



NOWYBURSZTYNOWYSZLAK

Polish maritime ports' hinterland



Bydgoszcz-Emilianowo



Port Gdynia

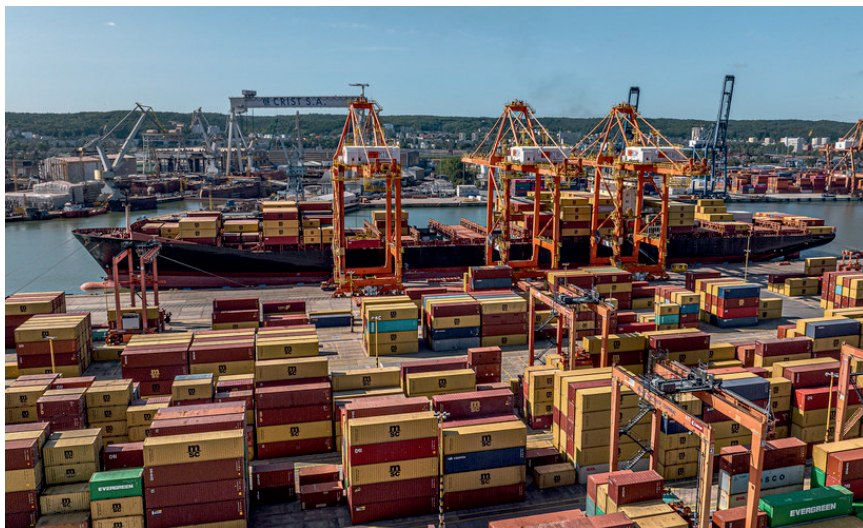


Polish maritime ports in Gdynia and Gdańsk are developing rapidly

In the first half of 2023, the Port of Gdansk handled cargo with a volume of 18 million tons, and the Port of Gdynia 29.4 million tons. This result made ports located in northern Poland the fastest growing in Europe. The above result makes the Port of Gdansk the second largest in the Baltic Sea and eighth in Europe. Port of Gdynia is one of the most dynamically developing ports in the Baltic Sea Basin, and its further development depends on the available land reserves in its hinterland. In 2023 Port of Gdynia handled 29,3 mln tonnes (including 6,75 mln t of grains as the largest grain port in the Baltic), representing an increase of 5,2% when compared to the previous year and of 25% when compared to 2015.

Increased accessibility from the foreground and hinterland will improve the competitiveness of the port by attracting cargo and capital investments and by contributing to future and sustainable development of the port. This publication is devoted logistics potential of northern Poland - not only infrastructural ones, because development also favors other industries green transformation.

Data source: ZMPG S.A.



Port of Gdynia is a universal port and one of the leading ports in the southern Baltic Sea. It specializes in handling general cargo, mainly unitized cargo, transported in containers and in the ro-ro system. An important segment of the business is also the handling of bulk cargo based on specialized terminals. Port of Gdynia is a recognized brand in transport and logistics systems around the world. The importance of the Gdynia port is largely determined by its geographical location. Port of Gdynia is a node of the TEN-T core network and the entry point of the Baltic-Adriatic corridor, the extension of which is the Gdynia-Karlskrona motorway of the sea connecting Gdynia with Sweden. The modern infrastructure and terminals of the Gdynia port are used by the largest global and European shipping operators, including: MSC, Hapag-Lloyd, Unifeeder, Containerships, MacAndrews, Transfennica, Finnlines-Grimaldi, Stena Line. Port of Gdynia, through an extensive network of regular container, ro-ro and ferry connections, connects sea routes with the national and European rail and road networks. Among the currently regularly serviced shipping connections, feeder calls of almost all major global container ship owners dominate. An important element of the Gdynia Port container connections' network are also short sea shipping connections (SSS).

Key investment projects carried out by Port of Gdynia:

- construction of an external port with a usable area of 150 ha and a transshipment potential of 2.5 million TEU per year



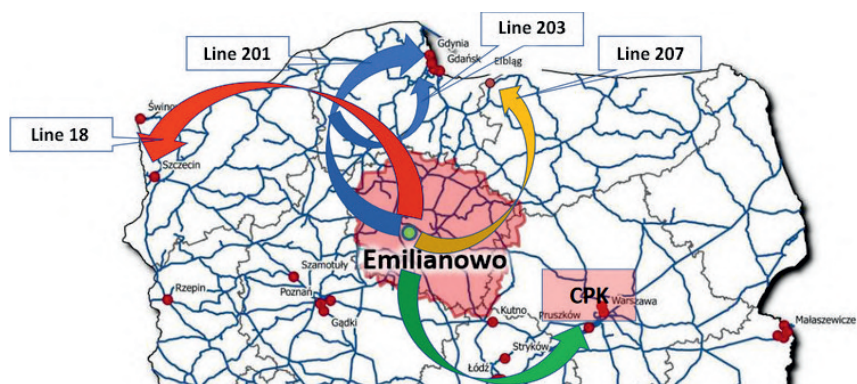
- Logistic Valley - 260 ha of logistics, warehouse and production space and an intermodal terminal
 - implementation of a modern traffic management system
- modernization of hydrotechnical infrastructure for servicing oceanic vessels

Port of Gdynia is also beneficiary of two investment projects: „Droga Czerwona road in Gdynia” (TEN-T project no 1167 in progress) and „Enhancement of port railway accessibility to the Port of Gdynia” (PKP PLK project finalised).

