POLAND'S LOGISTICS

PAIiIZ Polish Information and Foreign Investment Agency
www.paiz.gov.pl

1. Transport infrastructure in Poland

The transport infrastructure in Poland includes roads, rail, airports, seaports, inland waterways, pipelines and combined transport. The Polish transport infrastructure requires much more investment in order to make Poland more attractive for foreign capital.

Poland has signed international agreements concerning European transport networks:

- European Agreement on Main International Traffic Arteries (AGR),
- European Agreement on Main International Railways Lines (AGC),
- European Agreement on Important International Combined Transport and Related Installations (AGTC),

According to these agreements, there are four main transport corridors running through Poland:

- European route E67 from Helsinki (Finland) to Prague (Czech Republic) – within Poland, following the A8 highway and the DK8 National Road
- European route E30 from Cork (Ireland) to Omsk (Russia) – within Poland, following the A2 highway and the DK2 National Road
- European route E40 from Calais (France) to Leninogorsk (Kazakhstan) – within Poland, following the A4 highway and the DK4 National Road
- European route E75 from Vardo (Norway) to Sitia (Greece) – within Poland, following the A1 highway and the DK1 National Road

The Polish transport network includes 4,700 km of state-owned roads (including planned motorways and international routes), as well as a 5,500 km rail network, 8 airports and 4 seaports, which belong to Transport Infrastructure Needs Assessment (TINA). TINA is a part of the Transeuropean Network – TEN, including infrastructure of transport, telecommunications and energy networks.

- **Road transport**

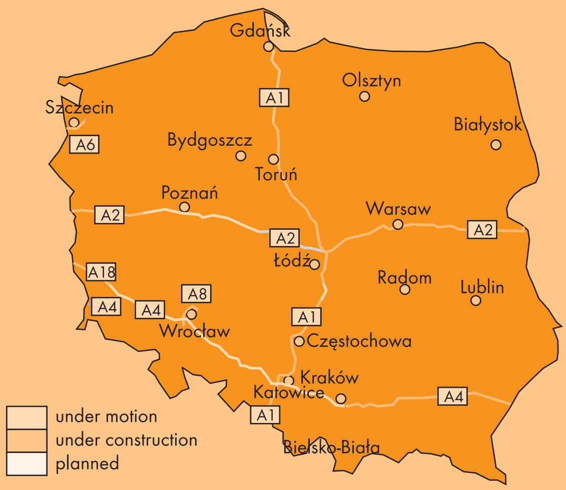
Road infrastructure in Poland includes 550 km of motorways, 230 km of expressways, and other province, district and communal roads. The total length of state-owned roads in Poland is 379,455.5 km.

The profile of overall roads in Poland and the motorway network is shown on the maps above. In a few years Poland will have the newest motorway network in Europe. According to the Polish Government programme, the completion dates for particular motorways in Poland are as follows:

POLISH ROAD NETWORK

Source: GDDKiA

POLISH MOTORWAYS



Source: www.wikipedia.pl, GDDKiA

- **Railway transport**

The total length of railway lines in Poland was 20,253 km in 2005, which was only 3 km more than in 2004. The railway network is the densest in the west of Poland. Polish railway operators offer a high level of service, especially on such routes as Intercity (IC). Travelling around Poland by express train is safe, comfortable, and quick. The time between Warsaw and other cities (200 to 400 km away) is 2 to 5 hours.

Motorway number	Route	Completion date*
A1	S6/S7 (Gdańsk)-Toruń-Łódź-Piotrków Trybunalski-Częstochowa-Gliwice-Gorzyczki-border-(Ostrava)	2010
A2	(Berlin)-border-Świecko-Poznań-Łódź-Warszawa-Biała Podlaska-Kukuryki-border-(Minsk)	2013
A4	(Dresden)-border-Jędrzychowice-Krzyżowa-Legnica-Wrocław-Opole-Gliwice-Katowice-Kraków-Tarnów-Rzeszów-Korczowa-border-(Lvov)	2013
A18	(Berlin)-border-Olszyna-A4 (Krzyżowa)	2009

* These dates are for completion of the whole routes. Particular sections will be ready for use earlier.

LENGTH OF RAILWAY LINES IN POLAND

Railway lines operated	2004	2005
in kilometres	20,250	20,253
per 100 km^2 of total area in km	6.5	6.5
including electrified in km	12,017	11,884
per 100 km^2 of total area in km	3.8	3.8

Source: Central Statistical Office (GUS)

The total length of electrified railway lines in Poland in 2005 was 11,884 km, which was 133 km less than in 2004. The best-electrified railways lines are located in central and southern Poland.

- **Air transport**

Poland is much better equipped now in airport infrastructure than it was just a few years ago. During the last two years, the number of civil airports servicing international air connections has increased. After liberalization of the air transport market in 2004, most of the regional airports (chiefly those located in major cities) have developed their own international connections, particularly with the support of cheap airlines.

The largest Polish airport is the Frederic Chopin Airport in Warsaw. It offers many more foreign air connections than the other Polish airports. Poland has regular connections with 32 countries and 56 cities all around the world. According to Central Statistical Office (GUS) data, the number of regular routes from Polish airports in 2005 was 107, of which 97 were international connections. Examples of connections in 2006 are presented in the following table.

