



Lublin region

Total area of the voivodeship	25 122 km ²
Number of citizens: - in urban areas	2139.7 thousand 46.2%
Population per 1 km ²	85 persons/km ²
Principal city	Lublin
Bigger cities in the voivodeship	Chełm, Zamość, Biała Podlaska, Puławy, Świdnik
Special Economic Zones	Tarnobrzeg Starachowice Mielec
Industrial& Technology Parks	Lublin Science and Technology Park, Puławy Science and Technology Park, Świdnik Regional Industrial Park, Southeastern Science and Technology Park in Zamość
Regional Investor Assistance Centre	Lublin

Lublin voivodeship, or Lublin region (in Polish *województwo Lubelskie*) is a voivodeship, or province, region, located in southeastern Poland.

The economy of the region is based on agriculture, because Lublin region is a large and important farmland in Poland. Due to good soil and climatic conditions Lublin region is the country's leader in crop-raising and fruit-growing, especially hops, soft fruit and tobacco.

The voivodeship owes its dynamic economic growth to, among other things, investments in the region's key industries with large development potential.

They include:

- machinery industry
- automotive industry
- aircraft industry
- BPO and IT
- furniture industry (with a clear development tendency, especially in terms of export)
- food industry (aimed at the development of food processing technologies and biotechnology in the food sector)

1. Lublin region is the gateway to the East

- Pan-European transport corridor o the route east-west/north-south.
- Well-developed border crossing infrastructure with Ukraine (4 border crossings) and Belarus (3 border crossings).
- Well-developed broad-gauge railway network to facilitate the transport of goods to the Commonwealth of Independent States.

- Border area between the European Union and the Customs Union (Russia, Belarus, Kazakhstan).

2. Solid research and technology base

- Lublin is the largest academic centre of Eastern Poland.
- Presence of Science and Technology Parks, as well as specialised research institutions (Life Sciences, Agricultural, Medical and Veterinary Sciences).

3. Lublin's tourist potential

- The variety of cultural institutions, an ever-growing network of sports and leisure facilities, and the availability of health care, schools and nurseries are key criteria that establish the quality of life of a region's residents, as well as the climate and environment for business processes.

4. International and national flight connections from Lublin Airport

5. Development of transport infrastructure

- Opening of the airport in Lublin in 2012
- Construction of the S17 expressway with Lublin's ring road
- Construction of the S19 Lublin – Rzeszów expressway

6. Friendly institutional environment

- Numerous business environment institutions bringing together and supporting enterprises from the region.
- Institutions established to support investors, e.g. Investor's Assistance Centre (COI), Investors' and Exporters' Assistance Centre (COIE)
- Actions to promote companies and products from the region, e.g. the "Lubelskie Brand" (in Polish *Marka Lubelskie*).
- Very large number of business entities – highly-qualified small and medium enterprises as potential subcontractors.

7. Investment sites

- 3 Special Economic Zones.
- Greenfield and brownfield sites in convenient locations.

8. One of the lowest costs of office space lease in Poland.

- The highest supply of modern office space (almost 7 million m²) in Central and Eastern Europe.

9. Competitive labour cost and high personnel qualifications

- Availability of young and well-educated candidates.
- Favourable age structure of residents – a sizeable share of working-age population.

10. Available incentives for investors

- Government grants
- EU funds under six national programmes and the Regional Operational Programme for Lublin Voivodeship
- Special Economic Zones (SEZs)
- Science and Technology Parks
- Local tax credits

11. Employment stability

- 12. Well-educated and competent human resources** – the number of foreign students and graduates from Polish universities is growing every year, including graduates of degree schemes that are most wanted among sophisticated technology companies.
- 13. Emerging innovation leader in the region** – fast research and development spending growth and active implementation of innovative research projects.
- 14. Well-developed vocational education system.**
- 15. Increased cooperation of companies, scientific and business-related institutions of Lublin region (e.g. clusters initiatives).**
- 16. Compared to other regions of Eastern Poland, Lublin voivodeship shows high employment rates in the R&D sector.**
- 17. Good conditions of development of agriculture, farm and food processing, machinery and wood manufacture, offshoring type services and tourism.**
- 18. The neighbourhood with Belarus and Ukraine.**

