The Development of Logistics Nodes in Poland

Marcin Foltyński
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• Logistics centers in Poland
• Intermodal terminals in Poland
• Warehousing centers
• Summary - conclusions
Fact sheet about ILiM

- The year of establishment - 1967
- Legal form- Research Institute
- Established by the Ministry of Economy
- Research Institute of the 1st category
- Member of GS1 organization, managing GS1 System in Poland - since 1990
- 185 employees

Our mission:

„We develop, promote and implement innovative logistics and e-commerce solutions in key business processes”
The Scope of Activity

- GS1 standards
- Logistics
- e-Business
- Research Laboratories
The Scope of Activity

Logistics

develops knowledge of supply chain management and all logistic aspects of operations, warehousing and distribution

GS1 standards

manages the world’s most frequently used system of standards, streamlining the processes of management and monitoring supply chains

e-Business

designs and promotes advanced solutions for businesses and public administration, consistent with global standards

Research Laboratories

automatic identification systems using GS1 global standards, tests on the safety of electrical and electronic devices
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There are three logistic centres in Poland that meet Western European standards. Their location resulted from local initiatives only, and their development was not supported by the state in a systematic way. That’s why their organisations and levels of development and availability of basic logistic infrastructure components much differ.

- Śląskie Centrum Logistyki S.A. w Gliwicach,
- Euroterminal Sławków Sp. z o.o.,
- Centrum Logistyczno Inwestycyjne Poznań (CLIP Logistics).

The existing centres neither cooperate with each other, nor undertake initiatives for development of the national intermodal logistic network.
Logistics centers in Poland

- Existing logistic centres
- Most advanced plans of logistic centre development
- Plans with no implementation structure
- International transportation corridors:

Source: Own study – map: http://www.pr.pkp.pl/
CLIP Group is a developer and logistics operator of industrial - warehouse facility with a private railway siding and an intermodal container terminal.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Warehouse 1</th>
<th>Warehouse 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>warehouse space [m²]</td>
<td>45 300</td>
<td>28 500</td>
</tr>
<tr>
<td>height of the hall at the highest point [m]</td>
<td>13,10</td>
<td>10,50</td>
</tr>
<tr>
<td>number of loading docks</td>
<td>24</td>
<td>16</td>
</tr>
<tr>
<td>number of unloading gates at level &quot;0&quot;</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>number of unloading rail gates</td>
<td>3</td>
<td>0</td>
</tr>
</tbody>
</table>
From the beginning of May 2012, together with Dutch partner, **ERS Railways** CLIP service a shuttle railway connection between Rotterdam and Swarżędz. The train runs **three times a week** according to a set schedule (Monday, Wednesday and Friday). The journey takes **22-24 hours**, which guarantees a possibility of regular deliveries to the Netherlands, and safe and quick import of goods.
Silesian Logistics Centre (ŚCL) began its activity in 1989 as Silesian Duty Free Zone, a company established to create and organize the Free Zone and the management and administration of ports in Gliwice. The company offers comprehensive solutions for logistics and transport, flexibly adjusted to individual needs, providing innovative solutions and management of advanced logistics project.
"Euroterminal in Slawkow" Ltd is a logistics terminal situated at the junction of the Western-most section of broad-gauge (1,520 mm) railway line and European standard-gauge (1,435 mm) railway line, due to perfect fit into the development of containers transport between the Far East/Asia and Western Europe.
DCT Gdansk, Poland’s newest and most modern container and Ro-Ro terminal facility, was officially opened on 1st October 2007. DCT Gdansk is an ideal gateway to Poland as well as the transhipment hub for St. Petersburg and the rest of the Baltic region. DCT Gdansk has unlimited potential for expansion, up to 4 million TEU capacity in future planned development phases.
The area of 110 hectares of land located at the back of DCT in Gdańsk is to be landscaped as a logistic center named Pomeranian Logistics Centre (PLC). This project will not only strengthen the position of Gdańsk and the region as a center of logistics and distribution in the Baltic region, but will also give an opportunity to revolutionize the logistics process used by major importers. PLC is to be run by an unconventional strategy planning, storage and distribution of goods implemented in the UK in London Gateway.

DCT Gdansk Gateway - Overview
DCT Gdansk Gateway - Overview

**PRODUCT:** Container train linking DCT Gdansk with Moscow via Chernyakhovsk container yard (Kaliningrad Region). Solution encompasses two container trains (Gdansk – Chernyakhovsk and Chernyakhovsk – Moscow)

**ORGANISERS:** Train is organized in partnership between SKD Intrans and DV Transport with support of DCT Gdansk, PKP CARGO and RZD Russian State Railways.

