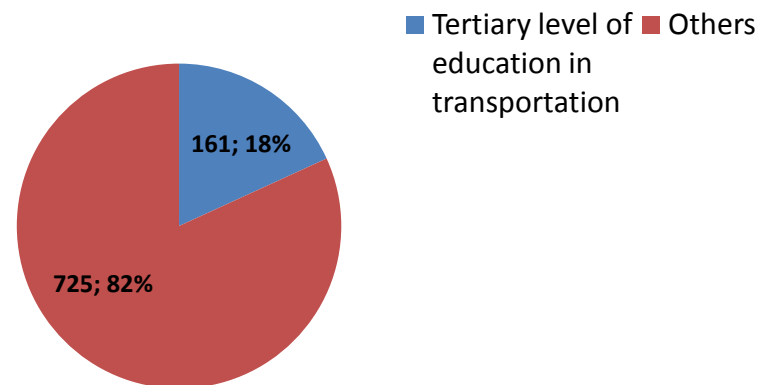
# EMPLOYMENT IN TRANSPORTATION AND EDUCATION

Employment in transportation and storage in relation to total employment in CEE (2015 Q1, in thousands)



Source: Eurostat

Persons with tertiary level of education employed in transportation and storage in relation to total employment in this sector in Poland (2015 Q1, in thousands)



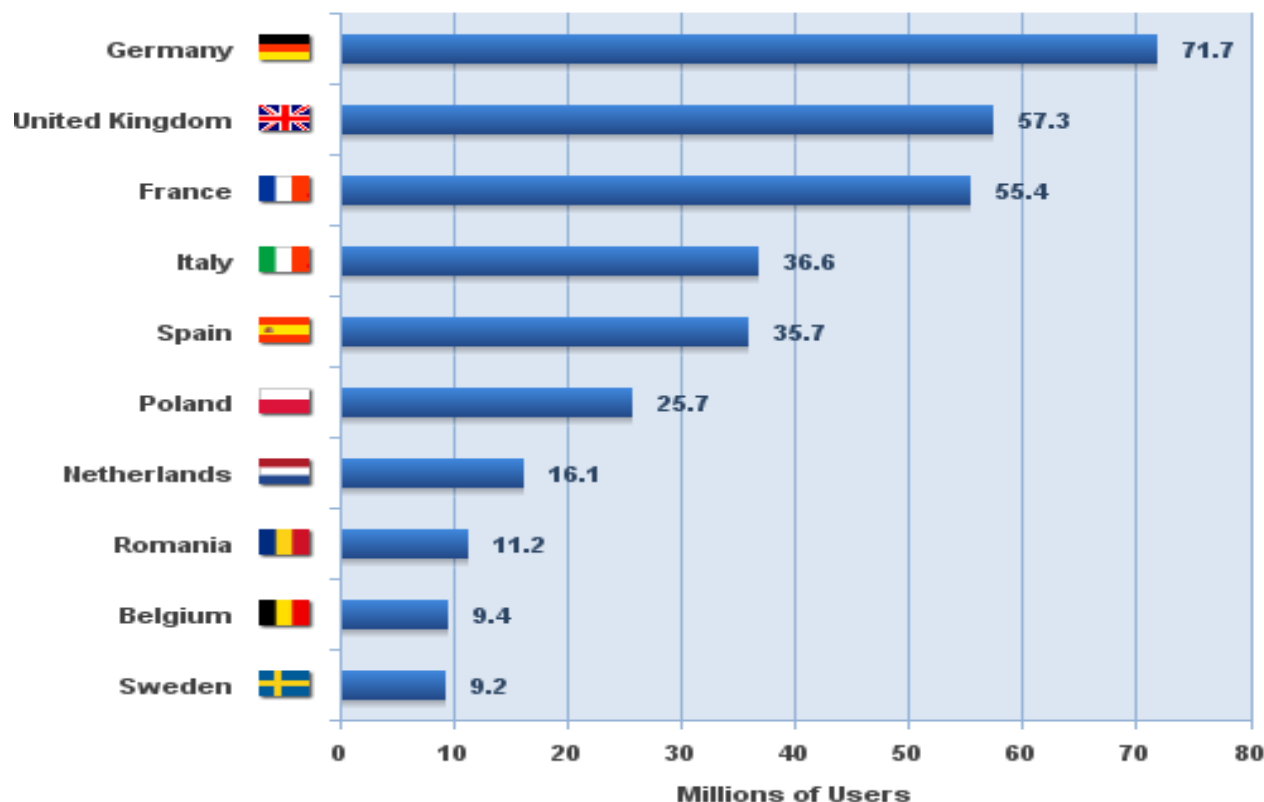
Source: GUS





# TOP TEN INTERNET COUNTRIES IN EU (2014)

## European Union - Top 10 Internet Countries December 31, 2014



Source: Internet World Stats - [www.internetworldstats.com/stats9.htm](http://www.internetworldstats.com/stats9.htm)  
398,972,533 estimated EU Internet users for 2014Q4  
Copyright © 2015, Miniwatts Marketing Group

