

Poland - Transport and Logistics: Infrastructure developments to drive growth (Strategy, Performance and Risk Analysis)

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Abstracts

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SUMMARY

Poland is one of the largest economies in Central and Eastern Europe. It is a member of the North Atlantic Treaty Organization (NATO) and joined the EU in 2004. The country has strong trade ties with the US, Germany, the UK, France, and Italy. In order to boost its infrastructure and high-technology industries, the country is focusing on increasing its trade and business relations. It proved to be comparatively well equipped to ride out the global financial crisis and emerged as one of the most stable economies in the region post 2008, owing to its strong economic policies and robust domestic demand. Total GDP registered a CAGR of 0.3%, from US\$500.4bn in 2012 to US\$507.4bn in 2017. It is anticipated to post a CAGR of 3.4%, from US\$554.9bn in 2018 to reach US\$635.5bn in 2022.

MarketLine's Premium industry reports provide a comprehensive overview of the market and include sections on: risk and reward, key industry trends and drivers, SWOT analysis, competitive landscape, innovation, deals, key developments, and industry benchmarking to compare key performance indicators with regional and global markets.

Key highlights

Growth in passengers to drive GVA

GVA from rail transportation registered a CAGR of 7.5%, rising from US\$119.1m in 2012 to US\$171.3m in 2017, and is anticipated to post a CAGR of 9.3%, from US\$199.4m in 2018 to US\$284.6m in 2022. Despite a decline in freight volumes, an increase in the number of passengers is anticipated to drive the rail transport GVA.

Increase in the volume of goods drive freight traffic

Total inland water freight volume stood at 7.0 million tons in 2017, and is anticipated to post a CAGR of 10.3%, to rise from 8.1 million tons in 2018 to 12.0 million tons in 2022. Total inland water freight traffic registered a CAGR of 4.3%, rising from 815.0 million ton km in 2012 to 1,005.2 million ton km in 2017 and is anticipated to post a CAGR of 27.6%, from 1,277.2 million ton km in 2018 to 3,389.2 million ton km in 2022.

Value added services to drive GVA

The GVA for warehousing and storage registered a CAGR of 2.9%, rising from US\$8,463.6m in 2012 to US\$9,741.6m in 2017. Growth in the manufacturing, retail, FMCG, and e-commerce spaces has driven the demand for warehousing. Aside from traditional services, warehouse providers are introducing value-added services, such as the consolidation and cargo, labelling, packaging, bar coding, and reverse logistics. Warehousing and storage GVA is anticipated to post a CAGR of 6.1%, from US\$10,927.9m in 2018 to US\$13,846.9m in 2022.

SCOPE

Risk & Reward Index: The Risk & Reward index compares the position of the Polish transport and logistics industry with other countries in the region in terms of specific risk and reward parameters.

Industry Snapshot and Industry View: Key transport and logistics industry statistics include freight traffic, freight volume, fleet size, passengers, import and exports gross value added, FDI and trends driving market performance.

Industry SWOT Analysis: Discover the strengths, weaknesses, opportunities and threats impacting market performance and investment in the Polish transport and logistics market.

Industry Benchmarking: Benchmark how the Polish transport and logistics market is performing compared to regional and global markets in terms of GVA,

fleet size and freight traffic by mode.

Competitive Landscape: Overview of industry players compared with their peers across a set of indicators.

REASONS TO BUY

How is the market performing in terms of indicators such as freight traffic, freight volume, fleet size, passengers, import and export, gross value added and FDI?

How risky is it to invest in the Polish transport and logistics industry compared to other countries in Central and Eastern Europe?

What is driving the performance of key industry segments such as land, air, water and rail?

Who are the leading players in the Polish transport and logistics industry and their presence in respective segment?

What trends are being witnessed within the Polish transport and logistics industry?

What are the Polish transport and logistics industry's strengths and weaknesses and what opportunities and threats does it face?

What are the recent developments and innovations in the Polish transport and logistics industry?

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