



CITY OF
TORUŃ

torun.direct
Business Support Center in Toruń



Toruń

- the investment area

Contents

01	Demographic analysis	2
02	Analysis of available infrastructure	3
03	Tourism sector in Toruń	7
04	Educational market analysis	8
05	Labour market in Toruń	9
06	Analysis of the city's revenues	11
07	Analysis of innovation	12
08	Business Environment Institutions	13
09	Situation of companies in Toruń on the market	14
10	Investment situation of the city of Toruń	16
11	Toruń real estate market	17

01

Demographic analysis



Women: 53,5%



Men: 46,5%

60,5% Population of working age

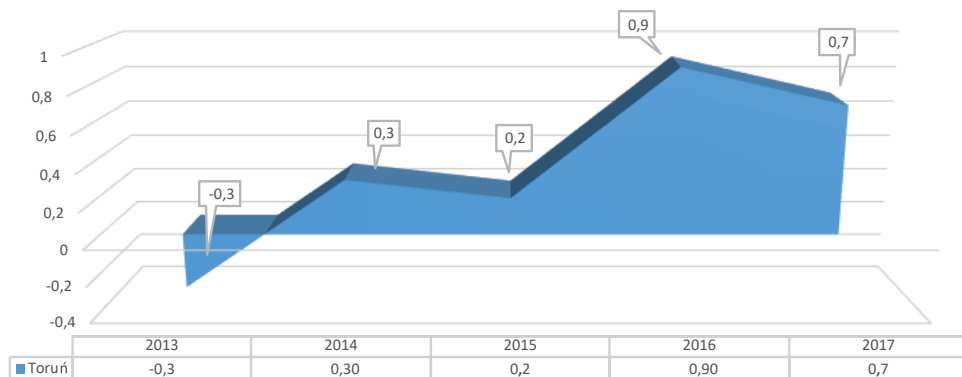
16,8% Pre-working age population

22,7% Population of post-working age

According to data from the Central Statistical Office from 2017 Toruń is inhabited by **202 562 people**.*

From 2015 until the end of the analysed period, the city of Toruń has recorded a natural growth rate. Compared to other large cities in the Kujawsko-Pomorskie Voivodeship, Toruń performs best results in this regard.

Drawing. Natural growth per 1,000 inhabitants, 2013-2017



Source: own elaboration based on data from the Central Statistical Office.

*as at 31.12.2017

02

Analysis of available infrastructure

Toruń has a significant role as the main transport hub in the voivodeship. Four national roads currently intersect in the city. Toruń is also connected with the A1 motorway, which provides a fast transport connection with the north and south of the country, as well as quick access to the airport in Gdańsk.

Road transport is complemented by the S-10 express road which is the city's southern ring road.



The nearest passenger airport is about 50 km away from Toruń, it is located in Bydgoszcz. The airport can be reached from Toruń by car or train. The next airport is in Gdańsk, about 175 km from Toruń and the motorway journey takes less than 2 hours.

Location of Toruń and selected airports



Gdańsk through A1
1h 40min



Katowice through A1 & DK1
3h 50min



Poznań through DK15
2h 20min



Bydgoszcz through DK10
50min



Warszawa through A1 & A2
2h 30min



Kraków through A1 & DK1
4h 30min



The city of Toruń has a civil airport, which is serviced by the Pomeranian Aeroclub. The airport was established in 1920 and is located in the western part of the city, in the district of Bielany. Currently, the airport hosts the Polish Glider Acrobatics Championships in Toruń. In 2009, the airport hosted the 19th Precision Flying World Championships.

The Pomeranian Aeroclub offers sightseeing flights by plane and glider, as well as aircraft training for tourist aircraft licence PPL(A) and light aircraft licence LAPL(A) with take-off weight up to 2,000 kg.



On the premises of the Pomeranian Aeroclub may land business aircrafts providing aviation services access - general aviation. Thanks to them there is a possibility of quick connection of Toruń with the rest of the country and Europe.



The constant development of Toruń real estate market directly affects the need to expand the distribution network. The size of the distribution network which includes: water supply, sewage system and gas network is gradually increasing year by year.

Size of the distribution network - **year 2017**



Water
distribution
system
325,6



Sewage
system
433,2



Gas
network
364,4

The condition of hard pavement in 2017 is 294.3 km which equals 16.8 km of roads per 10 thousand people.

