



7 reasons to invest in Poland





Poland in numbers



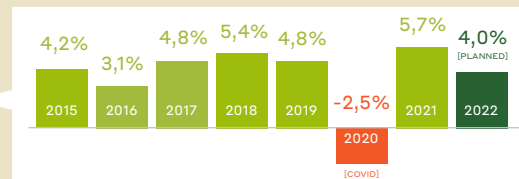
TOTAL COUNTRY AREA:
31,271 ha



POPULATION:
38 million



GDP [1]:
Continued economic outperformance



CONSUMPTION [2]:
Private Consumption accounts for **57.8 % of its Nominal GDP** (as of September 2022)



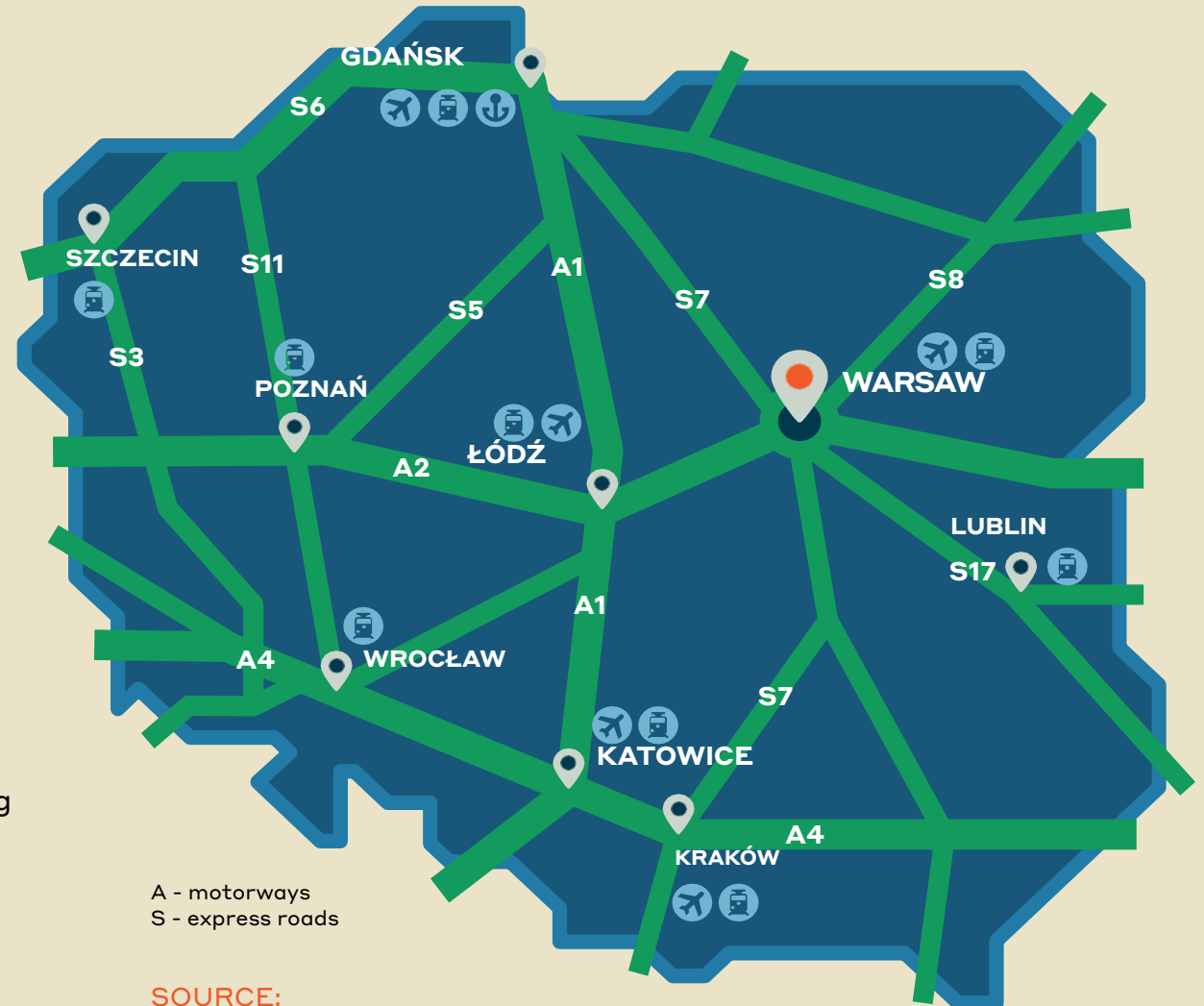
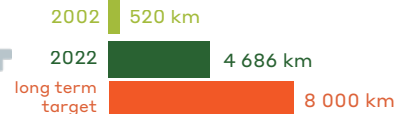
NEARSHORING [3]:
PL is the 4th in global ranking of most popular sourcing, nearshoring and reshoring locations and 1st for EU companies