RAILWAY LINES IN POLAND

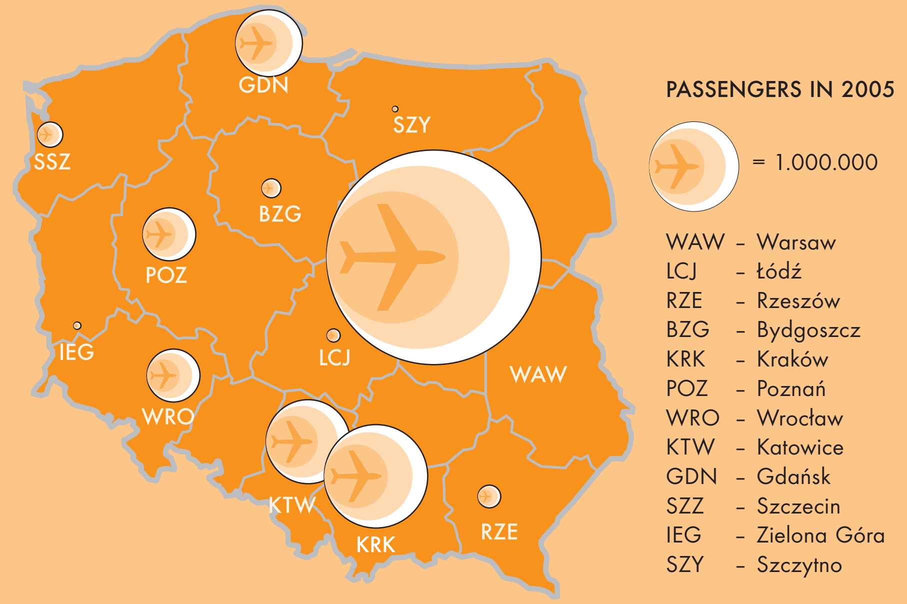
Source: www.trakcja.rail.pl

WEEKLY AIR CONNECTIONS FROM POLISH AIRPORTS IN 2006

from Warsaw to	weekly takeoffs	from Cracow to	weekly takeoffs	from Gdańsk to	weekly takeoffs
Amsterdam	41	Amsterdam	3	Copenhagen	20
Athens	11	Athens	2	Dublin	4
Barcelona	7	Barcelona	4	Frankfurt	18
Beirut	3	Berlin	12	London	20
Berlin	14	Brussels	3	Munich	14
Brussels	31	Budapest	6	**from Wrocław to**	
Bucharest	11	Chicago	9	Copenhagen	6
Budapest	30	Dublin	11	Frankfurt	7
Chicago	30	Helsinki	2	London	10
Dublin	21	London	41	Munich	20
Frankfurt	42	Paris	12		
Geneva	7	Prague	12		
Hamburg	16	Rome	5		
Helsinki	33	Tel Aviv	4		
Istanbul	9	**from Poznań to**	**weekly takeoffs**		
Kaliningrad	7	Copenhagen	6		
Kiev	11	Dublin	5		
London	84	Frankfurt	14		
Lvov	7	London	12		
Moscow	18	Munich	27		
New York	42				
Paris	53				
Prague	31				
Rome	38				
Vienna	35				

Source: Elaboration of WYG International data

AIRPORTS IN POLAND



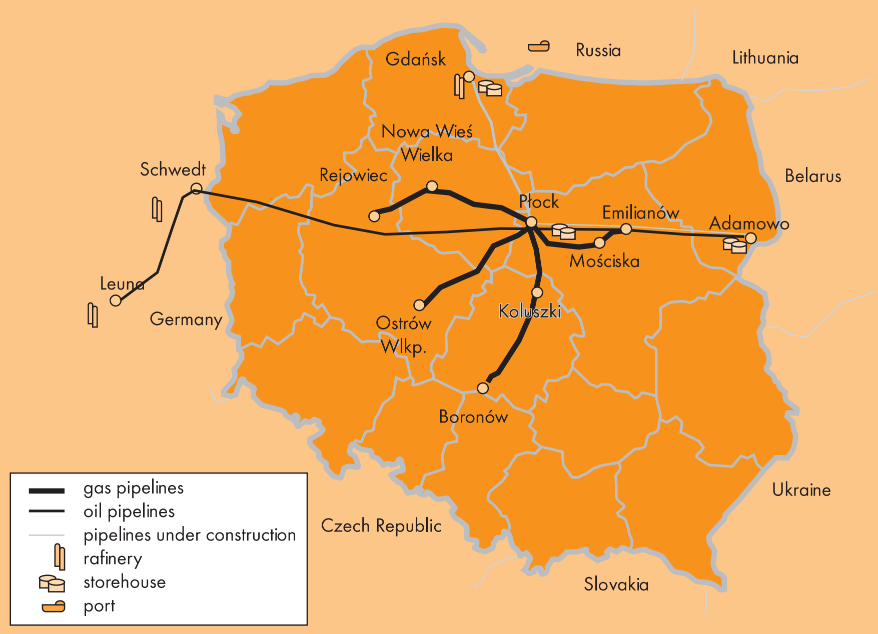
Source: www.wikipedia.org

FERRY CONNECTION FROM POLISH SEAPORTS IN 2006

Ferry connection		Shipowner	Voyage per week
from	to		
Świnoujście	Ystad	Unity Line	14
		Polish Baltic Navigation (Polferries)	7
		Unity Line	12
Gdańsk	Nynashamn	Polish Baltic Navigation (Polferries)	3
Gdynia	Karlskrona	Stena Line	12
Świnoujście	Copenhagen	Polish Baltic Navigation (Polferries)	4-5