Surface condition - **year 2017**



Hardened surface
294,3 per 100km², **16,8** per 10 thousand inhabitants









Ground surface
67,7 per 100km², **3,9** per 10 thousand inhabitants



03

Tourism sector in Toruń

According to the data of Tourist Traffic Monitoring in Toruń, it is estimated that in 2017 the city was visited by 2,371,754 tourists. Compared to the previous years, the number of sleeping places have increased which also translated into an increase of the number of tourists visiting the city and enjoying its attractions.

-  Germany **27,2%**
-  Great Britain **8,0%**
-  Spain **7,4%**
-  USA **6,5%**
-  Italy **5,6%**
-  France **5,6%**

Source: Monitoring of tourist traffic „Tourist Toruń 2017”, March 2018.



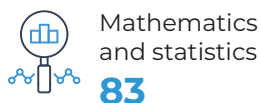
04

Educational market analysis

There is a possibility to study at 6 different universities in Toruń: Nicolaus Copernicus University in Toruń (abbreviation UMK), School of Banking in Toruń (WSB), Jagiellonian College - Toruń School of Higher Education (TSW), Higher School of Social and Media Culture, Higher School of Economy in Bydgoszcz - Technical Faculty in Toruń and Higher Seminary of the Toruń Diocese. Seniors can take up a course in the University of the Third Age. Noteworthy is the fact that the Nicolaus Copernicus University in Toruń occupies a high position in the Ranking of Universities of Perspectives - in 2018 it was classified on the 11th position.

Number of students as of 2017: **26.972.**

Number of graduates as of 2017: **8.114.**



Graduates of secondary schools.

Secondary schools
1.931

High schools for young people
1.452

Technical colleges for young people
453

Art schools with vocational qualifications
13

Number of industry schools of the first degree: **6**

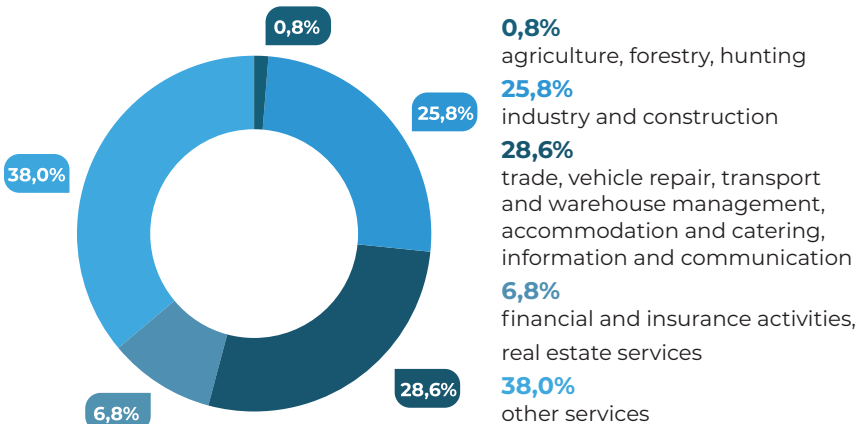
Number of technical schools: **8**

05

Labour market in Toruń

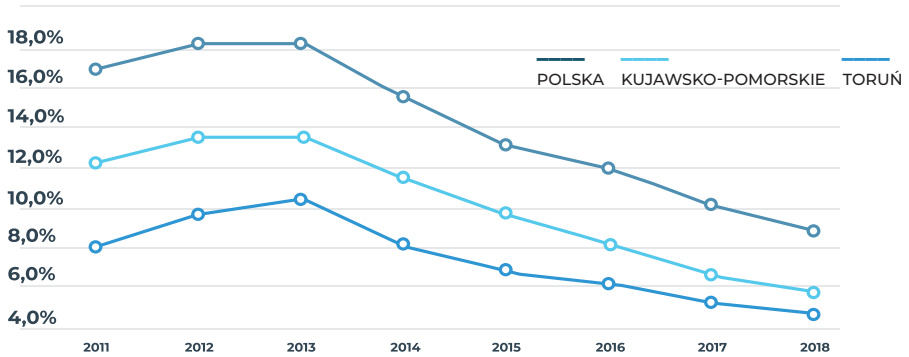
Labour market in Toruń is considered stable in terms of the number of employed people - for several years this number has been oscillating around 64 thousand people.