LABOUR COSTS [4]:
average salary of a blue collar worker PLN 56.800/yr (€ 12.136/yr) which is almost 1/3 of the same cost in the neighboring Germany



HIGHWAY & MOTORWAY NETWORK [5]:
long-term growth



A - motorways
S - express roads

SOURCE:

- [1] Macrotrends.net
- [2] [HTTPS://WWW.CEICDATA.COM/](https://www.ceicdata.com/)
- [3] Report: "A generational shift in sourcing strategy – A global and European deep dive into near-sourcing, nearshoring and reshoring in the post-pandemic world" (in partnership with Maersk)
- [4] Economic research Institute
- [5] General Directorate for National Roads and Motorways

Business Smart – 7 reasons to invest in Poland



1. STRATEGIC LOCATION

- Bordering largest EU economy Germany, as well as other CEE dynamic developed economies.
- Poland has been rapidly expanding its road, rail, air and sea infrastructure. Due to its strategic location at the intersection of the main transport routes on both the north-south and the east-west lines, Poland places a lot of emphasis on maintaining a strong position on the logistics map of Europe.
- Major projects such as the “Solidarity” Transport Hub, Polish involvement in the Belt and Road initiative, and the North-south “via Carpatia” route testify to Poland’s position as a regional leader.

DISTANCE FROM WARSAW:

[1] 475 km [2] 800 km [3] 780 km [4] 650 km [5] 670 km [6] 640 km [7] 575 km [8] 1000 km [9] 680 km

■■■■ in progress



Business Smart – 7 reasons to invest in Poland



2. PROVEN ATTRACTIVE MARKET [6]

- Poland is a leader in the CEE region in terms of the number of greenfield investments, and ranks third in Europe.
- The fact that **94% of investors** are willing to reinvest in Poland is a significant proof of their trust in Polish economy. Furthermore, this willingness to re-invest in the country is growing every year. Despite the unfavourable circumstances caused by the Covid-19 pandemic, Poland was one of the few countries to record an increase in the inflow of new foreign investments and **rose from 7th to 6th place in the ranking of European countries attracting the most investments.**



3. SKILLED AND AFFORDABLE WORKFORCE [7]

- Poland's greatest asset are its citizens, especially their ambitious nature, eagerness to learn, work ethic and loyalty.
- Poland ranks **third in the prestigious PISA ranking**, an international assessment of students' skills.
- As many as **92% of Polish citizens aged 25-64** have at least a secondary education. This places Poland in 5th place among all the OECD countries and is a result well above the OECD **average of 78%.**
- **Almost 1.3 million** students' study at Institutes of Higher Education, which means Poland **ranks 4th in Europe** in terms of the number of students.



Business Smart – 7 reasons to invest in Poland



4. AVAILABILITY OF MODERN WAREHOUSE

- The industrial warehouse market is the **fastest growing sector of Polish commercial real estate**. It has been fueled by the e-commerce sector and multi-channel sales models implemented by conventional retailers further accelerated by pandemic, which contributed to **record demand that amounted to approx. 7.1m m²**. Approx. three quarters of concluded transactions were new leases and extensions.
- As the speed of delivery is of growing importance, the demand for last-mile logistics, Small Business Units (SBUs) and automation solutions is growing.



5. NEARSHORING INVESTMENT POTENTIAL [9]

- Poland will benefit of this trend as:
 - skilled workforce at competitive rates,
 - closeness to Western EU consumption markets,
 - connectivity and infrastructure.
- Due to the proximity to Western markets, the location of investments in these industries in Poland ensures the stability and predictability of supplies.