Source: Elaboration of WYG International data

PIPELINES IN POLAND



Source: The Oil Pipeline Operation Company 'Przyjaźń' Joint Stock-PERN "Przyjaźń" S.A.

- **Maritime transport**

The main and largest Polish Baltic seaports are located in Gdańsk, Gdynia, Szczecin and Świnoujście. Significant smaller seaports are located in Darłowo, Elbląg, Kołobrzeg, Łeba, Police, Władysławowo, Ustka and Stepnica.

The Polish maritime economy produces 2.5% of GDP, and the sector's share in exports is 6%.

The main Polish seaports have transport connections with the most important international seaports in the world. Maritime ferry transport routes lead from Polish ports to Sweden, Germany and Denmark (table).

The largest number of passengers travelled on the routes Poland-Sweden (73.3%), Poland-Germany (15.6%) and Poland-Denmark (7.8%).

- **Pipelines in Poland**

The main pipelines in Poland include the crude oil pipelines Adamowo-Płock, Płock-Schwedt and Gdańsk-Płock. The other ones connect industrial centres and generally run over short distances.

- Planned projects of pipeline construction

The development plans for pipeline construction concern two main directions:

Eastern – a third pipeline from Adamowo to Płock, which is currently under construction, will make it possible to adjust the capacity of the Polish pipelines to the capabilities of the northern part of the "Przyjaźń" pipeline. The new pipeline, in addition to addressing important issues concerning the security of the country's energy supply, will also allow the development of crude oil transport services for other countries. The completion date of this investment is set for the end of 2006.

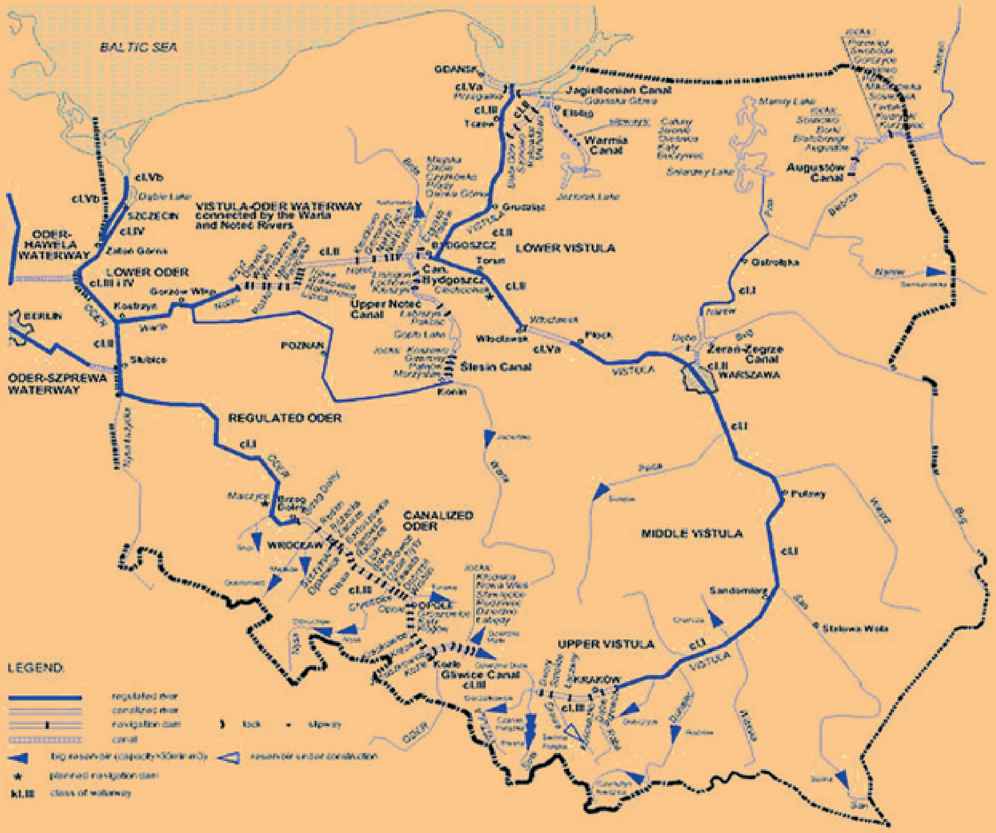
Southern – the Brody-Płock pipeline is being built together with the Ukrainian Ukrtransnafta which will enable transport of up to 25 mln tonnes of Caspian crude oil yearly.