Drawing. Employees, division by sector of activity, 2016



Source: own elaboration based on data from the Central Statistical Office.

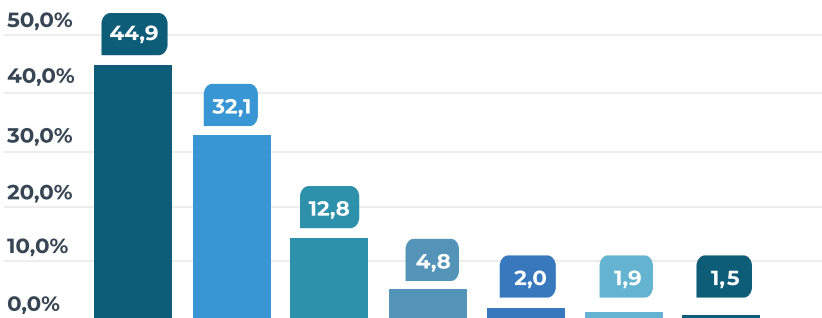
Also, the registered unemployment rate has been steadily decreasing for years, to reach 4.7% in June 2018.

Drawing. Registered unemployment rate, 2011 - 06.2018

Source: own elaboration based on data from the Central Statistical Office

In the perspective of the whole Kujawsko-Pomorskie voivodship, the average gross monthly remuneration, in relation to the national average, the highest is in Toruń and in 2017 it amounted to **4.384,59 PLN**.

The percentage distribution of Toruń taxpayers' income from 2017 is presented in the chart below.

Drawing. Stratification of annual income of taxpayers in Toruń, 2017

44,9% - 0,01 PLN - 24.000 PLN **32,1%** - 24.000,01 PLN - 48.000 PLN **12,8%** - 48.000,01 PLN - 72.000 PLN **4,8%** - 72.000,01 PLN - 96.000 PLN **2,0%** - 96.000,1 PLN - 120.000 PLN
1,9% - 120.000,01 PLN - 180.000 PLN **1,5%** - powyżej 180.000 PLN

Source: First and Second Internal Revenue Service (IRS) in Toruń.

06

Analysis of the city's revenues

The analysis of the per capita wealth level of the largest cities of the Kujawsko-Pomorskie Voivodeship showed that the city of Toruń has one of the highest indicators - **PLN 4,222.55**.

Tax transfers from legal and natural person account for about $\frac{1}{4}$ of the city budget, i.e. they are the main source of income for the commune..

Drawing. Prosperity level per capita, 2017



Source: own elaboration based on a report „The richness of local governments. Ranking of income of local government authorities”

07

Analysis of innovation

The share of the creative sector in newly registered entities in Toruń in 2017 amounted to **7,9%**

One of the sectors of activity based on innovation is the creative sector. Its uniqueness is the result of the rich and multidisciplinary knowledge of creators, as a result of which the products and services produced have social, economic, cultural and sustainable development aspects.

Patents: **241 (2009-2017)**



Research institutes
39,4%



Higher schools
26,6%



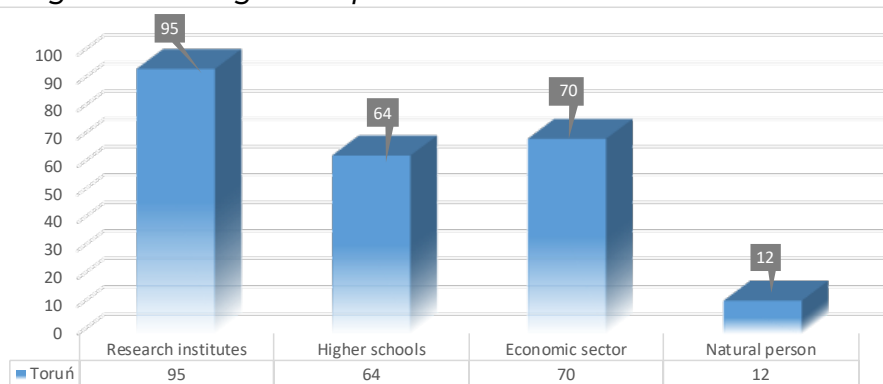
Economic sector
29,0%



Natural persons
5,0%

Comparing the number of granted patents in the surveyed cities, it can be seen that their total from 2009 to 2017 is the highest in Bydgoszcz - 266, while Toruń has a slightly lower number of granted patents - 241. Włocławek has received 15 patents in the course of the surveyed years.

