



# LOCATION

- The region is located in eastern Poland.
- A gateway into Eastern Europe and Asia – a border area between the European Union and the Eurasian Customs Union (Russia, Belarus and Kazakhstan).
- Lublin Airport – one of the most modern airports in Poland.
- The Pan-European east-west/north-south transit corridor: the A2 motorway, S17 and S12 expressways, railway line E20 (Paris-Moscow) and E7 (Gdynia-Odessa).
- Highly developed infrastructure of border checkpoints
  - › with Ukraine (4 checkpoints)
  - › Belarus (3 checkpoints).
- Modern and specialised transloading and warehousing facilities.
- Logistics outsourcing – a growing transport and logistics industry.
- Direct support for foreign trade partners (specialised customs).
- New and consistently upgraded road and rail transport routes.

The logistics sector is an important fixture of Lublin's economic landscape. The region has a favourable geographical location, which is its asset and a chance to fast-track its development. The eastern border of the Lubelskie Voivodeship is the border of the Schengen Area and the European Economic Area (EEA). With its borderland location, the region has a chance of becoming the leading transport hub of Central and Eastern Europe. Due to the favourable location, the region also offers good prospects for the warehousing sector. Warehouses are located primarily near main transport routes and industrial zones. Most of them are equipped with specialist, state-of-the-art handling and transport equipment. Some of the many key factors driving the growth of the logistics sector in the Lubelskie Region include the ever-improving road and rail infrastructure, and the increasing presence and modernisation of transloading facilities. The 2011-2020 decade will prove to be a period of unprecedented development, in which the Lubelskie Voivodeship and the Eastern-Poland Macroregion will improve the quality of their road and rail infrastructure to approximate to the EU average.



## SUPPORT FOR YOU FROM THE MARSHAL'S OFFICE OF THE LUBELSKIE VOIVODESHIP

### Services available free of charge

- Preparing comprehensive, reliable and up-to-date economic information on the region
- Preparing and running current databases of development land
- Information on public aid for investors and investment zones
- Assistance in communication with local administration and business support institutions
- Support for exporters from the Lubelskie Voivodeship
- Preparing and managing trade missions to the Lubelskie Voivodeship, including individual project support and the comprehensive preparation of investors' visits
- Supervision by a „project manager” throughout the process



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## SECTOR LOGISTICS



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## SIZE, STRUCTURE AND NATURE

## WAREHOUSING AND LOGISTICS

## LUBELSKIE – WHERE SCIENCE UNDERSTANDS BUSINESS



In recent years we have seen a rapid development in the transport infrastructure sector, with the Lubelskie Voivodeship recording the largest investment expenditures in the sector since 2008.

- New expressways that stimulate the development of road transit. The new S17 route, linked to Lublin's ring road. The increase in volumes of received and sent cargo in the Lubelskie Voivodeship is higher than for Poland in total, at 14 % and 18%, respectively.
- A new bridge on the Vistula River in Kamień.
- An extensive rail network, accommodating the essential needs of the sector – the network connects almost all urban and industrial centres in the region. Some routes are used only for freight traffic (Radzyń Podlaski-Lublin, Włodawa-Chełm, Zamość-Dorohusk). These hubs have special freight stations, where all kinds of goods can be efficiently loaded or unloaded.
- The Broad Gauge Metallurgy Line (Linia Hutnicza Szerokotorowa/LHS), which connects the border checkpoint in Hrubieszów to the Sławków train station (in Katowice), plays a particularly important role in the development of the logistics sector. The LHS rail system has direct connections with the Trans-Siberian Railway. This facilitates railway connections with the Ukrainian and Russian rail systems, and also allows the development of a pan-European inland transport corridor between Europe and Asia.



- A more effective logistics system, facilitated by the transloading facility in Małaszewice, where goods can be quickly unloaded from the “narrow-gauge” wagons to wagons conforming to the European track-gauge standards, or to all kinds of road vehicles.
- The Lublin Airport in Świdnik is increasingly busy, consistently adding new destinations. Opened in December 2012, the Lublin Airport recorded its five hundred thousandth passenger on 23 July 2015. The airport provides regular flights between Świdnik and Brussels, Doncaster, Sheffield, Dublin, Frankfurt, Glasgow, London, Luton, London Stansted, Oslo and Stockholm. To facilitate the export of goods – mainly from the automotive, aircraft and food industries, there are plans to build a cargo terminal, which will be initially designed to handle up to 1.200 tonnes of shipments a year.



