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I. Socio-economic Situation of Poland in Three Quarters of 2013

Introduction

In the period of January–September 2013, together with the continually unfavourable business tendencies on the global markets, the economic growth rate was lower than a year before. However, in subsequent quarters, a gradual improvement in the dynamics was recorded.

According to the preliminary estimate, an increase in the gross domestic product (at constant average prices of the previous year) in the 3rd quarter of 2013 was higher than in the previous periods. The GDP increased by 1.9%, in real terms, in comparison to the corresponding period of the previous year (against a growth of 0.5% and 0.8% in the 1st and 2nd quarters of 2013, respectively). This rise resulted from a positive impact of both the domestic and foreign demand (net exports). The domestic demand, after five quarters of a drop in annual terms, was by 0.5% higher, in real terms, than in the 3rd quarter of the previous year (with a slight improvement in the dynamics of final consumption expenditure in total – an increase of 1.2% against 1.1% in the 2nd quarter, and a considerably lower drop in the gross capital formation than in the five preceding quarters – a drop of 2.4% against 13.6% in the 2nd quarter of 2013). Net exports remained the major growth factor. In the 3rd quarter of 2013, its impact on GDP growth amounted to 1.4 percentage point, and was lower than in the 2nd quarter (2.5 percentage points).

In the period of three quarters of 2013, the following tendencies were observed:

- Sold production of industry, at constant prices, was by 1.4% higher than a year before (following a drop in the 1st quarter of 2013, in subsequent quarters it grew in annual terms, strengthening the growth rate in the period of July–September 2013). An increase concerned all industry sections. Among the main industrial groupings, the fastest sales growth occurred in enterprises manufacturing mainly consumer goods.
- Construction and assembly production, at constant prices, was lower than a year before (by 15.6%), but its drop in the 3rd quarter of 2013 was lower than in the two preceding ones. A decrease was observed in all divisions of construction.
- Retail sales grew, in annual terms, by 1.9%. A growth was recorded in the majority groups, except, among others, for solid, liquid and gaseous fuels.
- The sales of transport services, at constant prices, increased by 3.7%, in comparison with the corresponding period of the previous year.
- A year-on-year drop in producer prices in both industry and construction, which had begun in the 2nd half of the previous year, maintained.
- The prices of consumer goods and services grew, in annual terms, by 1.0%, reaching the level below the lower limit of deviation from the inflation target. The dynamics in most groups of goods and services were slower than in the period of January–September 2012.
- Despite the growth in average monthly nominal gross wages and salaries in the enterprise sector being slower than a year earlier, their purchasing power was higher than in the period of January–September of the previous year (a growth of 1.9% against a drop of 0.2% a year before).
- Average real retirement pays and pensions in the employee systems and farmers were higher than a year before (by 4.2% and 5.2%, respectively).
- The average paid employment in the enterprise sector was by 1.0% lower than a year before.

- At the end of September of 2013, the registered unemployment rate amounted to 13.0% and was by 0.6 percentage point higher than a year before.
- On the agricultural market, the procurement prices of cereals fell below the previous year's level. The prices of cattle for slaughter in procurement were also lower. However, the prices of pigs for slaughter and poultry for slaughter were slightly higher than a year earlier; milk prices also increased. The procurement prices of potatoes considerably exceeded the low level recorded a year before.
- The financial results of non-financial surveyed enterprises improved in relation to the ones achieved in the corresponding period of the previous year. An increase was observed, among others, in gross and net financial results, following a considerable drop a year before. The basic economic and financial indicators slightly improved slightly. The indicators obtained by exporters slightly weakened, though they were still more favourable than average. The value of export sales grew in annual terms, and so did its share in net revenues from the sales of products, goods and materials in entities in total.
- The investment outlays of the surveyed entities (at constant prices) were by 2.2% higher than in the period of the three quarters of the previous year (against a growth of 4.4% a year before and 0.2% in the 1st half of 2013). The estimated value of the newly started investments increased by 16.2% (following a drop of 18.9% in the period of the nine months of the previous year).
- The dynamics of foreign trade turnover (calculated in PLN) were weaker than in the corresponding period of the previous year. Exports were higher than a year before while imports dropped. As a result, the negative balance of trade in annual terms improved considerably. In the period of January–September of 2013, the terms of trade index in total reached a favourable level, and amounted to 101.9 (against 97.9 a year before).
- The state budget expenditure amounted to PLN 234.0 bn, and revenue to PLN 204.4 bn. The deficit reached the level of PLN 29.6 bn, which accounted for 83.3% of the plan for 2013.

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Population

According to preliminary data, as of 30 September 2013, the population of Poland amounted to approx. 38 510 thous. persons, i.e. nearly by 35 thous. less in relation to the status recorded a year before and by over 23 thous. less in comparison to the end of the previous year. Such a considerable drop in population was caused by increased emigration in 2013 and high mortality in the 1st quarter of 2013, when a substantial natural decrease (approx. 16.5 thous. persons) was recorded. It is estimated that in the period of three quarters of 2013, as a result of the vital statistics and international migrations, the population number decreased by 6 persons per each 10 thous. population (in the corresponding period of the previous year the number increased by 2 persons).

In the period of January–September 2013 over 283 thous. live births were recorded, i.e. by over 10 thous. less than a year before. The birth rate dropped by 0.4 point and amounted to 9.8‰. Nearly 290 thous. persons died, i.e. by over 6 thous. more than in the corresponding period of the previous year. The death rate increased by 0.2 point to 10.0‰.

Natural decrease was observed from the beginning of the year. In the period of three quarters of 2013, the number of live births was by over 6 thous. lower than the number of deaths, while in the corresponding period of the previous year natural increase was positive and amounted to 10 thous. persons.

The number of infant deaths slightly decreased in annual terms. In the period of three quarters of 2013 below 1.3 thous. children under 1 year of age died (against slightly more than 1.3 thous. a year before). The rate expressing the number of infant death per 1000 live births amounted to 4.5‰, i.e. by 0.1 point less than a year before.

In the fourth year in a row a drop in the number of newly contracted marriages is recorded. Nearly 149 thous. marriages were contracted, i.e. by over 15 thous. less than a year before. Approximately 70% of which were religious marriages. The rate of marriages decreased by 0.5 point to 5.1‰. However, the number of divorces increased (by approx. 5 thous.) to over 50 thous. The rate of divorces decreased slightly and amounted to 1.7‰. Moreover, approx. 1.7 thous. separations, i.e. slightly less than a year before, were adjudicated.

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Labour Market

In the period of nine months of 2013, the average paid employment in the national economy¹ amounted to 8 151 thous. persons and was lower than the year before by 98.7%. In the enterprise sector² the average paid employment was lower than a year before, with the decrease rate similar to the one recorded in the 1st half of 2013. The registered unemployment rate at the end of September of 2013 was higher than a year before. In the period of three quarters of 2013, in comparison to the corresponding period of the previous year, unemployment inflow was higher, and simultaneously more persons were removed from unemployment rolls, particularly due to taking up a job.

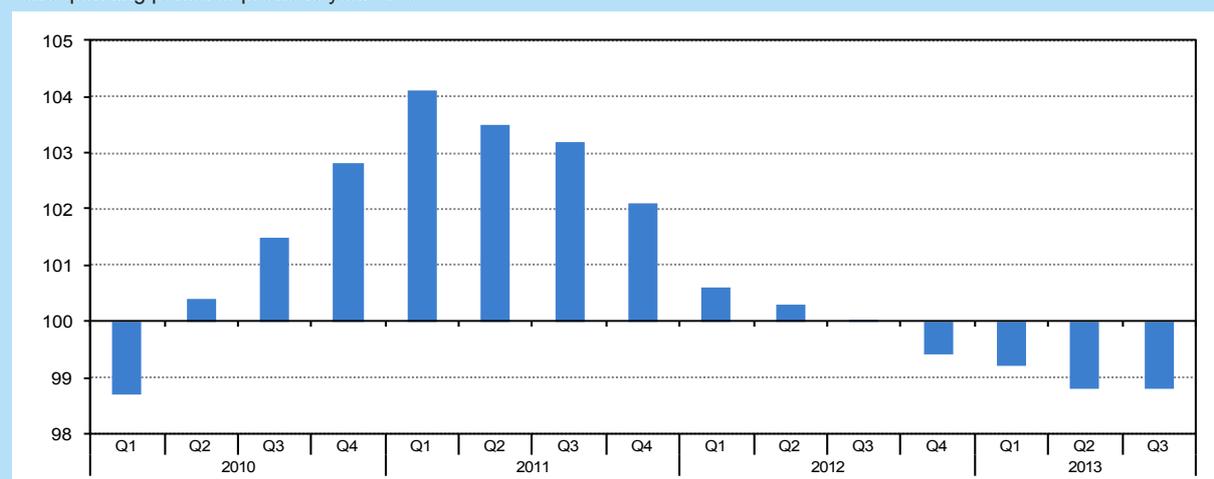
The average paid employment in the enterprise sector in the period of January–September 2013

amounted to 5 489.5 thous. persons and was by 1.0% lower than a year before (against a growth of 0.3% in the corresponding period of the previous year). The most significant decrease was recorded in construction (of 8.6%). The employment was also lower, among others, in electricity, gas, steam and air conditioning supply (by 6.2%) and real estate activities (by 3.5%). A slight drop was also observed in manufacturing (of 1.0%). However, employment grew, among others, in administrative and support service activities (by 4.3%), water supply; sewerage, waste management and remediation activities (by 2.7%), information and communication (by 2.4%) as well as in professional, scientific and technical activities (by 2.3%).

The employed persons and the average paid employment in the national economy¹

Specification a – corresponding period of the previous year=100	2012				2013		
	Q1	Q2	Q3	Q4	Q1	Q2	Q3
Employed persons (end of period) in thous. ...	8 526	8 518	8 487	8 447	8 476	8 490	8 496
a	100.2	100.0	99.8	99.7	99.4	99.7	100.1
Average paid employment in thous.	8 266	8 280	8 259	8 338	8 210	8 187	8 151
a	100.2	100.2	99.9	99.6	99.3	98.9	98.7

Average paid employment in the enterprise sector
corresponding period of previous year=100



¹ Excluding economic entities employing up to 9 persons, and private farms in agriculture as well as budget entities conducting activity in the scope of national defence and public safety.

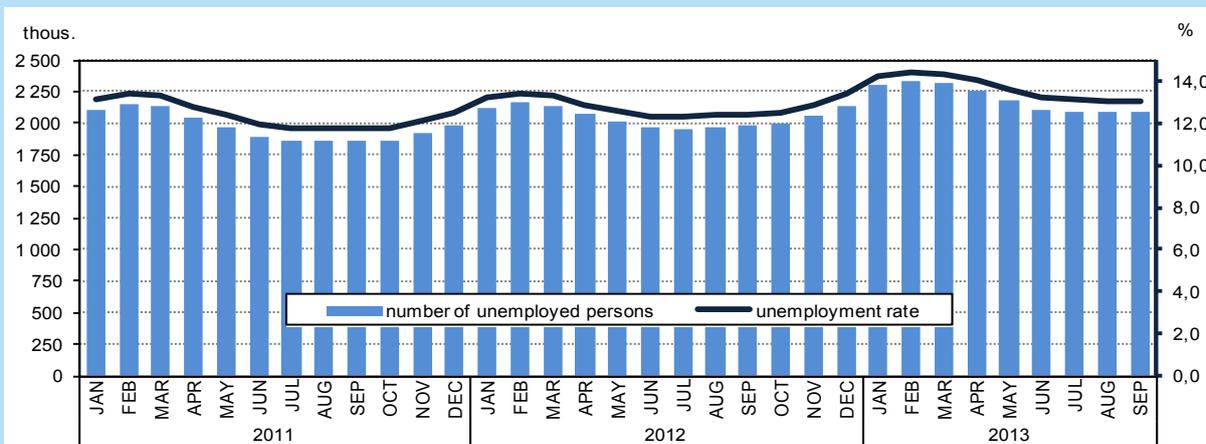
² In economic entities employing more than 9 persons.

Among the divisions with the highest share in employment, the largest decline in the average paid employment in relation to the period of January–September 2012 was observed in enterprises dealing with the construction of buildings (of 13.4%). Employment also decreased, among others, in civil engineering (by 8.7%), wholesale and retail trade and repair of motor vehicles and motorcycles (by 4.4%), manufacture of machinery and equipment (by 4.1%), manufacture of other non-metallic mineral products (by 3.5%) and mining of coal and lignite (by 3.1%). In manufacture of wearing apparel, where for several years a decrease has been observed,

employment in the three quarters of 2013 was by 5.6% lower than a year before. An increase in average paid employment was recorded, among others, in warehousing and support activities for transportation (of 3.2%) and manufacture of motor vehicles, trailers and semi-trailers (of 2.9%).

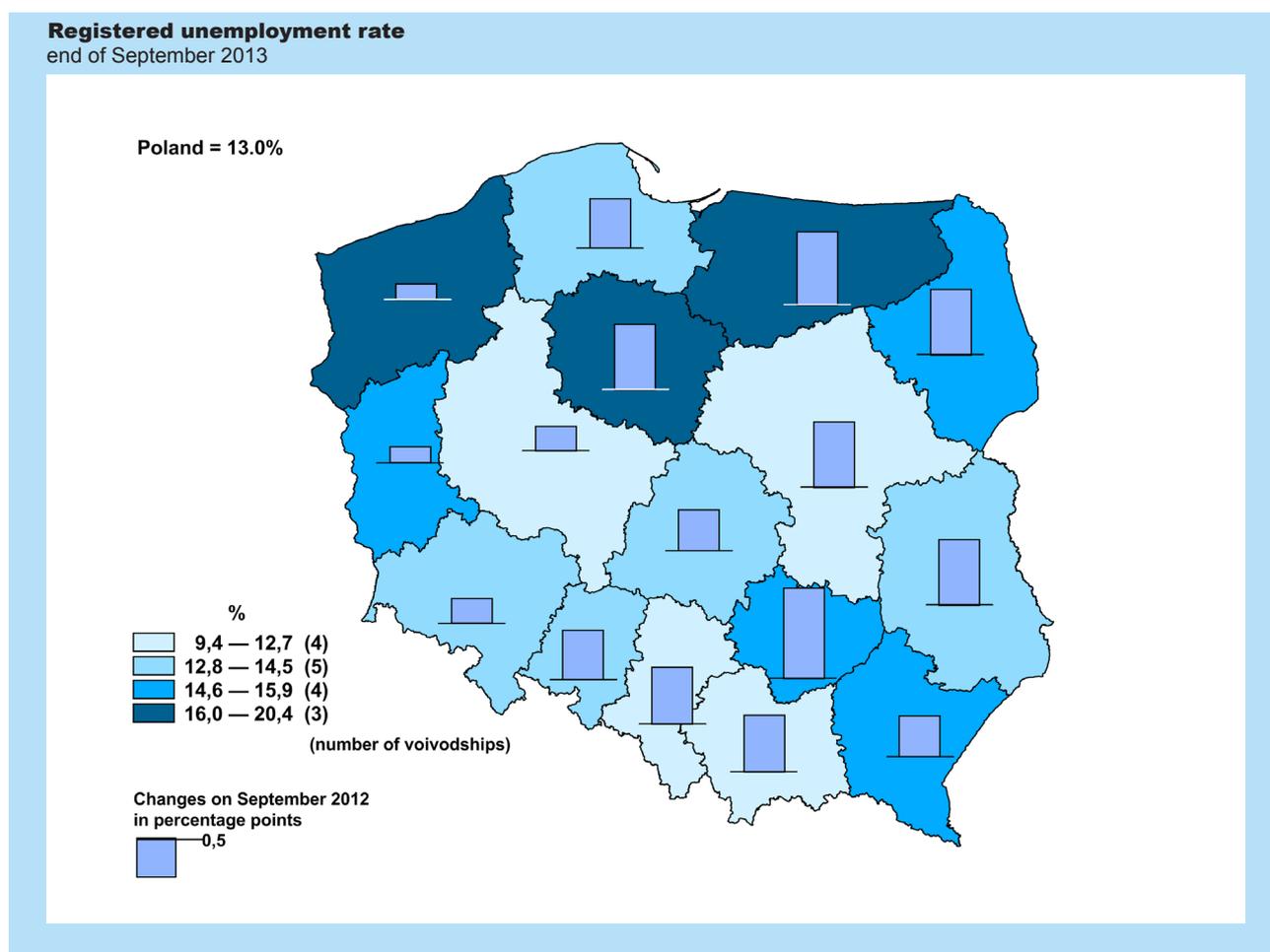
At the end of September 2013, the number of unemployed persons registered in labour offices amounted to 2 083.1 thous. and increased, in annual terms, by 5.3% (i.e. by 104.1 thous. persons). Registered unemployment rate amounted to 13.0% and was by 0.6 percentage point higher than a year before.

Registered unemployment



Registered unemployment

Specification a – corresponding period of the previous year=100	2012				2013		
	Q1	Q2	Q3	Q4	Q1	Q2	Q3
Registered unemployed persons in total (end of period) in thous.	2 141.9	1 964.4	1 979.0	2 136.8	2 314.5	2 109.1	2 083.1
a	100.4	104.3	106.3	107.8	108.1	107.4	105.3
Newly registered unemployed persons in thous.	692.4	526.4	675.4	760.8	756.7	554.5	692.4
a	94.3	101.7	104.4	109.8	109.3	105.3	102.5
Persons removed from unemployment rolls in thous.	533.2	703.8	660.9	603.0	579.1	759.8	718.2
a	96.1	91.6	98.9	105.4	108.6	108.0	108.7
Unemployment flow (inflow – outflow).....	159.2	-177.4	-14.5	157.8	177.6	-205.3	-25.8



The unemployment rate in voivodships ranged from 9.4% in wielkopolskie to 20.4% in warmińsko-mazurskie voivodship. In comparison with September of the previous year, the unemployment rate grew in all voivodships, and the most considerable increase was recorded in świętokrzyskie (of 1.1 percentage point) and warmińsko-mazurskie (of 0.9 percentage point), and the least considerable increase was recorded in zachodniopomorskie and lubuskie voivodships (of 0.2 percentage point each).

At the end of September 2013, the share of women in the structure of registered unemployed persons decreased, in annual terms (by 1.3 percentage point to 52.1%). The share of graduates also dropped (by 0.3 percentage point to 5.1%). However, the share of persons without benefit rights and of previously working persons increased by, respectively, 1.8 percentage point to 86.1% and by 0.7 percentage point to 81.1% (of which persons terminated for company reasons constituted 6.6% against 4.3% at the end of September of the previous year).

