

**Polska**



**Economy**

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The Kujawsko-Pomorskie Voivodeship contributes 4.5% of the Polish GDP. In 2012, as the preliminary data of the Central Statistical Office (GUS) demonstrated, it was PLN 33,803.00 per capita which represented 81.7% of the average GDP in Poland. Industry plays a crucial part in the economy of the region. Bydgoszcz, Toruń, Włocławek, Grudziądz and Inowrocław are the engines of development in the Voivodeship and important industrial centres representing the chemical, electromechanical, food, textiles, cellulose, mineral and polygraphic industries. About nineteen thousand entities are currently operating as part of its industrial production.

The Kujawsko-Pomorskie Voivodeship plays an important role in the Polish food industry. It is one of the leading food suppliers on the national market and a significant sugar and oil producer. Large companies with foreign capital and many smaller producers, including Krajowa Spółka Cukrowa S.A. (Toruń), Zakłady Przetwórstwa Cykorii S.A. (Wierzchosławice), Frosta sp. z o.o. (Bydgoszcz), Jutrzenka Colian sp. z o.o. (Bydgoszcz), Zakłady Tłuszczowe Kruszwica S.A. (Kruszwica) and Bonduelle Polska SA (Gniewkowo) operate in the region.

The chemical industry is of considerable significance for the region. The Voivodeship ranks fourth with regard to nitrogen fertilisers production (15%), and produces over 20% of the national sold production of the cellulose and paper industry. It is worth highlighting the innovativeness of regional companies, which is proved by numerous protection licences and certificates for utility models. Owing to the Nicolaus Copernicus University in Toruń and the UTP University of Science and Technology in Bydgoszcz, which provide education in the field of chemistry, enterprises have permanent access to qualified employees.

Apart from these, in this sector there are operating Zakłady Azotowe Anwil S.A. in Włocławek, Elana S.A. in Toruń, Soda Polska Ciech SA, Inowrocławskie Kopalnie Soli Solino S.A. and Unilever Polska SA.

The electromechanical industry is also a significant one. The regional companies in this industry have a crucial share of national exports (approx. 20%). It is the place where PESA Bydgoszcz SA (former Rail Rolling Stock Repair Workshops) produces trams and rolling stock, and sells them on the national and international markets. PESA Bydgoszcz SA is the first Polish company to design, build and start supplying new low-floor trams. To commemorate the 25<sup>th</sup> anniversary of the economic transformation in our country, the "Brief" magazine honoured this company as a brand creating the image of a modern, creative and economically powerful Poland. Other companies operating in the sector are Apator S.A., Przedsiębiorstwo Hydrauliki Siłowej Hydrotor SA, Bydgoskie Zakłady Elektromechaniczne Belma S.A., Fabryka Obrabiarek do Drewna FOD Sp. z o.o., Inofama S.A. in Inowrocław, and Sharp Manufacturing Poland Sp. z o.o.

Scientific and research facilities provide this sector with higher-education institutions specialising in electrotechnology (the UTP University of Science and Technology in Bydgoszcz, the Nicolaus Copernicus University in Toruń, the Kazimierz Wielki University in Bydgoszcz, and scientific and research institutes). Investors are attracted by such incentives as investment exemptions in Bydgoszcz, Toruń, Grudziądz, Inowrocław and other communes/municipalities.

The major branches of the economy of the Kujawsko-Pomorskie Voivodeship also include such sectors as BPO. In industrial reports Bydgoszcz is described as the "rising star" of this sector. This is owing to its favourable location in the centre of the country, on the intersection of important motorway connections and railways, with access to the international airport in Bydgoszcz, and the good knowledge of foreign languages by students at the universities in Bydgoszcz and Toruń. It is not without significance that local government policies focus on creating convenient operational conditions for BPO companies.

Given the natural potential of the Voivodeship, renewable energy sources are also important for the economy of the region. According to the Energy Regulatory Office in 2010 in the Kujawsko-Pomorskie Voivodeship operated

in total 54 hydropower plants. The hydropower plant on the Vistula River in Włocławek, the dam on the Koronowo Reservoir, the Smukała and Tryszczyn dams on the Brda River as well as the Gródek and Żur dams on the Wda River. The Kujawsko-Pomorskie Voivodeship is one of the leaders with regard to the number of wind-power installations in Poland. The largest number of wind turbines can be seen in the Inowrocław, Radziejów, Włocławek, and Aleksandrów Kujawski Districts. In addition, the Voivodeship ranks first compared to other regions in Poland with regard to biomass heat release (23%).