### Warehousing infrastructure

Recent years have seen a growing demand for modern warehousing facilities at the national level, as well as in the Lubelskie Voivodeship. According to statistics provided by Skanska, 90% of this company's clients are from the SSC/BPO sector. These clients currently account for about 50% of the demand for office facilities. There are plans to build more warehousing facilities for rental to respond to these market needs. At PLN 45–50/sq. m (EUR 11–12/sq. m) rental costs in Lublin are the lowest among the nine largest office-space markets in Poland. According to experts from Cushman&Wakefield, Lublin is one of the cities that will see the most new projects involving office and warehousing buildings. For instance, there are plans to build a new warehouse compound within the Euro-Park Mielec Special Economic Zone, located in Felin on the outskirts of Lublin. It is important to note the available rental services for warehousing facilities of different types, sizes and purposes. These services are provided by companies that lease their unused warehouse space. Having specialist loading and transport equipment, such as rail-mounted gantry trains with a carrying capacity of several tonnes, and an excellent location (close to transport routes, industrial zones), Lublin's warehouse facilities can successfully compete with the best facilities of this type across Poland.



### Logistics outsourcing

In the Lubelskie Voivodeship, there is a range of specialised operators dealing with comprehensive logistics outsourcing and supply chain management. The transport and logistics market is well developed in this respect, with several dozen large and medium-sized operators specialising in transport, shipping (both domestic and international) and warehousing services. Having the required resources, infrastructure and experience, these companies can successfully accommodate the needs of modern businesses.



### Direct support for foreign trade partners

The borderland location of the Lubelskie Voivodeship entails the additional needs of handling the transfer of goods through the borders with Russia, Ukraine and Belarus. Specialised customs agencies play an essential role in supporting foreign trade. They provide a range of dedicated services, including customs clearance (for export, import and transit), filling in TIR carnets and CMR forms, and arranging for additional documents.



### Higher education

The workforce in the transport and logistics sector comprises graduates of

- Maria Curie-Skłodowska University
- The Lublin University of Technology
- The University of Life Sciences in Lublin
- The Catholic University of Lublin
- The College of Enterprise and Administration in Lublin (WSPiA)
- The University of Economics and Innovation in Lublin (WSEI)
- The College of Administration and Business in Łuków

The number of students and graduates in 2014

Majors	Students	Graduates
Logistics	567	–
Transport	1 509	332
Traffic psychology (postgraduate programme)	17	23
Professional competence in road transport (postgraduate programme)	–	20
Transport – Shipping – Logistics (postgraduate programme)	15	27

In the academic year 2013/2014, 332 people graduated in majors associated with the logistics and transport industry.

32 people completed postgraduate programmes associated with the logistics industry.



### Vocational education

The number of students in the school year 2014/2015 in Lublin's vocational schools and the number of graduates of vocational schools in the years 2011-2014

Vocation	Lubelskie Voivodeship	
Automatic train control technician	Students	30
	Graduates	4
Logistics technician	Students	721
	Graduates	597
Shipping technician	Students	285
	Graduates	335
Road transport technician	Students	66
Rail transport technician	Students	108
Traffic maintenance technician	Graduates	83
Total	2009	

### The Lublin Investor Cluster

The Cluster brings together the local-government, academic and business communities to provide personalised support for investors.

Here are some of the benefits of being part of the Cluster:

- Individual support for each Investor – Grupa Magazyny Polska's services include property management and dealing in property.
- Employer support – cooperation with Pracodawcy Lubelszczyzny “Lewiatan” Union of Employers of the Lubelskie Region, an organisation that brings together private employers from the Lubelskie Region.
- Scientific support – a highly qualified workforce and scientific support.
- Legal support – specialised law firms will attend to the Investor's needs once the Investor decides to start a project in the region.

for 2016

According to Colliers's projections, the logistics market in the region of Lublin is expected to grow.

5 reasons

why it is worth investing in the logistics sector of the Lubelskie Voivodeship:

1 The international transit route that runs via the region facilitates export.

2 Almost 4,300 people studying to work in the transport and logistics sector.

3 Competitive costs of labour due to relatively low wages.

4 Bold higher education institutions and powerful cluster initiatives to foster the logistics sector.

5 A long-standing industrial tradition of the Lubelskie Voivodeship built by such enterprises as Grupa Azoty Zakłady Azotowe Puławy, Ursus, Fabryka Łożysk Toczących Kraśnik and Caterpillar Janów Lubelski.