Among unemployed persons in a specific situation on labour market, at the end of September 2013, the percentage of long-term unemployed persons³ among the total number of registered unemployed persons was higher than a year before (a growth of 1.5 percentage point to 52.4%). An increase was also recorded in the share of unemployed persons above 50 years of age (of 1.1 percentage point to 23.6%), of unemployed persons bringing up single-handed at least one child below 18 years of age (of 0.5 percentage point to 9.4%) and of persons without occupational qualifications (of 0.4 percentage point to 30.1%). However, the share of unemployed persons below 25 years of age dropped (by 1.3 percentage point to 19.1%). The share of disabled persons remained at the level recorded a year before and amounted to 5.3%. The number of unemployed persons increased in annual terms in most of the mentioned categories, except for unemployed persons below 25 years of age. The most considerable growth concerned persons bringing up single-handed at least one child below 18 years of age (of 10.9%) and persons above 50 years of age (of 10.2%).

In the three quarters of 2013, the number of newly registered unemployed persons amounted to 2 003.7 thous., i.e. it was by 5.8% higher than a year before. Persons registering for another time still constituted the most numerous group, and their share in the newly registered unemployed persons in total grew as compared with the previous year

(by 1.0 percentage point to 78.3%). An increase was also recorded in the share of persons terminated for company reasons (of 2.9 percentage point to 6.2%) and persons residing in rural areas (of 0.9 percentage point to 41.1%). However, the percentage of persons who had not been previously employed decreased (by 0.5 percentage point to 19.9%). The percentage of graduates remained at the similar level observed a year before (11.9%).

In the period of January–September 2013, 2 057.2 thous. persons were removed from the unemployment register, i.e. by 8.4% more than a year before. Receiving a job was still the main reason for deregistering, as a result of which 944.1 thous. persons were removed from unemployment rolls (against 819.4 thous. a year before). The share of this category in the total number of deregistered persons increased by 2.7 percentage points to 45.9% in comparison with a year before.

In the nine months of 2013, 701.7 thous. of job offers⁴ were submitted to labour offices, i.e. by 10.6% more than a year before. Offers from the public sector constituted 22.5% of the total number of offers (against 23.7% a year before). At the end of September 2013, job offers which were not utilised for more than one month constituted 24.3% of the total number of offers (against 26.5% a year before). Among all offers, 4.4% referred to traineeship, 8.5% were targeted at disabled persons, and 0.3% – at graduates.

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³ Long-term unemployed persons include persons remaining in the register rolls of the powiat labour office the whole period of over 12 months during the last 2 years, excluding periods of traineeship and occupational preparation at the workplace.

⁴ It concerns the vacant places of employment and places of occupational activation.

Wages and Salaries, and Social Benefits

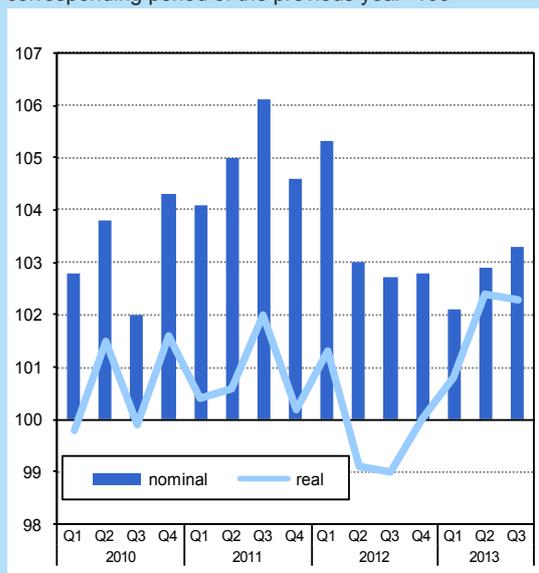
In the period of January–September 2013, average monthly gross nominal wage and salary in the national economy⁵ amounted to PLN 3 667.47, i.e. by 3.3% more than in the corresponding period of the previous year. Average monthly gross nominal wages and salaries in enterprise sector⁶ increased in annual terms at a rate slower than a year before. With the low dynamics of consumer prices, the purchasing power of wages and salaries in the nine months of 2013 was higher than a year before, when its slight drop was recorded. In the 3rd quarter of 2013 the growth rate of real wages and salaries was similar to the one observed in the 2nd quarter, but higher than in the 1st quarter. The growth in annual terms of average monthly nominal retirement pays and pensions in both systems continued. In real terms these benefits grew at a faster rate than a year before.

The average monthly gross wage and salary in the enterprise sector in the period of January–September 2013 amounted to PLN 3 780.73 and was by 2.8% higher than a year before (against a growth of 3.7% in the corresponding period of the previous year). Average wages and salaries increased in all sections with a considerable share in employment, with the highest growth in electricity,

gas, steam and air conditioning supply (by 5.7%), accommodation and catering (of 5.2%), administrative and support service activities (of 5.1%), and real estate activities (of 4.0%). The least considerable increase was recorded in average wages and salaries in the construction (by 0.3%).

Average monthly gross wages and salaries in the enterprise sector

corresponding period of the previous year=100



Average monthly nominal gross wages and salaries in the enterprise sector

Specification	Q1–Q3 2012	Q1–Q3 2013	2012				2013			
			Q1	Q2	Q3	Q1–Q3	Q1	Q2	Q3	
			in PLN / corresponding period of the previous year=100							
Total	3 689.81	3 813.25	105.3	103.0	102.7	103.7	102.8	102.1	102.9	103.3
of which:										
Industry	3 769.29	3 924.55	106.6	103.6	102.6	104.2	103.0	102.2	102.7	104.1
mining and quarrying	5 920.08	6 060.89	105.2	104.1	97.5	102.2	101.3	103.9	98.0	102.4
manufacturing	3 463.43	3 625.28	106.7	104.1	103.3	104.7	103.2	102.0	103.0	104.7
electricity, gas, steam and air conditioning supply	5 790.49	6 020.95	108.1	99.9	104.1	104.1	105.7	104.3	109.2	104.0
water supply; sewerage, waste management and remediation activities	3 535.60	3 652.21	104.4	102.4	101.8	102.9	102.0	101.6	102.0	103.3
Construction	3 709.10	3 765.91	104.0	99.1	98.4	100.4	100.3	98.3	101.3	101.5
Trade; repair of motor vehicles	3 321.95	3 407.81	104.5	102.6	102.7	103.3	102.4	102.2	102.5	102.6
Transportation and storage	3 543.33	3 588.81	100.4	102.5	105.2	102.7	102.5	102.5	103.7	101.3
Accommodation and catering	2 596.68	2 713.45	103.8	101.3	103.9	103.0	105.2	103.5	107.7	104.5
Information and communication	6 492.58	6 653.69	98.6	100.8	102.1	100.5	102.7	102.2	103.5	102.5
Real estate activities	3 789.73	3 943.98	107.0	103.5	104.2	104.9	104.0	103.9	104.4	104.1
Professional, scientific and technical activities^a	5 162.77	5 365.45	103.5	99.7	102.1	101.8	103.0	102.6	103.0	103.9
Administrative and support service activities	2 464.43	2 617.82	110.0	107.3	105.2	107.5	105.1	104.0	104.9	106.2

a Excluding the divisions: "Scientific research and development", as well as "Veterinary activities".

5 Including entities employing up to 9 persons.

6 In entities employing more than 9 persons.

The number of retirees and pensioners, and average monthly gross retirement pays and pensions

Specification	2012				2013			
	Q1	Q2	Q3	Q1-Q3	Q1	Q2	Q3	
Average number of retirees and pensioners:								
in thousand	9 052.5	9 034.2	9 020.0	9 035.6	8 965.3	8 991.8	8 968.2	8 936.2
from non-agricultural social security system	7 751.9	7 743.6	7 739.9	7 745.2	7 715.1	7 730.9	7 718.4	7 696.1
of farmers	1 300.9	1 290.6	1 280.1	1 290.5	1 250.2	1 260.9	1 249.8	1 240.1
corresponding period of the previous year=100	98.7	98.8	98.9	98.8	99.2	99.3	99.3	99.1
Average retirement pay and pension:								
from non-agricultural social security system:								
in PLN	1 775.07	1 832.96	1 834.59	1 814.20	1 914.09	1 877.38	1 930.18	1 934.78
corresponding period of the previous year=100	105.0	105.6	105.5	105.4	105.5	105.8	105.3	105.5
of farmers:								
in PLN	1 016.28	1 067.75	1 067.27	1 050.30	1 118.42	1 095.45	1 129.99	1 129.90
corresponding period of the previous year=100	104.6	107.7	107.7	106.7	106.5	107.8	105.8	105.9

In three quarters of 2013, the amount of wages and salaries in the enterprise sector was higher than in the corresponding period of the previous year by 1.7% (against an increase of 4.0% a year before).

In the period of January–September 2013, the purchasing power of average monthly gross wages and salaries in the enterprise sector in annual terms was higher by 1.9% (against a drop by 0.2% in the corresponding period of the previous year).

The average monthly nominal gross retirement pay and pension from the non-agricultural social security system in the period of January–September 2013 amounted to PLN 1 914.09 and was by 5.5% higher than a year before. In three quarters of 2013 the average monthly gross real retirement pay and pension from the employee system was higher by 4.2% than a year before.

The average monthly nominal gross retirement pay and pension of farmers in the nine months of 2013 amounted to PLN 1 118.42 and grew in annual terms by 6.5%. The average monthly real gross retirement pay and pension of farmers in the period of January–September 2013 was higher by 5.2% than a year before.

The gross amount of unemployment benefits (excluding social security contributions) in the three quarters of 2013 amounted to PLN 2 259.7 mln, i.e. by 11.3% more than in the corresponding period of the previous year.

The value of pre-retirement benefits and allowances in the period of January–September 2013 amounted to PLN 1 545.6 mln, i.e. it increased by 18.8% in annual terms.

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Prices

In the period of January–September 2013, the growth rate of consumer goods and services prices in annual terms was considerably weaker than in the corresponding period of the previous year, being at a rate below the lower limit of deviations from the inflation target in the consecutive quarters. Following the substantial deceleration in the 2nd quarter, in the period of July–September prices in annual terms grew slightly faster, and their dynamics were at a similar level in the consecutive months.

In industry and construction the drop in producer prices which began in the 2nd half of the previous year has continued.

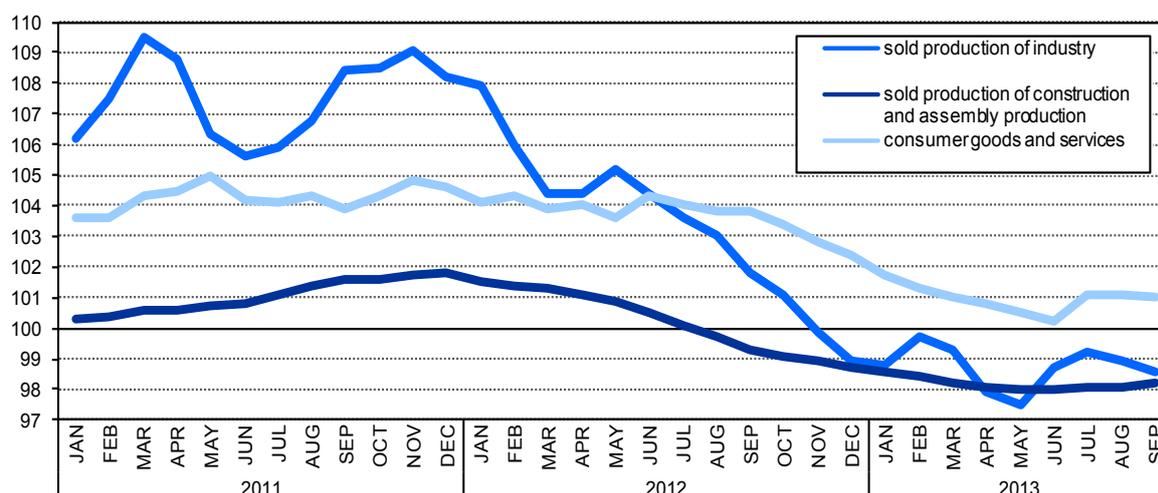
In the period of January–September 2013 the prices of sold production of industry were lower by 1.3% than in the corresponding period of the previous year.

In September 2013, a drop in the prices of sold production of industry, in annual terms, was deeper than a month before and amounted to 1.4%.

In comparison to December 2012, the prices of sold production of industry in September 2013 increased by 0.1% (against a respective growth of 0.4% a year before).

Price indices

corresponding period of the previous year=100



The price indices of sold production of industry and construction and assembly production

Specification	2012				2013					
	Q1	Q2	Q3	JAN-SEP	Q1	Q2	Q3	JAN-SEP	SEP	
	corresponding period of the previous year =100									DEC 2012=100
Price indices of sold production of industry	106.1	104.7	102.8	104.5	99.2	98.0	98.9	98.7	98.6	100.2
mining and quarrying	105.8	99.3	97.4	100.8	91.5	88.9	88.4	89.6	87.7	91.9.
manufacturing	106.4	104.6	102.7	104.5	99.4	98.5	99.6	99.2	99.2	100.8
electricity, gas, steam and air conditioning supply	103.6	107.2	106.0	105.6	102.2	98.6	98.5	99.8	98.4	98.4
water supply; sewerage, waste management and remediation activities	104.8	104.3	103.1	104.1	101.7	101.5	101.7	101.6	101.7	101.7
Price indices of construction and assembly production	101.4	100.8	99.7	100.6	98.4	98.0	98.1	98.2	98.2	98.6

An increase was observed in the following sections: water supply; sewerage, waste management and remediation activities (of 1.7%), and in manufacturing (0.8%). In turn, a drop was recorded in mining and quarrying (of 8.1%), and in electricity, gas, steam and air conditioning supply (of 1.6%). Among manufacturing divisions, prices were higher than in December of the previous year, among others, in manufacture of coke and refined petroleum products (by 2.4%), beverages as well as motor vehicles, trailers and semi-trailers and wood, cork, straw and wicker (by 1.4% each). An increase in prices was also recorded, among others, in manufacture of machinery and equipment and paper and paper products (of 1.2% each) and food products (of 0.9%). However, a fall was observed in the prices of, among others, other non-metallic mineral products (of 0.9%), metal products (of 0.8%), electrical equipment (of 0.6%) and metals (of 0.5%).

The prices of construction and assembly production were lower than in the period of January–September 2012 by 1.8%. In September 2013, the prices dropped by the same percentage (i.e. 1.8%) in annual terms and in comparison to December 2012 a decrease of 1.4% was observed.

The prices of consumer goods and services in the period of January–September 2013 grew by 1.0% in comparison to the corresponding period of the previous year (against an increase of 4.0% a year before).

In September 2013, the growth in the prices, in annual terms, was slightly slower than a month before and amounted to 1.0%.

The prices of consumer goods and services in September 2013 were by 0.5% higher than the ones recorded in December of the previous year (against an increase of 1.9% a year before). Price growths were observed in most groups of goods and services, of which higher than average, among others, in the scope of recreation and culture, alcoholic beverages and tobacco and services related to dwelling. Increases in the prices of goods and services associated with dwelling and recreation and culture had the highest impact on the total price index, increasing it by respectively 0.38 percentage point and 0.35 percentage point. The drops in the prices of goods and services associated with communications and the prices of clothing and footwear lowered the total price index by 0.40 percentage point and 0.35 percentage point, respectively.

Consumer goods and services price indices

Specification	2012				2013					
	Q1	Q2	Q3	JAN–SEP	Q1	Q2	Q3	JAN–SEP	SEP	
	corresponding period of the previous year =100									DEC 2012=100
Total	104.1	104.0	103.9	104.0	101.3	100.5	101.1	101.0	101.0	100.5
Food and non-alcoholic beverages	104.2	103.7	105.2	104.4	102.5	101.3	102.5	102.1	102.6	100.6
Alcoholic beverages and tobacco	104.3	104.6	103.7	104.2	103.3	103.6	103.6	103.5	103.7	103.5
Clothing and footwear ..	97.2	95.9	94.9	96.0	94.9	95.2	95.2	95.1	95.3	92.7
Dwelling	105.4	105.9	105.1	105.4	102.2	101.1	101.9	101.7	101.8	101.5
Health	104.1	103.8	103.6	103.8	102.2	101.8	101.4	101.8	101.2	100.9
Transport	109.6	108.3	107.1	108.3	99.4	96.7	98.7	98.3	98.6	100.9
Communication	99.6	102.3	101.2	101.0	95.6	91.1	90.3	92.3	90.3	90.3
Recreation and culture	101.3	101.1	101.2	101.2	100.5	103.6	103.3	102.4	103.9	104.4
Education	105.1	105.0	104.0	104.7	102.7	102.6	99.7	101.7	94.1	93.5
Restaurants and hotels	103.4	102.9	102.9	103.1	102.6	102.3	102.0	102.3	101.9	101.4
Miscellaneous goods and services	102.9	102.4	102.0	102.4	101.3	100.9	100.6	100.9	100.4	100.1

The prices of food and non-alcoholic beverages were higher than in December of the previous year by 0.6% (against a growth of 1.9% a year before), with a rise in the prices of food amounting to 0.7%, and a fall in the prices of non-alcoholic beverages amounting to 0.4%. Consumers paid more, among others, for fruit (by 5.2%), milk (by 3.4%), oils and fats (by 3.0%), flour (by 2.7%) and meat (on average by 2.4%). In comparison to December of the previous year, increases were also recorded in the prices, among others, of yoghurts, cream, milk beverages and desserts and cheese (of 1.9% each) as well as fish (of 1.7%). However, decreases were observed, among others, in the prices of sugar (of 11.9%), eggs (of 11.0%), coffee (2.0%) and rice (of 1.5%).

The prices of tobacco were higher by 7.6% than in December of the previous year, and those of alcoholic beverages – by 1.0%.

A price decrease was recorded in footwear (of 8.0%) and clothing (of 7.0%).

In comparison to December of the previous year, the prices related to dwelling grew by 1.5%. Price increases were observed in housing charges (on average of 7.2%), of which the price of refuse collection increased by as much as 53.7%, sewerage collection by 5.5%, and water supply by 4.1%. Lower prices than in December of the previous year were recorded in electricity, gas and other fuels (on average by 1.8%, of which in gas of 8.0%, liquid and solid fuels of 1.2%, and electricity of 1.0%, with a simultaneous increase in the prices of heat energy – of 2.8%). Prices related to furnishings, household equipment and routine maintenance of the house were at a level similar to the one observed in December of the previous year.