Drawing. Number of granted patents in 2011-2017



Source: own elaboration based on data from the Patent Office of the Republic of Poland

08

Business Environment Institutions

Among the Business Environment Institutions in Toruń you can find: Academic Entrepreneurship Incubator UMK, Academic Entrepreneurship Incubator WSB, Business Centre Club Łoża Toruńska, Business Link Toruń Technology Incubator, Various Craft Guild in Toruń, Technology Transfer Centre UMK, Exea Smart Space Toruń Technology Park, Interdisciplinary Centre of Modern Technologies of the Nicolaus Copernicus University, Chamber of Commerce and Industry in Toruń, Kujawsko-Pomorskie Organisation of Employers LEWIATAN in Toruń, Main Technical Organisation Technology Club, Toruń Regional Development Agency TARR S.A.

Entrepreneurial centres – deal with broadly understood promotion and incubation of entrepreneurship (often in discriminated groups), provide support services for small businesses and activate the development of peripheral regions or those affected by the structural crisis;



Innovation centres – wide promotion and incubation of innovative entrepreneurship, technology transfer and provision of pro-innovation services, activation of academic entrepreneurship and cooperation between science and business;

Financial institutions – facilitating access to financing for both start-ups and small businesses without a credit history, providing financial services tailored to the specificity of innovative business ventures.

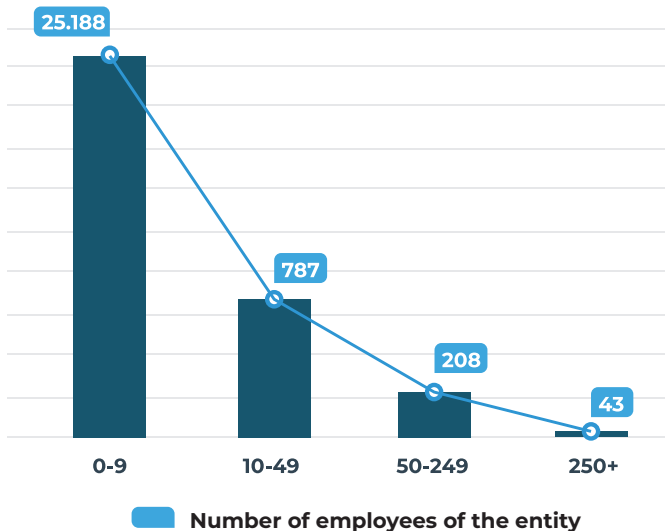


09

Situation of companies in Toruń on the market

Micro-enterprises make up about 96% of all companies in Toruń. In terms of size, they are the main economic force on the enterprise market, so the increase in their number is synonymous with the economic development of the city. The second largest group of enterprises are entities employing from 10 to 49 employees. The least numerous group are entities employing more than 250 people - in 2017 in Toruń there were 43 such enterprises.

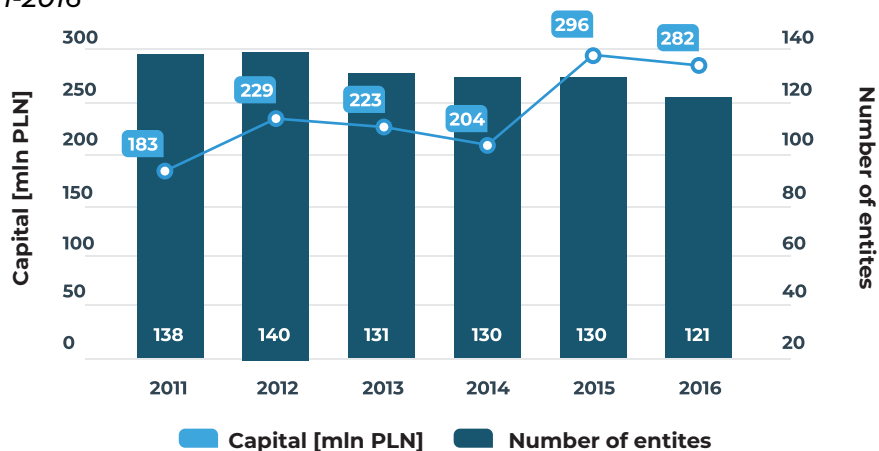
Drawing. Economic entities by size classes, 2017



Source: own elaboration based on data from the Central Statistical Office

Number of business entities with participation of foreign capital in 2016 amounted to 121 and their capital amounted to PLN 282 million. The chart below shows the changes that have taken place over the years in terms of companies in Toruń with foreign capital.