Sectors with huge potential

Food industry

- Lublin region is among the biggest and most important agricultural regions of the country. It is a leading region in agriculture and orchard cultivation.
- favourable natural conditions for the development of ecological food:
 - farming land cover 70% of the voivodeship's area
 - forests cover 24.2% of the voivodeship's area
 - climate conditions allowing to grow all plants typical for this geographical and climate zone
 - over 2000 licensed farms produce ecological food based on the methods of eco-production of plants and animals
- well-organized agriculture market:
 - 3 large agricultural stock exchanges:
 - Agricultural Stock Exchange in Elizówka near Lublin
 - Eastern Crops and Goods Exchange in Lublin
 - Eastern Centre of Agroexport in Biała Podlaska
 - fairs and exhibitions organized by fair-exhibition centre in Lublin (TArgi Lublin S.A.)
- leading position in terms of growing numerous plants, vegetables and fruit:
 - hops - 83% of domestic output,
 - tobacco - 58% of domestic output
 - raspberries - 79% of domestic output
 - currant – 48,8% of domestic output
 - strawberries – 27,9% of domestic output
 - white beet – 17,9% of domestic output
 - potatoes – 7,8% of domestic output
- strong apiarian traditions:
 - the only in Europe specialist apiarian school in Pszczela Wola
 - beekeeping is a traditional occupation in many farms
- availability of highly skilled labour:
 - University of Life Sciences in Lublin (8.6 thousand students – academic year 2015/2016)
- scientific and research base for agriculture sector:

- Institute of Agrophysics of the Polish Academy of Science in Lublin
- Witold Chodzko Institute of Rural Health in Lublin
- Artificial Fertilizers Institute in Puławy
- Farming, Fertilizing and Soil Institute in Puławy
- State Veterinary Institute in Puławy
- potential partners and suppliers:
 - sugar plants in Krasnystaw, Rejowiec
 - large creameries: Spomlek - Radzyń Podlaski, Biomlek - Chełm, OSM Krasnystaw, Piaski, Ryki
 - companies operating in the meat processing sector: Lmeat Łuków, Wierzejki, Cioczek in Lublin, Felix Sp. z o.o. in Rossorz, Meat Plant Dobrosławów
 - brewing companies: Perła Lublin Breweries, Zwierzyniec Brewery
 - grain mills: pasta plant Lubella, Grain Production Plant in Zamość
 - companies operating in the spirits sector: Stock Poland
 - herbal sector representatives, e.g.: Herbapol Lublin, and vegetables and fruits processing companies, e.g. Materna Polska in Łopatki near Nałęczów, Osmofrost in Osmolice, Agram in Lublin

Energy sector

Hard coal

There is a significant coal field in Lublin region and an active hard coal mine Lublin Coal Group "Bogdanka" (Lubelski Węgiel Bogdanka S.A.). The energy-dense hard coal is sold mainly for production of electrical power, heat energy and cement. 18.7 % of the national hard coal reserves are located in Lublin region, which can make its mining industry development even more dynamic.

Additionally, in the Lublin province operates PD Co. company which is a Polish subsidiary of the Australian company - Prairie Downs Metals Limited, established to build a coal mine in the Lublin Coal Basin. They received four licenses for the diagnosis of coal deposits in the Lublin region. The project includes exploration concessions with a total area of 235 km² within Lublin Coal Basin. The project assumes the construction of a modern coal mine which produces 6-7 million tons per year and employs approx. 2 000 employees. Its construction is expected to begin in late 2016.

Renewable Energy Sources

The great environmental potential of the region creates friendly conditions for the development of such power sectors as: heat energy and electrical power from biomass, solar power, water energy, geothermal electrical power engineering and wind energy. The agricultural character of the region allows for growing energy crops and for energy production from plant and animal offalls (biogas). Regions within poviats of Lublin, Parczew, Biłgoraj and Chełm are the most favourable for development of the solar power industry. Chełm is documented to have the highest in Poland annual sum of solar radiation - over 950 kWh/m² annually.