Goods and services associated with health were by 0.9% more expensive than in December

of the previous year. Consumers paid more for sanatorium services (by 24.4%), dentist services (by 2.7%), medical services (by 2.2%) and hospital services (by 1.8%). A decrease was recorded in the prices of pharmaceutical products (by 0.4%).

The prices of goods and services related to transport grew, in comparison to December of the previous year, by 0.9%. Increases were recorded in the prices of transport services (on average of 2.8%, of which passenger transport of railway – of 4.8%, and passenger transport by road – of 2.0%). Fuels for personal transport equipment were more expensive on average by 0.7%, of which motor petrol by 2.7%, diesel oil by 0.9%, with a simultaneous drop in the prices of liquid petroleum gas – of 11.5%. The prices of motor cars remained at a level similar to the one recorded in December of the previous year.

In comparison to December of the previous year, consumers paid much less for goods and services associated with communication (by 9.7%).

Prices related to recreation and culture increased by 4.4%. In comparison with December of the previous year, increases were recorded in payments connected with package holidays (of 8.6%), newspapers and periodicals (of 6.5%), books (of 2.1%) and tickets to cinemas, theatres and concert halls (of 1.7%). In turn, the prices of audio-visual, photographic and information processing equipment decreased (by 4.8%).

A growth in the prices of consumer goods and services calculated using the moving average method, in the period of October 2012 – September 2013, in comparison to the preceding twelve months, amounted to 1.5% (against 1.6% in the period of September 2012 – August 2013). Consumer prices according to the harmonised index of consumer prices (HICP)⁷ grew in the reference period by 1.4%.

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⁷ The harmonised index of consumer prices (HICP) is computed according to the unified methodology of the European Union. The basis for compiling of the HICP for Poland constitutes an observation of representatives of consumer goods and services and the weight system based on the structure of individual consumption expenditure in the households sector (in 2013 – the structure of consumption in 2011 according to December 2012 prices). The grouping of consumer goods and services has been based on the Classification of Individual Consumption by Purpose adapted for the needs of HICP (COICOP/HICP).

Agriculture

In three quarters of 2013, an increase was recorded on the agricultural market in average procurement prices of livestock products, except for cattle for slaughter, were higher than in the corresponding period of the previous year. Among crop products, only the prices of potatoes were higher than a year before. In the period of January–September 2013 the average procurement prices of wheat were lower than a year before, which was influenced by a considerable drop in prices recorded from the beginning of the second half of the year. The prices of rye in procurement were much lower than in the corresponding period of the previous year.

In the period of July–September 2013, the procurement of basic cereals (including cereal mixed, excluding sowing seed) from this year's production amounted to 2 667.7 thous. tonnes and was by nearly 20% lower than in the corresponding period of the previous year. The supply of wheat and rye decreased by 16.6% and 11.6%, respectively.

In the period of January–September 2013 the supply of animals for slaughter (2 183.0 thous. tonnes), as a result of an increase in procurement of poultry for slaughter (of 7.0%) and cattle for slaughter (of 9.9%) were by 3.7% higher than a year before. In this period the domestic supply of pigs for slaughter dropped by 0.9% in annual terms.

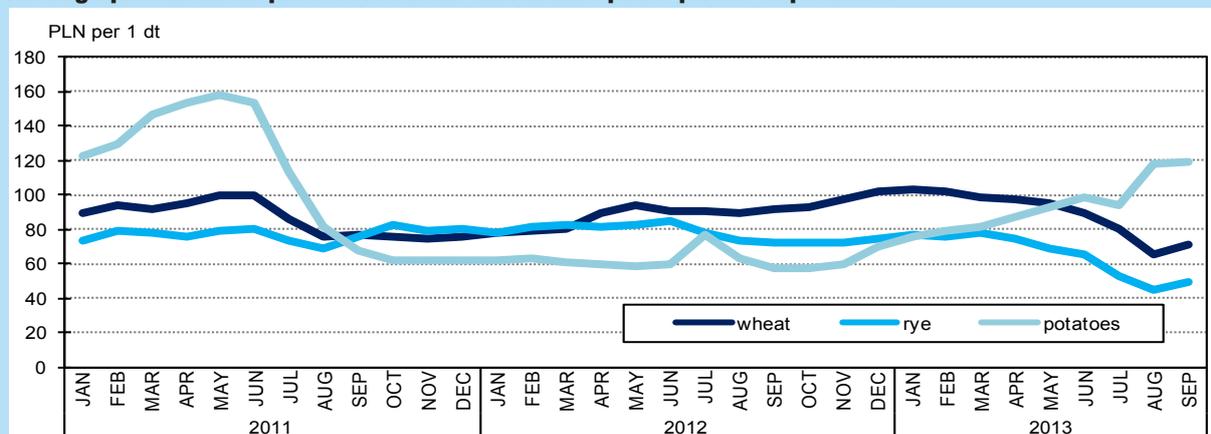
In the period of January–September 2013, the procurement prices of cereals decreased in annual terms – the average prices of wheat (PLN 81.93/dt) were by 6.7% lower than a year before, and the prices of rye (PLN 56.27/dt) – by 25.4%. In marketplace turnover grain was more expensive than in procurement. In comparison with the corresponding period of the previous year, the average price of wheat in marketplaces was by 7.3% higher, and that of rye by 7.9% lower.

The procurement of cereal^a and basic livestock products^a

Specification	JUL–SEP 2013			JAN–SEP 2013				milk ^d
	cereal grain ^b			animals for slaughter ^c				
	total	wheat	rye	total	cattle (including calves)	pigs		
Procurement:								
in thous. t	2 667.7	1 606.8	407.9	2 183.0	188.0	919.9	1 070.2	7 262.0
corresponding period of 2012=100	80.1	83.4	88.4	103.7	109.9	99.1	107.0	99.4

a Excluding procurement effectuated by natural persons. b Basic (wheat, rye, barley, oats, triticale) including cereal mixed, excluding sowing seed. c Including cattle, calves, pigs, sheep, horses and poultry. In terms of meat, including fats, in post-slaughter warm weight. d In million litres.

Average procurement prices of cereals and marketplace prices of potatoes



With a decreased domestic supply of potatoes in annual terms, resulting from a considerable drop in production (of over 36% in comparison to the previous year), the average prices of potatoes in the period of January–September 2013 in procurement (PLN 53.50/dt) and in marketplaces (PLN 93.91/dt) were much higher than a year before (respectively by 42.0% and 56.5%).

In the period of January–September 2013, with domestic supply of pigs for slaughter slightly lower than a year before (by 0.9%), the average prices of pigs on both markets were similar to the ones recorded in the corresponding period of the previous year. In September 2013, as a result of seasonal changes on the pigs and cereals market, the relation between the procurement prices of pigs and the prices of rye in marketplaces amounted to 8.9 (against 7.4 a year before). In the period of January–September 2013, despite the limited supply, the average prices of piglets in marketplace turnover (approx. PLN 169) were by 1.3% lower than in the corresponding period of the previous year. The limited number of piglets was compensated with the growing imports of young pigs with a weight of up to 50 kg. In the period of January–August 2013 their imports amounted to 2 319.4 thous. head and was by 26.7% higher than in the corresponding period of the previous year.

In the period of three quarters of 2013, with a high value of poultry procurement, the average price of poultry for slaughter (PLN 4.29/kg) reached a level similar to the one in the corresponding period of the previous year.

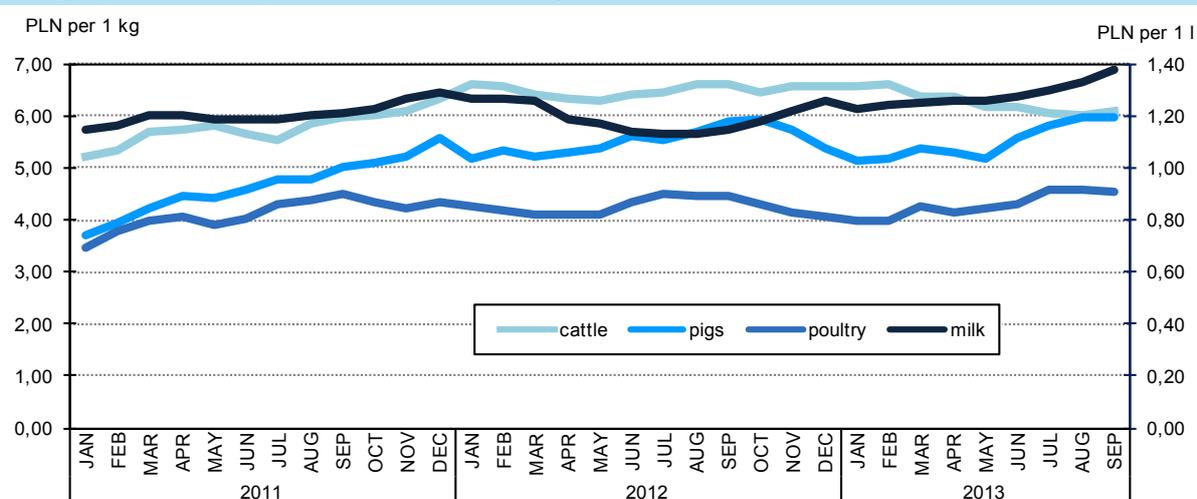
In the period of January–September 2013, with an increased domestic supply, a downward trend was observed in the prices of cattle for slaughter in procurement, while in marketplace turnover the prices were above the level recorded a year before. The average procurement prices of cattle for slaughter (PLN 6.27/kg) and young cattle for slaughter (PLN 6.47/kg) were lower than a year before (respectively by 3.2% and 4.7%). In marketplaces the average prices of 1 kg of cattle for slaughter (PLN 6.64) and young cattle for slaughter (PLN 6.95) were higher than a year before by 6.1% and 3.7%, respectively.

In the period of January–September 2013, a total of 7 262.0 mln litres of milk was purchased in procurement, i.e. by 0.6% less than a year before. In this period the prices of milk displayed an upward trend. The average price of milk (approx. PLN 128/ hl) was by 8.0% higher than in the period of January–September of the previous year.

In the period of the three quarters of 2013, the average prices of cows (approx. PLN 3 013) and one-year heifers (approx. PLN 1 939) in marketplace turnover were higher than a year before by 5.0% and 2.5%, respectively.

In the 3rd quarter of 2013, as compared to the previous quarter, worsening was recorded in the relation between the retail prices of selected means of production and the procurement prices of cereals and cattle for slaughter. An improvement was observed in the relation between the prices of selected means of production and the prices of pigs for slaughter and milk.

Average procurement prices of animals for slaughter and milk



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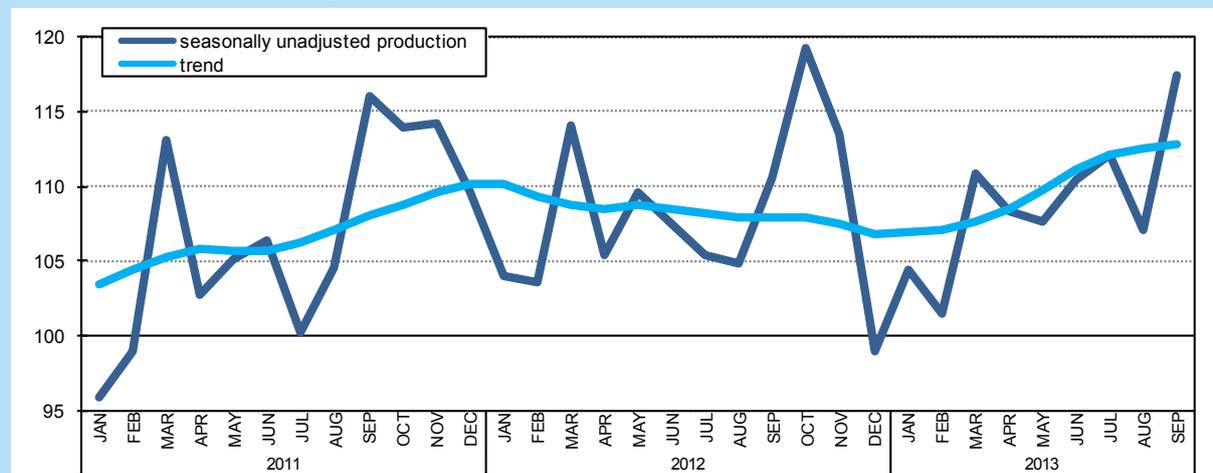
Industry

In the period of January–September 2013, the sold production of industry⁸ increased by 1.4% in annual terms. Following the decrease in the period of January–March, in the consecutive periods a growth was recorded (in the 2nd quarter of 1.2% and in the 3rd quarter of 4.9%).

In the period of January–September 2013, an increase in production in annual terms was recorded in all sections of industry. In water supply; sewerage, waste management and remediation activities production grew by 3.4%, in mining

and quarrying – by 1.8%, while in manufacturing and in electricity, gas, steam and air conditioning supply – by 1.3% each. Among the main industrial groupings, in the period of January–September 2013, sold production of the following goods was higher than the year before: durable consumer goods – by 4.3%, non-durable consumer goods – by 3.5%, capital goods – by 2.1%, and energy – by 0.3%. The production of intermediate goods was at a level recorded a year before.

Sold production of industry
at constant prices; monthly average of 2010=100



Sold production of industry
the dynamics (at constant prices) and the structure (at current prices)

Specification	2012				2013				2012	
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	JAN–SEP		
	corresponding period of the previous year=100							structure in %		
T o t a l	104.7	102.6	99.7	97.0	98.0	101.2	104.9	101.4	100.0	100.0
Mining and quarrying	95.4	92.5	94.9	99.1	102.0	100.3	103.3	101.8	4.5	5.0
Manufacturing	105.4	103.4	100.2	96.8	98.0	100.8	105.0	101.3	84.6	84.3
Electricity, gas, steam and air conditioning supply	104.4	101.2	97.8	97.4	96.3	104.1	105.5	101.3	8.7	8.6
Water supply; sewerage, waste management and remediation activities	103.4	100.3	97.2	99.1	101.7	104.8	103.5	103.4	2.2	2.1

⁸ At constant prices; in entities employing more than 9 persons.

Labour productivity in industry, measured by sold production of industry per one employee, was in the period of January–September 2013 by 2.5% higher than a year before, with the average paid employment lower by 1.1% and an increase in average monthly gross wage and salary by 3.0%.

In the period of January–September 2013, a growth in sold production, in comparison with

the corresponding period of the previous year, was recorded in 21 (out of 34) industry divisions.

Of 239 industrial products and industrial product groups observed during the nine months of 2013, in 132 of them the production was lower, and in 107 higher than a year before.

Sold production of industry by selected divisions

the dynamics (at constant prices) and the structure (at current prices)

Specification	2012				2013				2012	
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	JAN–SEP		
	corresponding period of the previous year=100								structure in %	
Industry in total – divisions:	104.7	102.6	99.7	97.0	98.0	101.2	104.9	101.4	100.0	100.0
mining of coal and lignite	88.4	88.6	95.5	103.7	102.2	104.4	105.0	103.9	2.2	2.4
manufacture of food products	108.1	106.9	104.5	99.5	103.2	99.6	104.6	102.5	16.7	16.0
manufacture of beverages	103.2	102.2	106.6	86.7	99.5	99.1	92.7	96.8	1.8	1.8
manufacture of wearing apparel	101.7	97.4	103.2	105.4	96.3	107.3	104.4	102.7	0.6	0.6
manufacture of products of wood, cork, straw and wicker	107.1	104.6	100.5	102.5	100.8	107.5	110.1	106.2	2.5	2.3
manufacture of paper and paper products	106.5	107.6	103.5	102.9	101.5	107.3	109.5	106.1	2.8	2.6
manufacture of coke and refined petroleum products	98.3	101.5	95.3	100.2	98.4	91.8	103.8	98.0	7.5	8.2
manufacture of chemicals and chemical products	113.4	110.7	103.0	101.7	95.5	98.3	97.5	97.1	5.0	5.2
manufacture of pharmaceutical products	92.1	92.0	87.6	105.8	102.1	95.9	116.8	104.2	1.0	0.9
manufacture of rubber and plastic products	104.1	101.4	99.8	95.7	99.4	107.3	109.5	105.5	5.9	5.6
manufacture of other non-metallic mineral products	102.5	97.1	94.6	92.4	89.5	93.6	104.5	96.6	3.6	3.9
manufacture of basic metals	105.7	99.4	96.3	88.9	89.4	92.7	101.0	94.2	3.7	4.1
manufacture of metal products	115.0	108.1	104.0	96.5	97.7	98.4	103.3	99.9	6.0	6.1
manufacture of computer, electronic and optical products	101.6	102.9	98.1	95.3	88.9	91.4	94.2	91.5	2.6	2.9
manufacture of electrical equipment	108.4	109.8	103.1	104.5	103.1	111.0	109.3	107.8	3.9	3.7
manufacture of machinery and equipment n.e.c.	111.9	109.9	105.3	96.5	89.4	91.9	98.0	93.1	2.9	3.1
manufacture of motor vehicles, trailers and semi-trailers	98.6	92.3	92.9	88.8	93.5	108.8	111.9	104.2	9.6	9.3
manufacture of other transport equipment	101.9	136.0	104.3	102.0	115.4	91.9	110.1	104.3	1.4	1.3
manufacture of furniture	96.3	92.3	88.5	87.3	100.0	108.8	108.0	105.5	2.4	2.3

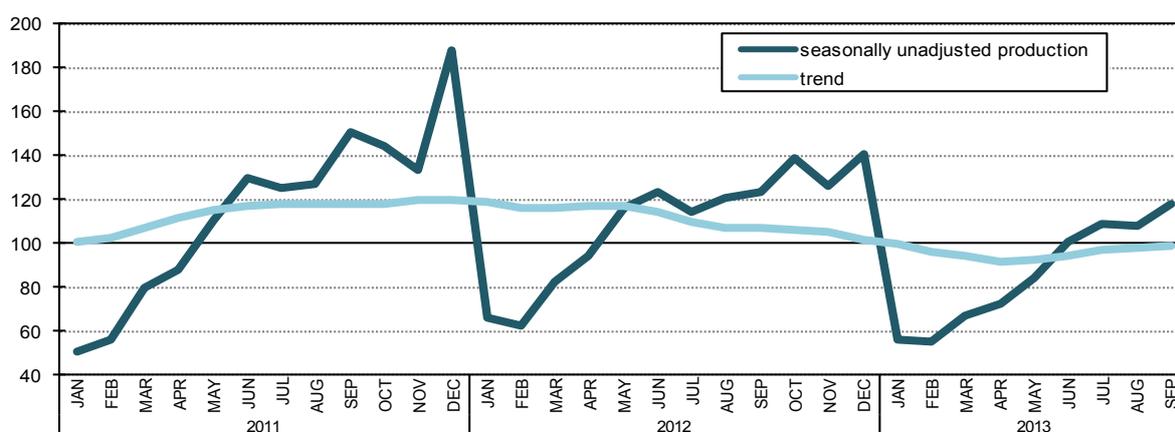
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Construction and Dwelling Construction

In the period of January–September 2013 the construction and assembly production⁹ carried out domestically was by 15.6% lower than a year before (against a decrease of 21.5% in relation to the 1st half of 2013 and an increase of 1.4% in the three quarters of the previous year).