- **Inland water transport**

Inland navigation is an important mode of transport. The length of navigable waterways in Poland is 3,983 km, but only 1,600 km are exploited, or about 40% of the total length. The longest of the exploited Polish rivers are the Vistula, the Oder and the Warta. The length of the Vistula is 1,047 km. The length of the Oder in Polish territory is 742 km, and the Warta 808 km. Although the Vistula is the longest river in Poland, it is equipped with no freight navigation.

There are 16 main river ports in Poland. Most of them are equipped with required port infrastructure like lifts, stock squares and warehouses. These ports are adapted to service such cargo as coal, iron ore, general cargo, fertilizers, grains and the like. The most important of them are described in the table on the page 4.

MAIN NAVIGABLE ROUTES IN POLAND



Source: *www.aquadocinter.pl*

MAIN RIVER PORTS IN POLAND

Port	Types of freight	Location	Infrastructure of ports			Load capacity of barge		Flow capacity (T million)
			Lift	Stock square (sq m)	Warehouse (sq m)	trans-shipment	laybay	
Gliwice	coal, iron ore, general cargo (including containers)	39.3 - 41.2 km of Gliwicki Channel	T 2x17.5; T 4x8.0; T 1x7.0; T 2x20.0	27,300	14,039	30	10	4.5
Koźle	coal, iron ore, others bulk cargo	98.0 km of Oder River	1x10.0 T; T 1x8.0; T 3x7.0	5,130	800 (capacity of engine containers T 10,000)	16	10	1.0
Wrocław–municipal port	bulk cargo, coal, general cargo, containers	250.6 km of Oder	T 1x10.0; T 1x20.0; T 1x20.0 gated; T 1x5.0 gated	4,400	10,100	20	–	1.2
Wrocław Popowice	general cargo, coal, cement for silos	266.2 km of Oder	T 1x8.0; T 2x3.0; T 1x2.0	6,470	1,570	6	6	1.1
Cigacice	general cargo, cement, construction materials	471.8 km of Oder	T 1x1.5 gated	3,230	1,570	6	6	0.5
Bydgoszcz	general cargo, bulk cargo, cargo boats repair	5.10 km of Brda	T 2x3.2 gated; T 1x6.3 gated; T 1x12.5 mobile; T1x15.0 swimming	3,800	1,430	–	–	1.06
Sandomierz	slag, steel products, general cargo	269.2 km of Vistula	T 2x16.0 mobile	5,500	–	4	4	1.2
Warsaw Żerań	slag, steel products cargo boats repair (swimming dock)	520 km of Vistula (Żerań-Zegrze Channel)	T 7x16.0 mobile	35,000	–	10	10	2.7

- **Intermodal transport**

The infrastructure of intermodal transport involves maritime and land intermodal terminals (mainly container), as well as logistics centres.
Intermodal transport may involve:
- combined rail-road transport
- combined rail-ship transport
- combined rail-air transport
- combined road-ship transport

Most types of intermodal transport involve railways, which are the most advantageous for this mode of transport. Intermodal transport provides important prospects for growth in freight transportation as well as a higher market share for rail businesses in the European transport sector.
The main players in the Polish sector of intermodal transport are PKP Cargo S.A., Spedcont, Polscont, Polzug, Trade Trans, Cargosped, and the Polish seaports, especially the Baltic Container Terminal in Gdynia.
The first private carrier which started to compete with the monopolist on the intermodal transport market, PKP Cargo, is PCC Containers. However, PKP Cargo still handles 98% of intermodal transport in Poland.

2. Characteristics of logistics in Poland

- **Employment in logistics**

According to the latest research, employment in logistics is becoming much more interesting in the last few years than in many other sectors. There are two groups of workers in the logistics sector. The first is the group of people who are responsible for logistics in manufacturing companies, and the second is people who work directly in the logistics sector.
Work associated directly with logistics includes work in sub-sectors such as transport, shipping, warehousing, customs, and so on.
There is no need to have a logistics education to work in the sector, but it could be necessary in the future, as the sector is dynamically developing and the recruitment requirements are rising. On the Polish market there are more and more young people qualified in the logistics area, especially in transport. However, it can be useful in this sector to have professional experience in trade or sales, as well as negotiation and analytical skills.

EMPLOYMENT IN TRANSPORT IN 2004 (THOUSAND)

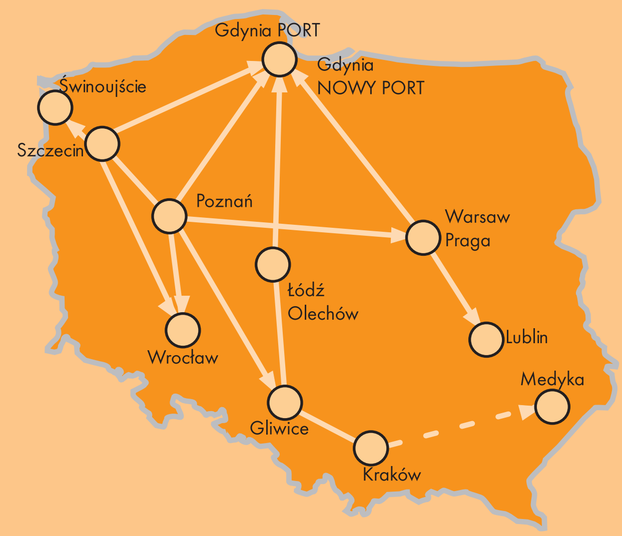
Year	2004	2005
Total	410.8	408,8
Public sector	212.8	200.1
Private sector	198.0	208.7