SOURCE: [8] EY: THE POLISH REAL ESTATE GUIDE 2022

[9] Report: "A generational shift in sourcing strategy – A global and European deep dive into near-sourcing, nearshoring and reshoring in the post-pandemic world" (in partnership with Maersk)

Business Smart – 7 reasons to invest in Poland



6. INVESTMENT INCENTIVES [10]

- One of the basic investment incentives which are available for businesses in gminas (municipalities) is the exemption from local taxes and charges. What is of fundamental importance for businesses is the exemption from real estate tax.
- **Governmental grants are provided** on the basis of the Program for supporting investments of major importance to the Polish economy for the years 2011-2030.
- There are investment incentives for business activities carried out in 14 zones defined as Special Economic Zones (SEZ). SEZ offer a **CIT exemption up to 50%** of the investment expenditure, plus there is availability of land with all necessary infrastructure.



7. ACCESSIBILITY & PRO-BUSINESS APPROACH

- The Government strives to make Poland business-friendly and promotes it as an attractive location for investment. The same goes for local authorities, which are also open for new investors in their regions.
- Uncomplicated scheme of setting up a business in Poland and **fast track of gaining necessary permits and allowances** necessary to start operations.



ctParks in Poland

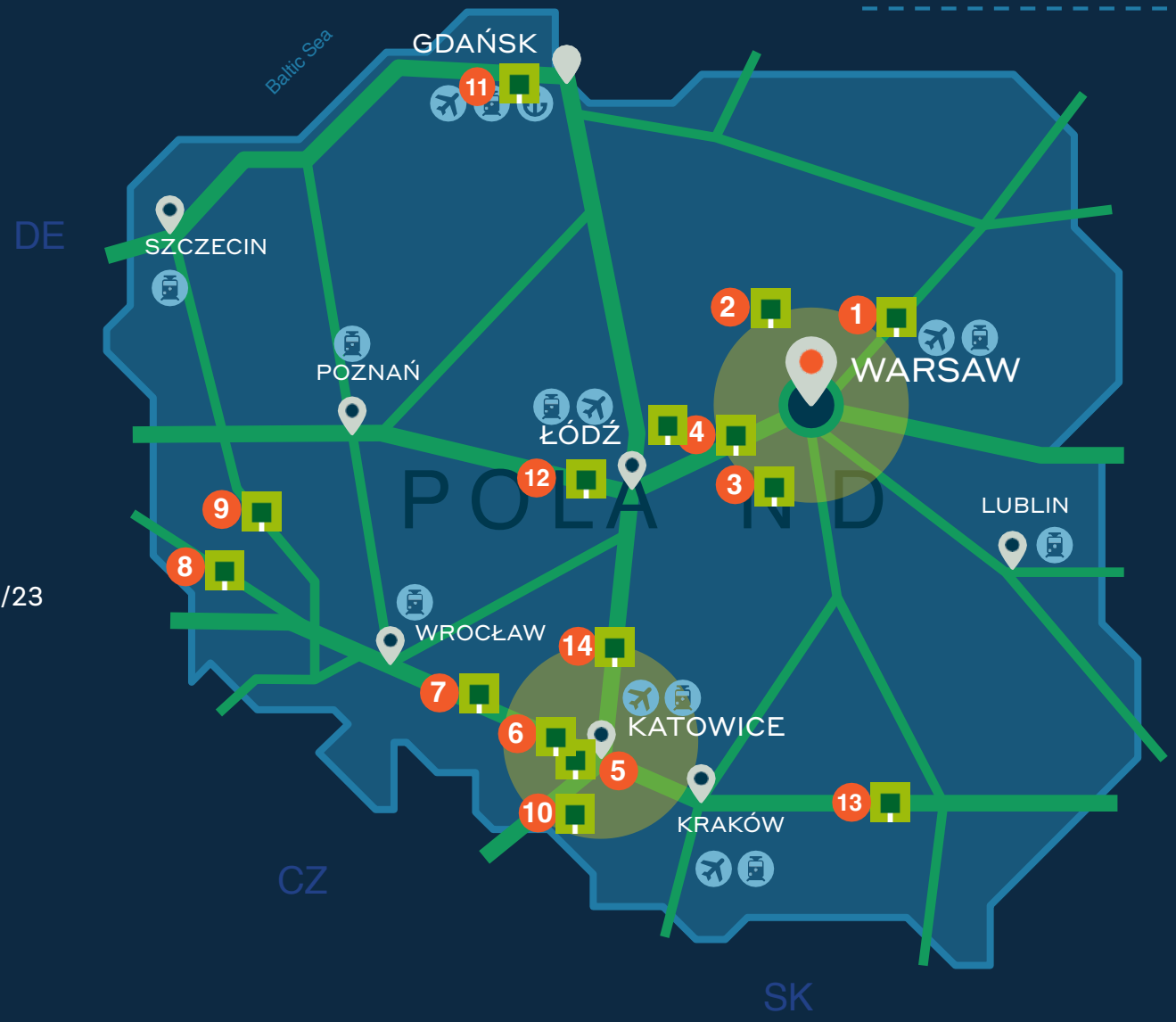


ctPark Poland

		Total size '000sq m	Under con. '000sq m	Availability '000sq m
1	Warsaw East	48	--	31 from now
2	Warsaw North	77	64	Q1/23
3	Warsaw South	162	77	Q1/23
4	Warsaw West	233	61	Q3/23
5	Katowice	50	--	50 from now
6	Zabrze	90	--	67 from now
7	Opole	83	8-11	Q4/23
8	Łódź	170	109	34 from now/ 75 -Q3/23
9	Sulechów	93	81	Q2/23
10	Gorzyce	36	36	Q3/23

CTParks in Poland – upcoming planned projects

- 11 Gdańsk
- 12 Stryków
- 13 Rzeszów
- 14 Częstochowa



Poland - leasing team



- Iłowa 8
- Sulechów 9
- Gdańsk 11

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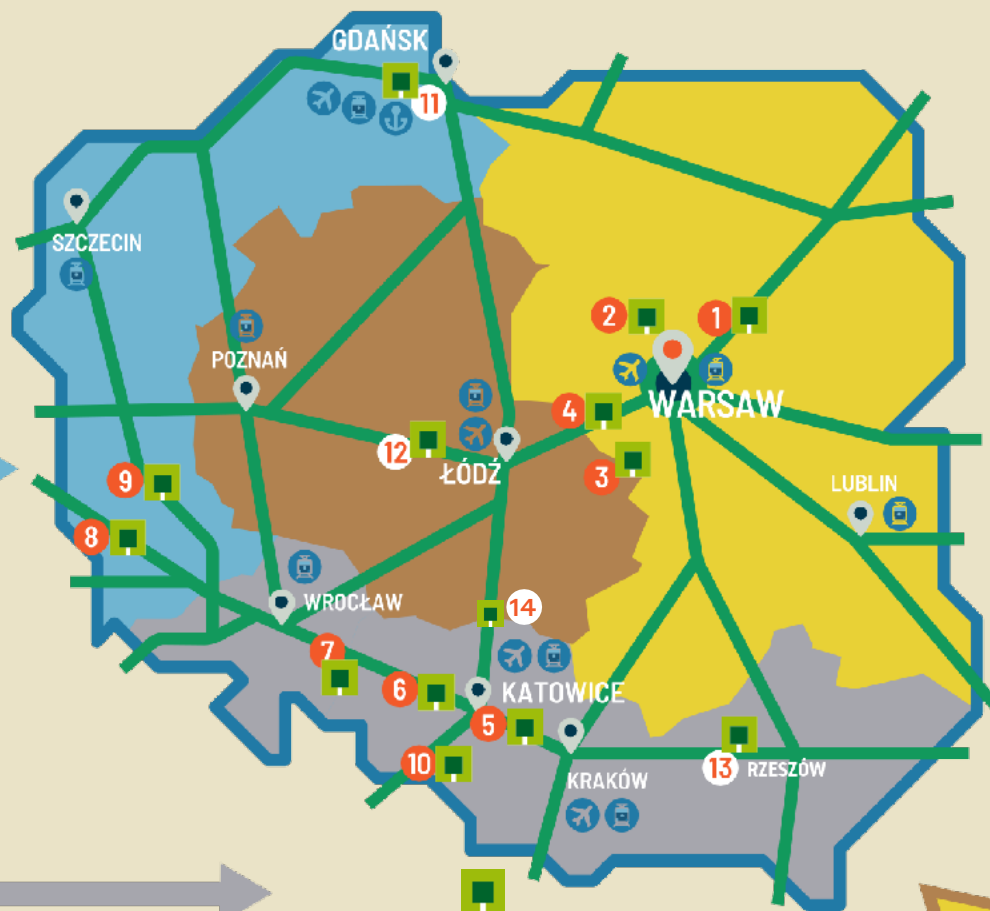
NORTH/WEST POLAND