In the period of January–September 2013, a drop in sales was observed in all divisions of construction: in civil engineering – of 20.5% and in construction of buildings – of 15.1% (of which in entities specialising in construction with residential and non-residential buildings – of 15.0%), and in specialised construction activities – of 9.0%.

Sales of construction and assembly production
at constant prices; monthly average of 2010=100



Construction and assembly production
the dynamics (at constant prices) and the structure (at current prices)

Specification	2012			2013			2012	
	JAN–MAR	JAN–JUN	JAN–SEP	JAN–MAR	JAN–JUN	JAN–SEP		
	corresponding period of the previous year=100						structure in %	
Total	114.6	107.8	101.4	84.9	78.5	84.4	100.0	100.0
construction works:								
investments	114.3	106.5	102.0	84.1	79.4	85.0	66.5	66.0
repairs	115.3	110.3	100.2	86.7	76.6	83.1	33.5	34.0
Construction of buildings	104.5	108.1	99.9	87.3	79.1	84.9	38.7	38.9
Civil engineering	136.6	108.5	102.1	79.9	72.3	79.5	35.1	37.0
Specialised construction activities	110.3	106.1	102.8	87.2	86.1	91.0	26.2	24.1

⁹ At constant prices; in construction entities employing more than 9 persons.

Among entities dealing with civil engineering, the highest drop in comparison to the three quarters of the previous year was recorded by enterprises specialising in the construction of roads and railways (of 27.4%), which have the highest share in this division. In comparison to the previous year, production also decreased in entities specialising in construction of other civil engineering projects (of 12.1%), and in units dealing mainly with the construction of utility projects (respectively of 1.7%).

Among enterprises dealing with specialised construction activities, production decreased in comparison to the period of January–September of the previous year in those entities which basic type of activity is other specialised construction

activities (of 17.5%), and in entities dealing with electrical, plumbing and other construction installations activities (of 9.4%). A growth was observed in entities dealing mainly with building completion and finishing (of 12.5%), and a slight increase was recorded in entities dealing with demolition and site preparation (of 0.6%).

In the period of January–September 2013 within the structure of construction and assembly production by type of construction in total, the share of non-residential buildings was higher than a year before. A decrease occurred in the share of residential buildings and civil engineering works, including mainly motorways, highways, streets and roads, as well as bridges, elevated highways, tunnels and subways.

The construction and assembly production by type of constructions
the structure (at current prices)

Types of constructions	Structure in %	
	JAN–SEP 2012	JAN–SEP 2013
Total	100.0	100.0
Buildings in total	45.5	49.3
Residential buildings	14.8	14.1
of which:		
one-dwelling buildings	1.6	1.4
two- and more dwelling buildings	11.4	11.0
Non-residential buildings	30.7	35.2
of which:		
office buildings.....	3.8	4.0
wholesale and retail trade buildings	6.5	7.5
industrial buildings and warehouses	9.7	12.6
public entertainment, education, hospital or institutional care buildings	7.3	7.4
Civil engineering works	54.5	50.7
of which:		
highways, streets and roads	22.6	17.1
railways, suspension and elevated railways	3.4	4.1
bridges, elevated highways, tunnels and subways	4.6	2.8
pipelines, communication and electricity power lines	5.3	6.4
local pipelines and cables	8.2	8.6
wastewater and water treatment plants	1.5	1.3
complex constructions on industrial sites	4.9	6.1
other civil engineering works n.e.c.	2.5	2.8

In the period of January–September 2013, less dwellings were completed than a year before. The number of dwellings for which permits have been granted and dwellings in which construction has begun was also lower than in the corresponding period of the previous year.

In the period of January–September 2013, 102.2 thous. dwellings were completed, i.e. by 2.5% less than in the corresponding period of the previous year. Weaker results in comparison to the previous year were obtained in construction for sale or rent, in which 37.7 thous. dwellings were completed (a fall of 10.2%), in cooperative construction – 2.7 thous. (respectively of 11.1%) and in municipal construction – 1.2 thous. (of 28.0%). In private construction more dwellings were completed than in the three quarters of the previous year (an increase of 3.9% to 59.4 thous. dwellings). More favourable results were also recorded in public building society

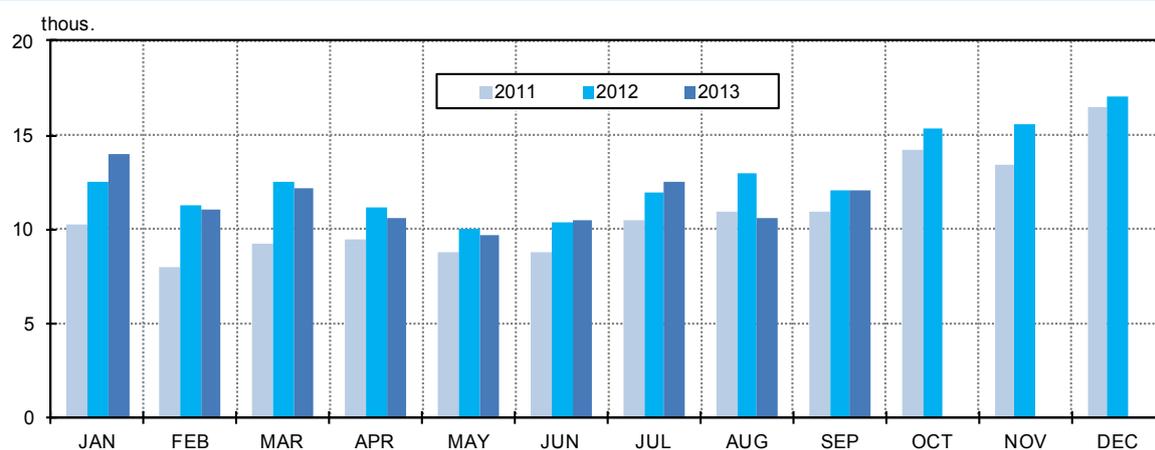
construction (959 against 896 a year before) and in company construction (189 against 166 dwellings).

The average usable floor space of 1 dwelling completed in the period of January–September 2013 amounted to 106.5 m² and was by 2.3 m² higher than a year before.

In the period of January–September 2013, a drop in annual terms was recorded in the number of dwellings for which permits have been granted (a decrease of 18.1% to 104.8 thous. dwellings, against a decrease of 9.5% in three quarters of the previous year). The number of dwellings in which construction has begun also decreased (by 16.2% to 97.9 thous. dwellings against a drop of 9.0% in three quarters of the previous year).

At the end of September 2013, 708.5 thous. dwellings were under construction, i.e. by 3.7% less than a year before.

Dwellings completed



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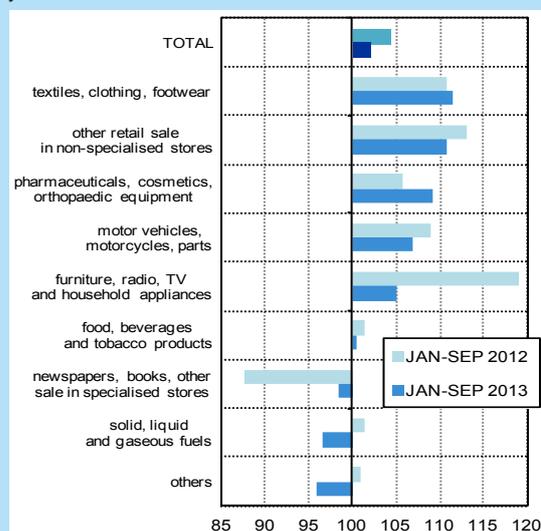
Domestic Market

In the period of January–September 2013, retail sales¹⁰ were by 1.9% higher than a year before, which was influenced by a slight growth in sales in the 2nd quarter of 2013 and a faster one in the 3rd quarter.

Among groups with a considerable share in total retail sales, a growth higher than average, in annual terms, was recorded in the analysed period of 2013, in the following groups: other retail sale in non-specialised stores (of 10.7%) and motor vehicles, motorcycles, parts (of 6.9%). The sales increased slightly in the group with the highest share in total retail sales, i.e. “food, beverages and tobacco products” (of 0.5%). The lesser sales (as compared to the nine months of 2012) were observed, among others, in entities dealing with trade in solid, liquid and gaseous fuels (of 3.5%).

Retail sales of goods by selected product groups

at constant prices; corresponding period of the previous year=100



Retail sales

the dynamics (at constant prices) and the structure (at current prices)

Specification	2012					2013					2012		
	JAN-SEP	Q1	Q2	Q3	Q4	Q1	Q2	Q3	JAN-SEP				
	corresponding period of the previous year=100									structure in %			
Total ^a	104.1	108.4	102.7	101.9	98.0	100.0	101.5	103.9	101.9	100.0	100.0		
of which:													
Motor vehicles, motorcycles, parts	108.9	123.8	105.3	99.2	92.2	100.1	108.2	113.2	106.9	9.1	8.7		
Solid, liquid and gaseous fuels	101.4	105.7	99.3	100.2	96.6	95.3	95.3	99.1	96.5	19.0	20.6		
Food beverages and tobacco products	101.3	104.9	100.6	98.5	97.0	100.9	99.2	101.2	100.5	25.6	25.4		
Other retail sale in non-specialised stores	113.1	115.3	111.5	112.6	111.3	113.0	108.3	110.9	110.7	10.5	9.7		
Pharmaceuticals, cosmetics, orthopaedic equipment	105.7	105.3	108.6	102.8	101.0	109.5	109.2	108.8	109.2	5.1	4.7		
Textiles, clothing, footwear		111.3	103.4	118.1	103.1	104.2	117.4	112.0	111.5	4.9	4.7		
Furniture, radio, TV and household appliances	119.0	119.3	121.5	116.6	109.6	101.0	109.3	104.6	105.1	7.5	7.2		
Newspapers, books, other sale in specialised stores	87.6	94.9	89.1	80.7	79.7	92.3	97.2	105.5	98.5	4.5	4.7		
Other	100.9	104.0	98.7	100.6	96.1	91.9	94.9	100.0	95.9	13.1	13.7		

a Groups of enterprises were created on the basis of the Polish Classification of Activities – PKD 2007. A given enterprise is included to a specific category by predominating kind of activity and according to its present organisational status. The recorded changes of rise or fall of the volume of retail sales in particular groups of enterprises activity may result from a change in the predominating kind of activity and organisational changes (e.g. a merger of enterprises). This does not have impact on the dynamics of the total retail sales.

¹⁰ At constant prices; in trade and non-trade enterprises, including enterprises employing more than 9 persons.

In the 3rd quarter of 2013, there was observed the boost up to 3.9% in the growth rate of retail sales in annual terms. This was influenced by a strengthening of dynamics, among others, in the following groups: motor vehicles, motorcycles, parts (a growth in sales of 13.2%) and other retail sale in non-specialised stores (an increase of 10.9%). Following the drop in the previous quarter, in the period of July–September 2013 the sales of food, beverages and tobacco products rose by 1.2% in annual terms.

A wholesale¹¹ in trade enterprises in the period of January–September 2013 increased by 2.9%,

in annual terms, of which in wholesale enterprises it grew by 1.2% (against a growth recorded a year before, of 5.2% and 8.3%, respectively). A substantial increase was observed, among others, in the groups “pharmaceuticals, cosmetics, orthopaedic equipment” (of 16.3% against a decrease in the period of three quarters of the previous year); a decrease in sales accounting for 4.5% was noted, in turn, among others, in the group with the highest share in wholesale sales, i.e. other intermediate products, agricultural waste and scrap.

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¹¹ At current prices; in trade enterprises employing more than 9 persons.

Transport and Communications

In three quarters of 2013, the sales of services¹² in total¹³ transport entities at constant prices increased in comparison to the corresponding period of the previous year by 3.7% (a year before a growth of 10.2% was recorded). In the 3rd quarter of 2013, the growth in sales was faster than in the 2nd, but slower than in the 1st quarter.

In the period of January–September 2013 among groups with a considerable share in total transport, the highest increase in sales was recorded in entities dealing with warehousing and support activities for transportation (of 7.5%) and in road transport (of 3.6%). However, a decrease was observed in railway transport (of 4.4%).

In the period of January–September 2013, total transport of goods amounted to 339.4 mln tonnes, i.e. by 0.9% less than in the corresponding period of the previous year. A drop was recorded in all types of transport, except for inland waterway transport.

In the period of three quarters of 2013, 170.1 mln tonnes of goods were transported with railway transport, i.e. by 0.2% less than a year before. A drop (of 2.2%) was recorded in domestic communication in comparison with the period of January–September of the previous year. International transport underwent an increase of 5.0% (of which the transport of exported goods grew by 23.0% and transit goods by 1.8%, while the transport of imported goods dropped by 6.6%).

From the beginning of the year, hire or reward road transport carried 123.9 mln tonnes of goods, i.e. by 1.0% less than a year before. The potential of hire or reward road transport grew by 4.6%.

In three quarters of 2013, 37.2 mln tonnes of crude petroleum and petroleum products were pumped by pipeline transport (by 5.7% less than a year before).

From the beginning of 2013, maritime transport carried 4.8 mln tonnes of goods (i.e. by 13.8% less than a year before).

In seaports from the beginning of 2013, 47.4 mln tonnes of cargo were loaded and unloaded, i.e. by 12.6% more than a year before. This was due to an increase in most groups of loading and unloading. A growth was observed in loading and unloading of containers – of 24.4%, liquid bulk goods – of 17.9%, dry bulk goods – of 11.2%, and ro-ro – of 0.5%. However, loading and unloading of other general cargo decreased by 7.1%.

In the period of January–September 2013, an increase in loading and unloading in comparison to the corresponding period of the previous year was observed in the following ports: Gdańsk (of 19.8% to 20.0 mln tonnes), Gdynia (of 18.7% to 11.2 mln tonnes), Świnoujście (of 5.9% to 9.1 mln tonnes) and Szczecin (of 2.1% to 5.6 mln tonnes). A drop was recorded only in Police port (of 17.9% to 1.1 mln tonnes).

In the period of three quarters of 2013, the public transport carried 510.7 mln passengers, i.e. by 11.2% less than a year before. Road transport carried 303.0 mln passengers (a drop of 17.0%). An increase was noted in air transport (of 14.8% to 5.2 mln passengers) but a decrease was recorded in railway transport (of 1.6% to 200.6 mln passengers).

Transport of goods

Specification	JAN–SEP 2013		
	in mln tonnes	increase / drop (-) in % in comparison to the period of:	
		JAN–SEP 2011	JAN–SEP 2012
Total	349.4	-2.7	-0.9
of which:			
Railway transport	170.1	-8.5	-0.2
Hire or reward road transport ^a	123.9	8.0	-1.0
Pipeline transport	37.2	-6.9	-5.7
Maritime transport.....	4.8	-13.6	-13.8

a In transport entities employing more than 9 persons. The share of hire or reward road transport in total hire or reward transport amounts to over 25%.

¹² Including revenues from the transport of goods, passengers, baggage and mail, trans-shipping, forwarding, the storage and warehousing of freight and other services connected with transport servicing.

¹³ At constant prices; in transport entities employing more than 9 persons.

In three quarters of 2013 the sales of communications services, in annual terms, was higher than a year before. A growth in sales in annual terms was recorded in the 2nd and 3rd quarter, following a decrease in the 1st quarter.

In three quarters of 2013 the sales of communications services in total¹⁴, including revenues from postal and courier as well as telecommunication services, was by 2.3% higher than a year before (against a growth of 3.3% in the corresponding period of the previous year). The sales of telecommunication services grew by 4.2%, while the sales of postal and courier services decreased by 8.4%.

At the end of September 2013, the number of subscribers and users (pre-paid services) of mobile telephony amounted to 56.0 mln (of which approx. 54% were users), and it was by 5.4% higher than a year before and by 3.1% higher than

at the end of December of the previous year. There were approx. 145.4 subscribers and users per 100 inhabitants (against 140.9 at the end of December of the previous year and 137.8 a year before). In three quarters of 2013 the number of subscribers and users increased by approx. 1.7 mln (against 2.4 mln a year before).

The decrease in the number of telephone main lines¹⁵, which started in 2005, continued. At the end of September 2013, their number in public wired telecommunications network amounted to approx. 5.9 mln and was by approx. 5% lower than at the end of the previous year. There were 15.3 main lines per 100 inhabitants (16.0 at the end of the previous year). At the end of September 2013, the number of ISDN¹⁶ connections reached the level of approx. 987 thous. (of which approx. 93% in urban areas) and was by approx. 1% lower than at the end of the previous year.

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¹⁴ At constant prices; in communications enterprises employing more than 9 persons.

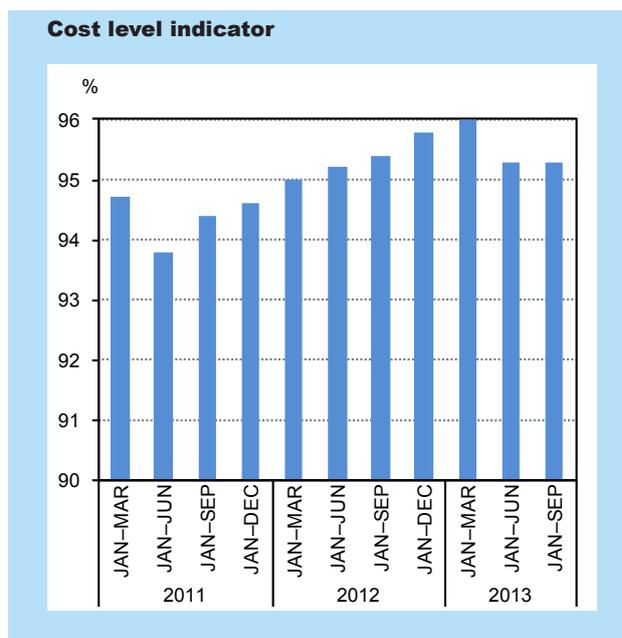
¹⁵ Standard main lines (subscribers of wired telecommunications) increased by the number of ISDN connections.