Source: Central Statistical Office (GUS)

- **Salaries in logistics**

The average gross wages in logistics are relatively high, comparable to those in the construction and environmental protection sectors, and higher than in trade or services. In 2005 the average gross monthly salary in logistics was PLN 2,500 (table).

INTERMODAL CONNECTION NETWORK IN POLAND



Source: 'New Industry Monthly', No. 06/2006

MONTHLY TOTAL WAGES IN LOGISTICS, TRANSPORT AND SHIPPING IN 2006

	Total monthly gross wages (PLN)				
Job position	10% earn less than	25% earn less than	Median	25% earn more than	10% earn more than
Blue-collar workers	1,000	1,300	1,713	2,500	3,700
Specialists	1,420	1,900	2,693	3,650	5,350
Managers	2,000	2,403	3,700	5,500	8,000
Executives	2,500	4,100	6,000	10,000	16,000
Presidents	3,000	4,580	7,100	17,000	35,000

Source: Internet Salary Survey, www.pracuj.pl

- **Public and private transport sector in Poland**

According to the national register of business entities (REGON), in 2005 there were 261,520 entities registered in transport, of which 772 were in the public sector. There were also 13,565 entities newly registered in 2005, of which 99.9% came from the private sector.

- **GDP in transport, warehousing and communications**

GROWTH OF REAL GDP IN TRANSPORT

	2002 (I-IV)	2003 (I-IV)	2004 (I-IV)	2005 (I-IV)
Gross added value	101.3	103.6	105.1	103.2
Transport, warehousing and communications	107.4	103.5	103.6	102.0

Source: Central Statistical Office (GUS)

3. Cargo and passenger transport in Poland

The total number of passengers transported in 2005 was 1,045,827. The majority of passengers (75%) travelled by road. The fewest travellers used maritime transport.

The number of passengers decreased from 2004 in railway and road transport, while growth was noted in maritime and inland waterway transport, as well as in air transport.

PASSENGERS BY TYPE OF TRANSPORT IN 2005

Transport of passengers	2004	2005
passengers in thousands, including:	1,085,509	1,045,827
railway transport	272,162	256,916
road transport	807,281	782,025
maritime transport	626	805
including ferries	626	695
inland waterway transport	1,396	1,444
air transport	4,044	4,637

Source: Central Statistical Office (GUS)

- **Goods transport by type in 2005**

In 2005 the total tonnage of transported goods was 1,422,585,000 tonnes. The majority of goods were carried by road transport, which accounted for 76%.

TRANSPORT OF GOODS BY TYPE IN 2005

Transport of goods	2004	2005
in thousand tonnes	1,324,511	1,422,585
railway transport	282,919	269,562
road transport	956,939	1,079,761
transport for hire	452,202	563,584
including road transport entities	370,205	442,746
transport on own account	504,737	516,177
pipeline transport	53,378	54,259
maritime transport	22,499	9,362
inland waterway transport	8,747	9,607
air transport	29	34

Source: Central Statistical Office (GUS)

4. Road transport

In Poland about 80,000 companies include transport activity in their registration documents. However, this is not the main activity of most of these companies. Only a fifth of them are engaged in transport, including nearly 8,000 in road transport abroad.

About 92% of carriers are in private hands, of which more than 74% possess from one to four vehicles and employ up to 5 people. Only 26% of transport companies in Poland employ more than 5 workers.

KM – Koleje Mazowieckie (Mazovia Railways)

Network length, gauge and electrification (2005):
- standard gauge, electrified at 3000 V

KM is a new company, operating local trains around Warsaw. It has taken over trains and employees from PKP.

SKM – SKM Warszawa Sp. z o.o.

Network length, gauge and electrification (2005):
- standard gauge, electrified at 3000 V

SKM operates commuter services around Warsaw using hired PKP electric trains.

WKD – Warszawska Kolej Dojazdowa (Warsaw Commuter Railways)

Network length, gauge and electrification (2001):
- standard gauge, electrified at 600 V

This company operates light rail trains around Warsaw. It used to be a subsidiary of PKP, but was sold to the Mazovia regional authority at the end of 2004.

CTL – Chem Trans Logistic

Network length, gauge and electrification (2003):
- 130 km standard gauge, electrified at 3000 V

In 2002 CTL took over the Maczki-Bór "sand railway" in Katowice. They now (also) operate open-access freight trains throughout Poland. In 2005 the CTL group carried 2 billion tonne-km net of freight.

EN – Euronaft-Trzebinia

Network length, gauge and electrification (2004):
- standard gauge, not electrified

LOTOS – LOTOS Kolej Spółka z o.o.