**CAPACITY:** Single train from Gdansk to Chernyakhovsk – 88 TEU. Single train from Chernyakhovsk to Moscow – 120 TEU.

**TRANSIT TIME:** 7 days (day 1 – loading in Gdansk, day 7 – discharging in Moscow)

GDAŃSK – MOSCOW 1 506 km
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Container terminals in Poland

<table>
<thead>
<tr>
<th>Year</th>
<th>2005</th>
<th>2007</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of container terminals</td>
<td>20</td>
<td>23</td>
<td>29</td>
<td>29</td>
<td>32</td>
</tr>
</tbody>
</table>

Source: Own study – map: http://www.pr.pkp.pl/
## Container terminals in Poland

<table>
<thead>
<tr>
<th>No</th>
<th>Terminal owner</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Cargosped</td>
<td>6</td>
</tr>
<tr>
<td>2</td>
<td>PCC Intermodal</td>
<td>4</td>
</tr>
<tr>
<td>3</td>
<td>Polzug Intermodal Polska</td>
<td>4</td>
</tr>
<tr>
<td>4</td>
<td>Spedcont Spedycja Polska</td>
<td>4</td>
</tr>
<tr>
<td>5</td>
<td>ATC Rail</td>
<td>2</td>
</tr>
<tr>
<td>6</td>
<td>DB Schenker Rail Polska</td>
<td>2</td>
</tr>
<tr>
<td>7</td>
<td>PKP Cargo</td>
<td>2</td>
</tr>
<tr>
<td>8</td>
<td>BTC - Bałtycki Terminal Kontenerowy</td>
<td>1</td>
</tr>
<tr>
<td>9</td>
<td>Clip logistics</td>
<td>1</td>
</tr>
<tr>
<td>10</td>
<td>CTL Logistics</td>
<td>1</td>
</tr>
<tr>
<td>11</td>
<td>DTC Gdańsk</td>
<td>1</td>
</tr>
<tr>
<td>12</td>
<td>Euroterminal Ślawków</td>
<td>1</td>
</tr>
<tr>
<td>13</td>
<td>Gdańsk Terminal Kontenerowy</td>
<td>1</td>
</tr>
<tr>
<td>14</td>
<td>GTC – Gdynia Container Terminal</td>
<td>1</td>
</tr>
<tr>
<td>15</td>
<td>Schavemaker Poland</td>
<td>1</td>
</tr>
</tbody>
</table>
Comparing the number of logistics centers, Poland has a **large number of container terminals** and their locations cover the whole country.

**Size** of the domestic container terminals **is much lower** than most similar types of terminals in Western Europe. **Technical condition** of most of them **is much worse** than in Western Europe.

Among currently existing terminals, the greatest potential of development have terminals in seaports, Małaszewicze, Sławków **Gądki and Kutno**.

Most container terminals **need to be modernized** (maneuvering areas, railroad), improving the quality of access roads and modernization of lifting equipment.
Container terminals in Poland
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Where are modern warehouse centers in Poland located?

Poland in total 6 874 280 m²

6 403 180 m² 93,1 %

Source: ILiM own study
Where are modern warehouse centers in Poland located?

<table>
<thead>
<tr>
<th>Region</th>
<th>Total /m²/</th>
<th>Share /%/</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mazowieckie</td>
<td>2 461 900</td>
<td>35,81</td>
</tr>
<tr>
<td>Wielkopolskie</td>
<td>1 360 600</td>
<td>19,79</td>
</tr>
<tr>
<td>Śląskie</td>
<td>1 158 500</td>
<td>16,85</td>
</tr>
<tr>
<td>Łódzkie</td>
<td>885 280</td>
<td>12,88</td>
</tr>
<tr>
<td>Dolnośląskie</td>
<td>536 900</td>
<td>7,81</td>
</tr>
<tr>
<td>Zachodniopomorskie</td>
<td>191 300</td>
<td>2,78</td>
</tr>
<tr>
<td>Pomorskie</td>
<td>107 100</td>
<td>1,56</td>
</tr>
<tr>
<td>Małopolskie</td>
<td>90 700</td>
<td>1,32</td>
</tr>
<tr>
<td>Kujawsko-pomorskie</td>
<td>32 000</td>
<td>0,47</td>
</tr>
<tr>
<td>Podkarpackie</td>
<td>20 000</td>
<td>0,29</td>
</tr>
<tr>
<td>Świętokrzyskie</td>
<td>15 000</td>
<td>0,22</td>
</tr>
<tr>
<td>Lubuskie</td>
<td>10 000</td>
<td>0,15</td>
</tr>
<tr>
<td>Lubelskie</td>
<td>3 000</td>
<td>0,04</td>
</tr>
<tr>
<td>Warmińsko-mazurskie</td>
<td>2000</td>
<td>0,03</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>6 874 280</strong></td>
<td><strong>100,00</strong></td>
</tr>
</tbody>
</table>

Source: Ireneusz Fechner, ILiM
Where are modern warehouse centers in Poland located?

• Warehouse centers are an essential element of the logistics nodes, usually with access only to road transport.
• There are large disproportions between regions in the number and the size of warehouse centers.
• Locations of warehouse centers outcome from the market demand and accessibility to road transport infrastructure.
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Conditions of constructing logistics centres in Poland

(+) Increase of transported containers and well prospects for the future in that regard.

(+) Increasing demand for modern warehousing space

(-) Lack of governmental programme supporting the idea of developing logistics centres.

(-) Development of logistics investments depend more on quality of the local logistics infrastructure than on demand for logistics services

(-) Demand for new warehouses spaces - fulfilled mainly by developers (logistics parks).

(-) Limited scope of services offered in logistics parks.
Summary - what should be done?

• To facilitate access to seaports from the hinterland by developing multimodal transport infrastructure

• To keep some of the rail area lands for future production and logistics investments

• To plan space for complete intermodal terminals in the warehouses concentration areas (where currently rail transport is not in use)

• To aware the spatial planners and regional governments that the area planning decisions have a great influence on transport and logistics business
Thank you for your attention!

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