Bydgoszcz-Emilianowo intermodal terminal

The government-local government company Terminal Intermodalny Bydgoszcz-Emilianowo plans to launch a modern intermodal terminal by 2027. It will be located on the southern side of Bydgoszcz, close to the Bydgoszcz Industrial and Technology Park.

The main advantage of this location is the location of the TEN-T core network at railway lines No. 131 and 201 - Bydgoszcz is the first point where the railway lines running from the ports of Gdańsk and Gdynia intersect, which makes it a perfect fit for the implementation of the intermodal transport concept. In the Polish government's strategies, it will also be mainly the distribution center of Polish agricultural produce.



Key information about the project:

- the project has an environmental decision issued - November 8, 2023
- shareholders of the company (as of February 2024): National Center for Agricultural Support, PKP SA, Bydgoszcz Industrial and Technology Park
- it is planned to use RMG technology
- planned commissioning in 2027
- projected transshipments: 93,600 TEUs in 2030 and 124,000 TEUs in 2031 - according to conservative estimates

Warehouse Market of Bydgoszcz

The strong manufacturing sector, the dynamically growing e-commerce market and the convenient location of Bydgoszcz, situated in a triangle between Warsaw, Poznań and the Tricity, are conducive to the development of the warehouse and Logistics sector in the city. Its central location on the map of Poland, close to important expressways and national roads, access to an international airport, as well as good transport links with seaports in Gdansk and Gdynia and large economic centres such as Berlin and Wrocław, are all important factors in Bydgoszcz's favour in terms of investors choosing this location. In recent years, the city has been recognised by international developers, and the stock of modern production and warehouse space has seen significant growth. Bydgoszcz still presents great potential for launching further investments in this type of facility or leasing existing space.

Existing space in Bydgoszcz

690 000 m²

Planned space and under construction in Bydgoszcz

170 000 m²

Existing in neighbouring communes

220 000 m²

Planned space and under construction in neighbouring communes

70 000 m²

The investment offer database is targeted at local entrepreneurs and new investors who plan to establish business activity in the City of Bydgoszcz and communes of Bydgoszcz Metropolitan Area - <https://invest.barr.pl>



W bazie ofert inwestycyjnych dostępnych
The investment offers database includes

150 ha

terenów w granicach miasta.
of areas within the city.



Emilianowo Industrial Park

We should think long-term and prepare investment areas in advance. There is a deficit of large investment plots in our country. We should bear in mind that investors looking for a convenient location will not wait several years for it to become available, and this means missed opportunities for economic development. The concept of the Emilianowo Industrial Park assumes the ultimate development of approximately 1,000 hectares around the planned Bydgoszcz-Emilianowo Intermodal Terminal.

The investment should be implemented in stages of approximately 125 hectares, while restoring the forests necessary for felling. The largest area of the Emilianowo Industrial Park would be in the Nowa Wieś Wielka municipality, which could significantly expand the local economy. We should remember, that one of the more affluent communes in the Kuyavian-Pomeranian Voivodeship is Łysomice, which, thanks to the sub-zone created there (approx. 175 ha), has been given a chance of such intensive development - Przemysław Sztandera President of the Management Board of Pomeranian Special Economic Zone Ltd.



The concept assumes the development of approximately 1,000 hectares of space around the planned Bydgoszcz-Emilianowo Intermodal Terminal. The Pomeranian Special Economic Zone wants to implement it in stages of approximately 125 hectares each, and at the same time restore forests necessary for logging in other places.

Gdynia-Karlskrona Motorway of the Sea

Under the transport policy adopted by the European Commission, important European maritime transport routes, including those in the Baltic Sea region, may be recognized as motorways of the sea. The motorway of the sea should contribute to the elimination of “bottlenecks” in the EU transport corridors and support trade by sea in order to reduce cargo transport by road, shorten travel times and optimize transport costs while reducing environmental pollution. The "Baltic-Link Maritime Motorway: Gdynia-Karlskrona" project concerns infrastructure investments and logistics projects to support the growing trade exchange between Sweden, Poland and other European countries, with particular emphasis on the Gdynia-Karlskrona ferry connection.