Network length, gauge and electrification (2004):
- standard gauge, not electrified

PTKiGK Rybnik – Przedsiębiorstwo Transportu Kolejowego i Gospodarki Kamieniem S.A., Rybnik

Network length, gauge and electrification (2004):
- standard gauge, not electrified

PTKiGK Zabrze – Przedsiębiorstwo Transportu Kolejowego i Gospodarki Kamieniem Sp. z o.o., Zabrze

Network length, gauge and electrification (2004):
- standard gauge, not electrified

The company is a private railway operator and has been active on the market since 1953. The company offers complete service and exploitation of railway sidings, railway transport of bulk commodities, forwarding and shipment as well as transport logistics. The company also specializes in repair and construction of track systems, repair of diesel locomotives and freight cars of various kinds as well as electric appliances and communication system devices. Earth work plays a significant role in the company's activity, including mining waste dumping and technical and biological land reclamation.

The company holds a licence for providing railway transport of bulk commodities, ISO 9001:2000 Certificate and Certificate of Safety. It has been awarded a European Medal for railway transport and complete operation of sidings as well as land reclamation. Its customers include coal mines, sugar plants, power plants and many others.

RP – Rail Polska

Network length, gauge and electrification (2004):
- standard gauge, not electrified

In 1999 Ed Burkhardt (well-known from EWS in the UK and Eesti Raudtee in Estonia) founded this freight railway company. In 2003 the company bought up the Polish companies Kolex and ZEC-TRANS, which mainly operated coal trains from mines to power stations.

TS – Transoda Sp. z o.o.

Network length, gauge and electrification (2004):
- standard gauge, not electrified

This company, based in Inowrocław, operates freight trains between Inowrocław/Janikowo and Gdańsk Kanał Kaszubski.

ENTERPRISES IN TRANSPORT FOR HIRE, BY NUMBER OF LORRIES AND ROAD TRACTORS

Years	Total	Enterprises with the number of lorries and road tractors					
		5 or fewer	6-9	10-19	20-49	50-99	100 or more
2004	1,608	269	654	404	229	43	9
2005	1,791	290	745	440	263	40	13

Source: GUS

5. Railway transport[1]

There is only one national railway registered in Poland, which is Polish State Railways (PKP). PKP SA was established on 1 January 2001 as a result of commercialization of the state-owned enterprise PKP. Its exclusive shareholder is the Polish Treasury.

Polish State Railways (PKP)

At the end of 2001 the old PKP was split up into different subsidiaries. The most important for railway operations are:
- PKP Intercity (long-distance passenger traffic)
- PKP Przewozy Regionalne (regional passenger trains)
- PKP Szybka Kolej Miejska (commuter traffic around Gdańsk/Gdynia/Sopot)
- PKP Warszawska Kolej Dojazdowa (commuter traffic around Warsaw, since sold)
- PKP Cargo (freight traffic)
- PKP Linia Hutnicza Szerokotorowa (broad gauge trains to Ukraine)

Besides PKP there are many local railways in Poland such as:

KW – Kuźnica Warężyńska

Network length, gauge and electrification (2005):
- standard gauge, not electrified

This former sand railway now operates local freight trains in the Łagisza area to the northeast of Katowice, and open-acces s coal trains to Katowice and Warsaw.

OK – Orlen Koltrans

Network length, gauge and electrification (2005):
- standard gauge, not electrified

Pol-Miedź Trans – KGHM Polska Miedź SA

Network length, gauge and electrification (2003):
- standard gauge, not electrified

Apart from shunting duties on its own network, this company operates open access trains with copper ore from Lubin Górniczy to the copper smelter in Głogów.

PRS – PCC Rail Szczakowa S.A.

Network length, gauge and electrification (2005):
- 210 km standard gauge, electrified at 3000 V

6. Air transport

- **Airlines**

Air transport is still one of the most expensive modes of transport. Nevertheless, more and more air carriers operate on the Polish market, especially small companies with foreign capital. Thanks to them, prices offered to consumers are on a significantly lower level than during previous years.

The largest Polish airline is LOT Polish Airlines, 67.79% of which is held by the State Treasury. The remaining part is held by the bankruptcy trustee of SAirLines and by LOT employees.

In addition to LOT, there are a number of other carriers operating in the Polish air transport services market. They are presented on the graph on the page 7.

7. Maritime transport

There are a total of 118 ships in the Polish fleet, of which 12 are under the Polish flag and 106 under a foreign flag.

8. Courier services market in Poland

In 2005 the turnover of the market for courier, packaging and express (CPE) services in Poland

[1] *Source: European Railway Server, http://www.railfaneurope.net*

was nearly PLN 8 billion, of which around PLN 2.6 billion came from courier and express mail services and PLN 5.4 billion came from parcel postal services. The CPE market in 2005 grew at an impressive average rate of 17-18% and was much higher in the foreign post segment.
During 2005 the total number of delivered postal items was 1.9 million. 4,078,000 registered letters were sent from Poland abroad, and 1,421,000 were sent to Poland from abroad.
The current division of the Polish CPE market results from progressive market consolidation, impressive growth of sales, especially sales by medium-sized companies, as well as an increasing share of outsourcing in sales. The Polish courier services market, ranked by sales, is shown in the graph below.

