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 Commission 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 one those countries with highest market potential and growth rates – e.g. Poland, Czech Republic ...

Source: TI Global Contract Logistics 2013
TRANSPORT MARKET DEVELOPMENT IN POLAND 2004-2012

Total freight transport (bln tonne-km)

- Road
- Rail

GDP

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

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

- Road transport: 75.19%
- Railway transport: 14.32%
- Pipeline transport: 6.32%
- Inland waterway transport: 0.22%
- Air transport: 0.04%

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

- Road transport: 71.93%
- Railway transport: 17.00%
- Pipeline transport: 4.68%
- Inland waterway transport: 6.39%

Source: GUS

Source: Eurostat
Poland has 2 Core Network Corridors crossing its country
Foreign direct investment in Poland in 2013 by the country of origin in EUR million

<table>
<thead>
<tr>
<th>Country of Origin</th>
<th>MEUR</th>
</tr>
</thead>
<tbody>
<tr>
<td>United Kingdom</td>
<td>3 343.3</td>
</tr>
<tr>
<td>Germany</td>
<td>1 910.0</td>
</tr>
<tr>
<td>Switzerland</td>
<td>955.3</td>
</tr>
<tr>
<td>Austria</td>
<td>792.1</td>
</tr>
<tr>
<td>Netherlands</td>
<td>618.7</td>
</tr>
<tr>
<td>Ireland</td>
<td>555.8</td>
</tr>
<tr>
<td>Norway</td>
<td>239.8</td>
</tr>
<tr>
<td>United States</td>
<td>203.0</td>
</tr>
<tr>
<td>France</td>
<td>180.5</td>
</tr>
<tr>
<td>Spain</td>
<td>136.3</td>
</tr>
</tbody>
</table>
Foreign direct investment in Poland in 2013
by economic activity of direct investment enterprise

- Telecommunications: 2,046.3 MEUR
- Wholesale trade: 1,141.5 MEUR
- Manufacture of motor vehicles, trailers and semitrailers: 477.9 MEUR
- Manufacture of petroleum, chemicals, pharmaceuticals: 542.8 MEUR
- Rental and leasing activities: 646.9 MEUR
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).

- Transportation and storage: 4549,9; 6%
- Others: 77972,6; 94%

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).

- Tertiary level of education in transportation: 161; 18%
- Others: 725; 82%

Source: GUS
TOP TEN INTERNET COUNTRIES IN EU (2014)

European Union - Top 10 Internet Countries
December 31, 2014

- Germany: 71.7 million users
- United Kingdom: 57.3 million users
- France: 55.4 million users
- Italy: 36.6 million users
- Spain: 35.7 million users
- Poland: 25.7 million users
- Netherlands: 16.1 million users
- Romania: 11.2 million users
- Belgium: 9.4 million users
- Sweden: 9.2 million users

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)
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.