Source: Baltic Link Associated

Port of Gdynia is one of the European Union's logistics hubs in the Baltic-Adriatic Corridor. The importance of the port in this corridor is related, among others, to its competitive position in handling cargo to/from the Scandinavian countries, mainly through the Gdynia-Karlskrona Motorway of the Sea, as an extension of the Baltic-Adriatic corridor, and regular ro-ro connections with Finland.

90th anniversary of the Coal Trunk Line

In June 1925, the Sejm of the Republic of Poland passed an act on the construction of the northern section of the Coal Main Line. In October, the Council of Ministers issued a regulation expropriating the areas where the Bydgoszcz-Gdynia line was built. The construction of the entire Main Line was completed in 1933, the 90th anniversary of which fell in 2023. The purpose of building the Coal Main Line was to connect the port of Gdynia with industrial Silesia. Thanks to the main line, the Port of Gdynia has also opened up to Poland's southern neighbours, including Czechoslovakia and Hungary.

The Coal Trunk Line today

Currently, the railway lines built as part of the Coal Trunk Line project are an important element of the TEN-T Baltic-Adriatic transport corridor. From 2013, Regulation 1315/2013 of the European Parliament and of the Council established railway line No. 131 as an element of the TEN-T core network, in 2023, as part of the revision, line No. 201 will be included in the TEN-T core network. In the TEN-T concept, the Coal Trunk Line plays a key role in connecting Polish seaports in Gdańsk and Gdynia with ports on the Adriatic Sea in Koper, Venice, Trieste and Ravenna.

The Coal Trunk Line tomorrow

The modernisation of the Coal Trunk Line is one of the most important investments currently being implemented on the Polish railway, worth €2.5 billion. The project, implemented with support from European programs, assumes for the Bydgoszcz-Gdynia section:

- expansion of railway line No. 201 to a double-track standard, additionally to three tracks on the Gdańsk Osowa - Gdynia section;
- full electrification of railway lines;
- increasing the speed of goods trains to 120 km/h;
- adapting the length of platforms to TEN-T requirements (suitable for trains of up to 740 metres in length);
- in the longer term, the installation of ERMTS along the entire section is planned

The investment project is scheduled to be completed by 2028. Further plans also include the extension of line 131 between Nowa Wieś Wielka and Inowrocław to four tracks in order to completely separate passenger and freight traffic.

Special energy zones



Northern Poland has been a kind of energy desert for decades. Electricity was produced in the south of the country, and transmitting it through networks resulted in serious losses. Hence, large industrial investments were located in the south. The construction of offshore wind farms and a nuclear power plant will change this

situation - said Maciej Kazienko, vice president of the Pomeranian Special Economic Zone, during the 3rd Bydgoszcz Amber Road Forum, presenting the Special Energy Zones project.

The implementation of these investments will facilitate the location of companies that consume more than 100 GWh of electricity annually in the northern part of the country. Two Special Energy Zones are planned in the Kuyavian-Pomeranian Voivodeship: near Szubin in the Bydgoszcz Metropolitan Area and in Ostaszewo near Toruń. These are areas located near current or planned high voltage transmission lines. Investors who locate their projects there will receive a 30% lower price of electricity. Ultimately, energy storage facilities will also be built there.

- Today, all investors are asking about green energy. To meet their expectations, the Pomeranian Special Economic Zone undertakes investments in renewable energy. We are working intensively on building our own photovoltaic farms. Green energy will be an additional incentive for investors in the Polish Investment Zone. We have two very mature projects: in Grudziądz, with a capacity of 5 MW, and in Barcin, with a capacity of 21 MW. We have already obtained connection conditions and a building permit for the latter. We will start construction in spring - sums up Maciej Kazienko.



Special Energy Zone in Szubin

New Amber Trail Association



The mission of the New Amber Trail association is to promote the development of intermodal transport in Poland.

We also support the development of the Bydgoszcz Logistics Hub and promote its potential around the world. Our brand is the Bydgoszcz Amber Road Forum organized in Bydgoszcz, where a debate on the development of infrastructure in northern Poland takes place.

Our demands:

- inclusion of the Bydgoszcz node in the TEN-T core network
- inclusion of the railway line from Bydgoszcz to the ports in Szczecin and Świnoujście into the TEN-T network
- promotion of cooperation between Polish ports and nodes connected with ports on the Black and Aegean Seas, in particular those located in Hungary, as an element of Europe-China trade exchange
- supporting the integration of Ukrainian infrastructure with the European CARGO system



Photo from the 3rd Bydgoszcz Forum (2023)

Pomeranian Special Economic Zone

The Polish Investment Zone is a statutory support instrument for entrepreneurs planning new investments. One of its key tasks is to grant tax relief for a period of 10 to 15 years. Assistance is provided to companies from the industry and modern services sectors, regardless of the company's size and location. The decision on support in the Kuyavian-Pomeranian Voivodeship and the eastern part of the Pomeranian Voivodeship is issued by the Pomeranian Special Economic Zone Ltd.

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Publisher

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