9. Warehousing

According to a CB Richard Ellis report from the first half of 2006, total warehousing space in the second quarter of 2006 grew by 2.3% in comparison with the first quarter. Currently warehousing space in Poland amounts to 1.9 million sq m. The majority of new warehouses are located in Katowice, Łódź, Poznań and Wrocław. However, Warsaw remains the largest warehousing market in Poland. Nearly 75% of all warehouses in Poland are located in the Warsaw area.
The future of this sector seems optimistic. Prices are expected to drop because of a growth of supply and the growing number of new developer companies. The vacancy rate in the second quarter of 2006 was 11.72%, lower by 1.94% than in the first quarter of 2006.
Developer companies are particularly interested in three Polish regions:

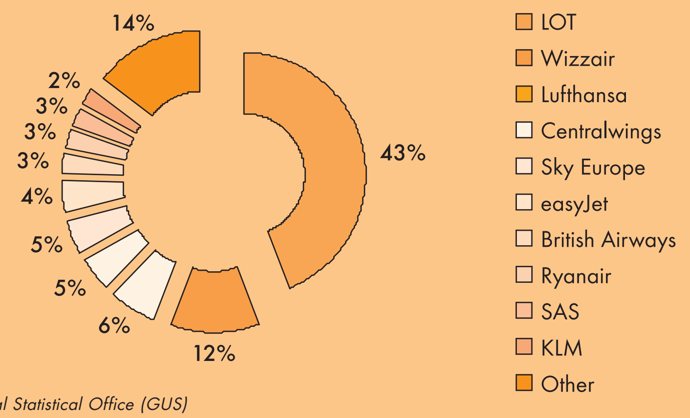
- central Poland including Łódź,
- the Silesia region,
- Poznań surroundings.

Central Poland is located near the crossroads of the A2 and A1 highways, which are part of European routes from Norway to Greece and from Ireland to Russia.
The Silesia region is interesting especially because of the proximity of the crossroads of the planned A1 and A4 motorways as well as the Czech Republic, Hungary and Germany. In this region AIG/Lincoln has developed its project Diamond Business Park Gliwice, which provides about 40,000 sq m of warehousing space.
Among other developers interested in the Silesia region are Parkridge, Raben and Tiner Poland.
Poznań is an attractive location especially because of the proximity to the German border and the A2 motorway.
The profile of present and planned warehousing space in the most attractive regions in Poland is shown in the table on the page 8.

- **Duty-Free Centres**

Duty-Free Centres are a part of the Polish customs area. Companies operating in duty-free zones can take advantage of numerous preferences. Goods and raw materials imported to a duty-free zone from abroad may be stored in the zone for an indefinite period and processed without making any payments or providing customs and taxation security. Goods exported from the zone abroad are also exempt from duties and taxes. Thanks to Duty-Free Centres, the State Treasury gains income from direct taxes.

LEADING AIRLINES IN POLAND IN 2005 (MARKET SHARE BY PASSENGER TRANSPORT)



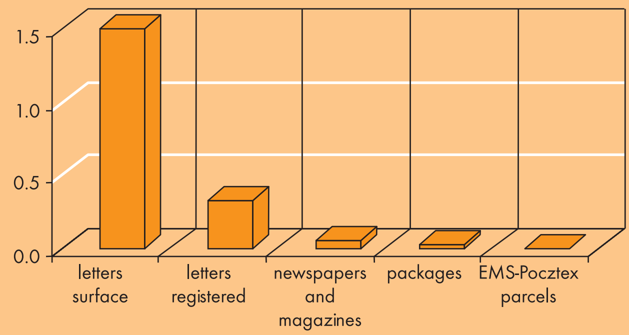
Source: Central Statistical Office (GUS)

MARITIME TRANSPORT FLEET IN POLAND IN 2005

Specification		Total	Ships for transport of fixed cargo	Liquid bulk ships	Ferries	Average age of ship
Total	a	118	99	12	7	–
	b	2,407.00	2,321.80	58	27.2	19.5
	c	1,709.00	1,547.80	42.9	118.3	–
Ships under Polish flag	a	12	4	7	1	–
	b	22.5	12.9	7	2.7	29.2
	c	33.5	19.5	5.2	8.8	–
Ships under foreign flag	a	106	95	5	6	–
	b	2,384.50	2,309.00	51	24.5	18.4
	c	1,675.40	1,528.30	37.7	109.4	–

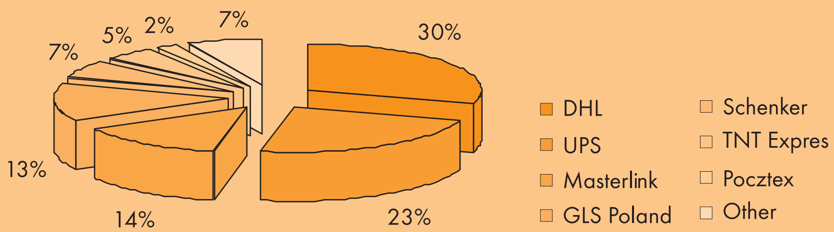
a – number of ships
b – load capacity (DWT), thousand tonnes
c – gross capacity (GT), thousands
Source: GUS