Drawing. Analysis of investment outlays of companies in Toruń, 2011-2016



Source: own elaboration based on data from the Central Statistical Office

Despite the large number of micro-enterprises, the largest employment is generated by medium and large enterprises, even though there are relatively few of them. In fact, medium-sized and large companies have the greatest impact on reducing the amount of unemployment in relation to micro, small and one-man economic activities. This confirms their influence on the market in Toruń as leading entities, influencing as:

- ✓ cooperating entities,
- ✓ also acting as sub-suppliers and subcontractors,
- ✓ generating demand for services provided to employees.

Table. Number of employees at active contribution payers, 2017 - 06.2018 [thousands]

	sole proprietorship	1-9	10-49	50-249	250+
12.2017	10,2	14,1	17,5	24,4	45,5
06.2018	10,5	14,3	17,7	23,6	45,8

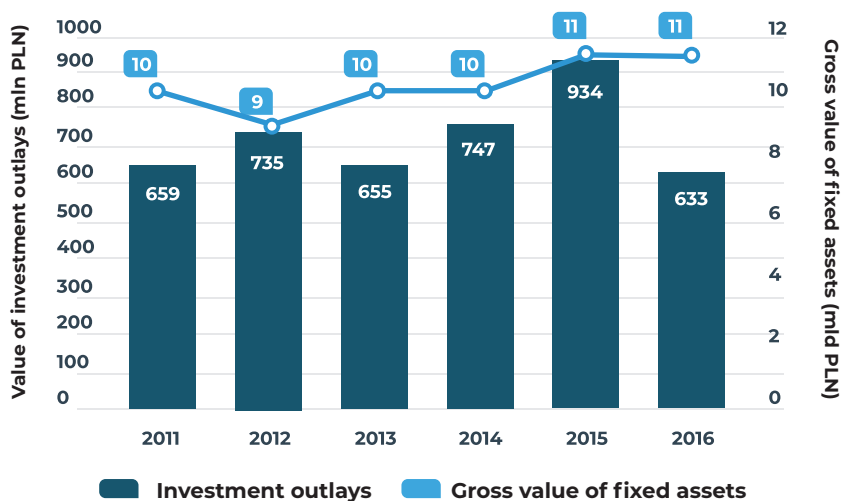
Source: Zakład Ubezpieczeń Społecznych Oddział w Toruniu (Social Insurance Institution, Toruń branch)

10

Investment situation of the city of Toruń

Over the years there have been significant fluctuations in the value of investment outlays of companies based in Toruń and in 2016 they reached the lowest value of 633 million PLN. This means that year 2015 was an intensive investment period for companies in Toruń, followed by the implementation of projects. This is visible in the increase in the gross value of fixed assets - in 2016 the ceiling of PLN 11 billion was exceeded

Drawing. Analysis of investment outlays of companies in Toruń, 2011-2016



11

Toruń real estate market

Toruń has a wide offer of office space to rent, which is dominated by single offices and relatively small complexes. There are also large, high standard office space for service centres. According to the report „Modern business services sector in Poland”, Toruń is mentioned as one of the best developing locations in terms of office space in Poland.



Investment areas

100 ha



Production



Trade



Logistics



Warehouses



The total supply of office space in Toruń in 2017 amounted to **57,400 m²**, and only in 2017 - **5,100 m²** was completed. The area under construction amounts to another **5,000 m²**.



The prices to be paid for office space of a given class are as follows:



Office building
class A+

Rent – ground floor: **75 PLN/m²**

Rent – floor: **45-48 PLN/m²**



Office building
class A

Rent: **40-43 PLN/m²**

Rent: **42 PLN/m²**

Rent: **25 PLN/m²**



Office building
class B

Rent: **45 PLN/m²**

Rent: **25 PLN/m²**



CITY OF
TORUŃ
