



AE MicroMacro - Japan

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Polish SEZs and Japanese business, part 2

What happened? [Recently I briefly described the possible leverage](#) offered by the EUJEPA to the Polish government and Special Economic Zones (SEZs). In this analysis, I will present a broader spectrum of Japanese companies, that have invested in Polish SEZs – especially those who might contribute to the increase in Polish exports to Japan.

The brief description. Among 14 SEZs operating in Poland, [the Japanese companies are present in 12 of them with 3 major ones. Outside SEZ the Japanese investments are concentrated mainly in Warsaw. The number of Japanese enterprises in key locations is as follows:](#) 1) Warsaw (21 Japanese companies – with entities such as Bridgestone Corporation operating on the premises of 3 different SEZs); 2) [Pomeranian SEZ](#) (14 Japanese companies); 3) [Katowice SEZ](#) (13 Japanese companies); 4) [Wałbrzych SEZ INVEST-PARK](#) (10 Japanese companies). The only Polish SEZs without any Japanese activities are [Suwałki](#) and [Euro-Park Mielec](#). The open question is how all 14 SEZs will compete in the long run and keep their competitive advantage for the Japanese investors over other locations when [the whole country becomes one big SEZ](#).

Manufacturing is the most common activity model of the Japanese located in SEZs (more than 60% of investments), with the Japan Tobacco International Holding B.V as a major player. It has to be mentioned, that [rolled Tobacco accounts for 24% of all Polish Export to Japan](#). The activities of the remaining Japanese companies are focused on wholesale and retail sales (almost 20%), followed by construction and transport/storage (more than 10%). Only four companies are focused on services: 1) Maruboshi Co. Ltd. (translation and interpretation activities); 2) ORIX Corporation (financial and insurance activities); 3) Tomoho Umeda (advertising); 4) Recruit Europe Ltd.



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(administrative and support service activities). Among those few service providers three are located in Warsaw, and Recruit Europe Ltd. in Wroclaw.

Why it matters for Poland?

The detailed knowledge of Japanese companies' operations could be crucial to encourage other businesses from a similar industry to invest in Poland, especially in the case of the no-deal Brexit. [The opportunities I described in the previous article could be](#) more visible knowing, that more than 10 Japanese companies are located in Polish SEZs manufacture parts and accessories for motor vehicles - not to mention those strongly focused on general-purpose machinery. This situation creates an opportunity, that could be exploited could by the board members of SEZs, and by the ["SEZ Poland", that will provide tax exemptions throughout the country for companies implementing new investments in both public and private areas \(excludes mineral deposits\).](#)