NUMBER OF POSTAL ITEMS BY TYPE IN 2005 (MILLION)



Source: GUS

LARGEST COMPANIES ON COURIER SERVICES MARKET IN POLAND



Source: Elaboration of WYG International data

There are currently seven Duty-Free Centres operating in Poland, at:

- Gdańsk
- Gliwice
- Mszczonów
- Terespol
- Świnoujście
- Szczecin
- Frederic Chopin Airport, Warsaw

- **FDI in logistics**

Foreign direct investment in transport, warehousing and communications in 2004 was EUR 1,782 million.

- **Prospects for Polish logistics**

The prospects for the logistics sector in Poland are optimistic. Poland is the leader in the CEE region in all fields. Poland has access to qualified human resources in logistics and transport.
On the other hand Poland requires more investment in transport infrastructure, especially in roads and railways, as well as in the ICT sector.
Polish logistics companies have to meet customer requirements and adjust their offers to demand. This is especially required in postal services and in preparing parcels for warehousing.
It is predicted that the current tendency of consolidation on the Polish logistics market will continue. Small companies will remain on the market, however, and provide services for big logistics corporations.

WAREHOUSING SPACE IN POLAND'S MOST ATTRACTIVE REGIONS IN 2006 (IN THOUSAND M^2)

Region	Present warehousing space	Planned warehousing space	Total warehousing space by 2010
Warsaw	1,260	320	1,580
Łódź	101	1,300	1,401
Wrocław	61	977	1,038
Silesia	100	514	614
Poznań	58	700	758

Source: PricewaterhouseCoopers

DUTY-FREE CENTRES OPERATING IN POLAND

Duty-Free Centre	Location	Total space (m^2)	Warehousing space (m^2)
Warsaw	Frederic Chopin Airport	–	–
Gliwice	Silesian Logistics Centre	476,000	14,000
Terespol	Małaszewicze	1,660,000	24,200
Świnoujście	Maritime Port	500,000	N/A
Gdańsk	Maritime Port	335,000	38,553
Mszczonów	City	31,000	11,000
Szczecin	Seaport in Szczecin	114,700	–

Source: 'Logistics', NO.2/2006; Szczecin-Świnoujście Seaport website

MAIN INVESTORS IN POLISH LOGISTICS IN 2004

	Investor	Country of registration	Country of origin	Activities (class)
1.	OAO Gazprom	Russia	Russia	Transport via pipelines
2.	GATX Rail Overseas Holding Corporation	USA	USA	Other land transport
3.	Hays	United Kingdom	United Kingdom	Cargo handling and storage
4.	Europort Grain Terminal	Canada	Canada	Cargo handling and storage
5.	DHL Worldwide Network	USA	USA	Post and courier activities
6.	Raben Group B.V.	The Netherlands	The Netherlands	Letting of own property; other supporting transport activities
7.	Banco Santander Central Hispano	Spain	Spain	Post and courier activities
8.	Fritidsresor Holding AB	Sweden	Sweden	Activities of travel agencies and tour operators; tourist assistance activities n.e.c.
9.	Europa Distribution Center	United Kingdom	United Kingdom	Cargo handling and storage
10.	National Grid Plc	United Kingdom	United Kingdom	Telecommunications
11.	International Container Terminal Services	Philippines	Philippines	Sea and coastal water transport
12.	EMERITA B.V.	The Netherlands	The Netherlands	Telecommunications
13.	EADS CASA	Spain	Spain	Scheduled air transport
14.	Faure Machet (FM) Logistic S.A.	France	France	Other land transport
15.	GN Great Nordic	Denmark	Denmark	Telecommunications
16.	Maersk S/A	Denmark	Denmark	Cargo handling and storage
17.	Wincanton European Transport Services B.V.	The Netherlands	The Netherlands	Activities of other transport agencies
18.	Staight Crosing	Canada	Canada	Sea and coastal water transport
19.	Mitsubishi Corp.	Japan	Japan	Activities of other transport agencies
20.	Telediffusion de France International (TDF)	France	France	Telecommunications
21.	Kuehne&Nagel Beteiligungs AG	Germany	Switzerland	Activities of other transport agencies
22.	Schrader	Germany	Germany	Cargo handling and storage
23.	PROGRESS Technology and Holdings International B.V.	The Netherlands	The Netherlands	Telecommunications
24.	Twentshe Kabel Holding	The Netherlands	The Netherlands	Telecommunications
25.	Spedimpex	Germany	Germany	Cargo handling and storage

Source: Polish Information and Foreign Investment Agency (PAIiIZ)

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Polska Agencja Informacji i Inwestycji Zagranicznych S.A.
ul. Bagatela 12, 00-585 Warszawa, Polska
tel. (+48 22) 334 98 00, fax (+48 22) 334 99 99
www.paiz.gov.pl, e-mail: post@paiz.gov.pl

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