- Katowice 5
- Zabrze 6
- Opole 7
- Gorzyce 10
- Rzeszów 13
- Częstochowa 14

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SOUTHERN POLAND



- Warsaw East 1
- Warsaw North 2
- Warsaw South 3
- Warsaw West 4

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WARSAW REGION



- Warsaw East 1
- Warsaw North 2
- Warsaw South 3
- Warsaw West 4

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WARSAW REGION



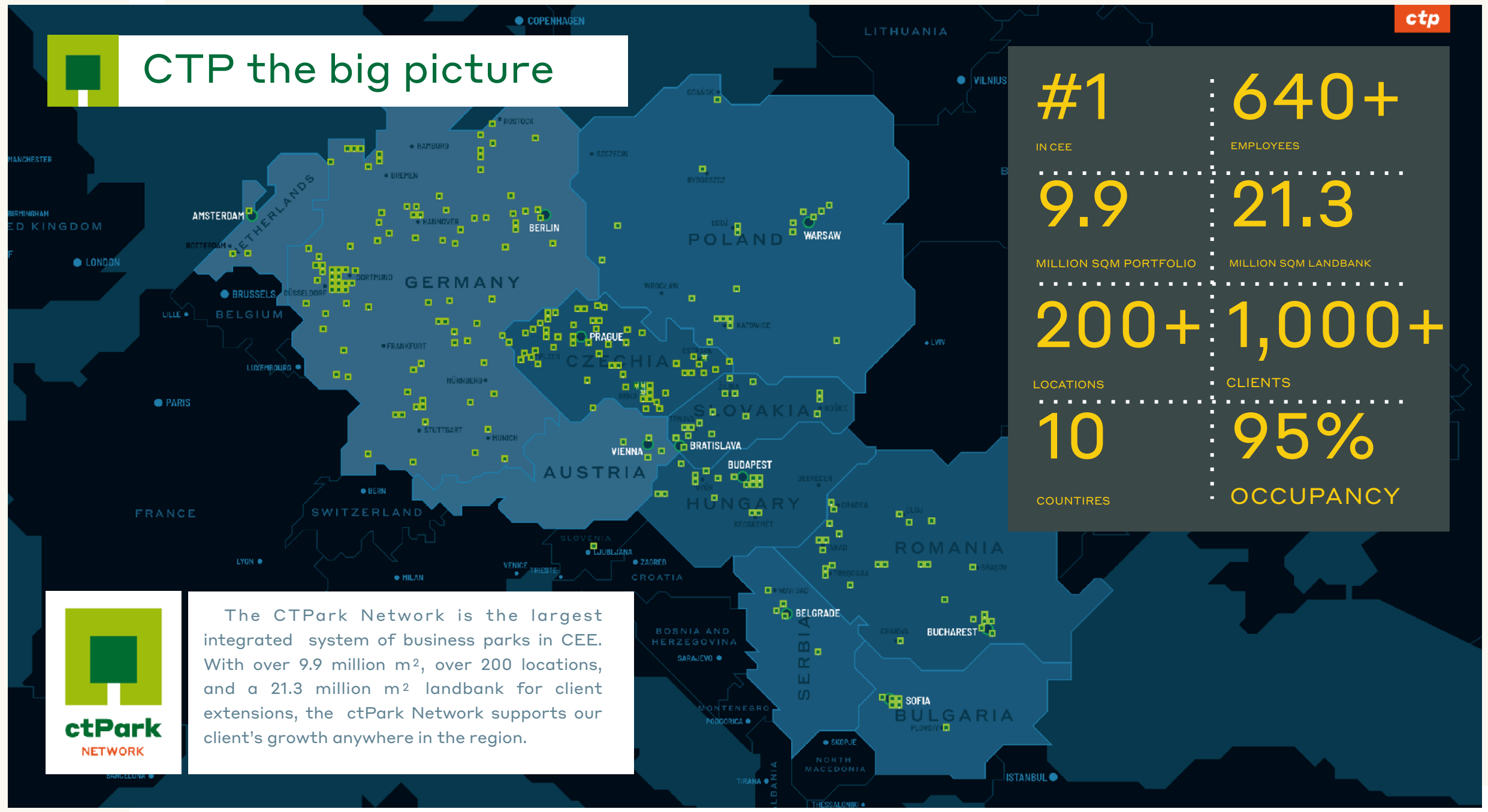
- Warsaw East 1
- Warsaw North 2
- Warsaw South 3
- Warsaw West 4
- Stryków 12