Potential of RES in the region:

- Hydroelectric potential (theoretical without the Vistula and the Bug rivers): 444.5 GWh / year
- The energy potential: 2 531.644 GWh / year
- The energy potential of biomass: 35 016 857 GJ (9 734 746 MWh / year)
- The potential of solar energy: 950 - 1020 kWh / m²,
- Biogas potential: 68 million m³ of the energy value of 2.5 million GJ.
- Potentially generated electricity: 289 082.345 MWh, heat 272 212.245 MWh

Machinery industry

The tradition of engineering: the production of passenger cars since 1918, production of trucks in 1945, installation of French cars (Peugeot) and Korean (Daewoo) in Lublin in 1990s. Lublin region boasts of a long tradition of a machinery industry, not only in Lublin but also in such towns as Świdnik, Janów Lubelski, Kraśnik or Międzyrzec Podlaski.

Leaders of the industry in Lublin voivodship include e.g.:

- AgustaWestland - a major shareholder of the PZL Świdnik S.A.,
- POL-MOT Warfama in Lublin - one of the biggest Polish manufactures of the agricultural equipment. The company has launched production of a first test series of tractors, sold under the URSUS trade mark,
- TSUBAKI-HOOVER POLSKA Co. Ltd., in the ball bearings factory FLT Krasnik S.A. in Krasnik,
- Same Deutz Fahr Polska in Mełgwia - production agricultural machines,
- Caterpillar Poland Sp. z o. o. in Janów Lubelski - the manufacturer of construction and mining machines, diesel engines and industrial gas turbines,
- „AluTeam” Polska Sp. z o.o. in Biała Podlaska - the manufacturer of trailers, semitrailers and bodyworks for motor vehicles,
- D&D Resory Poland in Lublin - manufacture of springs for cars
- Sipma S.A. in Lublin - production of agricultural machinery,
- Manufacturer of Equipment and Machinery for the Food Industry “Spomasz” in Bełżyce,
- Sigma S.A. in Jastków - manufacturer of mining machinery,
- Orzeł S.A. in Ćmiłów
- Multivac Sp. z o.o. in Jastków
- Military Engineering Plants in Dęblin,
- Company for the Automation of Animal Production „Meprozet” in Międzyrzec Podlaski

The science - research and qualified staff:

- Technical University of Lublin (10 249 students - November 2014) - important scientific research institute, which working with businesses,
- Lublin Science and Technology Park
- WSK „PZL-Świdnik”,
- Świdnik Regional Industrial Park - research and development potential of the Technical University of Lublin.

Logistic sector

Lublin region advantage is its great geographical location and nearness of transcontinental traffic routes.

- Convenient location and conditions transportation:
 - Pan-European east-west/north-south transit corridor - A2 motorway, roads: S17 and S12, railway lines: E20 (Paris-Moscow) and E7 (Gdynia - Odessa);
 - Well developed border crossing infrastructure: Ukraine (4 crossings) and Belarus (3 crossings) - the most up-to-date customs (phytosanitary and veterinary) terminal in Poland located in Koroszczyń, and land cross-docking facility at Małaszewicze with the capability to trans-load any type of goods shipped via railway;
 - Situated at the border between the EU and the Customs Union of Belarus, Kazakhstan and Russia - the region is a gate to Eastern Europe and Central Asia.
 - Broad-gauge railway lines facilitating transport to the CIS countries;

- Lublin Airport in Świdnik
- Constantly expanded infrastructure:
 - National road S-17 - one of the most important transport routes linking Warsaw with Kyiv and Lviv;
 - Geographical location of the region makes it a good place for logistics centres (the following are already operating there: Raben, Schenker, Tradis, Cargosped, C. Hardwig, Polcont, Trade Trans, Spedcont, M&M Militzer);

The road network (according to the Lublin branch of General Directorate for National Roads and Highways, the state as on the 1.01.2016): The length of national roads in the Lublin province is 1,095.271 kilometres (in total).

Technical classification of roads.