¹⁶ ISDN – integrated digital telephone network allowing the same network to be used for voice, video, fax and data transmission.

Financial Results of Non-financial Enterprises

In the period of January–September 2013, financial results of the surveyed enterprises¹⁷ were better than those obtained a year before. A growth in net profit and a limitation of loss were observed. The basic economic and financial indicators improved slightly. Revenues from export sales increased in comparison to a year before. Their share in net revenues from the sales of products, goods and materials in the entire group of entities increased. The basic economic and financial relations obtained by exporters worsened insubstantial in comparison to the three quarters of the previous year, though they were more favourable than for the surveyed enterprises in total.

Revenues from total activity in the period of January–September 2013 were by 0.3% lower than the ones earned in the corresponding period of the previous year, while the costs of obtaining them dropped by 0.4%, which was reflected in the slight improvement of the cost level indicator from 95.4% to 95.3%. Net revenues from the sales of products, goods and materials went down a little, and the most considerable decrease was observed, among others, in mining and quarrying, information and communication and real estate activities. An increase in net revenues from the sales of products,



goods and materials was recorded in trade; repair of motor vehicles, manufacturing, electricity, gas, steam and air conditioning supply, administrative and support service activities, professional, scientific and technical activities, other service activities, transportation and storage, water supply; sewerage, waste management and remediation activities and accommodation and food service activities.

Revenues, costs and financial results of non-financial enterprises

Specification	2012				2013		
	JAN-MAR	JAN-JUN	JAN-SEP	JAN-DEC	JAN-MAR	JAN-JUN	JAN-SEP
	in mln PLN						
Revenues from total activity	574 194.0	1 160 587.9	1 760 310.2	2 383 226.7	551 403.9	1 141 214.9	1 754 751.4
of which net revenues from sales of products, goods and materials	549 767.5	1 118 124.3	1 699 803.9	2 299 319.1	535 043.2	1 100 270.4	1 698 926.4
Costs of obtaining revenues from total activity	545 264.6	1 104 931.1	1 679 033.6	2 283 868.1	529 498.3	1 087 890.5	1 671 980.1
of which costs of products, goods and materials sold	525 329.8	1 069 102.7	1 625 723.4	2 200 204.6	512 301.6	1 052 123.0	1 623 080.2
Financial result on economic activity	28 929.3	55 656.8	81 276.6	99 358.5	21 905.6	53 324.4	82 771.4
Gross financial result	28 910.2	55 631.1	81 237.9	99 372.0	21 879.1	53 310.4	82 793.2
Net financial result	23 560.7	46 195.5	67 229.6	82 116.9	17 622.8	45 442.0	70 297.5
Net profit	31 970.5	59 672.2	84 822.1	105 437.4	27 563.6	59 642.2	86 124.0
Net loss	8 409.8	13 476.7	17 592.5	23 320.5	9 940.8	14 200.3	15 826.5

¹⁷ Data concerns economic entities keeping accounting ledgers and employing 50 persons or more. Data does not include "Agriculture, forestry and fishing", "Financial and insurance activities", as well as "Higher education".

The financial result from the sales of products, goods and materials was by 2.4% higher than in the previous year and amounted to PLN 75 846.3 mln. An improvement was recorded in the result on extraordinary activity (from minus PLN 38.7 mln to PLN 21.8 mln) and, even more significantly, on other operating activity (from PLN 3 018.7 mln to PLN 8 158.6 mln), which stemmed from a lower decrease in revenues than in operating costs. The result on financial operations was worse than in the previous year (minus PLN 1 233.5 mln against the positive result amounting to PLN 2 056.4 mln a year before), which derived from a considerably faster drop in revenues on financial operations (of 12.2%) as compared to costs (of 1.7%) – mainly in terms of the balance of exchange differences.

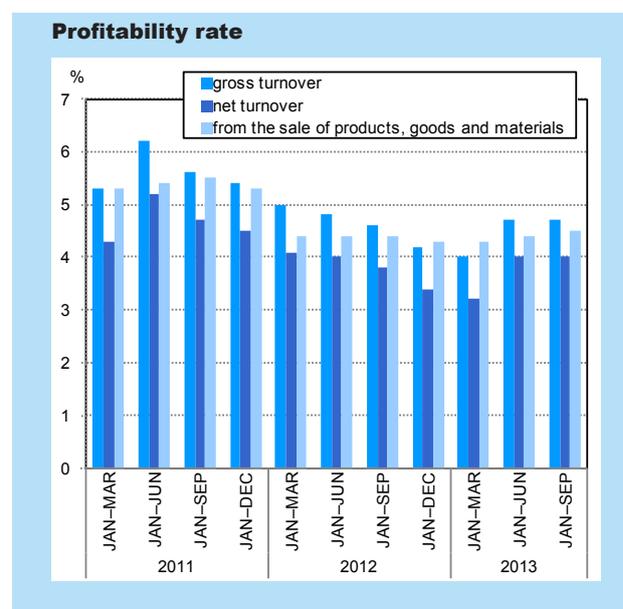
Consequently, the result on economic activity amounted to PLN 82 771.4 mln and was by 1.8% higher than a year before.

The gross financial result amounted to PLN 82 793.2 mln (gross profit – PLN 99 167.0 mln, gross loss – PLN 16 373.8 mln) and was by PLN 1 555.3 mln (i.e. by 1.9%) higher in comparison to the corresponding period of the previous year. Encumbrances on gross financial result decreased in annual terms by 10.8% to PLN 12 495.7 mln.

The net financial result amounted to PLN 70 297.5 mln (net profit – PLN 86 124.0 mln, net loss – PLN 15 826.5 mln), i.e. by PLN 3 067.9 mln (4.6%) more in comparison to the result achieved in the period of January–September 2012. Net profit was reported by 73.4% of the surveyed enterprises (against 72.1% a year before) and the revenues obtained by them constituted 82.4% of revenues from total activity of the surveyed enterprises (against 83.0% in the corresponding period of the previous year). In manufacturing, net profit achieved 78.3% enterprises (against 76.1% a year before), and their share in revenues from this section amounted to 88.7% (against 85.5%).

Profitability rate from the sales of products, goods and materials, and the gross turnover profitability rate increased by 0.1 percentage point each (4.5% and 4.7%, respectively) compared to the period of the three quarters of 2012, while net turnover

profitability rate went up by 0.2 percentage point to 4.0%. In comparison to the period of January–September 2012, in the total number of enterprises surveyed, an increase was recorded in the share of profitable entities (i.e. with the net profitability rate equal to or higher than 0.0) from 72.4% to 73.7% and their share in revenues from total activity dropped from 83.1% to 82.4%. An improvement in the net turnover profitability rate was observed in professional, scientific and technical activities (from 0.1% to 6.1%), electricity, gas, steam and air conditioning supply (from 8.3% to 11.5%), real estate activities (from 5.7% to 8.3%), construction (from minus 1.0% to 0.3%), water supply; sewerage, waste management and remediation activities (from 5.3% to 6.1%) and slightly in manufacturing (from 4.3% to 4.4%). The net turnover profitability rate remained at the same level in trade; repair of motor vehicles, and equalled to 1.3%. The most serious worsening of the rate was observed, among others, in mining and quarrying, though it remained at a relatively high level (a drop from 12.9% to 5.4%). A decrease was also recorded in accommodation and food service activities (from 8.0% to 3.8%), information and communication (from 8.6% to 6.4%), other service activities (from 6.2% to 4.6%), administrative and support service activities (from 4.5% to 3.8%) and in transportation and storage (from 3.2% to 2.6%).



The basic economic and financial indices of the surveyed enterprises

Specification	2012				2013		
	JAN–MAR	JAN–JUN	JAN–SEP	JAN–DEC	JAN–MAR	JAN–JUN	JAN–SEP
	in %						
Cost level indicator	95.0	95.2	95.4	95.8	96.0	95.3	95.3
Profitability rate from the sales of products, goods and materials	4.4	4.4	4.4	4.3	4.3	4.4	4.5
Gross turnover profitability rate	5.0	4.8	4.6	4.2	4.0	4.7	4.7
Net turnover profitability rate	4.1	4.0	3.8	3.4	3.2	4.0	4.0
Liquidity ratio of the first degree	33.9	32.0	31.3	34.1	32.7	33.5	32.7

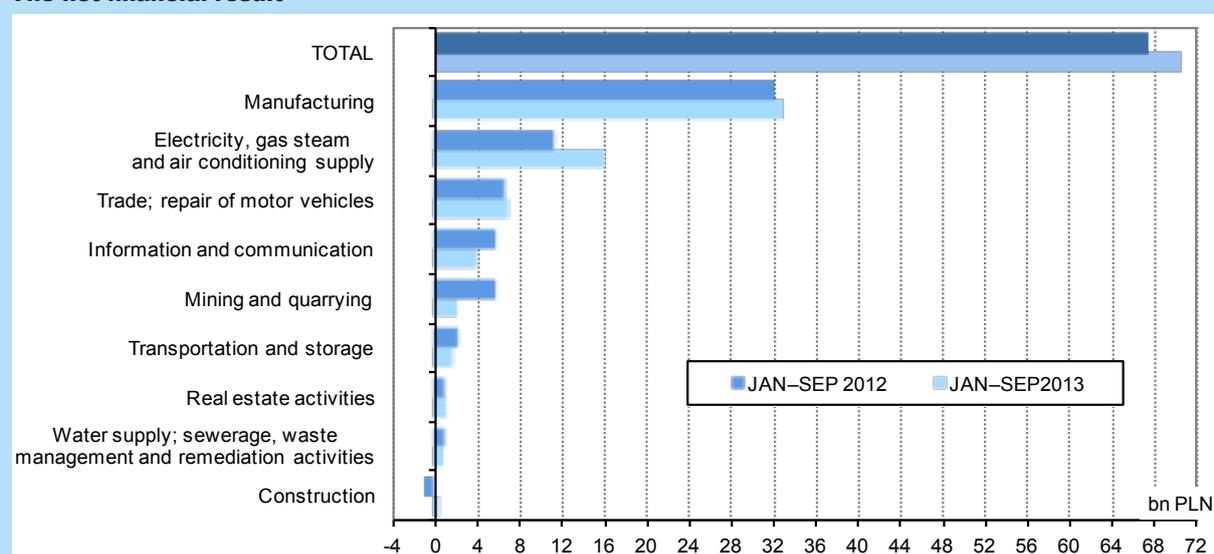
An increase was recorded in financial liquidity ratios: of the 1st degree from 31.3% a year before to 32.7%, and of the 2nd degree from 97.4% to 98.2%. The liquidity ratio of the 1st degree above 20% was obtained by 45.6% of the enterprises surveyed (against 42.4% a year before), and the liquidity ratio of the 2nd degree within the range from 100% to 130% was noted in 12.3% of the enterprises surveyed (as compared to 11.7% in the corresponding period of the previous year).

The ratio of liabilities to dues (resulting from deliveries and services) was at the same level as a year before (94.1%). The value of liabilities resulting from deliveries and services, exceeding the value of dues connecting with them, was recorded in trade; repair of motor vehicles, in accommodation and food service activities and in mining and quarrying.

The costs of current activity incurred by the enterprises surveyed in total in the period

of January–September 2013 were by 1.2% lower than a year before. In the structure of costs by type, an increase concerned the share of wages and salaries, depreciation, taxes and payments, insurances and benefits for workers and the costs of energy. The share of the costs of materials, services made by other contractors and other costs declined.

In the group of the surveyed enterprises, 49.7% entities in the period of January–September 2013 reported export sales against 48.1% a year before. The level of export sales was by 6.3% higher than in the corresponding period of the previous year, and its share in net revenues from the sales of products, goods and materials of enterprises in total grew from 22.2% to 23.6%. In the period of January–September 2013, 67.6% of export sales fell on those enterprises in which export sales account for more than 50% of the turnover from the sales of products, goods and materials – against 66.7% a year before.

The net financial result

In the group of exporting entities, an increase was recorded in the share of units reporting net profit (to 77.6% from 76.3% a year before, of which in manufacturing – to 79.7% from 77.9%). The basic economic and financial relations established by exporters worsened in comparison to the previous year but were still better than for the enterprises surveyed in total. The financial liquidity ratios of the 1st degree and 2nd degree were lower than the ones recorded in enterprises in total.

Among the surveyed enterprises, 90.7%, i.e. 15 525 entities conducted economic activity

in both 2012 and 2013 (against 88.9% respectively a year before). Net revenues from the sales of products, goods and materials of these entities comprised 97.1% of net revenues from sales recorded in enterprises in total (against 97.2% a year before). The share of this group of enterprises in net profit and loss of total surveyed enterprises amounted to 96.7% and 92.2% respectively (against 97.0% and 84.8% a year before). The basic economic and financial indicators recorded in this group, and in the surveyed entities in total, reached a level similar to the one observed a year before.

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Investment Outlays

In the period of January–September 2013, the total outlays, in annual terms, of the surveyed enterprises¹⁸ increased (at constant prices). However, the rate of this increase was lower than in the corresponding period a year before. The number of newly started investments was higher than a year before, and their cost estimate value increased.

In the period of January–September 2013, the total outlays of the surveyed enterprises amounted to PLN 66.7 bn, and were (at constant prices) higher by 2.2% than a year before (against a growth of 4.4% in the corresponding period of the previous year, and of 0.2% in the 1st half of 2013). Outlays on buildings and structures grew by 3.1%, while those on purchases¹⁹ – by 1.6%. The share of purchases in total outlays amounted to 59.3% (against 59.5% a year before).

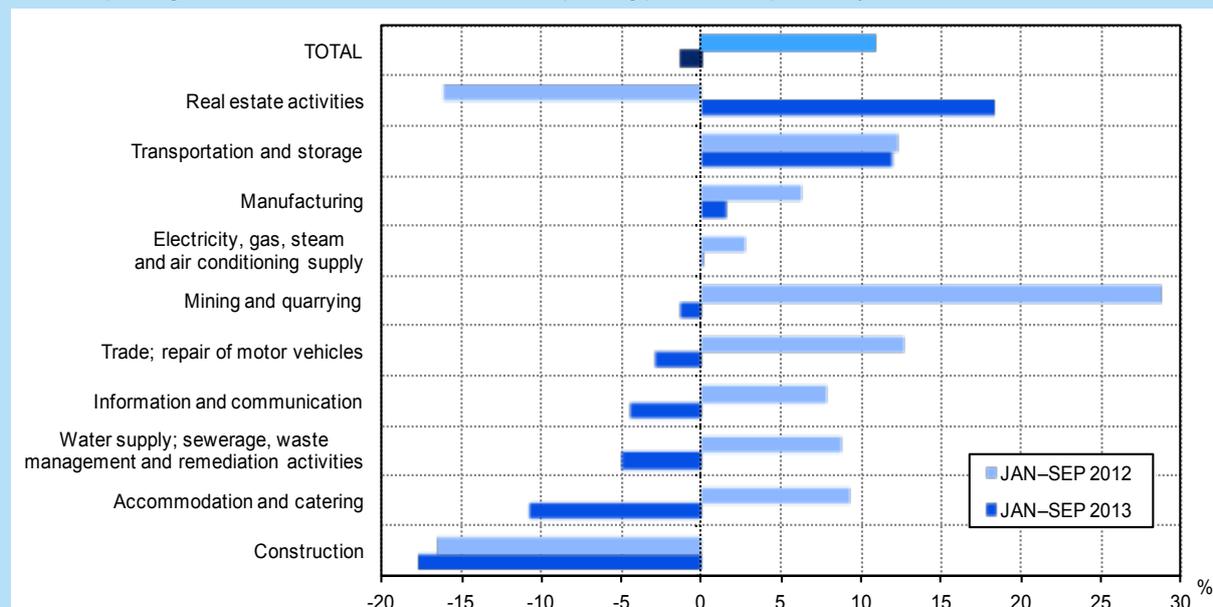
The highest growth in outlays (at current prices) was recorded in real estate activities (by 18.2%, against a drop of 16.1% a year before), in transportation and storage (by 11.9%, against a growth of 12.3%). In manufacturing outlays increased by 1.5% (against a growth of 6.3%). However, outlays decreased, among others, in construction (by 17.7%, against

a decrease of 16.5% a year before) and in water supply; sewerage, waste management and remediation activities (by 5.0%, against an increase of 8.7%).

Among the divisions of manufacturing with the highest share in investment outlays, an increase in total outlays was noted in enterprises dealing, among others, with manufacture of paper and paper products (of 112.0%, against a drop of 22.4% a year before), manufacture of products of wood, cork, straw and wicker (of 66.5%, against a growth of 12.4% a year before), manufacture of beverages (of 19.3%, against a growth of 27.6%), manufacture of motor vehicles, trailers and semi-trailers (of 11.6%, against a drop of 7.7%), and manufacture of coke and refined petroleum products (of 5.9% against a drop of 11.2%). The highest drop in outlays was recorded in manufacture of other non-metallic mineral products (of 23.9% against a growth of 27.3% a year before), manufacture of machinery and equipment n.e.c. (of 13.7%, against a growth of 28.0%), and manufacture of electrical equipment (of 8.7% against a growth of 63.3%).

Investment outlays by selected sections

at current prices; growth / decrease in relation to the corresponding period of the previous year – in %



¹⁸ Data concerns economic entities keeping accounting ledgers and employing 50 persons or more. Data does not include "Agriculture, forestry and fishing", "Financial and insurance activities", as well as "Higher education".

¹⁹ Machinery, technical equipment and tools as well as transport equipment.