## Agriculture

A strong position on the market is held by agriculture – there are approx. 110 thousand people employed in the sector, and the area of agricultural lands amounts to 1036.6 thousand ha, 87% of which are arable land. The Kujawsko-Pomorskie Voivodeship is among the Poland's best in terms of slaughter animal production, especially pigs. It also reports good performance in cattle, poultry and sheep breeding, and dairy production. Kuyavia and Pomerania provide high quality crops (a 9.5% share in national production, which ranks it second), sugar beet (20%, second place), rapeseeds (12.6%, third place), potatoes, fruit and vegetables.

According to the experts, agriculture can constitute the competitive edge of the Kujawsko-Pomorskie region. The great potential of agricultural production, which consists of good agrarian structure and advanced agricultural culture, can be used for the further development of food processing, especially in the case of production oriented towards sales outside the voivodeship, and for the development of the renewable energy industry based on agriculture-related resources. Healthy-food production is also another opportunity which is going to be used for building the Voivodeship's brand.

In addition, rural areas are used for tourism purposes. There are many ecotourist farms in the Voivodeship which attract with their beautiful location and ecological cuisine.

## The labour market

One of the highest unemployment rates in Poland is a big problem in the region. At the end of August 2014, 128 thousand people were registered as unemployed in labour offices of the Kujawsko-Pomorskie Voivodeship. The unemployment rate reached here 15.8% compared to 11.7% in the whole country. With regard to the last year's rate it was lower by 1.6%; however, the Kujawsko-Pomorskie Voivodeship was still among voivodeships with the highest unemployment rate just after the Warmińsko-Mazurskie Voivodeship (18.4%). A relatively healthy situation is in the largest cities, Bydgoszcz (8%) and Toruń (9.1). The highest unemployment was reported in the following districts – the Włocławek District (25.2%), the Lipno District (23.6%) and the Radziejów District (23.4%). It is worth mentioning that in all districts the unemployment rates decreased in annual terms, mainly in the Lipno District (by 3.3 p.p.), the Golub-Dobrzyń District and in Grudziądz (by 3 p.p.).

In August 2014, average employment in the corporate sector reached 239.3 thousand people and was by 0.6% lower compared to the previous year. The largest decrease in employment was reported in construction (by 6%), while the largest increase was reported in the information and communication industry (by 9.4%). When compared to the whole country, the structure of employment in the Voivodeship has a relatively low contribution from the services sector (54.1%) whereas the agricultural and industrial sectors encompass respectively 15.7% and 30.2% of the employed.

In August 2014, the average gross salary in the corporate sector in the Kujawsko-Pomorskie Voivodeship was PLN 3,303.00 (as compared to PLN 3,893.23 at the national level). In this respect, the region ranked twelfth in the country. In comparison to the previous year the average remuneration increased by 3%. It included mainly those employed in the trade and repair of motor vehicles (an increase of 5.2%), real estate management (3.9%),

and in industrial processing (3.6%). However, the best earnings were received by people employed in the information and communication sector (49.2% more the voivodeship average) and real estate management (8.7% more), the lowest earnings were received by those employed in administrative and support service activities (by 28.5%), accommodation and catering (by 17.5%), and in transport and warehouse management (by 15.9%).