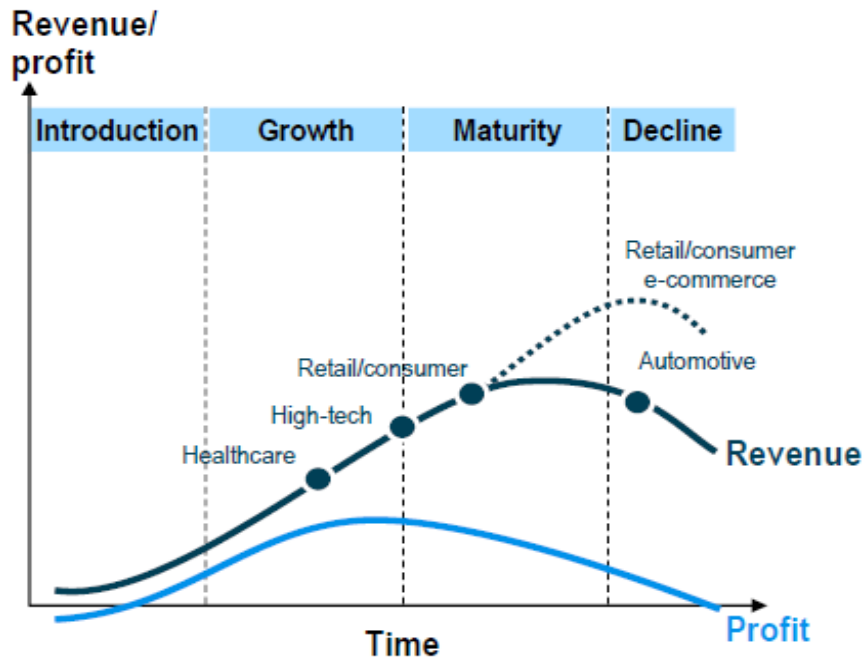


# Comparison of a developed and developing market in a vertical sector

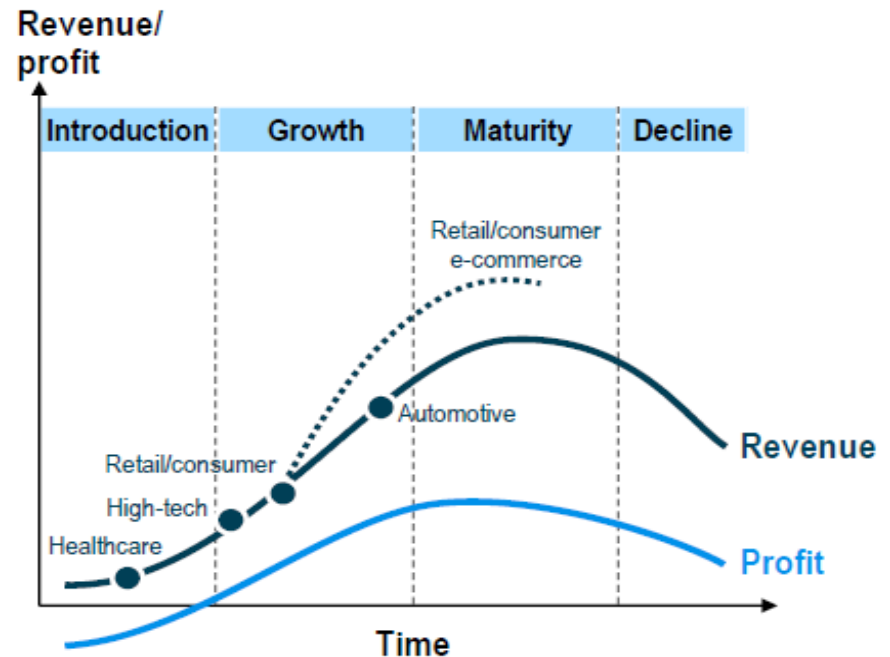
( Source: TI Global Contract Logistics 2013)

## Lifecycles in a vertical sector

### Developed market



### Developing market



# SUMMARY

- 1. Poland economic condition is good and stable. The consumer market is one of the largest market in European Union (over 38 inhabitants).**
- 2. Poland's good economic performance relied strongly on competitive labour costs .**
- 3. Poland participates in the global supply chain thanks to its transit location in Europe and access to the sea.**
- 4. Polish workers are creative and engagement. More and more people develop their logistics skills at universities (public and private). The idea of lean management is growing rapidly in Poland.**
- 5. Poland is one of the fastest-growing ecommerce markets in the European Union.**





WARSAW SCHOOL OF ECONOMICS

[www.sgh.waw.pl/english](http://www.sgh.waw.pl/english)