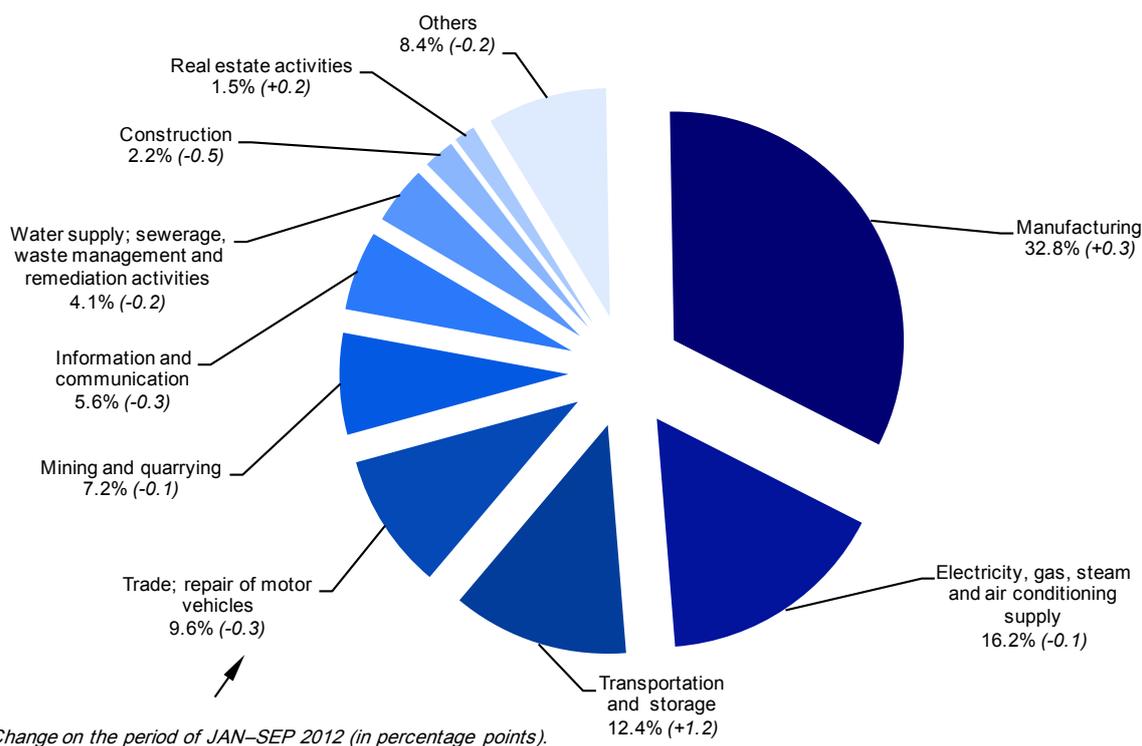
In the structure of total outlays by sections, in the period of the three quarters of 2013, an increase, in annual terms, was recorded in the share of outlays incurred, among others, by entities operating in transportation and storage (from 11.2% to 12.4%), and in manufacturing (from 32.5% to 32.8%). However, a decrease was noted in the share of outlays incurred by entities dealing with construction (from 2.7% to 2.2%), trade; repair of motor vehicles (from 9.9% to 9.6%), and information and communication (from 5.9% to 5.6%).

An increase in the outlays was recorded in entities employing more than 1000 persons (of 3.9%), and in entities with the number of employees between 50 and 249 persons (of 2.4%). However, in entities with the number of employees between 250 and 1000 persons a decrease of 6.9% was recorded.

In the period of January–September 2013, 129.1 thous. investments were newly started, i.e. by 15.6% more than a year before (against a drop of 5.9% in the corresponding period of the previous year). Approximately 53% of newly started investments concerned electricity and gas connections with a low unit value. The total value of newly started investments amounted to PLN 36.0 bn, and was by 16.2% higher than a year before (when a drop of 18.9% was recorded).

Entities with foreign capital participation²⁰ incurred 34.9% of the total value of outlays accomplished by the surveyed enterprises (against 35.7% in the corresponding period of the previous year). The outlays of this group of entities (at constant prices) were by 0.1% lower than a year before (when a growth of 4.2% was recorded).

Structure of investment outlays in total
in the period of JAN–SEP 2013



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²⁰ Data concerns economic entities with foreign capital exceeding USD 1 mln (excluding credit and insurance institutions) keeping accounting ledgers in which the number of employed persons is 50 or more.

Foreign Trade

In the period of January–September 2013, the dynamics of trade turnover expressed in PLN were considerably weaker than a year before. Against a slight growth in exports and a decrease in imports, the negative balance of trade improved significantly. The dynamics of exports and imports recorded in the 3rd quarter of 2013 were higher than in the 1st half of the year. In this nine-month period, price relations in trade turnover were favourable.

Exports (calculated in PLN) in current prices were higher than a year before by 5.4%, and amounted to PLN 474.0 bn, while imports dropped by 1.2% to PLN 477.9 bn, as a result of which the turnover closed with a negative balance amounting to PLN 3.9 bn (minus PLN 33.9 bn a year before). The trade turnover calculated in EUR increased in exports by 6.9% to EUR 113.6 bn and in imports – by 0.3% to EUR 114.5 bn. The negative balance amounted to EUR 0.9 bn (minus EUR 8.0 bn a year before). Exports in USD amounted to USD 150.1 bn, and were by 9.9% higher, and imports – to USD 151.4 bn, i.e. by 3.0% more than a year

before. The negative balance reached the level of USD 1.3 bn (against minus USD 10.4 bn in three quarters of the previous year).

Exports in constant prices, in the period of January–September 2013, were higher than in the corresponding period of the previous year by 4.7%, while imports remained at the same level. In turnover with the EU countries, the volume of exports increased by 2.4%, with the Central and Eastern European countries – by 9.5%, and with developing countries – by 11.6%. The volume of goods exported from the EU countries dropped by 2.1%, from the Central and Eastern European countries – by 4.3%, while from developing countries it increased by 7.5%.

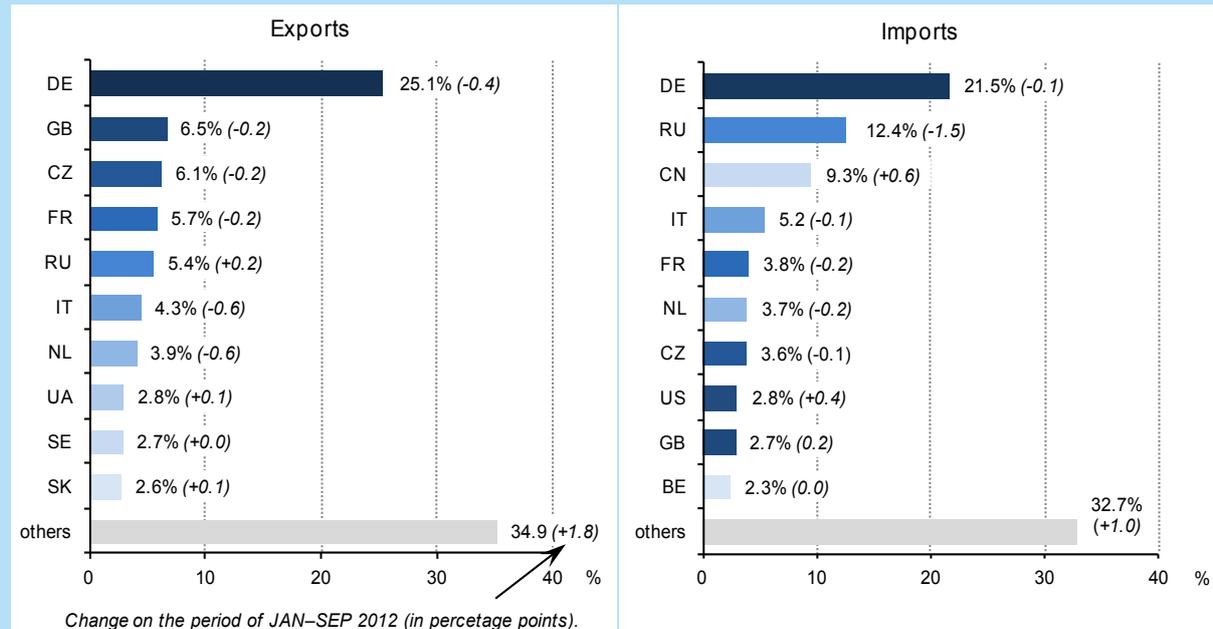
In the period of January–September 2013, transaction prices (calculated in PLN) of exported goods were higher than in the corresponding period of the previous year by 0.7%, and of imported goods – lower by 1.2%. The total terms of trade index amounted to 101.9 (against 97.9 a year before).

Foreign trade turnover

Specification	JAN–SEP 2013						JAN–SEP 2012	JAN–SEP 2013
	in mln PLN	in mln EUR	in mln USD	JAN–SEP 2012=100				
				in PLN	in EUR	in USD	structure in %	
Exports	473 975.9	113 581.8	150 121.3	105.4	106.9	109.9	100.0	100.0
developed countries	387 058.1	92 762.5	122 684.1	103.9	105.4	108.5	82.9	81.7
of which the European Union	354 483.8	84 954.0	112 389.9	102.7	104.2	107.2	76.8	74.8
of which euro-area ...	239 561.3	57 415.4	75 961.0	101.6	103.2	106.2	52.4	50.5
developing countries	41 847.6	10 028.8	13 225.5	116.0	117.5	120.6	8.0	8.8
the Central and Eastern European countries	45 070.2	10 790.5	14 211.7	109.8	111.1	113.9	9.1	9.5
Imports ^a	477 911.3	114 548.5	151 383.5	98.8	100.3	103.0	100.0	100.0
developed countries	313 998.8	75 251.0	99 537.0	100.1	101.6	104.5	64.9	65.7
of which the European Union	277 322.8	66 458.4	87 930.5	98.8	100.3	103.2	58.0	58.0
of which euro-area ...	215 512.0	51 646.0	68 333.5	97.9	99.4	102.3	45.5	45.1
developing countries	97 473.0	23 365.3	30 856.6	104.0	105.5	108.4	19.4	20.4
the Central and Eastern European countries	66 439.5	15 932.2	20 989.9	87.2	88.6	90.3	15.7	13.9
Balance	-3 935.4	-966.7	-1 262.2	x	x	x	x	x
developed countries	73 059.3	17 511.5	23 147.1	x	x	x	x	x
of which the European Union	77 161.0	18 495.6	24 459.4	x	x	x	x	x
of which euro-area ...	24 049.3	5 769.4	7 627.5	x	x	x	x	x
developing countries	-55 625.4	-13 336.5	-17 631.1	x	x	x	x	x
the Central and Eastern European countries	-21 369.3	-5 141.7	-6 778.2	x	x	x	x	x

a Data concerning imports by groups of countries are presented by country of origin.

Note: Data on the structure and dynamics of Poland's turnover with the developed countries, including the EU and the Central and Eastern European countries, were presented in comparable conditions, i.e. taking into account the value of foreign trade turnover of Croatia, which joined the EU on 1 July 2013 – and which earlier was recognised as one of the Central and Eastern European countries.

The geographical structure of the foreign trade turnover by countries in the period of JAN–SEP 2013


In the geographical structure of exports, in comparison with the three quarters of the previous year, the share of both developing countries and the Central and Eastern European countries increased, while the share of developed countries (including the EU countries) decreased. In imports, the share of developed countries and developing countries increased (the share of the EU countries remained unchanged). A drop in the share of the Central and Eastern European countries was recorded.

In comparison with the period January–September of the previous year, an increase in exports to Germany, our most important trade partner, was recorded (of 3.6% to 118.9 bn), while imports dropped by 1.8% to PLN 102.6 bn. The trade turnover closed with a positive balance amounting to PLN 16.3 bn (PLN 10.2 bn a year before). Exports expressed in EUR grew by 5.2%, while imports decreased by 0.3%. The positive balance amounted to EUR 3.9 bn, against EUR 2.4 bn recorded in the previous year. The share of Germany in total trade turnover decreased in exports from 25.5% to 25.1%, and in imports – from 21.6% to 21.5%.

In trade exchange with Germany, an increase in exports was recorded among the following major SITC commodity groups: passenger motor cars,

part and accessories of motor vehicles, and articles of plastic, while a decrease was recorded in, among others, internal combustion piston engines and parts thereof, copper, and manufactures of base metal. In imports, the value of the following increased, among others: articles of plastic, paper and paperboard, internal combustion piston engines and parts thereof, and part and accessories of motor vehicles, while the value of passenger motor cars and plastic plates, sheets, films, foil, strip of plastics – decreased.

After nine months of 2013, Russia, similarly to a year before, occupied the 5th position among our trade partners in exports, while in imports it maintained its 2nd position. Exports to Russia, in comparison with three quarters of the previous year, grew by 8.6%, and amounted to PLN 25.5 bn, while imports decreased by 11.4% to PLN 59.4 bn. The balance of turnover improved from minus PLN 43.6 bn a year before to minus PLN 33.9 bn. The turnover with Russia, expressed in EUR, grew by 10.0% in exports, while in imports it decreased by 10.0%. The negative balance amounted to EUR 8.1 bn (in three quarters of the previous year minus EUR 10.3 bn). The share of Russia in exports grew from 5.2% a year before to 5.4%, while in imports it decreased from 13.9% to 12.4%.

In total turnover, according to the SITC classification, in comparison to the with three quarters of the previous year, an increase in exports was recorded in all commodity sections, while a growth in imports was observed, among others, in food and live animals, and in machinery and transport equipment. The most considerable drop was recorded in mineral fuels, lubricants and related materials. The increasing turnover in food and live animals resulted in a growth of importance of this section in foreign trade, while poor dynamics of exports and imports of mineral fuels, lubricants and related materials contributed to a decrease in their share in total turnover. The share of machinery

and transport equipment in imports increased considerably.

In the distribution structure of imports by main economic categories, in comparison with the period of the three quarters of the previous year, a growth was recorded in the share of consumer goods (from 19.4% to 20.3%) and capital goods (from 14.8% to 15.3%). However, the share of goods intended for intermediate consumption decreased from 65.8% to 64.4%. A drop was recorded in goods intended for intermediate consumption (of 3.9%), while an increase was observed in imports of consumer goods – of 3.0% and capital goods – of 1.3%.

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Money Supply

At the end of September 2013, M3 money supply²¹ amounted to PLN 947 227.6 mln, i.e. by 2.8% more than at the end of the previous year.

The supply of currency in circulation (excluding bank vault cash) at the end of September 2013 amounted to PLN 113 222.7 mln, and increased by 10.5% in comparison to the end of the previous year. Deposits and other liabilities, constituting the main item in the structure of M3 money supply, at the end of September 2013 amounted to PLN 817 819.1 mln, and were by 2.5% higher than at the end of the previous year. The deposits and other liabilities towards local government institutions increased by 14.5%, towards non-profit institutions serving households – by 9.1%, towards households – by 3.1%, towards social security funds – by 1.5%, and non-financial corporations – by 0.5%. However, a decrease was recorded in the deposits and other liabilities towards non-monetary financial institutions – of 4.0%.

Other M3 components at the end of September 2013 amounted to PLN 16 185.8 mln. Their value in relation to the end of the previous year dropped by 23.2%.

External assets, net which at the end of September 2013 amounted to PLN 147 978.4 mln, constituted

another factor influencing the status of money resources. Their value in comparison to the end of the previous year dropped by 12.8%. Domestic assets, net at the end of September 2013 amounted to PLN 799 249.2 mln, and were by 6.3% higher in comparison to the end of the previous year.

Claims, having the highest share in the structure of domestic assets, net at the end of September 2013 reached the level of PLN 936 803.0 mln, and increased in comparison to the end of the previous year by 4.0%. An increase concerned the claims from non-monetary financial institutions – of 25.7%, non-profit institutions serving households – of 5.3%, households – of 4.2% and non-financial corporations – of 2.3%. Claims from local government institutions dropped by 4.0%. In September 2013, no claims from social security funds were recorded (against PLN 840.2 mln at the end of the previous year).

Credit to the central government, net at the end of September 2013 amounted to PLN 119 532.7 mln. This debt increased of 10.3% in comparison with the end of the previous year.

The negative balance of other items (net) amounting to PLN 257 086.6 mln, which improved in relation to the end of the previous year by PLN 7 256.0 mln.

The components of money supply (M3) and assets of the bank system^a

Specification	2012		2013			
	SEP	DEC	AUG	SEP	change in relation to	
					AUG 2013	DEC 2012
	in mln PLN					
Money supply (M3)	892 680.0	921 412.5	949 987.6	947 227.6	2 760.0	25 815.1
currency in circulation	103 178.8	102 470.5	114 083.1	113 222.7	-860.4	10 752.2
deposits and other liabilities .	771 384.4	797 866.2	814 275.7	817 819.1	3 543.4	19 952.9
other components of M3	18 116.8	21 075.7	21 628.8	16 185.8	-5 443.0	-4 889.9
External assets, net	161 243.9	169 184.6	154 035.4	147 978.4	-6 057.0	-21 206.2
Domestic assets, net	731 436.1	752 227.9	795 952.2	799 249.2	3 297.0	47 021.3
Other items, net	-257 565.8	-257 812.2	-258 562.0	-257 086.6	-1 475.4	-182.6

^a End of period.

²¹ Based on the data of the National Bank of Poland.

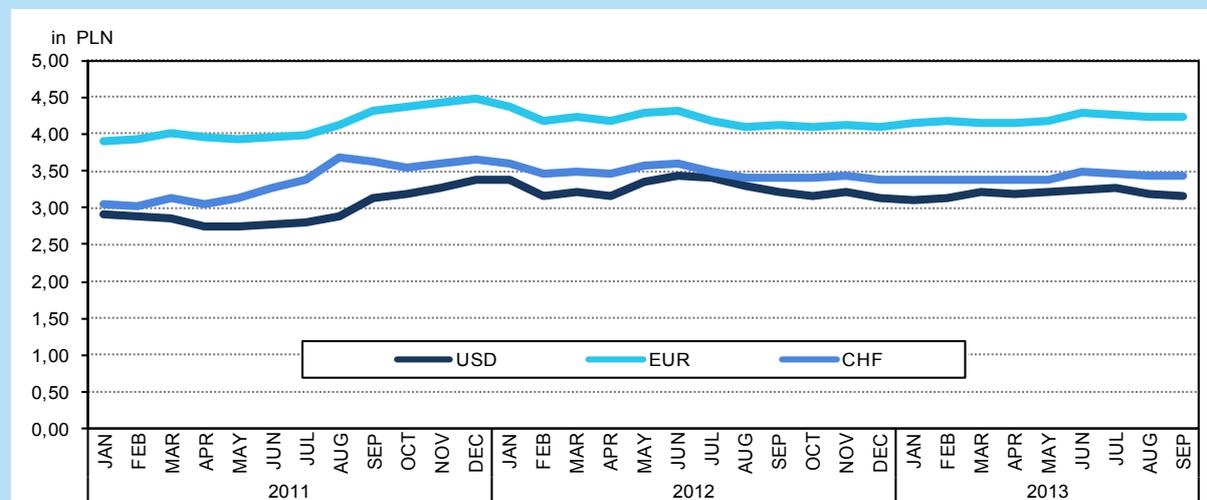
The basic interest rates of the National Bank of Poland in September 2013, following a decrease of 0.25 percentage point on 4 July 2013 and were as follows: the lombard credit rate – 4.00%, the rediscount rate – 2.75%, the reference rate – 2.50%, and the deposit rate – 1.00%.