The length of roads in each class:

- Express roads (S) 79.303 km (including dual carriageway sections - 71.433 km)
- Main roads of the precipitated move (GP) 903.816 km (including dual carriageway sections - 16.686 km)
- Main roads (G) 51.497 km

Development of road infrastructure:

1. S17 - Warsaw - Lublin (realization to 2019r.)
2. S19 - Lublin - Kraśnik (in the tender procedure) length of 42 km
3. S19 - Kraśnik - border of the province (in the tender procedure) length of 35 km
4. DK74 - Frampol bypass (in progress)
5. DK74 - Gorajec bypass (in preparation)
6. S17 - Piaski - Hrebenne (in preparation) length of 113.3 km
7. S17 - Tomaszow Lubelski bypass (in the tender procedure)
8. S12 - Piaski - Dorohusk (in preparation) length of 62.4 km
9. S19 - Lublin - Lubartów (in preparation) length of 17.3 km
- 10.S19 - Międzyrzec Podlaski - Lubartów (in preparation) - length of 62.7 km
- 11.S19 - Międzyrzec Podlaski - Białystok (in preparation) - length of 10.7 km
- 12.A2 - "Lublin" junction - Kukuryki border crossing point

One of the values of Lublin region is the proximity of transcontinental routes – the voivodeship has the shortest road and rail routes going through Berlin and Warsaw to Minsk in Belarus, Moscow in Russia, and Kiev and Odessa in Ukraine.

Also located in the region is a Customs - Free Zone based in Małaszewicze with a railway siding, a broad and standard gauge, which is also connected to the No. 2/E20 magistral railway line. PKP Cargo Group handling port includes the following stations: Małaszewicze, Raniewo, Kowalewo, Podsędków, Wólka, Kobylany, Bór, Chotyłów. Closeby is also one of Europe's greatest state-of-the-art. Car terminal in Koroszczyn, which is part of the road border crossing point in Kukuryki.

- availability of skilled labour:
 - 77.6 thousand students in the region
- relatively low labour costs:
 - 89 % of the national average
- proper scientific base:
 - Maria Curie-Skłodowska University in Lublin
 - John Paul II Catholic University of Lublin
 - University of Life Sciences in Lublin
 - Medical University in Lublin
 - Lublin University of Technology
 - University College of Enterprise and Administration in Lublin
 - Vincent Pol University in Lublin (Social-Environmental Academy)
 - Economy and Innovation Academy in Lublin
 - Social Sciences Academy in Lublin
 - Management and Administration Academy in Zamość
 - Jan Zamoyski Humane-Economy Academy in Zamość
 - State Vocational Academy in Chełm
 - State School of Higher Education in Chełm
 - State Vocational Academy in Biała Podlaska
- BPO/SSC/ITO/R&D companies in the region:
 - Alior Bank (Relationships with Clients Office)
 - Altkom Software & Consulting
 - Arcus IT Systems
 - Asseco Business Solutions
 - Billennium (Lublin Branch)
 - BL Stream
 - Brad Services
 - Britenet
 - Accounting Operations Centre Orange Polska
 - Colt
 - Comarch
 - Compugroup Medical
 - DataArt Lublin
 - Edge One Solutions
 - EOS KSI
 - Euronet (Euro RTV AGD)
 - Genpact
 - Impaq
 - Infinite
 - KS Engineering Technology (IBS GmbH)
 - Mobica
 - MTBC – EUROPE
 - OEX Voice CC
 - OPTeam S.A.
 - Orange Customer Service
 - Pekao Faktoring
 - PhlexGlobal
 - PKO BP (Contact Center)
 - Proama (National Customer Service)
 - Sii
 - Simple
 - Softsystem
 - Sollers Consulting
 - SST
 - Team International

- Tesseract Dev
- Transition Technologies
- Trimetis
- Warta 24 (Liquidation of Damages Centre)

Tourism

- clean natural environment and areas offering good conditions for leisure:
 - Kazimierz Dolny - town of artists
 - Leczyńsko-Włodawskie Lake District - vast forest area
 - Roztocze - diversified, uplandish terrain and picturesque tourist destinations
 - Puszcza Solska and Lasy Janowskie - enormous area covered with forests, rarely met in Europe
 - Zalew Zemborzycki - artificial lake, recreation area
 - Janów Podlaski - beautiful stud and the largest in the world exhibition of Arab horses „Pride of Poland”
- numerous monuments:
 - religious: pilgrimage locations, catholic and orthodox sanctuaries
- numerous national parks of significant importance for the promotion of eco-tourism and agro-tourism e.g :
 - Roztocze National Park
 - Polesie National Park
- health resorts:
 - Nałęczów cardiological health resort
- traditions in horse breeding:
 - stud of Arab horses in Janów Podlaski
 - stud in Białka
 - Polish horse breed in Roztocze National Park
- foreign investors in tourism and leisure sector:
 - Lublin Grand Hotel Sp. z o.o.
 - Mercure - Unia - Accor Hotels
 - Campanille
 - Europa Hotel
 - Spa Nałęczów