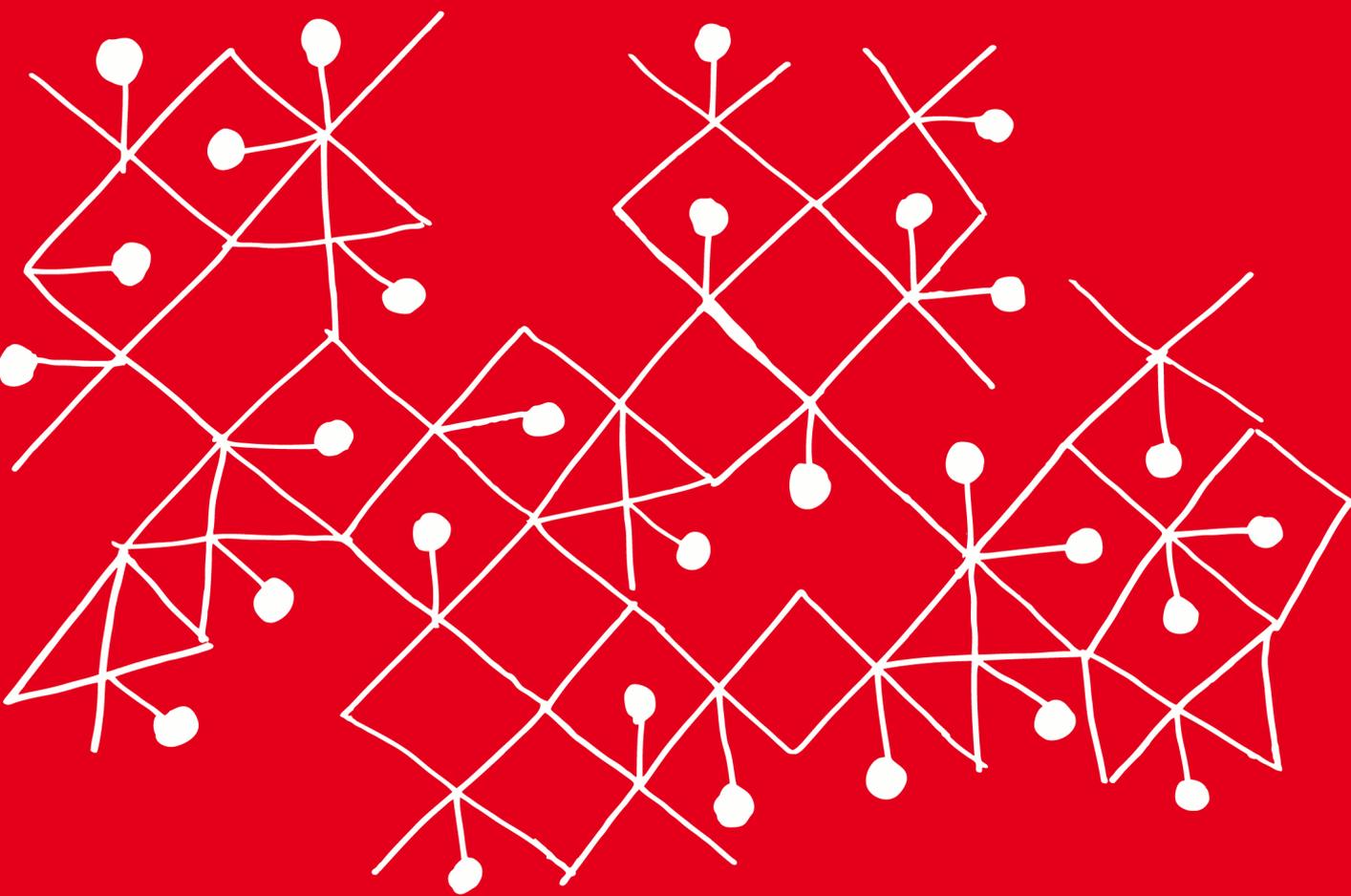
Twenty two universities, including seventeen non-public institutions, make potential for creating human capital in the Voivodeship. The development of cooperation between the R&D sector and the economy, and the increase in science and research capacity of the universities are among the long-term priorities of the Voivodeship's Local Government. Adapting the curriculum to market needs is another challenge for the universities in the region. It should be noted that entrepreneurs have a propensity for undertaking innovative actions.

The main academic centres are the two capitals of the Kujawsko-Pomorskie Voivodeship. In Toruń students can choose to study at the Nicolaus Copernicus University, the Toruń School of Banking, the Toruń Higher School, the College of Social and Media Culture in Toruń. The town is also home to the branches of the Polish Academies of Sciences - the Department of Astrophysics at the Nicolaus Copernicus Astronomical Centre, the Department of Geomorphology and Hydrology of Lowlands at the Institute of Geography and Spatial Organisation, the Research and Development Centre on Drive Control Devices, the Institute for Plastics Processing "Metalchem".

Bydgoszcz offers education at, among others, the UTP University of Technology, the Kazimierz Wielki University, the Feliks Nowowiejski Academy of Music, the Ludwik Rydygier Collegium Medicum at the Nicolaus Copernicus University, the Higher School of Aviation Services, and the University of Economy. There are also the Research Institute of the Bakery Industry, the Institute of Technical Implementation INTECH, the Institute for Potato Research and the National Veterinary Institute. Włocławek, in turn, holds such institutions of higher education as the State Higher School of Vocational Education and the University of Humanities and Economics. The universities have their academic business incubators.

A vital role have scattered throughout the region facilities operating as part of agricultural institutes. In addition, some production plants in the Voivodeship carry out their own research and development activities. Such a solution has been introduced by Anwil S.A. in Włocławek, Toruńskie Zakłady Materiałów Opatrunkowych TZMO in Toruń, Zachem in Bydgoszcz, Telefonía Kabel in Bydgoszcz and Lucent Technologies in Bydgoszcz.

The most important road investment in the region is the A1 motorway, which passes near Grudziądz, Toruń and Włocławek. Bydgoszcz is located further from the motorway. The city will have a better connection to the A1 and A2 motorways owing to the S5 expressway. Practically all local-governments focused on the construction of their road infrastructures. In Toruń and Bydgoszcz new bridges and diametral highways have been constructed. Utilising pre-accession funds and grants obtained following Poland's accession to the EU, water and sewerage networks as well as water-treatment plants and landfills have been constructed and modernised.



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