In September 2013, the average monthly exchange rate of USD in the National Bank of Poland amounted to PLN 317.50/USD 100, and decreased in relation to the corresponding month of the previous year by 1.3%, and in comparison to the average rate in December of the previous year it was by 1.7% higher.

In September 2013, the average monthly exchange rate of EUR in the National Bank of Poland reached the level of PLN 423.76/PLN 100, and was by 2.6% higher in comparison to the corresponding month of the previous year, while in comparison to the average rate in December of the previous year it was by 3.5% higher.

The average monthly exchange rate of CHF in the National Bank of Poland, in September 2013, amounted to PLN 343.49/CHF 100, i.e. by 0.5% more than the one recorded a year before. In relation to the average rate in December of the previous year, it was by 1.4% higher.

Exchange rates



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State Budget

In the period of January–September 2013, the revenue of the state budget²² amounted to PLN 204 358.0 mln (i.e. 68.3% of the amount planned in the budget act for 2013), and expenditure

– to PLN 234 001.4 mln (respectively 69.9%). The deficit reached the level of PLN 29 643.4 mln, which constituted 83.3% of the plan.

Revenue and expenditure of the state budget

Specification	Budget act ^a for 2013	JAN–SEP 2013		
		execution	low on public finances	structure
		in mln PLN		in %
Total revenue	299 385.3	204 358.0	68.3	100.0
tax revenue	266 982.7	176 523.4	66.1	86.4
indirect taxes	192 208.2	128 664.1	67.0	63.0
of which excise tax	64 543.7	44 120.0	68.4	21.6
corporate income tax	29 638.5	16 741.2	56.5	8.2
personal income tax	42 936.0	29 495.9	68.8	14.4
non-tax revenue	30 806.7	27 133.7	88.1	13.3
of which receipts from customs duties	2 001.0	1 481.7	74.0	0.7
non-returnable funds from the European Union and other sources	1 596.0	741.8	46.5	0.4
Common Agricultural and Fisheries Policy structural funds and other	187.9	104.9	55.8	0.1
structural funds and other	1 408.0	636.9	45.2	0.3
Total expenditure	334 950.8	234 001.4	69.9	100.0
of which:				
domestic debt servicing	32 126.2	19 447.4	60.5	8.3
foreign debt servicing	11 385.7	9 201.4	80.8	3.9
settlements with the EU general budget with regard to own resources	17 775.3	15 356.1	86.4	6.6
allocations for:				
Pension Fund	15 875.2	11 713.8	73.8	5.0
Social Insurance Fund	37 113.9	24 776.8	66.8	10.6
general subsidy for local self-government entities	51 259.5	41 812.8	81.6	17.9
Deficit	-35 565.5	-29 643.4	83.3	x
Deficit financing ^b :				
domestic sources	12 546.9	16 091.2	128.2	x
foreign sources	16 864.0	13 510.8	80.1	x

a Journal of Laws No. 24, dated 5 II 2013, item 169. b Including the financing of the state budget and the European Union funds deficit.

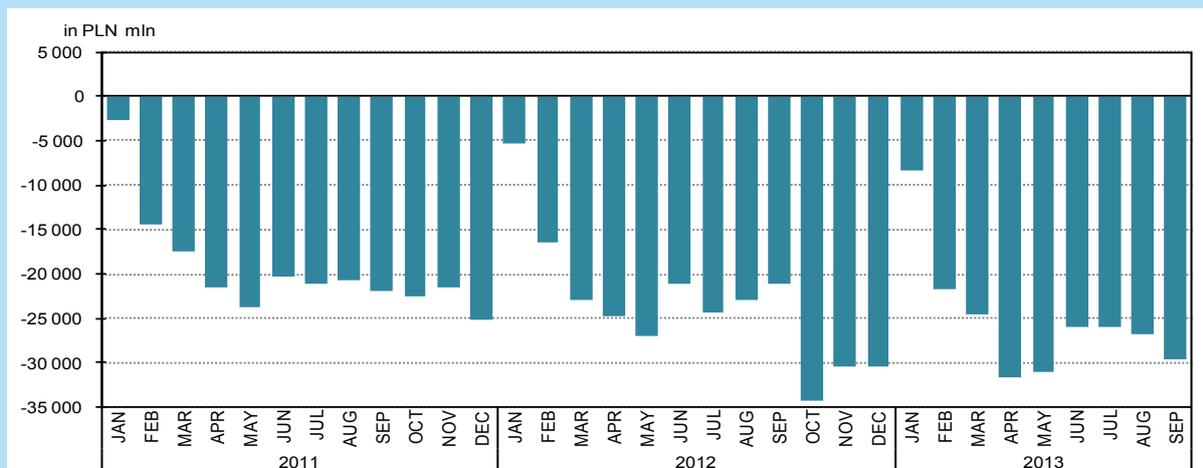
²² Prepared on the basis of the information provided by the Ministry of Finance: “Estimated data on the execution of the state budget for the period of January–September 2013.”

The revenue executed in the period of January–September 2013 was lower than in the corresponding period of the previous year by 4.5%, and the execution of the budget act in this scope was by 4.5 percentage points lower. Receipts from indirect taxes amounted to PLN 128 664.1 mln (i.e. by 4.9% less than in the period of January–September of the previous year), of which from excise tax PLN 44 120.0 mln (respectively by 1.0% less). Their share in the total amount of revenue amounted to 63.0% and 21.6%, respectively. Receipts from corporate income tax reached the level of PLN 16 741.2 mln (by 11.3% lower than a year before), and from personal income tax – PLN 29 495.9 mln (by 4.2% more than a year before). Their share in total revenue amounted to 8.2% and 14.4%, respectively. The revenue of the state budget from the inflow of non-returnable funds of the European Union and other sources constituted 46.5% of the plan (against 50.9% in the corresponding period of the previous year).

Expenditure incurred in the period of January–September 2013 were by 0.4% lower than a year before, and the execution of the budget act in this scope was respectively by 1.6 percentage point lower. General subsidy for local self-government entities increased by 2.2%, in comparison to the previous year, and amounted to PLN 41 812.8 mln, i.e. 17.9% of total expenditure. Expenditure on domestic and foreign debt servicing, similarly to a year before, constituted 12.2% of total expenditures. Allocations paid by the end of September 2013 to the Pension Fund amounted to PLN 11 713.8 mln (i.e. by 2.0% more than in the corresponding period of the previous year), and to the Social Insurance Fund – PLN 24 776.8 mln (respectively by 23.3% less), which accounted for respectively 5.0% and 10.6% of total expenditures.

State budget result

on accrued basis from the beginning of the year

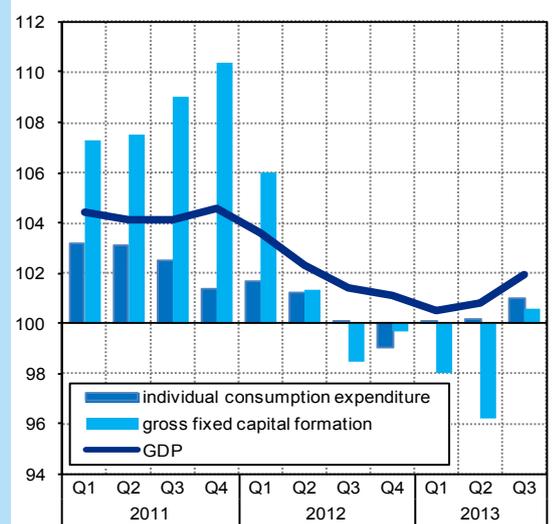


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Gross Domestic Product

According to preliminary data, the growth rate of the gross domestic product (at constant average prices of the previous year) in the 3rd quarter of 2013 was faster than in the four preceding periods, and amounted to 1.9% in annual terms (against a growth of 0.8% in the 2nd quarter of 2013 and 1.3% in the 3rd quarter of the previous year). After eliminating seasonal factors, the gross domestic product increased by 1.7% in annual terms (against 1.6% a year before) and compared to the previous quarter – by 0.6%.

Gross domestic product, individual consumption expenditure and gross fixed capital formation
corresponding period of the previous year=100



In the 3rd quarter of 2013 on the economic growth positively, though more weakly than in the previous period influenced the net exports (1.4 percentage point).

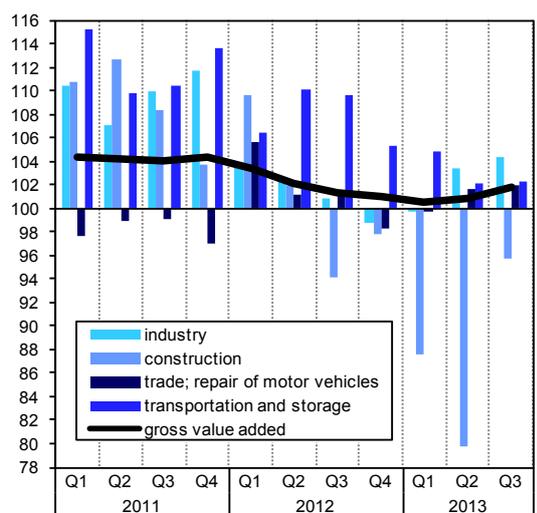
For the first time since the 1st quarter, a positive influence of domestic demand (0.5 percentage point) was recorded. Similarly to the previous quarter, the influence of final consumption expenditure amounted to 0.9 percentage point (of which individual consumption expenditure to 0.6 percentage point, and public consumption expenditure to 0.3 percentage point). The influence of gross capital formation, in turn, weakened to minus 0.4 percentage point (with a negative impact of the changes in inventories – minus 0.5 percentage point, and slightly positive impact of the investment demand – 0.1 percentage point).

Having dropped for five quarters, the domestic demand in the period of July–September 2013 was higher by 0.5% than a year before (against a decrease of 1.7% in the 2nd quarter of 2013 and of 0.7% in the 3rd quarter of the previous year). Final consumption expenditure grew by 1.2%, including a growth of 1.0% in individual consumption expenditure and 1.7% in public consumption expenditure. The drop in gross capital formation was less prominent than in the previous periods (2.4% against 13.6% in the 2nd quarter of 2013). For the first time since the 2nd quarter of the previous year gross fixed capital formation recorded a growth – of 0.6%. The investment rate in the 3rd quarter of 2013 was lower than a year before and amounted to 17.8%.

Exports in the 3rd quarter of 2013 grew by 6.4% in annual terms, i.e. faster than in the previous periods, (against a growth of 3.2% in the 2nd quarter of 2013 and of 2.1% in the 3rd quarter of the previous year). Imports, following the drop observed since the 2nd quarter of the previous year, in the 3rd quarter of 2013 were 3.4% higher than a year before.

Gross value added

corresponding period of the previous year=100



The gross value added in the national economy, in the 3rd quarter of 2013, grew by 1.8% in annual terms. The largest increase in the gross value added was recorded in industry (4.4%), financial and insurance activities (3.6%), information and communication and real estate activities (2.4% each), while the growth in the last two sections was slower than in the 2nd quarter of 2013. A slight acceleration in the growth rate of gross value added was found in transportation and storage (of 2.3%) and in trade; repair of motor vehicles (of 2.0%). The scale of decline in the gross value added in construction decreased considerable (to 4.2%).

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II. Selected Socio-economic Indicators for Poland

Please, click on the table

Tabl. 1. Basic annual data

Tabl. 2. Basic annual indicators

Specification	2007	2008	2009	2010	2011	2012	
mining and quarrying	182	194	188	171	174	176	
manufacturing	2 874	2 887	2 430	2 430	2 480	2 443	
electricity, gas, steam and air conditioning supply	146	152	152	161	157	149	
water supply; sewerage waste management and remediation activities	138	131	130	138	142	142	
construction	827	916	859	824	961	945	
trade, repair of motor vehicles*	2 207	2 224	2 267	2 210	2 208	2 217	
transportation and storage	712	761	733	730	745	730	
information and communication	210	242	252	266	265	269	
education	1 080	1 065	1 054	1 082	1 027	1 091	
human health and social work activities	742	764	787	802	812	806	
Retirees and pensioners (annual averages)	in thous.	9 183	9 297	9 202	9 244	9 124	9 027
	in % of total population	24.1	24.3	24.5	24	23.7	23.4
Gross domestic product** (current prices)	in mln zł	1 176 727	1 275 500	1 244 595	1 416 585	1 520 127	1 595 204
Gross domestic product** (current prices)	in %	100.0	100.0	100.0	100.0	100.0	100.0
of which:							
agriculture, forestry and fishing	3.7	3.5	3.2	3.3	3.3	3.3	
industry	21.4	21.1	20.8	21.2	21.0	21.0	
construction	6.5	6.7	7.2	7.1	7.2	6.6	
trade, repair of motor vehicles*	16.0	16.0	16.7	17.1	16.4	16.6	
transportation and storage	4.9	4.9	5.1	4.9	5.0	5.4	
information and communication	3.9	3.6	3.6	3.4	3.2	3.2	
finance and insurance activities	4.7	4.8	5.0	5.0	5.0	4.7	
real estate activities	6.5	6.3	6.0	6.0	6.0	6.1	
education	4.2	4.2	4.3	4.3	4.2	4.3	
human health and social work activities	3.2	3.3	3.3	3.5	3.4	3.3	
Distribution of GDP* (current prices)	in %	100.0	100.0	100.0	100.0	100.0	100.0
private consumption expenditure	62.5	61.6	61.1	61.2	61.1	61.1	
public consumption expenditure	17.9	18.5	18.3	19.0	18.0	17.8	
gross capital formation	24.5	23.9	20.2	21.5	22.1	20.7	
of which: gross fixed capital formation	21.8	22.2	21.1	19.9	20.2	19.4	
changes in inventories	2.8	1.6	-0.8	1.1	1.9	1.3	
balance of foreign trade turnover*	-2.6	-4.0	0.1	-1.2	-1.2	0.0	
Net borrowing (c) / net lending (+) of general government	in mln zł	-22 112	-46 590	-59 596	-111 291	-79 094	-42 695
	in % of GDP	-1.9	-3.7	-4.8	-7.9	-5.2	-2.7
General government consolidated gross debt	in mln zł	529 576	606 848	634 902	776 626	859 676	906 779
	in % of GDP	45.0	47.1	50.9	54.9	56.2	56.6
Foreign trade turnover* (current prices)							
imports	in mln USD	164 171	210 479	149 870	170 063	212 331	199 438
	in mln USD	138 786	171 800	136 641	159 758	190 248	182 716
exports	in mln USD	233 302	289 619	215 002	232 002	272 002	272 002
	in mln USD	195 585	248 019	178 359	192 305	222 002	222 002

Specification	2007	2008	2009	2010	2011	2012
Population	38 200 000	38 100 000	38 000 000	37 900 000	37 800 000	37 700 000
Population aged 15 and over	30 500 000	30 400 000	30 300 000	30 200 000	30 100 000	30 000 000
Population aged 65 and over	6 500 000	6 600 000	6 700 000	6 800 000	6 900 000	7 000 000
Population aged 0-14	7 700 000	7 700 000	7 700 000	7 700 000	7 700 000	7 700 000
Population aged 15-64	22 800 000	22 800 000	22 800 000	22 800 000	22 800 000	22 800 000
Population aged 65-74	1 500 000	1 500 000	1 500 000	1 500 000	1 500 000	1 500 000
Population aged 75 and over	1 500 000	1 500 000	1 500 000	1 500 000	1 500 000	1 500 000
Population aged 0-14 (per 1 000)	201	202	203	204	205	206
Population aged 15-64 (per 1 000)	597	598	599	600	601	602
Population aged 65-74 (per 1 000)	162	163	164	165	166	167
Population aged 75 and over (per 1 000)	162	163	164	165	166	167
Population aged 0-14 (per 1 000 of 15+)	33.7	33.8	33.9	34.0	34.1	34.2
Population aged 15-64 (per 1 000 of 15+)	100.0	100.0	100.0	100.0	100.0	100.0
Population aged 65-74 (per 1 000 of 15+)	27.2	27.3	27.4	27.5	27.6	27.7
Population aged 75 and over (per 1 000 of 15+)	27.2	27.3	27.4	27.5	27.6	27.7
Population aged 0-14 (per 1 000 of 65+)	13.1	13.2	13.3	13.4	13.5	13.6
Population aged 15-64 (per 1 000 of 65+)	45.9	46.0	46.1	46.2	46.3	46.4
Population aged 65-74 (per 1 000 of 65+)	100.0	100.0	100.0	100.0	100.0	100.0
Population aged 75 and over (per 1 000 of 65+)	100.0	100.0	100.0	100.0	100.0	100.0
Population aged 0-14 (per 1 000 of 75+)	10.4	10.5	10.6	10.7	10.8	10.9
Population aged 15-64 (per 1 000 of 75+)	35.3	35.4	35.5	35.6	35.7	35.8
Population aged 65-74 (per 1 000 of 75+)	100.0	100.0	100.0	100.0	100.0	100.0
Population aged 75 and over (per 1 000 of 75+)	100.0	100.0	100.0	100.0	100.0	100.0