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WARSAW / CENTRAL POLAND



CTP the big picture



#1 IN CEE	640+ EMPLOYEES
9.9 MILLION SQM PORTFOLIO	21.3 MILLION SQM LANDBANK
200+ LOCATIONS	1,000+ CLIENTS
10 COUNTRIES	95% OCCUPANCY



The CTPark Network is the largest integrated system of business parks in CEE. With over 9.9 million m², over 200 locations, and a 21.3 million m² landbank for client extensions, the ctPark Network supports our client's growth anywhere in the region.

Unique and Stable Business Model

EXECUTION & DELIVERY

SECURED FINANCING & PIPELINE OF PROJECTS TO BE DELIVERED

IN-HOUSE

COMPLETE PROPERTY DEVELOPMENT SERVICES

COMMUNITY BASED

PARKS

LISTED COMPANY

AMSTERDAM AEX
25.03.21

OWNER / MANAGERS

LONG-TERM BUSINESS FOCUS

SUSTAINABLE WORK

ENVIRONMENTS

HIGH QUALITY

BUILDING STANDARDS ACROSS THE REGION

FLEXIBLE SPACES

EASY TO CUSTOMISE & RETROFIT



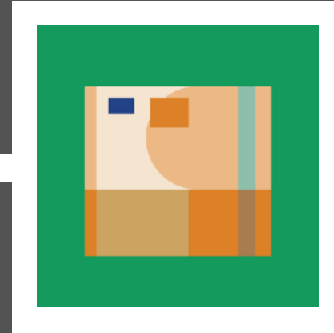
CLIENT REQUIREMENTS



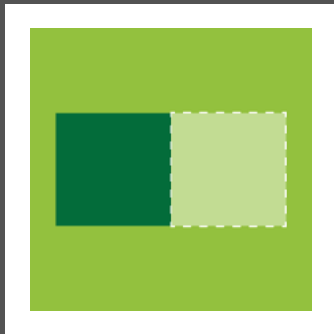
LOCATION SEARCH



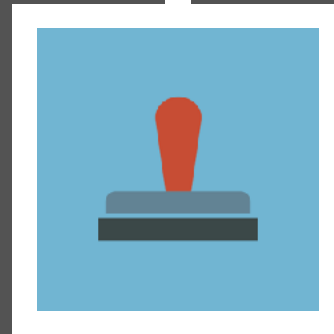
DESIGN



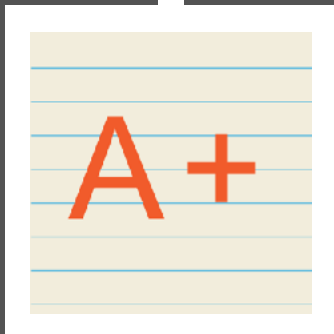
FINANCING



EXPANSION & REPEAT ...



PERMITTING



BUILDING UPGRADES



PROPERTY MANAGEMENT



FITOUT



CONSTRUCTION

Sustainability Leader



BREEAM
Certified



Low Energy
LED Lights



Solar Farms
& Reflective Roofs



5.8 million kWh
Energy Generation



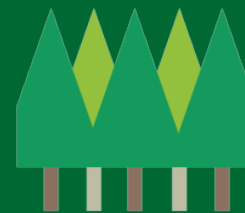
Climate
Adaptive



Increasing
Biodiversity



Circular
Economy



2x ctForest
1:1 sqm Portfolio

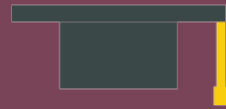
**CARBON
NEGATIVE
OPERATIONS**

2021

Community-based Parks



Community Center



Education & Training



Restaurants & Amenities



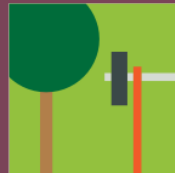
Medical Care on site



Workers Accommodation



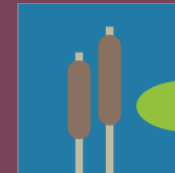
Public Transport & Shuttle Buses



Sports Facilities & Bike Paths



Park / Facility Managers



Communal Areas & Landscaping



Charity Support & Student Visits



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