Economic Potential

Gross domestic product in 2013

	in mln PLN	in %	per capita
Poland	1656341	100	100
Lublin region	65738	4.0	70.7

Source: Central Statistical Office

Gross value added by kind of activity (mln) in 2013

	Total	Agriculture, hunting and forestry; fishing	Industry	Construction	Trade and repair; hotels and restaurants; transport, storage and communication	Financial and insurance activity; real estate, renting and business activities	Other service activities
Poland	1470844	46067	381788	111437	433852	135047	362644
Lublin	58376	3576	12187	4189	16571	5810	16044

region							
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Source: Central Statistical Office

Average monthly gross wages and salaries (PLN) in 2015

Poland	4150,88
Lublin region	3699,48

Source: Local Data Bank

Local job market

Economic activity of the population aged 15 and more (the first quarter of 2016)

	Economically active persons (in thous.)	Activity rate (%)	Registered unemployment rate (%)
Poland	17215	56.1	7.
Lublin region	943	55.1	10.8

Source: Central Statistical Office

Registered unemployed persons by educational level in the second quarter of 2016

	Total	Tertiary	Vocational	General	Basic vocational	Lower secondary, primary and incomplete primary
Poland	1392460	179142	304346	151150	368462	389360
Lublin region	95799	14175	23407	11495	22336	23386

Source: Local Data Bank

Registered unemployed persons by age in in the second quarter of 2016

	Total	24 years and less	25-34	35-44	45-54	55 years and more
Poland	1392460	186333	388802	307553	252264	257508
Lublin region	95799	14930	30427	20359	15325	14758

Source: Local Data Bank

Higher education institutions including non-public higher education institutions

Higher education institutions

	Schools		Students	
		Non-public schools		In non-public schools
Poland 2014/2015	434	302	1469386	359178
Lublin region 2014/2015	18	10	80983	24.8 thous.

2015/2016	18	10	77562	22.6 thous.
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Source: Central Statistical Office

Selected higher education institutions

Lublin University of Technology (Politechnika Lubelska)

selected faculties: computer science, environmental engineering, mechanics and machine construction, production management and engineering, architecture and urban planning,

Maria Curie-Skłodowska University in Lublin (Uniwersytet Marii Curie-Skłodowskiej)

selected faculties: administration, management, biotechnology, philology, computer science, law

Military Aviation Academy in Dęblin (Wyższa Szkoła Oficerska Sił Powietrznych)

selected faculties: air force, space science

John Paul II Catholic University of Lublin (Katolicki Uniwersytet Lubelski Jana Pawła II)

selected faculties: english philology, psychology, sociology, law, biotechnology, journalism and social communication, european

Medical University of Lublin (Uniwersytet Medyczny w Lublinie)

selected faculties: medical, dental, nursing, pharmacy, cosmetology, medical emergency

University of Life Sciences in Lublin (Uniwersytet Przyrodniczy w Lublinie)

selected faculties: landscape architecture, veterinary medicine, biology, agriculture, environmental protection, horticulture, organic farming

Major foreign investors in Lublin Voivodeship

Investor (firm in Poland)	Country of capital origins	Type of business	Commune
Industry			
ABM Greiffenberger	Germany	Production of electrical motors	Lublin
Aliplast Sp. z o.o.	Belgium	production of aluminum profile systems for the construction industry	Lublin
Baxter Healthcare Corporation (Baxter Manufacturing Sp. z o.o.)	USA	production of innovative medications and therapies	Lublin
Biosyntec (Zakłady Tytoniowe w Lublinie S.A.) [Tobacco Plants]	France	tobacco production	Lublin
Bochemie Group (Permedia Zakłady Chemiczne S.A.)	Czech Republic	production of colouring agents	Lublin
British Vita (Vita Polymers Poland Sp. z o.o.)	United Kingdom	production and processing of polymer materials	Lublin
Clondalkin Group Holdings BV (Boxes Prestige Poland)	Netherlands	production of paper cartons	Lublin
Daewon Kang Up Co. Ltd, (D&D Springs Poland Sp. z o.o.)	South Korea	production of automotive parts	Lublin
Danish Brewery (Lublin Breweries Pearl)	Denmark	beer production	Lublin
Deutz Fahr Holding & Finance BV (Deutz Fahr Poland Sp. z o. o.)	Netherlands	manufacturing of machinery for agriculture and forestry	Melgiew
Earlex Group	France	manufacturing of electrical	Lublin