Tabl. 3. Selected quarterly indicators

Specification	2010	2011	2012	2013				2014				2015					
				Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4		
Labour market																	
average job employment	in thous.	9 656	9 742	9 722	9 806	9 800	9 806	9 806	9 806	9 806	9 806	9 806	9 806	9 806	9 806	9 806	9 806
of which:																	
industry	in thous.	88.0	100.0	88.0	88.0	88.0	88.0	88.0	88.0	88.0	88.0	88.0	88.0	88.0	88.0	88.0	88.0
services	in thous.	2 168	2 174	2 168	2 174	2 174	2 174	2 174	2 174	2 174	2 174	2 174	2 174	2 174	2 174	2 174	2 174
mining and quarrying	in thous.	176	176	176	176	176	176	176	176	176	176	176	176	176	176	176	176
manufacturing	in thous.	68.0	88.0	68.0	68.0	68.0	68.0	68.0	68.0	68.0	68.0	68.0	68.0	68.0	68.0	68.0	68.0
electricity, gas, steam and air conditioning supply	in thous.	2 000	2 000	2 000	2 000	2 000	2 000	2 000	2 000	2 000	2 000	2 000	2 000	2 000	2 000	2 000	2 000
water supply; sewerage waste management and remediation activities	in thous.	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
construction	in thous.	476	476	476	476	476	476	476	476	476	476	476	476	476	476	476	476
Trade, repair of motor vehicles*	in thous.	1 500	1 500	1 500	1 500	1 500	1 500	1 500	1 500	1 500	1 500	1 500	1 500	1 500	1 500	1 500	1 500
transportation and storage	in thous.	600	600	600	600	600	600	600	600	600	600	600	600	600	600	600	600
information and communication	in thous.	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
finance and insurance activities	in thous.	200	200	200	200	200	200	200	200	200	200	200	200	200	200	200	200
Real gross value added (at basic prices)																	
Unemployment rate	in %	12.4	12.8	12.8	12.8	12.8	12.8	12.8	12.8	12.8	12.8	12.8	12.8	12.8	12.8	12.8	12.8
job offer	in thous.	22.0	22.0	22.0	22.0	22.0	22.0	22.0	22.0	22.0	22.0	22.0	22.0	22.0	22.0	22.0	22.0
Relative indicators																	
by economic sector: agriculture	in thous.	10 000	10 000	10 000	10 000	10 000	10 000	10 000	10 000	10 000	10 000	10 000	10 000	10 000	10 000	10 000	10 000
services	in thous.	1 000	1 000	1 000	1 000	1 000	1 000	1 000	1 000	1 000	1 000	1 000	1 000	1 000	1 000	1 000	1 000
Unemployed persons	in thous.	1 000	1 000	1 000	1 000	1 000	1 000	1 000	1 000	1 000	1 000	1 000	1 000	1 000	1 000	1 000	1 000
Economically inactive persons	in thous.	10 000	10 000	10 000	10 000	10 000	10 000	10 000	10 000	10 000	10 000	10 000	10 000	10 000	10 000	10 000	10 000
female rate	in %	80.0	80.0	80.0	80.0	80.0	80.0	80.0	80.0	80.0	80.0	80.0	80.0	80.0	80.0	80.0	80.0
employment rate	in %	80.0	80.0	80.0	80.0	80.0	80.0	80.0	80.0	80.0	80.0	80.0	80.0	80.0	80.0	80.0	80.0
Unemployment rate	in %	20.0	20.0	20.0	20.0	20.0	20.0	20.0	20.0	20.0	20.0	20.0	20.0	20.0	20.0	20.0	20.0

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General Notes

1. Data contained in the Poland Quarterly Statistics are presented in accordance with the Polish Classification of Activities – PKD 2007, compiled on the basis of the Statistical Classification of Economic Activities in the European Community – NACE Rev. 2.
2. The category of “Industry” used in this quarterly refers to NACE Rev. 2 sections “Mining and quarrying”, “Manufacturing”, “Electricity, gas, steam and air conditioning supply” and “Water supply; sewerage, waste management and remediation activities”.
3. Data are compiled according to the respective organizational status of units of the national economy.
4. Data by NACE Rev. 2 sections, divisions and groups as well as voivodships are compiled on the basis of the enterprise (entity) method, assuming whole entities of the national economy as the basis for grouping all data characterising their activity according to individual classification levels and territorial divisions.
5. Data presented in the publication cover units of the national economy regardless of ownership, i.e. included in the public and private sectors.
6. The information concerning the enterprise sector is presented on the basis of the definition of “enterprise” – introduced by the Council Regulation (EEC) No. 696/93 of 15 March 1993 on the statistical units for the observation and analysis of the production system in the Community. In accordance with the aforementioned Regulation, an enterprise is treated as an organisational unit producing goods or providing services, which obtains benefits from a certain degree of independence in decision making, especially in the area of allocation of its current assets. An enterprise conducts one or several types of activity in one or several places and is established by a legal entity or a group of legal entities. The enterprise sector includes entities conducting economic activity in the scope of forestry and logging; marine fishing; mining and quarrying; manufacturing; electricity, gas, steam and air conditioning supply; water supply; sewerage, waste management and remediation activities; construction; wholesale and retail sale; repair of motor vehicles and motorcycles; transportation and storage; accommodation and food service activities; information and communication; real estate activities; legal and accounting activities; activities of head offices; management consultancy activities; architectural and engineering activities; technical testing and analysis; advertising and market research; other professional, scientific and technical activities; administrative and support service activities; arts, entertainment and recreation; repair of computers and personal and household goods; other personal service activities.
7. Data on employed persons, employment, as well as wages and salaries does not include private farms in agriculture or budget units conducting activity within the scope of national defence and public safety; furthermore:
 - quarterly data refer to those entities of the national economy in which the number of employed persons exceeds 9; furthermore, the data on employment, as well as wages and salaries exclude persons employed abroad and engaged in social and political organisations, trade unions, etc.;
 - average monthly total wages and salaries in quarterly periods cover complete statistical population;
 - annual data cover all entities of the national economy regardless of the number of employed persons.
8. Data on sold production of industry, construction and assembly production, wholesale and retail trade of goods:
 - quarterly data (in the case of sale of construction and assembly production are provided on an accrued basis) cover those economic entities in which the number of employed persons exceeds 9;
 - annual data cover all economic entities regardless of the number of employees.
 Data on the sale of construction and assembly production concern works accomplished by construction entities on the basis of the contract system (i.e. for outside clients) and do not include work performed abroad.
9. Data on the production of selected industrial products in all kinds of activities refer to those entities in which the number of employed persons exceeds 49.
10. Data on the financial results of non-financial enterprises refer to economic entities keeping accounting ledgers (excluding entities whose basic type of activity is classified to section “Agriculture, forestry and fishing” and “Financial and insurance activities” according to the NACE Rev. 2) in which the number of employed persons exceeds 49.

11. Quarterly data referring to investment outlays and newly started investments refer to economic entities (with the exception of entities in which the principal activity is classified as "Agriculture, forestry and fishing" and "Financial and insurance activities" according to the NACE Rev. 2) in which the number of employed persons exceeds 49. Quarterly data are presented on an accrued basis. Annual data concerning investment outlays include all units of the national economy regardless of the number of employees.
12. Unless otherwise stated, data in value terms and structural indicators are provided at current prices, and dynamic indices – on the basis of value at constant prices. As constant prices in the period of 2006-2010 were adopted constant prices of 2005 (2005 average current prices), since 2011 – constant prices of 2010 (2010 average current prices), except for foreign trade turnover, where average current prices from the year preceding the surveyed year were assumed as constant prices, as well as for investment outlays and retail sales, for which current prices from the corresponding period of the previous year were assumed as constant prices.
13. Relative numbers (indices, percentages) are calculated, as a rule, on the basis of absolute data expressed with higher precision than that presented in tables.
14. Some data are preliminary and may be revised in subsequent editions of the Poland Quarterly Statistics.
15. This publication uses abbreviations of some classification levels of NACE Rev. 2; the abbreviated names were marked with "Δ" in the tables. The list of abbreviations and their respective full names is presented below:

Abbreviation**Full name****NACE sections**

Trade; repair of motor vehicles

Wholesale and retail, trade; repair of motor vehicles and motorcycles

Accommodation and catering

Accommodation and food service activities

Codes of Selected Countries

AT	–	Austria	KR	–	Republic of Korea
BE	–	Belgium	LT	–	Lithuania
BG	–	Bulgaria	LU	–	Luxembourg
CN	–	China	LV	–	Latvia
CY	–	Cyprus	MT	–	Malta
CZ	–	Czech Republic	NL	–	Netherlands
DE	–	Germany	PL	–	Poland
DK	–	Denmark	PT	–	Portugal
EE	–	Estonia	RO	–	Romania
ES	–	Spain	RU	–	Russia
FI	–	Finland	SE	–	Sweden
FR	–	France	SI	–	Slovenia
EL	–	Greece	SK	–	Slovakia
HR	–	Croatia	UA	–	Ukraine
HU	–	Hungary	UK	–	United Kingdom
IE	–	Ireland	US	–	United States
IT	–	Italy			

Conventional signs

Dash (–)	magnitude zero	Dot (.)	data not available or not reliable
Zero: (0)	magnitude not zero, but less than 0.5 of a unit	Sign x	not applicable
(0,0)	magnitude not zero, but less than 0.05 of a unit	Colour red	data in tables altered in relation to that published in the previous edition

Major abbreviations

thous.	thousand
mln	million
bn	billion
PLN	zloty
USD	United States dollar
EUR	euro
CHF	Swiss franc

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Methodological Notes

1. Data on population for the period of 2007–2009 are compiled on the basis of the results of the Population and Housing Census 2002 and since 2010 – the Population and Housing Census 2011, as well as data from current reporting on vital statistics and population migration.
2. Data on the number and structure of population concern actually living population.
3. Data regarding employed persons concern persons performing work providing earnings or income and include:
 - employees hired on the basis of an employment contract;
 - owners, co-owners, and leaseholders of private farms in agriculture (including contributing family workers);
 - owners and co-owners of entities engaged in economic activities excluding private farms in agriculture (including contributing family workers);
 - other self-employed persons, e.g. persons practising learned professions;
 - outworkers;
 - agents (including contributing family workers and persons employed by agents);
 - members of agricultural production co-operatives;
 - clergy fulfilling priestly obligations.
4. Data on the average number of employed persons are given after converting of part-time paid employees into full-time paid employees, excluding employers and own-account workers (excluding private farms in agriculture) as well as agents.
5. Data on average paid employment include persons employed on the basis of a full-time and part-time contract, converted into a full-time period.
6. Data on registered unemployment concerning persons registered in powiat labour offices are presented in accordance with the Law of 20 April 2004 on Promoting Employment and Labour Market Institutions (Journal of Laws No. 99, Item 1001, with later amendments).
The number of the unemployed does not include persons undergoing, among others, traineeship, internship and occupational preparation of adults, as well as social utility works.
Long-term unemployed are persons remaining in the register rolls of a powiat labour office the overall period of over 12 months during the last 2 years, excluding the periods of traineeships or occupational preparation of adult at the workplace.
7. The registered unemployment rate was calculated as the share of the number of registered unemployed persons in economically active civilian population, i.e. excluding employees of budgetary entities conducting activity within the scope of national defence and public safety.
8. Data on the economic activity of population aged 15 and more are compiled on the basis of the sample survey within the Labour Force Survey (LFS) conducted quarterly using a continuous observation method (a sliding survey week). The survey includes persons who are members of sampled households. The LFS data are calculated on the basis of the exact date of birth. Work, i.e. performing, having or seeking work, is the basic criterion of dividing population into employed persons, unemployed persons and economically inactive persons.
Economically active population (i.e. labour force) covers all persons considered employed or unemployed. Economically inactive population (i.e. outside the labour force) covers all persons who in the survey week were classified neither as employed nor as unemployed.
Unemployed persons are persons aged 15–74 who in the reference week were not employed, were actively looking for work and were ready to take up work within 2 weeks after the reference week.
The unemployed also included persons who had found a job and they were waiting to start it in the period not longer than 3 months, and they were able to take up work.
The activity rate was calculated as a share of economically active persons (in total or in a given group) in the number of population aged 15 or more (in total or in a given group).
The employment rate was calculated as a share of employed persons (in total or in a given group) in the number of population aged 15 or more (in total or in a given group).
The unemployment rate was calculated as a share of unemployed persons (in total or in a given group) in the number of population aged 15 or more (in total or in a given group).

9. Average monthly nominal wages and salaries per paid employee were calculated assuming:

- personal wages and salaries, excluding wages and salaries of outworkers and apprentices as well as persons employed abroad;
- payments from a share in profit or in the balance surplus of cooperatives;
- additional annual wages and salaries for employees of budget sphere entities;
- fees paid to selected groups of employees for performing work in accordance with labour contracts.

Data on average monthly wages and salaries per paid employee are presented in gross terms, i.e. including deductions for personal income taxes and also contributions to compulsory social security (retirement, pension and illness) paid by the insured employee.

Indices of average monthly real gross wage and salary were calculated as a quotient of the growth rate of the average monthly nominal gross wage and salary and the consumer price index of households of employed persons.

10. Price indices of:

- sold production of industry (i.e. mining and quarrying, manufacturing, electricity, gas, steam and air conditioning supply, and also water supply; sewerage, waste management and remediation activities) are calculated on the basis of a monthly survey on prices of products and services actually received by specifically selected economic units, included in the above mentioned sections. The survey covers about 3.3 thousand units in which the number of employed persons exceeds 9. The price indices were calculated using, as a weight system, the structure of sold production from 2010. These values are updated monthly by the price changes and the changes in the sales structure taking place in consecutive months of the year to which the price indices refer;
- construction and assembly production are calculated on the basis of a monthly survey of prices of works realised by specifically

selected economic units, classified in "Construction" section, i.e. by approx. 480 construction and assembly enterprises in which the number of employed persons exceeds 9. The price indices were calculated using, as a weight system, the sales value from 2010. These values include the price changes and the changes in the sales structure taking place in consecutive months of the year to which the price indices refer;

- consumer goods and services are obtained on the basis of price observations of representatives of consumer goods and services (approx. 1400 in 2013) in 209 price survey regions of the country. Price observations carried out in selected retail outlets, service and catering units located in the price survey regions (a town or part of a town) constitute the principal source of information. Price-lists, regulations and decisions applicable to the uniform prices binding throughout the country or its parts, and also price observations of goods and services purchased through the Internet constitute additional sources of information.

Price indices of consumer goods and services are calculated using, as a weight system, the annual structure of expenditure (excluding own consumption) of particular groups of households on purchasing consumer goods and services from the year preceding the one under the survey, obtained from the Household Budget Survey. The groupings of consumer goods and services are presented on the basis of the Classification of Individual Consumption by Purpose, adapted to the needs of the Harmonized Indices of Consumer Prices (COICOP/HICP);

- procurement of agricultural products are compiled on the basis of information on the prices paid in a given period of time by procurement entities for products directly from agricultural producers. These practices are averages and are computed as a quotient of the value (excluding VAT) and quantity of every single agricultural product.

11. Data on sold production of industry concern industrial and non-industrial activity of economic entities included in sections “Mining and quarrying”, “Manufacturing”, “Electricity, gas, steam and air conditioning supply” and “Water supply; sewerage, waste management and remediation activities”, while data on sold production of construction cover construction and non-construction activity of economic entities included in “Construction” section. This data include:
- the value of sold finished products, semi-finished products and parts of own production (regardless of whether or not payments due for the production have been received);
 - the value of paid works and services rendered, i.e. both industrial and construction, as well as non-industrial and non-construction;
 - the lump sum agent’s fee in the case of concluding the agreement on commission terms and full agent’s fee in the case of concluding agency agreement;
 - the value of products in the form of settlements in kind;
 - products designated for increasing the value of own fixed assets.
12. Data on the sales in construction and assembly production concerning work carried out domestically on the basis of a contracts system (i.e. for outside clients) by construction entities according to NACE Rev. 2 were included in “Construction” section, consisting of constructing buildings and structures, including the preparation through a diversified scope of terrestrial works, ground work (zero state), making load bearing elements, partitions, roof laying and covering (raw state), and assembly, installation and completion works. All the categories include works associated with building, rebuilding, extension, restoration, renovation and temporary building structures.
13. Data on retail sales include the sales of consumer and non-consumer goods carried out by retail sales outlets, catering establishments and other sales outlets (e.g. warehouses, stock houses) in quantities indicating purchases for individual needs of the purchaser.
14. Data on wholesale of commodities include the sales from own or rented warehouses in which commodities are stored, belonging to “Wholesale and retail trade; repair of motor vehicles and motorcycles” section.
Wholesale carried out by wholesale enterprises concerns the sales of commodities by enterprises included in “Wholesale trade, except of motor vehicles and motorcycles” division.
15. The gross financial result (profit or loss) is a result on economic activity adjusted by the result of extraordinary events.
16. The net financial result (profit or loss) is obtained after deducting the obligatory encumbrances from the gross financial result.
17. The presented division of investment outlays, including outlays on new fixed assets and (or) improvement (enlargement, rebuilding, reconstruction or modernisation) of the existing capital asset items was prepared according to the principles of the system of national accounts, according to the recommendations of ESA 1995. Investment outlays are divided into outlays on fixed assets and other outlays.
Outlays on fixed assets include outlays on:
- buildings and structures (including buildings and places, as well as civil engineering constructions), including construction and assembly works, design and cost estimate documentation;
 - machinery, technical equipment and tools (including instruments, movables and fittings);
 - transport equipment;
 - other, i.e. detailed meliorations, costs incurred for purchasing land and second-hand fixed assets and from 1995 livestock (basic herd), long-term plantings and, in addition, the costs of treatment of constructed liabilities incurred for the purpose of purchase financing, constructing and developing fixed assets (specified until 31 December 2001 as interest on investment credits and loans) for the period of investment realization (taken into account only in data expressed in current prices).
- Other outlays are outlays on the so-called initial investments as well as other costs connected with investment realization. These outlays do not increase the value of fixed assets.
18. Since 1 May 2004, i.e. the day of Poland’s accession to the European Union (EU), the data on Poland’s foreign trade turnover have been based on:
- the EXTRASTAT system – based on customs declarations; the system includes trade turnover carried out between Poland and the so-called third countries, i.e. non-EU countries;
 - the INTRASTAT system – based on INTRASTAT arrival and dispatch declarations; the system includes trade turnover between Poland and other EU member states;
 - alternative data sources used to register trade in “specific goods”, i.e. electricity, gas, sea products and military goods.

Data obtained from the combination of the above mentioned sources created a unified collection of statistical data on foreign trade turnover.

19. The value of imports is presented according to cif, i.e. including the transportation and insurance costs to the Polish border. The value of exports is presented according to fob.

20. Data on turnover by group of countries are presented in imports – according to the country of origin and in exports – according to the country of destination.

The country of origin is considered a country in which the goods were produced, processed or transformed, and in this form entered the Polish customs territory.

The country of destination is the country in which the goods are consumed, i.e. the country in which the goods are finally used, processed or transformed.

21. The M3 money supply comprises:

- currency in circulation (excluding bank vault cash);
- zloty and foreign currency deposits and other liabilities of households, non-monetary financial

institutions, non-financial corporations, non-profit institutions serving households, local government institutions and social security funds:

- current (overnight deposits and deposits without an agreed term),
 - term and blocked (deposits with an agreed maturity of up to 2 years),
 - deposits redeemable at notice of up to 3 months.
 - other components of M3, i.e. debt securities including up to 2 years, issued by monetary financial institutions and held by residents and non-residents, and liabilities of monetary financial institutions related to repurchase agreements and also in money market funds (MMFs) shares.
22. Data concerning gross domestic product and gross value added, as well as components of its distribution are compiled according to the principles of ESA 1995 (the European System of Accounts).

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