(Elektroland PW) Hüttenes-Albertus Chemische Werke GmbH (Hüttenes-Albertus Poland Sp. z o.o.) Inergy Automotive (Inergy Automotive System Poland Sp. z o.o.) Bellmer (Klimapol SP. z o.o.)	Germany	switchboards production of auxiliary materials for foundry	Lublin
	France	production of automotive fuel systems	Lublin
	Germany	manufacturing of equipment for mechanical dewatering and thickening of sludge and chemical	Jastkow (village of Dabrowica)
Michael Leier (Leier Markowicze S.)	Austria	production of construction materials	Ksiezpol (village Majdan Stary)
Power Pipe AB (Prim S.A.) PZ CORMAY S.A.	Sweden	manufacturing pre-insulated pipes	Lublin
	International capital	Producer of clinical chemical tests	Lublin
Spectra (Polfa S.A.)	International group	manufacturing of medical devices, pharmaceutical packaging and accessories	Lublin
Sulzer Elbar (Sulzer Elbar Polska Sp. z o.o.) SpitznasGmbH (Transtools Sp. z o.o.)	Switzerland	iron casting	Lublin
	Germany	manufacturing of hydraulic machinery	Lublin
Wentworth Tech INC (Wentworth Tech Sp. z o. o.)	Canada	production of design tools and moulds for plastics processing, processing of polymers	Poniatowa
PD Co Sp. z o.o.	Australia	mining industry / mining	Warsaw
Services			
(D). Chase Enterprises (UPC Telewizja Kablowa S.A) [Cable Television] Gruppo CLN (MW Poland Sp. z o.o) Hispanica de aviation (Lotnicze Przedsiębiorstwo Usługowe "Heliseco" sp. z o.o)	USA	cable tv service	Lublin
	Italy	merchandising agency	Lublin
	Spain	helicopter services	Swidnik
Raben Group B.V. (Raben Polska Sp. z o.o.)	Netherlands	forwarding and logistics services	Lublin
Hotels and tourism			
Accor Hotels	France	Hotel Mercure Unia	Lublin
Louvre Hotels SAS	France	Hotel Campanile	Lublin
Von der Heyden Group	Germany	Grand Hotel Lublinianka	Lublin
Real estate			
First Property Group (Centrum Zana)	United Kingdom	developer office	Lublin
Trade			
Maxima Grupe Litwa ALDIK NOVA Sp. z o.o Klépierre (Lublin Plaza)	Lithuania	grocery store chain	Lublin
	France	shopping and entertainment centre	Lublin
Carrefour	France	Network of shops	
E. LECLERC	France	Network of shops	
Jeronimo Martins Holding	Portugal	Network of shops	Lublin Voivodeship
METRO AG (macro Cash and Carry, Real, Media Markt)	Germany	Network of shops	

OBI	Germany	Network of shops	
TESCO Plc	United Kingdom	Network of shops	
The Schwarz Group	Germany	Network of shops	

BPO/SSC			
Genpact Poland Sp. z o.o.	England	accounting and financial support for international clients	Lublin
Convergys	US	client relationship management	Lublin
Orange Customer Service	France	comprehensive telephone support for individual customers and business	Lublin
Accounting Operations Centre Orange Polska	France	financial and accounting support	Lublin

ICT			
Sii Sp. z o.o.		IT services and modern technology	Lublin
Transition Technologies SA		copyright systems for selected market sectors: energy, gas, manufacturing and biomedicine	Lublin
Comarch S.A.		producer and supplier of modern information systems.	Lublin
Mobica		IT solutions for e.g. automotive and aviation industries, finances, mobile applications,	Lublin
Trimetis		Information and consulting services	Lublin

Useful addresses

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The material has been updated by Investor's Assistance Centre in Lublin.

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